



## Board of Trustees

June 25, 2020

1:50 PM

### Virtual Meeting 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.

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- |   |                                   |
|---|-----------------------------------|
| <b>1. Call to Order</b>   | Board Chair Kevin Queenin         |
| <b>2. Approval of Minutes</b><br>April 14, 2020 Special Meeting<br>April 15, 2020 Special Meeting<br>April 30, 2020 | Board Chair Kevin Queenin         |
| <b>3. General Announcements</b>   | Board Chair Kevin Queenin         |
| <b>4. Student Trustee Report</b>  | Trustee Thalita Neves             |
| <b>5. President's Report</b>  | Dr. Ramon S. Torrecilha           |
| <b>6. Safe Opening Task Force Report</b>  | Mr. Richard Lenfest, Jr.          |
| <b><u>Advancement and Enrollment Management Committee</u></b>   | Committee Chair Martinez-Alvarez  |
| <b>7. Items for Information</b>   |                                   |
| <b><u>Academic and Student Affairs Committee</u></b>  | Committee Chair Dr. Robert Martin |
| <b>8. Items for Information</b>   |                                   |
| <b>9. Items for Action</b><br>a. Motion – New Program LOI: Music Therapy  |                                   |
| <b><u>Finance and Capital Assets Committee</u></b>  | Committee Chair Edward Sullivan   |
| <b>10. Items for Information</b>  |                                   |

**11. Items for Action**

- a. Motion – Motion – FY21 Provisional Operating Budget
- b. Motion – Capital Projects greater than \$500,000
- c. Motion – Vehicle Lease/Purchase Program
- d. Motion – FY21 Sponsorships
- e. Motion – Fixed Assets, Capitalization, and Inventory Control Policy (0601)

**Audit Committee**

Committee Chair Paul Boudreau

**12. Items for Information**

**Governance and Nomination Committee**

Committee Chair Madeline Landrau

**13. Items for Information**

**14. Items for Action**

- a. Motion – Election of Board of Trustees Officers for 2020-2021

**Executive Committee**

Committee Chair Kevin Queenin

**15. Items for Action**

- a. Motion – Ratification of Motion to Approve FY21 Revised Schedule of Tuition and Fees

**Other Business**

Board Chair Kevin Queenin

**16. Items for Information and Discussion**

- a. Interim President
- b. Presidential Search Committee

**17. Items for Action**

- a. Motion – Confirm Appointment of Audit Committee Chair for 2020-2021
- b. Motion – Authorization to Executive Committee to Engage Search Firm for Presidential Search

**Attachments:**

- a. Minutes of April 14, 2020 Special Meeting
- b. Minutes of April 15, 2020 Special Meeting
- c. Minutes of April 30, 2020

**Academic and Student Affairs Committee:**

- d. Motion – New Program LOI: Music Therapy
- e. Music Therapy Program Letter of Intent and Information

**Finance and Capital Assets Committee:**

- f. Motion – FY21 Provisional Operating Budget
- g. FY21 Provisional Operating Budget (Narrative)
- h. FY21 Provisional Operating Budget (Campus)
- i. FY21 Provisional Operating Budget (Trust Fund)
- j. FY21 Provisional Operating Budget (Scenario Planning)

- k. FY21 Provisional Operating Budget (Scenario Assumptions)
- l. FY21 Provisional Operating Budget (Tuition and Fees)
- m. Motion – Capital Projects Greater 500K
- n. Capital Projects (Funding Plan)
- o. Capital Projects (Facilities Plan)
- p. Motion – Vehicle Lease Program
- q. Vehicle Lease Program
- r. Motion – FY 21 Sponsorships
- s. Motion – Fixed Assets Capitalization and Inventory Control Policy
- t. Fixed Assets Capitalization and Inventory Control Policy (Narrative)
- u. Fixed Assets Capitalization and Inventory Control Policy (Revised)

**Governance and Nomination Committee:**

- v. Motion – Election of Board of Trustees Officers for 2020-2021
- w. Proposed Slate of Officers

**Executive Committee:**

- x. Motion – Ratification of Motion to Approve FY21 Revised Schedule of Tuition and Fees
- y. FY21 Revised Schedule of Annual Tuition and Fees - Undergraduate

**Other Business:**

- z. Motion – Confirm Appointment of Audit Committee Chair for 2020-2021
- aa. Motion - Authorization to Executive Committee to Engage Search Firm for Presidential Search



## Board of Trustees

Special Meeting

April 14, 2020

Minutes

### Meeting held virtually 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.

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**MEMBERS PARTICIPATING REMOTELY:** Board Chair Kevin Queenin, Vice Chair Edward Sullivan, Secretary Lydia Martinez-Alvarez and Trustees Melissa Alvarado, Paul Boudreau, James Hagan, Madeline Landrau, Robert Magovern, Dr. Robert Martin, and Thalita Neves

**MEMBERS EXCUSED:** Trustee Dr. Gloria Williams

Dr. Jane E. Milley and Mr. Kevin Matthews, Vice President of The Registry, were also participating remotely.

The meeting was called to order at 4:00 PM by Chair Queenin, who stated the meeting would be held entirely by Zoom and be live streamed on YouTube. He welcomed Dr. Jane Milley, one of the two finalists for the interim president position. He thanked Mr. Kevin Matthews, Vice President of The Registry, who provided the names of twelve potential candidates. Chair Queenin and Trustee Martin interviewed six candidates.

Dr. Milley provided her professional background and experience and stated the New England Association of Schools and Colleges (NEASC), the union, and the Strategic Plan will guide the interim in preparing for a new president. She shared the following:

- Partnerships between colleges and universities and business and industry are essential.
- She worked through the tenure process herself and understands shared governance, making it a high priority if selected for the interim president position.
- The Strategic Plan and partnership and collaboration between k-12 schools and the University is key.
- A first-year program is very important for recruitment and retention. Academic maps such as the Complete College America program and a guided pathways model work very well as they help students create their college plan and build their schedule as soon as they start. Recruitment also needs to focus on the adult learners program. A centralized advising center in one place is also successful.
- Fundraising is critical and relationships with faculty, staff, alumni and community groups and businesses need to be cultivated.
- In the first 90 days as an interim, it would be essential to get to know the faculty, students, staff, unions, deans, department chairs and community members. Listening more than talking is very important to build an agenda for the year.

- In developing a budget, the interim president will have to work closely with the vice president of Administration and Finance and Trustees to solidify priorities with input from the deans, faculty, staff and unions in the context of what would like to be accomplished, what can actually get done, and how to work together to implement it.
- Diversity equals excellence. You need to reach out to more diverse students to help them understand how they would fit into the right program at your University. Use the early college program. Once those students arrive on campus, use advising to help them understand the jobs that are available and how they can move through the college program to obtain those jobs.
- She enjoys talking with and interacting with students and would meet with the Student Government Association regularly by interacting with and going to their events.
- To get buy-in of programs from members of the campus, show proof of success at other universities and negotiate until there is an understanding of the benefit of a program.
- She has previously been an interim president, dealing with all types of difficult situations. It is most important for an interim to learn how to choose what is important. Transformation comes from listening, negotiating and learning what works for each institution.
- Learning will never be the same as it was last fall due to Coronavirus. In order to plan for Westfield's re-opening, either in September or January, these questions need to be asked: 1) How is technology working? 2) How are faculty doing with online teaching? 3) How are students doing with online learning? 4) What discussion and planning is being made now for prolonged online learning? 5) What does the Board of Higher Education (BHE) say?
- Dr. Milley finds it very creative to work with many different people on program development, alumni relations, and fundraising, and the challenge is how to accomplish it. After being asked to direct a college arts and sciences program, she realized she enjoyed it and started moving into administrative roles.

Chair Queenin stated that those viewing on YouTube who want to provide input from the interview should send feedback to Jean Beal by this Friday. It will then be sent to the Trustees.

There being no further business, **MOTION** made by Trustee Magovern, seconded by Trustee Alvarado, to adjourn.

**ROLL CALL VOTE** taken:

Trustee Alvarado	Yes	Trustee Martin	Yes
Trustee Boudreau	Yes	Trustee Martinez-Alvarez	Yes
Trustee Hagan	Yes	Trustee Neves	Yes
Trustee Landrau	Yes	Trustee Queenin	Yes
Trustee Magovern	Yes	Trustee Sullivan	Yes

**Motion passed unanimously.**

Meeting adjourned at 4:54 PM.

Attachments presented at this meeting:

- a. Resume of Dr. Jane E. Milley

#### **Secretary's Certificate**

I hereby certify that the foregoing is a true and correct copy of the approved minutes of the Westfield State University Board of Trustees Executive Committee meeting held on April 14, 2020.

\_\_\_\_\_  
Lydia Martinez-Alvarez, Secretary

\_\_\_\_\_  
Date



## Board of Trustees

Special Meeting

April 15, 2020

Minutes

### Meeting held virtually 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

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**MEMBERS PARTICIPATING REMOTELY:** Board Chair Kevin Queenin, Vice Chair Edward Sullivan, Secretary Lydia Martinez-Alvarez and Trustees Paul Boudreau, James Hagan (joined at 3:59 PM), Madeline Landrau, Robert Magovern, Dr. Robert Martin, and Thalita Neves

**MEMBERS EXCUSED:** Trustees Melissa Alvarado and Dr. Gloria Williams

Dr. Roy H. Saigo and Mr. Kevin Matthews, Vice President of The Registry, were also participating remotely.

The meeting was called to order at 3:31 PM by Chair Queenin, who stated the meeting would be held entirely by Zoom and be live streamed on YouTube. He welcomed Dr. Roy Saigo and thanked him for his interest in applying for the position of interim president of Westfield State University. Chair Queenin also introduced Mr. Kevin Matthews, Vice President of The Registry, who assisted in bringing a number of candidates to the Board.

Dr. Saigo provided his professional background and experience and stated that after teaching and doing research, he decided to go into administration after publishing his first paper. He shared the following:

- Dr. Saigo has focused on diversity everywhere he has been. His practice was to visit and meet the principals of the schools surrounding the university, many of which served minority communities. Enrollment soared. You have to put into place a system with activity and support to make the students feel welcome once they get to campus.
- In the first 90 days as an interim, he would invite the entire campus to hear him speak and try to meet with every department, although the types of meetings may need to be modified due to the COVID-19 restrictions.
- He feels he can contribute to Westfield State's success due to his accomplishments in assisting universities facing similar situations with budget issues, retrenchment, lawsuits, grievances, and votes of no confidence.
- Fundraising is a huge priority for universities due to declining enrollment. His experience has been working with university foundation leadership to renovate and expand their membership and increase the base of donors. Donors need to trust the president and his/her leadership and the plan for the institution.

- Interaction with students is important. At Southern Oregon University, he helped to coin the phrase to “treat every student as if they were your own” so that every member of the faculty and staff would do the best they could to make each student successful.
- Everyone talks about recruiting, but if you do not keep the students, your numbers will not increase. Focus on creating connect points for the students - when they come onto campus, when they declare a major, when they are having trouble. Use the Westfield Promise to connect one year to the next, ensuring they are connected year-to-year and remain at Westfield.
- You must make sure, even with your body language, that you are creating trust. Trust and respect are the hardest to receive and you have to show and tell the truth to gain them. Shared governance is needed to work together to solve issues. The positive of COVID-19 is that it is requiring everyone to collaborate.
- In order to receive buy-in for programs, you need to listen to concerns. There will not always be agreement, but it is important to understand the issues with kindness and respect, listening carefully.
- The Strategic Plan and the two new Centers will move the institution forward together to support hybrid and online learning due to COVID-19. Contingencies such as online classes only, then hybrid classes, then regular face-to-face classes have to be considered. The Coronavirus will not be going away soon, so in the future of Westfield State there will have to be all three types of learning. When students enroll, intensify the Westfield Promise to keep them connected and successful.
- As he has looked at the graphs from 2000, 2007, and the model for 2020, the year following a recession showed a greater deficit than in the year it happened. Financial challenges will be much greater for 2021. He can bring great energy and dedication to a public institution. Public education, especially regional schools, is an avenue for citizens to move up the economic ladder. If we do not have quality affordable education, we do not have democracy and a successful middle class.
- Success for Westfield State is to buy into and work the Strategic Plan. The only thing holding the campus back is spending too much time with a toxic environment. Focus on the issue of working together and moving Westfield State another bar or two.

Chair Queenin stated that those viewing on YouTube who want to provide input from the interview should send feedback to Jean Beal by this Friday. It will then be sent to the Trustees.

There being no further business, **MOTION** made by Trustee Landrau, seconded by Trustee Sullivan, to adjourn.

**ROLL CALL VOTE** taken:

Trustee Boudreau	Yes	Trustee Martinez-Alvarez	Yes
Trustee Hagan	Yes	Trustee Neves	Yes
Trustee Landrau	Yes	Trustee Queenin	Yes
Trustee Magovern	Yes	Trustee Sullivan	Yes
Trustee Martin	Yes		

**Motion passed unanimously.**

Meeting adjourned at 4:26 PM.

Attachments presented at this meeting:

- a. Resume of Dr. Roy H. Saigo

**Secretary's Certificate**

I hereby certify that the foregoing is a true and correct copy of the approved minutes of the Westfield State University Board of Trustees Executive Committee meeting held on April 15, 2020.

\_\_\_\_\_  
Lydia Martinez-Alvarez, Secretary

\_\_\_\_\_  
Date





## BOARD OF TRUSTEES

April 30, 2020

Minutes

### Meeting held virtually 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 PARTICIPATING REMOTELY:** Chair Kevin Queenin, Vice Chair Edward Sullivan, Secretary Lydia Martinez-Alvarez and Trustees Melissa Alvarado, Paul Boudreau, James Hagan, Madeline Landrau, Robert Magovern, Dr. Robert Martin, Thalita Neves and Dr. Gloria Williams

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

The meeting was called to order at 1:52 PM by Chair Queenin, who welcomed Mr. Matt Noyes, Director of Trustee Relations at the Department of Higher Education (DHE) and all others watching live on YouTube.

**MOTION** made by Trustee Magovern, seconded by Trustee Martinez-Alvarez, to approve the minutes of the February 6, 2020 Board of Trustees meeting.

**ROLL CALL VOTE** taken:

Trustee Alvarado	Yes	Trustee Martinez-Alvarez	Yes
Trustee Boudreau	Yes	Trustee Neves	Yes
Trustee Hagan	Yes	Trustee Queenin	Yes
Trustee Landrau	Yes	Trustee Sullivan	Yes
Trustee Magovern	Yes	Trustee Williams	Yes
Trustee Martin	Yes		

**Motion passed unanimously.**

General Announcements: Chair Queenin stated we are living in challenging times and it is clear that Westfield State and the entire state university system has some difficult decisions to make in the near future. On behalf of the entire Board, he thanked the faculty, staff, and administration for their dedication and commitment to University; it is truly appreciated. He thanked the students for their patience and cooperation. Although it is impossible to predict the new normal going forward, the faculty, staff, administration, and Board are committed to putting student success at Westfield State University at the forefront.

Student Trustee’s Report: Trustee Neves thanked all the professors and students who have made the online learning process happen. It has been an extremely anxious and challenging time for students mentally and financially. She is pleased that commencement will take place on October 24 and thanked everyone who is

making decisions. Students are worried about internships. If the fall semester is virtual, it will cause some students to take a gap year. She expressed appreciation that the Center for Undergraduate Research and Creative Activities (CURCA) celebration, honors projects, classes, Ely Library, and the counseling and career centers are all online. The Student Government Association (SGA) Executive Board has come together to help provide input on the Pass/Fail Policy and advocate for refunds and awards at year end. The SGA will be holding elections in the fall and she will run again for the student trustee position. She will be the SGA co-president with Sam Tsongalis, the current president for the Class of 2021. When tough decisions concerning the budget need to be made, Trustee Neves requested that everyone ask themselves at what cost those decisions will affect the students.

President's Report: President Torrecilha thanked the entire campus community for adapting so quickly to the challenges presented by COVID-19. The faculty are real heroes in delivering their curriculum. He thanked the staff for their willingness to support faculty and students and thanked the students for their grit and efforts.

- The long-term impact on public Higher Education presented by this pandemic remains uncertain. Tax collections for the Commonwealth will be \$4 billion to \$6 billion below FY21 projections and unemployment levels won't bounce back until 2022. The state appropriation will be reduced by at least 5% with the possibility of up to 20%. Some other states are cutting public Higher Education funding by 25% to 30%.
- The CARES Act funds will be split. The first half of \$2.2 million will go to students. The second half of \$2.2 million to \$2.4 million will be for institutional support. Congressman Richard Neal met with the Council of Presidents (COP) to discuss federal relief, and there may be a Phase 4 funding to cities and towns and a Phase 5 funding to infrastructure, healthcare and possibly education. Senate President Spilka recently gave sobering remarks and invited presidents and chancellors to reimagine what public Higher Education will look like in the future.
- There are discussions with the Massachusetts State College Building Authority (MSCBA) to refinance for spring 2020 and for FY21. If successful in refinancing, that will provide relief.
- Very shortly a task force will be established to plan for a safe opening and return to campus. The following three scenarios are anticipated for fall. Traditional on-ground, delayed traditional opening, and a hybrid model with both on-ground and online classes. Try to imagine social distancing on move-in day, in residential halls, dining commons, and sports events. Would we need to test, track and quarantine students? Communication has been initiated with Baystate Medical Center.
- President Torrecilha stated that he appreciated faculty and staff who took the time to provide him with input on a successful Provost appointment. It was hoped to do a national search in the fall. The faculty union voted not to participate. He reached out to the colleges to meet for their input and a meeting did not take place. He is very proud to announce that Dr. Robert Kersting has agreed to serve as Provost and Vice President for Academic Affairs. He has been with Westfield State almost 25 years and has made valuable contributions to the institution.
- Dr. Kersting thanked President Torrecilha for the appointment and said he was looking forward to working with the faculty, staff, students and the Board at Westfield State. With the realities of COVID-19 putting the institution in uncharted waters, there is a need to be flexible and creative and to collaborate and listen to students. Although very important to return to campus in the fall, safety and social distancing will be extremely essential. Dr. Kersting looks forward to guiding the campus through continued development and implementation of the Strategic Plan and next accreditation. Dr. Kersting believes one of his best leadership traits is the ability to listen and spend time talking with people to understand and come to a consensus on how to move forward.

Academic and Student Affairs Committee: Trustee Martin read a proclamation recognizing Ms. Carly Thibodeau, the 29 *Who Shine* award recipient. During its meeting, the committee discussed the transition

to online learning, retention, and had a presentation on commuter students. The Provost’s recommendations for tenure and promotion were also reviewed and approved. Dr. Diane Prusank, Provost and Vice President for Academic Affairs, then referenced the eligibility and process criteria and presented to the full Board the candidates for automatic promotion, who were invited to join the meeting on YouTube. The Trustees viewed photos of each candidate as they were presented.

**MOTION** made by Trustee Martin, seconded by Trustee Magovern, to approve the granting of tenure with automatic promotion, effective September 1, 2020, to:

Dr. Leonardo Andrade	Psychology
Dr. Maria del Mar Farina	Social Work
Dr. Christopher Gullen	Communication
Dr. Phillip Hart	Economics and Management
Dr. Jesse Johnson	Mathematics
Dr. Erica Morin	History
Dr. Dristi Neog	Geography, Planning, and Sustainability
Dr. Mark Nimkoff	Communication
Dr. Kimberly Sherman	Economics and Management
Dr. Shirley Wong	English

To approve the granting of tenure, effective September 1, 2020, to:

Dr. Karen Sladyk	Health Science
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**ROLL CALL VOTE** taken:

Trustee Alvarado	Yes	Trustee Martinez-Alvarez	Yes
Trustee Boudreau	Yes	Trustee Neves	Yes
Trustee Hagan	Yes	Trustee Queenin	Yes
Trustee Landrau	Yes	Trustee Sullivan	Yes
Trustee Magovern	Yes	Trustee Williams	Yes
Trustee Martin	Yes		

**Motion passed unanimously.**

Provost Prusank presented each of the candidates for promotion. Trustee Martin thanked all who were involved in the careful process, taking the time to get to know the people they were writing about. He reminded Trustees that they were voting on the leaders for the next 10-to-20 years which will establish the character of the University.

**MOTION** made by Trustee Martin, seconded by Trustee Magovern, to approve the granting of promotion to the rank of Professor, effective September 1, 2020, to:

Dr. Gabriel Aquino	Sociology
Dr. Mary Brown Bonacci	Music
Dr. David Christensen	Biology
Dr. Brian Conz	Geography, Planning, and Sustainability
Dr. Rachel Gibson	Music
Dr. Hugh Jo	Political Science
Dr. Megan Kennedy	Education
Dr. Rebecca Morris	Economics and Management
Dr. Aaron Reyes	Chemical and Physical Science
Dr. Brian Rizzo	Criminal Justice
Dr. Makoto (Max) Saito	Communication
Dr. Catherine Savini	English

Dr. Karen Sladyk  
Dr. Rosemary Sullivan

Health Sciences  
Social Work

To approve the granting of promotion to the rank of Associate Professor, effective September 1, 2020, to:

Dr. Tracy McLeod  
Dr. Miriam Tager

Education  
Education

**ROLL CALL VOTE** taken:

Trustee Alvarado	Yes	Trustee Martinez-Alvarez	Yes
Trustee Boudreau	Yes	Trustee Neves	Yes
Trustee Hagan	Yes	Trustee Queenin	Yes
Trustee Landrau	Yes	Trustee Sullivan	Yes
Trustee Magovern	Yes	Trustee Williams	Yes
Trustee Martin	Yes		

**Motion passed unanimously.**

Audit Committee: Trustee Boudreau stated the committee discussed a recommendation to defer the search for an associate director for risk management to a later date due to the University's freeze on hiring, its current financial position, and lack of a qualified applicant. The auditors participated in the committee meeting and they will evaluate our internal procedures related to wire transfers and vendor management as part of their current work on the audit this year. The committee voted to engage the audit firm used in the past for next year's audit. Their engagement letter is similar to previous letters, and audit fees will go up 3% next year pursuant to the pre-negotiated fees in the contract.

**MOTION** made by Trustee Queenin, seconded by Trustee Sullivan, to engage the accounting firm of O'Connor and Drew, P.C. for FY20 audit services.

**ROLL CALL VOTE** taken:

Trustee Alvarado	Yes	Trustee Martinez-Alvarez	Yes
Trustee Boudreau	Yes	Trustee Neves	Yes
Trustee Hagan	Yes	Trustee Queenin	Yes
Trustee Landrau	Yes	Trustee Sullivan	Yes
Trustee Magovern	Yes	Trustee Williams	Yes
Trustee Martin	Yes		

**Motion passed unanimously.**

Advancement and Enrollment Management Committee: Trustee Martinez-Alvarez stated the committee discussed funnel reports for day and CGCE enrollment as well as enrollment projections. There has been a slight change to the financial aid model and how funds are distributed to students. The admission schedule has changed to have all virtual meetings and events. There was a presentation from Marts & Lundy on planning for a strategic campaign. Information was distributed on the Public Higher Education Endowment Program, an incentive to receive a \$1 match from the state for every \$2 raised from July 1, 2019 to June 30, 2021. The Institutional Advancement Dashboard was shared and the *Owls Helping Owls* campaign has raised almost \$20,000.

Finance and Capital Assets Committee: Trustee Sullivan stated the committee held an extensive review and discussion of the University's finances for FY20 and budget scenarios for FY21. Everything is changing so rapidly, which is a challenge for creating a sound budget for FY21.

Representatives from the Division of Capital Asset Management and Maintenance (DCAMM) and the architectural firm of Miller Dyer Spears (MDS), provided an update on the Parenzo Hall renovation.

- The conceptual design is finished and the project is now moving into the more detailed schematic design.
- The scope has been brought back so that it now aligns to the resources. A budget summary from July 2019 to March 2020 was shared. Institutional Advancement will fundraise for \$200,000 to replace the seating in Dever Auditorium.
- There are regular biweekly meetings between DCAMM, MDS and the Parenzo Working Group. There are three other groups working on the project, which are the Student Success, Academic, and CoLab working groups. The lists of group participants was shown.
- The project goals were shared of renovating Parenzo Hall to renew functionality and maximize its use, and expanding and deepening programmatic collaboration with the Center for Student Success, CoLab, academic department updates and flexible classrooms.
- Plans for the renovation of Parenzo and Scanlon Halls were shared.
- The project schedule was shown with a projected move into the renovated Parenzo Hall during the summer of 2023.

Other Business - Interim President Discussion: Chair Queenin stated that he had contacted The Registry, a search firm in Massachusetts who specializes in interim appointments. Twelve qualified candidates for interim president were presented, which was then reduced to six. He and Trustee Martin interviewed those six candidates, finalizing the two candidates. Discussion on the two finalists, Dr. Roy Saigo and Dr. Jane Milley, followed.

- The candidates were provided links to documents on the University website to review, and they both have a good sense of what is going on locally and nationally in regard to COVID-19. They also have a very clear understanding of the campus environment, spending, and budget issues.
- Both candidates are clearly qualified and very experienced. Dr. Saigo stood out given his past leadership experience in dealing with similar challenges as Westfield State in issues of diversity, budgets, fundraising, no confidence votes and the need for healing.
- Dr. Saigo's approach is very personal and direct, with the ability to listen to, interact with, and be accepted by faculty, students, staff of all levels, administrators, and alumni.
- Dr. Saigo researched Westfield State's faculty, enrollment, programs and understood the significance of Horace Mann's vision.
- Moving across the country to live in the surrounding area demonstrates a commitment Dr. Saigo is willing to make. Alternatively, coming from out of state, he may be unfamiliar with our state, the system, and the area, which is important at a state institution.
- There were approximately eight emails with feedback received from the campus community who viewed the interviews on YouTube. There was one in favor of Dr. Milley and the rest were for Dr. Saigo.

Chair Queenin shared that the next steps are a motion to appoint the interim president, then approval from the Department of Higher Education, and then negotiations.

**MOTION** made by Trustee Martin, seconded by Trustee Martinez-Alvarez, to appoint Roy Saigo, Ph.D. as Interim President of Westfield State University, effective date to be determined, and to serve in that capacity until the search is complete and a new President has been identified and appointed; and to confer upon and delegate to the Interim President, the powers and authority of the Office of the President, subject to the approval of the Department of Higher Education.

**ROLL CALL VOTE** taken:

Trustee Alvarado	Yes	Trustee Martinez-Alvarez	Yes
Trustee Boudreau	Yes	Trustee Neves	Yes
Trustee Hagan	Yes	Trustee Queenin	Yes
Trustee Landrau	Yes	Trustee Sullivan	Yes
Trustee Magovern	Yes	Trustee Williams	Yes
Trustee Martin	Yes		

**Motion passed unanimously.**

**MOTION** made by Trustee Martin, seconded by Trustee Alvarado, to authorize and direct the Chairman of the Board of Trustees to negotiate compensation and benefits for the Interim President, Roy Saigo, Ph.D.; and to authorize the Chairman to execute, ratify, approve and confirm all actions, commitments, negotiated compensation and benefits made to Roy Saigo, Ph.D. by the Chairman acting for and on behalf of the Board of Trustees.

**ROLL CALL VOTE** taken:

Trustee Alvarado	Yes	Trustee Martinez-Alvarez	Yes
Trustee Boudreau	Yes	Trustee Neves	Yes
Trustee Hagan	Yes	Trustee Queenin	Yes
Trustee Landrau	Yes	Trustee Sullivan	Yes
Trustee Magovern	Yes	Trustee Williams	Yes
Trustee Martin	Yes		

**Motion passed unanimously.**

Chair Queenin will reach out to Dr. Milley to thank her for her involvement and participation.

Permanent President Search Committee Discussion: Chair Queenin stated that in early April, the Executive Committee met to discuss the permanent president search committee and organizing the committee will start soon. Trustee Martinez-Alvarez shared that she would like to volunteer to be on that committee.

Trustee Sullivan left the meeting at 3:54 PM.

Chair Queenin stated that the pandemic has defined a new normal and that for far too long we have been a divided campus. We all need to come together and put aside differences. Starting today, he asked that everyone commit to moving Westfield State forward together, focusing on what needs to be accomplished in spite of economic challenges, creating long-term success for the students and the University.

There being no further business, **MOTION** made by Trustee Magovern, seconded by Trustee Landrau, to adjourn.

**ROLL CALL VOTE** taken:

Trustee Alvarado	Yes	Trustee Martinez-Alvarez	Yes
Trustee Boudreau	Yes	Trustee Neves	Yes
Trustee Hagan	Yes	Trustee Queenin	Yes
Trustee Landrau	Yes	Trustee Sullivan	Disconnected.
Trustee Magovern	Yes	Trustee Williams	Yes
Trustee Martin	Yes		

**Motion passed unanimously.**

Meeting adjourned at 3:58 PM.

Attachments presented at this meeting:

- a. Minutes of February 6, 2020

**Academic and Student Affairs Committee:**

- b. 29 Who Shine Proclamation
- c. Tenure and Promotion Criteria
- d. Motion – Tenure
- e. Tenure Recommendations and Justifications
- f. Motion – Promotion
- g. Promotion Recommendations and Justifications

**Audit Committee:**

- h. Motion – FY20 Audit Firm Selection
- i. O’Connor & Drew Engagement Letter

**Finance and Capital Assets Committee:**

- j. Parenzo Hall Renovation Update Presentation

**Other Business:**

- k. Motion – Appointment of Interim President
- l. Motion – Authorization to Negotiate Compensation

**Secretary’s Certificate**

I hereby certify that the foregoing is a true and correct copy of the approved minutes of the Westfield State University Board of Trustees meeting held on April 30, 2020.

\_\_\_\_\_  
Lydia Martinez-Alvarez, Secretary

\_\_\_\_\_  
Date

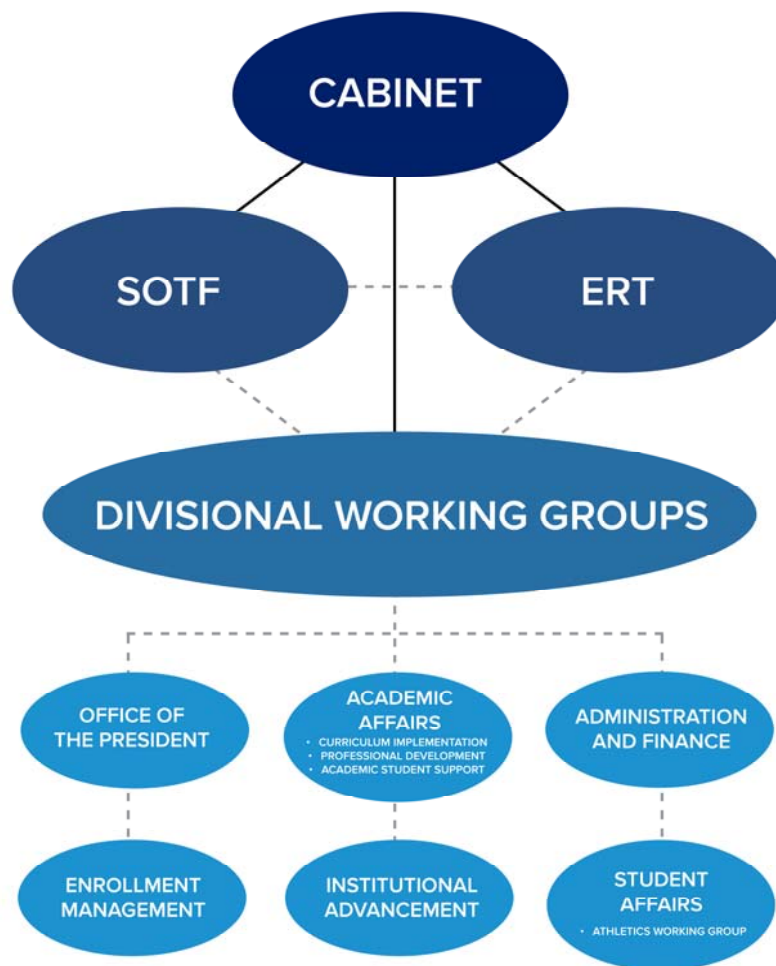
# Safe Opening Task Force (SOTF)

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- Director of Athletics **Richard (Dick) Lenfest Jr.** (chair)
- Interim Director of Health Services **Lisa Brosnan**, JD, DNP, FNP-BC
- Interim Director of Counseling Center and APA President **Brian Cahillane**, MSW, JD, LICSW
- Maintenance Foreman for Environmental Services and AFSCME Chief Steward **Luis Gonzalez**
- Dean of the College of Mathematics and Sciences **Jennifer Hanselman**, Ph.D.
- Professor of Ethnic and Gender Studies and MSCA President **C. Margot Hennessy**, Ph.D.
- Director of Housing Operations **Joshua Hettrick**, Ed.D.
- Director of Institutional Advancement **Lisa McMahon**
- Executive Director of Facilities and Capital Planning **Maureen Socha**



# Safe Fall Opening Planning





## **Board of Trustees**

June 25, 2020

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### **MOTION**

To approve the attached Letter of Intent for the  
Bachelor of Music in Music Therapy

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Kevin R. Queenin, Chair

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Date

# Program Approval Process





AAC reviews LOI, provides feedback, and votes: **Fast Track** or **Standard Process**

**Fast Track:** Campus prepares full proposal, submits to campus BOT, and then to Commissioner. DHE staff review full proposal and provide recommendation. Approval authority delegated to Commissioner.

**Standard:** AAC provides feedback for institution to address in full proposal. Campus prepares full proposal, submits to campus BOT, and then to Commissioner. DHE staff review full proposal for completion. Campus returns to AAC for BHE approval.



**MEMORANDUM**

**TO:** Dr. Ramon S. Torrecilha, President  
**FROM:** Dr. Diane T. Prusank, Provost and Vice President, Academic Affairs  
**DATE:** June 10, 2020  
**SUBJECT:** Letter of Intent, Bachelor of Music in Music Therapy

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On behalf of the Department of Music, I am pleased to provide you with the attached Letter of Intent for a Bachelor of Music in Music Therapy for submission to the Board of Trustees. The proposed program is aligned with the *Westfield State Strategic Plan 2019-2024*, representing an expansion of options from our renowned National Association of Schools of Music (NASM) accredited music program, and continues our expansion of offerings in the health professions. An American Music Therapy Association (AMTA) approved Bachelor of Music in Music Therapy prepares students for employment as board-certified music therapists, combining traditional coursework, experiential learning, and real-world clinical experience in partnership with community institutions. The program is designed with a focus on both WSU and the Commonwealth's commitment to the equity agenda and student success, taking full advantage of alignment with key components of *The Westfield State Experience*.

**Intent and mission**

The community-oriented music therapy program will produce professional music therapists who contribute to the social and cultural health of the community while fulfilling an economic need in the health professions, supporting Westfield State's mission, vision and values. The program is aligned with the state's equity agenda and the *Westfield State Strategic Plan 2019-2024* goals to create academic programming that builds on liberal arts tradition, provides focus on career pathways and maintains accessibility. Specifically, the B.M. in Music Therapy will increase access for underserved populations to a healthcare profession that offers economic stability, personal fulfillment, and community building. As the only public university in New England to offer this

degree, Westfield State will be the sole point of affordable access to the B.M. in Music Therapy. We will recruit intensively through our partnerships in Holyoke and Springfield, aligning the program with options for participants in *The Westfield Promise* early college program and using transfer agreements to create guided pathways from community colleges. Importantly, the program is designed to avoid privileging a traditional Western-European preparatory model and the barrier that a requirement for formal music training can create by integrating more organic music experiences including improvisation, learning by ear, and expertise in nonsymphonic instruments.

### **Demand and Enrollment Projections**

Board-Certified Music Therapists are health professionals employed in a plethora of healthcare and education settings, including substance abuse programs, oncology treatment centers, hospice and palliative care centers, and special and developmental education programs. Within the program development period, our music department has already created partnerships for clinical training with thirteen institutions, including Westfield High School's Developmental Learning Program and Baystate Medical Center's Adult Psychiatric Unit.

Research by EMSI and EAB, noted in the LOI, indicate this is an area for job growth in the Northeast region. Employers in the area have difficulty finding qualified applicants. EAB data found approximately 58 job postings per month relevant to music therapy in the northeast region while only about 44 qualified music therapy candidates graduate in all of New England each year. EAB market analysis indicates job growth in music therapy is on par with other growth professions in general at 6%, and in key areas at a rate as high as just under 14%. The *Labor Market Blue Print for the Pioneer Valley* indicated high need areas including health care and education, primary sectors for employment of music therapists.

Experts in the field also note that growth in job opportunities follows the work of AMTA-approved education programs. Only two such undergraduate programs exist in all of the New England area. Both existing programs in the commonwealth carry a tuition and fee payment of approximately \$40,000 per year while Westfield State's is nearly a quarter of this cost. The highest enrolling program (42 graduates in AY 18-19) is in Boston and the other MA program is low enrolled with no strong music program as its base. The reasonable cost of our program, the strong existing music

and health profession programs, along with our diversity and inclusion focused music therapy curriculum, including unique work in contemporary and world music along with clinical improvisation, will attract students from a variety of high schools and community colleges.

We project a progressive enrollment increase over the first five years of the program, reaching the reasonable target of an incoming class of 12 full-time day students each year. We anticipate modest additional growth from transfer, part-time, and post-bacc enrollment.

### **Academic Content and Accreditation** (See attached curriculum template)

The proposed Bachelor of Music in Music Therapy is a competency-based program that provides the educational and clinical experiences necessary to qualify graduates to sit for the board-certification exam administered by the Certification Board for Music Therapists. Students complete 120 credits grounded in our liberal arts core curriculum, supported by our outstanding NASM-accredited music program, while engaging in progressive clinical work and a subsequent non-credit six-month AMTA-required internship. Within the 120-credit program, students complete a required five semester sequence of clinical placements, exposing them to varied settings for the practice of music therapy and giving them time in the process to understand the settings best aligned with their professional goals. In concert with the growth of digital music production, the program provides students with the most up-to-date skills via coursework in music technology and application of digital production in the two-part clinical Improvisation sequence.

Institutions with music therapy degree programs must be accredited by the National Association of Schools of Music (NASM), a process which includes a thorough review of the music therapy curriculum, the music department, and all other institutional resources relevant to the music therapy program. In addition, the American Music Therapy Association must grant approval for music therapy degree programs. This process includes an independent review by the AMTA Academic Program Approval Committee to ensure that all music therapy competencies and clinical training requirements are met. Only students who complete an AMTA-approved music therapy degree program are eligible to sit for the Board-Certification Exam for Music Therapists. NASM accreditation and AMTA approval are both necessary, and the two approval processes are concurrent but independent of the other.

## **Resources**

Because the proposed B.M. in Music Therapy builds upon existing programs, it requires minimal additional resources to mount. The majority of courses will take place in existing spaces within the Catherine Dower Center for Performing and Visual arts, taking full advantage of this newly redesigned building and expansion of studio and rehearsal space as well as upgraded equipment. Seventy-five percent of the curriculum is currently on the regular schedule of the university with space available in these courses. The newly proposed coursework will be covered within an existing full-time faculty line. By year three of the program, additional funding will be needed for supervision of clinical experiences and by year five, if enrollment projections hold, there will be need for part-time faculty to add sections of some required coursework. The department seeks approximately \$3000 to mount the program to cover the annual accreditation fee, some musical instrument purchases and marketing costs. All other resources are absorbed into current budgets/programming.

In summary, the proposal for the B.M. in music therapy utilizes a rigorous, progressive curriculum to attract and engage a diverse population of students to prepare for a career in the health professions. As the only such program at a public institution in the Northeast region, we anticipate that we will not only attract a new population of students to this major, but that our graduates will have a critical impact on diversifying the profession as a whole.

Thank you for your consideration of this letter of intent.



**PHASE I: LETTER OF INTENT TEMPLATE  
FOR BOARD VOTE ON APPROVAL PROCESS**

Review Guidelines Prior to Submitting Materials

<https://www.mass.edu/foradmin/academic/publicnewdegrees.asp>

Information should be typed directly into the boxes below, which will expand. Letter of Intent (LOI) document should be about five to six pages in addition to appendices. After the local approval process for the LOI has been completed, the President of the institution should submit this template and all required forms addressed to the Commissioner of Higher Education, and to the Academic Affairs Committee (AAC) and Strategic Planning Committee (SPC) of the Board of Higher Education (BHE).

*Submissions are required to be in MS Word format. Please direct the completed to:  
[awilliams@dhe.mass.edu](mailto:awilliams@dhe.mass.edu).*

**Proposed Degree Title and Intent and Mission of the Program (200 words):**

Bachelor of Music in Music Therapy

Our mission is to provide high-quality, culturally responsive, and financially accessible training in music therapy in a career-focused music degree program leading to board-certification as a professional music therapist. Traditional coursework, experiential learning, and real-world clinical experience in partnership with community institutions are combined in a developmentally-informed sequence to support student success. We engage students directly in the process of music therapy treatment planning and implementation with individualized mentorship from a board-certified music therapist as they work collaboratively to address real-world clinical issues in ways that directly link their traditional coursework on theory with the practice of clinical music therapy.

We aim to prepare students for employment as board-certified music therapists who creatively combine highly developed musical skill, knowledge, and artistry with current research from music therapy, psychology, neuroscience, health sciences, and education for highly effective music therapy practice with a wide range of clinical populations and settings. Students will develop the relational awareness, empathy, and reflexivity necessary to work therapeutically in a way that reflects a community-oriented respect for diversity, equity, and inclusion. Graduates will be prepared for sustainable careers as music therapists, having developed skills for professional resilience and lifelong learning for professional development.

**Proposed CIP Code:** 51.2305

**Chief Academic Officer (CAO) Name and Title:**

Dr. Diane Prusank, *Provost*

**CAO Phone Number:** (413) 572-5214

**CAO Email:** [dprusank@westfield.ma.edu](mailto:dprusank@westfield.ma.edu)

**Has the Chief Academic Officer reviewed this LOI?** Yes

**Date LOI was approved by governing authority:** TBD

### **A. Alignment with Massachusetts Goals for Public Higher Education**

The FY19 BHE Equity Statement (<https://www.mass.edu/strategic/equity.asp>) provides campuses with insight into the next iteration of the system-level plans.

1. How does the program address institutional gaps in opportunity and achievement? How does the program align with campus goals?

In presenting this proposal, we acknowledge the challenges and uncertainty facing higher education in the context of the COVID-19 pandemic. We have worked to be responsive to these new concerns, and address them in this Letter of Intent.

The Bachelor of Music in Music Therapy at WSU addresses institutional gaps in opportunity and achievement because there are currently no public universities in Massachusetts, and New England more broadly, with music therapy degree programs. It is a career-oriented professional music degree leading to eligibility for the professional credential Music-Therapist – Board-Certified (MT-BC), a profession with high growth trends in student enrollment and employment.<sup>1</sup> There is significant economic need for this program, which would be the only public option for studying music therapy in MA. For more details regarding alignment with campus goals, see Item B.1.

Affordability is a significant barrier to improving diversity and inclusion of underrepresented persons in the profession of music therapy. Minority communities are disproportionately underrepresented in institutions of higher education and are underrepresented in the community of professional music therapists, with 88% identifying as white/Caucasian/European<sup>2</sup>. The music therapy program at WSU will support a culturally, racially, and economically diverse group of students that more accurately reflects the diversity of clients served by music therapy. To do this, we are crafting partnerships with community music schools and high schools in traditionally underserved areas including Holyoke and Springfield, MA. Additionally, the music therapy program will place an emphasis on music skills like improvisation, learning by ear, and expertise in nonsymphonic instruments, which will improve inclusivity for students with fewer pre-collegiate opportunities for formal music training in the Western-European model.

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<sup>1</sup> Iwamasa, D. A. (2019). Music therapy degree program enrollment trends: What the numbers tell us. *Music Therapy Perspectives*, 37, 196–204. See Item A.4 for more details.

<sup>2</sup> American Music Therapy Association (2018). *2018 AMTA Member Survey and Workforce Analysis*. Silver Spring, MD: Author

The affordability gap for music therapy education is likely to widen in the aftermath of the COVID-19 pandemic. Students who wish to study music therapy are likely to be looking for a more affordable option, which does not currently exist in MA.

To support equity, the curriculum will integrate opportunities for early college and community college transfer students (see below). Additionally, we will address the opportunity and achievement gap for students enrolled in the program by using mentored learning through clinical supervision, focused advising beginning with the formulation of a comprehensive plan of study in the student's first semester, and applied experiential learning in community institutions.

Since improving equity in music therapy education is a priority of this program, we have made a number of efforts to maximize accessibility to students. The degree requirements are limited to 120 credit hours.

**Community College Transfers:** Students who earn an A.A in Music with prescribed core courses at a community college may complete the BM in Music Therapy in four semesters plus internship. An articulation agreement with Holyoke Community College has been drafted, and we will move forward with approval after the BM in Music Therapy is approved.

**Westfield Promise Early College Program:** Students who participate in the Westfield Promise program are able to complete courses that will reduce their time to the BM in Music Therapy by one full academic year. More details, including sample course plans, are available upon request.

**Admission to MA in Mental Health Counseling:** Students who complete the proposed BM in Music Therapy at Westfield State with a minimum GPA of 3.5 are eligible to apply for the MA in Mental Health Counseling with the graduate examination requirement waived.

**Post-Baccalaureate Program:** For students who already have a bachelor's degree, we will have a Post-Baccalaureate Music Therapy Program designed to take two years plus internship. In this program, students complete the equivalent of all requirements for the BM in Music Therapy. Completion leads to eligibility to sit for the Music Therapy Board-Certification Exam to earn the professional credential Music Therapist – Board-Certified.

**Inclusive Education:** We are developing two avenues for inclusive education in collaboration with WSU's Inclusive Concurrent Enrollment Initiative (ICEI) program, which serves students with intellectual and developmental disabilities, age 18-21. In addition to inviting ICEI students to enroll in introductory music therapy coursework, we are also developing a music therapy group where music therapy practicum students work collaboratively with ICEI students to focus on self-determined therapeutic goals through music for improved well-being and social inclusion.

**Challenges to Equity:** We acknowledge that the proposed music therapy program presents several challenges to equity. These are addressed here:

**Internship:**

According to requirements set forth by the American Music Therapy Association (AMTA) and Certification Board for Music Therapists (CBMT), all students must complete a music therapy internship at an approved internship site, usually 6-months full-time. As per AMTA requirements, the internship must come after all other entry-level music therapy requirements have been fulfilled. This means that in an undergraduate degree, the internship must come after all other coursework has been completed. These current standards for the internship in undergraduate music therapy degree

programs were reaffirmed by the AMTA Board of Directors in 2018 (more detail is available upon request). We acknowledge that the Music Therapy Internship creates challenges to student equity, and have worked to minimize the burden that it poses for our students in the following ways:

**1) Internship Scholarships and Stipends:** Some approved Music Therapy Internships provide free housing to music therapy interns, and others carry stipends of up to \$5,000, which can offset the cost of housing during internship. Professional Music Therapy organizations also award scholarships to music therapy interns. We will work with our students to target internship sites and scholarships that fit the student's needs. Additionally, the music department at WSU has prioritized developing scholarships for our music therapy students to further reduce the financial burden of internship for students who have a financial need.

**2) Internship credit load:** Since the internship typically lasts 6 months, students register for internship during two terms: Summer and Fall semesters, or Spring and Summer semesters. In our proposed program, the internship will be a required course with variable credits from 0-12. The internship is completed off-site and conducted by the facility's Internship Director independent of WSU. WSU carries no responsibility for the administration of the internship beyond receipt of the students' Final Clinical Skills Evaluation, by which we affirm their successful completion of all Internship requirements. Since WSU has no involvement, it follows that the course should carry a 0-credit load. This proposal also means that students are not required to pay tuition or fees during semesters that they are only enrolled in internship, reducing the financial burden for students.

We recognize that some students may need to be eligible for full-time student status while completing their internship in order to access benefits like additional student loans and student health insurance, and that this need may outweigh the cost of tuition. For these students, students may elect the 6- or 12-credit option for the variable credit internship during the Fall or Spring semester of their internship, depending on the student's housing and financial aid needs. These 6- and 12-credit options carry additional assignments administered by the Music Therapy program at WSU, reflective of the increased credit load. Students in need of loans can register for 6 credits, the minimum number of credits to qualify for loans. An additional benefit of being enrolled in at least 6 credits is that all student loans remain in deferral. Day students may apply for XRG status to become part-time students, while still being eligible for housing.

**3) If a student completes all other degree requirements but does not complete internship:**

If a student decides late in their degree that they no longer want to pursue music therapy as a profession, they may decide not to complete the internship and instead earn a Bachelor of Arts in music. A student who completes all coursework required for our proposed BM in Music Therapy degree other than internship will have already completed all requirements for the BA in Music.

If a student does want to pursue music therapy as a profession but is unable to complete the internship right away, we would advise the student to graduate with a BA in Music. When they are ready to complete their internship, they complete the internship as a continuing education student in our Post-Baccalaureate Music Therapy Equivalency program. Upon completion of the internship, our music therapy program coordinator conveys their eligibility to the Certification Board for Music Therapists. The student would not earn a new music therapy degree, but is eligible to sit for the music therapy board-certification exam and may earn the credential Music Therapist – Board-Certified.

It is important that the Music Therapy Internship be required for the BM in Music Therapy, since it is a requirement for professional music therapy training. One could argue that the Internship could be completed after the student is awarded their degree, and that it should only be a requirement for Board-Certification as a music therapist. However, that student who is awarded the degree in Music Therapy prior to internship is not qualified to be a music therapist. Since a degree in Music Therapy implies that the graduate is a qualified music therapist, it creates an ethical issue in that it is misleading to consumers and employers, and undermines formal music therapy education.

**Additional Equity Concerns**

**Transportation to Clinical Placements:** While completing their 5 semesters of clinical placements pre-internship, we will accommodate students who do not have access to their own transportation in a few different ways. A number of our practicum placements will take place in the Music Therapy Clinic on campus. Students who do not have cars can be given priority for these placements. For off-site practicum placements, the program coordinator will pair students so that at least one of them has access to a car since students will complete music therapy practicum in pairs.

**Student Jobs:** Clinical placements involve one hour of sessions per week, so students are able to work during coursework. Additionally, students are not expected to take coursework or complete additional internships during the summers, so they are available to work between semesters. During internship, most students find that they are not able to work an additional job. We acknowledge that the current system for music therapy internships is not equitable, and we are working to mitigate the effects on our students while working within the strictures of professional accrediting bodies, as described above.

1. What program or department supports and practices are in place to ensure that students persist and complete the certifications and degrees offered by the program?

During the student's first semester, the music therapy faculty and student create a comprehensive plan of study to ensure that the student completes all required courses in the requisite sequence.

In their five semesters of clinical fieldwork, students receive close mentorship and individual supervision by a board-certified music therapist who is a qualified clinical supervisor. That clinical supervisor meets with the student one-on-one for midterm and final evaluations during each semester of clinical fieldwork to identify the student's strengths and discuss plans for remediating areas of deficiency. These clinical evaluations are designed according to the AMTA Professional Competencies so that the student and music therapy faculty may continuously monitor the student's progress towards meeting those competencies and improve the likelihood that students persist through the degree program. Any time a deficiency is identified, the clinical supervisor and/or music therapy faculty create with the student a plan for remediation that includes specific skills and criteria that must be met, strategies for meeting those criteria, and a timeline by which that criteria should be met.

Once a student finishes all requirements of the degree, they are eligible to sit for the board-certification exam to earn the credential Music Therapist – Board-Certified. All coursework exams are structured in a way that parallels the board-certification exam so that students are adequately prepared not just in terms of content and competencies, but also the practicalities of taking the exam.

2. Please describe relevant alliances and partnerships with PK-12, other institutions of higher education, and the employer community. If you have or plan to convene an advisory group for this proposed program, please explain. Describe how information from an advisory will be used to develop and refine the program.

To date, we have developed partnerships with the following community institutions for clinical training, where our music therapy students will provide music therapy sessions with on-site supervision by a board-certified music therapist. These partnerships and others will continue to be developed as the program grows.

- Community Music School of Springfield, Adaptive Music Partnership Program (AMP)
- Berkshire Health System, HospiceCare Pediatric Palliative Care
- Westfield High School, Developmental Learning Program (DLP)
- Agawam High School, ASPIRE Program
- Ludlow Public Schools, Special Education Center
- Baystate Medical Center, Pediatric Inpatient Acute Care
- Baystate Medical Center, Pediatric Palliative Care
- Baystate Medical Center, Adult Psychiatric Treatment Unit
- Baystate Medical Center, Neuroscience Unit
- Behavioral Health Network Crisis Intervention Centers, Holyoke and Westfield, MA
- Berkshire Hills Music Academy, South Hadley, MA
- Jefferson House Assisted Living, Newington, CT
- Westfield State University Inclusive Concurrent Enrollment Initiative (ICEI)

In addition, we are working with Community Music School of Springfield to develop a music therapy internship that leads to employment as Music Therapy Fellow, a time-limited entry-level position to provide new music therapists with mentored employment experience as they enter the job market.

3. If the proposed program is designed for students to enter an employment area of demonstrated need in the regional and/or statewide labor market, provide evidence including references to workforce development plans (e.g. MassHire Regional Blueprints, <https://www.mass.gov/service-details/view-your-regions-blueprint>), showing market need and employer engagement. If it is not directly labor market aligned, identify the career options related to the proposed program and explain how students will be made aware of them. Do not rely on Bureau of Labor Statistics projections in this section.

The music therapy program at WSU will lead to eligibility to become a board-certified music therapist, earning the credential Music Therapist – Board-Certified (MT-BC). Music therapy is an established health profession involving the clinical and evidence-based use of music interventions to accomplish individualized therapeutic goals by a credentialed professional.<sup>3</sup> Music therapists are employed in healthcare and special education settings including but not limited to medical hospitals, oncology treatment centers, physical rehabilitation clinics, behavioral and mental health settings, substance abuse programs, correctional facilities, hospice and palliative care, nursing homes and dementia care, treatment centers for persons with emotional, developmental, or physical disabilities,

<sup>3</sup> AMTA (2019). *What is music therapy?* Retrieved from <https://www.musictherapy.org/about/musictherapy/>

and special education.<sup>4</sup> While grounded in music, it is intrinsically a health profession through which clients address physical, emotional, psychological, social, and educational needs.<sup>5</sup>

Music therapy is underdeveloped in western MA and New England more broadly, a region with only three of the nation's 88 AMTA-approved music therapy training programs and only two bachelor's level programs.<sup>6</sup> According to a 2018 survey of music therapists in MA, 50% of cities and towns in MA had no music therapy services provided and 86.3% had two or fewer music therapists providing services.<sup>7</sup> New England has fewer music therapists than any other region in the US. As of Nov. 1, 2019, only 5% of American Music Therapy Association (AMTA) members lived in New England states.<sup>8</sup> Professional music therapy positions have greatest concentrations in areas with AMTA-approved music therapy degree programs. One American Music Therapy Association (AMTA) official stated, "What we have found is that areas that have music therapy degree programs have more music therapy visibility as a profession. Therefore, job creation tends to follow quickly."<sup>9</sup> Attached is a map of MA illustrating the number of music therapists providing services in each municipality, based on a 2018 survey. This map shows that the highest concentration of music therapists in MA is in Boston where the music therapy training program is located with 91% of the state's annual music therapy bachelor's degree completions.

There is regional demand for growth that is currently unmet – see the attached Letter of Support from an area employer. For example, the Pediatric Palliative Care program at Baystate Medical has been unable to fill a new music therapy position due to lack of qualified music therapists in the labor force.<sup>10</sup> Similarly, a coordinator for a nearby institution (Community Music School of Springfield<sup>11</sup>) that serves children with disabilities communicated that they are unable to meet demand for music therapists to work in their Adaptive Music Program in schools and for one-on-one music therapy and adaptive music lessons. To increase access to qualified music therapists, the coordinator hoped that the WSU music therapy program could provide a pipeline for new music therapists into their employment. Regionally, a recent call from the Vermont state coordinator for the VT Department of Health Pediatric Palliative Care Program stated that while expressive therapy (which includes music, art, dance, and drama therapy) is the most utilized service in their program, there are regions in the state with no available music therapists.<sup>12</sup> One AMTA official stated that employers regularly contact the AMTA stating they are unable to find qualified music therapists to fill their positions.<sup>13</sup> We anticipate that as the region gains more qualified music therapists, employment opportunities for music therapists will expand.

Trends in enrollment reflect this economic demand for new qualified music therapists. Between 2005 and 2016, nationwide student enrollment in AMTA-approved music therapy programs grew from

<sup>4</sup> AMTA (2018). *2018 AMTA Member Survey and Workforce Analysis*. Silver Spring, MD: Author

<sup>5</sup> Knight, A., LaGasse, B., & Clair, A. (2019). *Music therapy: An introduction to the profession*. Silver Spring, MD: AMTA

<sup>6</sup> J. Creagan, Director of Professional Programs at AMTA, personal communication, Nov. 24, 2019

<sup>7</sup> Massachusetts Music Therapy Survey (2018). MA Music Therapy State Task Force.

<sup>8</sup> American Music Therapy Association (2018). *2018 AMTA Member Survey and Workforce Analysis*. Silver Spring, MD: Author

<sup>9</sup> J. Creagan, Director of Professional Programs at AMTA, personal communication, Nov. 24, 2019

<sup>10</sup> M. O'Neill, personal communication, February 13, 2020

<sup>11</sup> A. D'Antonio, personal communication, October 31, 2019)

<sup>12</sup> Boyea, J. (October 5, 2019). Music therapy jobs and hiring. Message posted to <https://www.facebook.com/groups/376064402585218/>

<sup>13</sup> J. Creagan, Director of Professional Programs at AMTA, personal communication, Nov 24, 2019



1,596 to 3,375, an increase of 111.5%.<sup>14</sup> Within MA, enrollment grew 76% between 2013 and 2017.<sup>15</sup> Similarly, the number of approved academic programs leading toward board-certification as a music therapist grew from 62 in 2005 to 88 in 2019, an increase of 42%. This reflects increased visibility of music therapy as a profession and growing interest among college students in majoring in music therapy.

EAB market analysis revealed that between Feb 2017 and Jan 2020, there were an average of 58 relevant job postings per month for music therapy in Massachusetts. In the last year, from Feb 2019-Feb 2020, there were 257 relevant job postings<sup>16</sup> in MA. This data is supported by EMSI data showing 37 unique online job postings for a Music Therapist position in MA during the period from August 2018-2019.<sup>17</sup> In contrast, New England states have a total of 229 music therapists who are AMTA members, 134 of whom live in MA. Over the last several years the entire NE region has had approximately 44 music therapy degree completions per year. In comparison to the number of qualified music therapists in the region, we interpret this data to mean that the number of job postings for music therapists is substantial relative to the labor force.

We note that employment opportunities in music therapy are more often communicated by posting to specialized music therapy job boards and by personal contact than by traditional online job search websites.<sup>18</sup> For example, on Dec 3, 2019, there were 77 unique active music therapy jobs listed on the AMTA Job Center.<sup>19</sup> Ten of these were in New England states, five of which were in MA. None of these five postings appeared on websites that were included in EMSI employment data analytics, showing that there are more employment opportunities for music therapists than EMSI data suggests. It is also important to note that neither EAB nor EMSI reports captured employment opportunities for music therapists in private practice. This is a significant source of job growth and employment for music therapists: In 2018, 24% of music therapists nationwide reported owning a music therapy private practice, each of which employed an average of one additional employee each.<sup>20</sup>

There is an economic need for more board-certified music therapists in the northeastern economic market. EAB market analysis found that music therapy employment opportunities are growing at a rate that is on par with other professions.<sup>21</sup> It also found that key areas of employment for music therapists are growing at a rate of 10.5-13.7%, compared with the average job growth of 6%.<sup>22</sup> The 2018 Labor Market Blueprint for the Pioneer Valley, created by the Massachusetts Workforce Skills Cabinet, identified healthcare and education services as two of the three highest priority sectors for economic development.<sup>23</sup> Healthcare and special education represent the primary sectors in which music therapists are employed.<sup>24</sup> Within healthcare, the market analysis identified areas of need

<sup>14</sup> Iwamasa, D. A. (2019). Music therapy degree program enrollment trends: What the numbers tell us. *Music Therapy Perspectives*, 37, 196–204

<sup>15</sup> EAB (March, 2020). Westfield State Music Therapy Pulsecheck. [www.eab.com](http://www.eab.com)

<sup>16</sup> EAB (March, 2020). Westfield State Music Therapy Pulsecheck. [www.eab.com](http://www.eab.com)

<sup>17</sup> EMSI (September, 2019). Emsi Q3 2019 Data Set. [www.economicmodeling.com](http://www.economicmodeling.com).

<sup>18</sup> J. Creagan, Director of Professional Programs at AMTA, personal communication, Nov. 24, 2019

<sup>19</sup> American Music Therapy Association (Dec 3, 2019). AMTA Job Center. Retrieved from <https://www.musictherapy.org/members/jobcenter/>

<sup>20</sup> American Music Therapy Association (2018). *2018 AMTA Member Survey and Workforce Analysis*. Silver Spring, MD: Author.

<sup>21</sup> EAB (March, 2020). Westfield State Music Therapy Pulsecheck. [www.eab.com](http://www.eab.com)

<sup>22</sup> Mental health and substance abuse, social workers; social and human services assistants.

<sup>23</sup> Crosby, P., & Cruise, D. M. (2018). *Pioneer Valley labor market blueprint: A regional planning initiative of the Massachusetts Workforce Skills Cabinet*. Regional Employment Board of Hampden County, & Regional Employment Board of Franklin and Hampshire Counties.

<sup>24</sup> American Music Therapy Association (2018). *2018 AMTA Member Survey and Workforce Analysis*. Silver Spring, MD: Author



including clinical workers in inpatient, community care, and social assistance facilities, all of which are relevant areas for music therapy and are built into the WSU music therapy program's clinical training plan through partnerships with area organizations. Within education, the market analysis identified broader areas of employment needs that are relevant to music therapy. Local primary and secondary schools have expressed enthusiasm for music therapy, but none have access to qualified music therapists.

From 2011-2017, job growth in Healthcare and Social Assistance in the Pioneer Valley increased by 41%, for a total of 20,839 new jobs created (Crosby & Cruise, 2018). Education saw job growth of 9% during the same period, indicating potential for growth of music therapy services in schools. In the Pioneer Valley, total population of residents age 70-74 and 75-79 increased by 30% and 35% respectively since 2012. As the population ages, the region requires an increase in Healthcare and Social Assistance services specific to aging adults – services that music therapists are well-qualified to provide with their unique skill set.

The Pioneer Valley Labor Market Blueprint also identified talent shortages and difficulty attracting and retaining qualified employees as major economic challenges over the next five years (Crosby & Cruise, 2018). For example, at the time of the report there was a shortage of 666 human/social service workers and 1,373 technical/clinical workers in healthcare, and 1,265 educators and education support workers. The labor market blueprint set a goal to design and implement educational/career programs with direct pathways for credential attainment by the end of 2020. The proposed music therapy program addresses this identified need with a clear pathway towards a professional credential in areas of economic need in western Massachusetts.

The underdeveloped state of professional music therapy in MA does present a challenge to this proposed program and its graduates. However, the enthusiasm of local institutions for developing clinical training placements with our program as well as demonstrated music therapy workforce shortfalls are signs that music therapy is poised to grow in the region. The proposed program at WSU will provide an accessible public option for music therapy training that is not currently available to students in MA. We feel that this program at WSU is forward-looking and growth-oriented, bringing together the arts, healthcare, and liberal studies in an expanding field.

During the COVID-19 pandemic, music therapists have continued to provide services by telehealth and as essential workers in healthcare settings. In this way, music therapists have been able to provide clients with a sense of continuity and normalcy that has helped to combat the isolation and despair that many have experienced during this pandemic. Regarding employment, it is important to note that the pandemic has not halted the provision of, nor demand for, music therapy services.

As the current health crisis has strained our whole healthcare system, it has also highlighted the related increase in mental health crises that accompany compromised health, increased stress, and financial struggle. Music therapists belong to the group of service providers who address psychological and emotional well-being, a group that is likely to be in higher demand in the wake of the pandemic.

4. Are there existing programs at other institutions (public and independent) in your region that offer a similar degree? If so, compare and contrast them with the proposed program.

There are no public institutions in Massachusetts with a degree program in music therapy, nor are there currently any public institutions in the New England region with a degree program in music therapy. There are two independent institutions in the New England region with undergraduate degrees in music therapy, both in MA.

**Independent institutions:** Anna Maria College (AMC) and Berklee College of Music (BCM)  
Similarities with both independent institutions: AMC and BCM both offer the Bachelor of Music in Music Therapy degree, each of which are approved by the American Music Therapy Association and lead to eligibility to take the board-certification exam for music therapists, administered by the Certification Board for Music Therapists. Both programs are designed to meet the education and clinical training competencies specified by the American Music Therapy Association.

**Anna Maria College (BM in Music Therapy):**

Differences: AMC is a private Catholic university, and requires coursework in Catholic Worldview. Their music therapy program includes one semester of pre-practicum and two semesters of music therapy practicum. In contrast, the WSU program will have five semesters in addition to a pre-practicum course, making the clinical training and community engagement components of our program more robust. AMC requires no courses in world music, contemporary music, or clinical improvisation, while ours centers these topics in our emphasis on diversity and inclusion. Yearly tuition and fees for 2019-2020 is \$38,640, compared with \$10,849 at WSU.

**Berklee College of Music (BM in Music Therapy)**

Differences: The Berklee music program is not accredited by the National Association of Schools of Music (NASM), though the music therapy program is NASM-affirmed. The Berklee program also does not have music therapy courses in clinical improvisation, while the WSU program will have two. Music therapy practicum occurs primarily in Berklee's Music Therapy Clinic, while at WSU practicum is conducted in partnership with community institutions like area schools, hospitals, and mental health clinics to ground clinical training in real-world professional contexts.

Yearly tuition and fees for 2019-2020 is \$40,927.81, compared with \$10,849 at WSU.

Similarities: Berklee has a robust clinical music therapy training program of 5 semesters with a variety of clinical populations, matching the number of semesters that will be required at WSU.

5. Has the proposed program been planned to include any significant digital, experiential, competency-based or other innovative approaches? Please explain and provide examples.

Experiential learning is essential in music therapy training and education, and takes two forms:

- **Clinical Music Therapy Practicum, Capstone, and Internship:** Students conduct the music therapy treatment process. Over the course of the degree, students gain 1,200 hours of supervised practice with a variety of clinical populations. For example, students may be assigned to conduct weekly music therapy groups with a group of high schoolers with multiple disabilities at Westfield High or with adults with severe mental illness at the Behavioral Health Network Crisis Intervention Center in Holyoke. See list of community institutions in Item A.3. Upper-level music therapy coursework is designed to support this experiential learning.
- **Self-reflective experiential learning in coursework:** In order to better understand the psychological, physiological, and social dynamics of music therapy, students engage in

experiential learning in the music therapy classroom by leading and participating in mock session fragments (for example, AMTA Competencies 8.2, 9.3, 9.4).

Competency-based: The WSU music therapy curriculum is designed according to the American Music Therapy Association's (AMTA) Standards for Education and Clinical Training (AMTA, 2018; <https://www.musictherapy.org/members/edctstan/>) so that students meet the AMTA's Professional Competencies (AMTA, 2013; <https://www.musictherapy.org/about/competencies/>). Two examples:

- 1) Students work towards meeting AMTA Professional Competency 10.4: *Apply basic knowledge of the physiological aspects of the musical experience including, but not limited to, the central nervous system, peripheral nervous system, and psychomotor responses.* Students work towards this competency in Intro to Music Therapy, Neurologic Systems in Music Therapy, Medical Music Therapy, and apply it in real-world clinical settings in Clinical Music Therapy Practicum, Clinical Capstone in Music Therapy, and Music Therapy Internship.
- 2) The AMTA Standards for Education and Clinical Training state that music therapy students must complete at least 1,200 hours of clinical training prior to becoming eligible for the CBMT exam, at least 180 of which must come before their internship. Accordingly, students will accrue at least 36 clinical hours in each of their five music therapy clinical training placements pre-internship.

Digital learning: Reflecting the growing importance of electronic music production in popular music, students in the WSU music therapy program take coursework on techniques for and clinical applications of digital music production. Foundational learning in this area occurs in the course Music Technology, is deepened in Clinical Improvisation I & II, and is applied in four semesters of Clinical Music Therapy Practicum and one semester of Clinical Capstone in Music Therapy.

## **B. Alignment with Campus Strategic Plan and Mission**

1. Describe why the proposed program is a priority, and how it supports the campus's approved strategic plan, in the context of the institution's mission.

The Bachelor of Music in Music Therapy is a priority because it is a career-oriented professional music degree leading to eligibility to take the board-certification exam for music therapists in a field with high growth trends in student enrollment and employment. The program also matches the state's analysis of workforce data that recommends a focus on professions in the priority industries of healthcare and education (see Item A.4). As the only music therapy program at a public institution in Massachusetts, it supports WSU's vision to be a premier public comprehensive institution. The community-oriented music therapy program will produce professional music therapists who contribute to the social and cultural health of the community while fulfilling an economic need in the health professions, supporting WSU's mission, vision, and values.<sup>25</sup> This Music Therapy program is timely. During the COVID-19 pandemic, students interested in studying the arts have experienced the complex issues related to health and wellbeing. We often turn to the arts in times of crisis and uncertainty, and music therapy is a specialized field designed to harness the power of music to help us in those moments.

<sup>25</sup> Westfield State University (n.d.). *Mission, Vision, and Values*. Retrieved from <http://www.westfield.ma.edu/about/mission-and-vision>

We see Music Therapy at Westfield State as a program that would draw a new group of students who would not otherwise consider the university. It will draw students who are interested in connecting the arts with helping professions, and right now WSU would be the only public higher education institution in MA to offer this type of program. Therefore, we anticipate that adding this Music Therapy program aligns with the university's strategic goals for increasing enrollment.

The program is also responsive to the financial uncertainty facing WSU and the state of MA in light of the COVID-19 pandemic. We have designed the Music Therapy program to maximize utilization of existing resources and full-time faculty, and have kept the costs of adding the program minimal. Adjunct costs will be off-set by savings in Applied Music, and equipment purchases will be nominal and absorbed by existing budget lines (see Items C.1, C.2, and Form D).

The design of the music therapy program aligns with each of WSU's Strategic Vision aspects of *Student Experience, Enrollment, Culture, and Resources*,<sup>26</sup> each of which are addressed below.

### **Westfield State Experience**

1. *"In year one, experiences including FYO courses and cohort groupings and targeted advising support students as they adjust to college"*

- Students begin the music therapy course sequence as a cohort by taking MUSC 0107 Introduction to Music Therapy
- Students intending to major in music therapy have focused advising with music therapy faculty to assess the student's interests and goals and align those with program coursework requirements, and create a comprehensive four-year plan of study.

2. *"In year two, students engage a reflective process to develop a feasible plan for understanding the import and consequences of selecting a major and a career path and planning for college success and graduation."*

- During their second year, students complete the Music Therapy Advanced Placement Jury. Passing this jury qualifies students for upper-level music therapy courses and clinical fieldwork.
- Second-year students enroll in Clinical Foundations of Music Therapy, learning the basics of clinical work in music therapy to prepare for five semesters of supervised clinical fieldwork beginning in the second semester of their sophomore year.
- In the spring of their second year, students complete their first Clinical Music Therapy Practicum placement. Learning objectives include observing, planning, and implementing music therapy sessions in the community with supervision from a board-certified music therapist. The course includes weekly seminar meeting with music therapy faculty and other students enrolled in practicum to connect their classroom learning with their real-world experiences

3. *"In year three, students engage in the full potential of high-impact practices, including undergraduate research, civic engagement and internships."*

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<sup>26</sup> Strategic Planning Committee (2019). *Westfield State University Strategic Plan: 2019–2024*. Retrieved from [http://www.westfield.ma.edu/images/uploads/strategicplan/StratPlan\\_Update\\_ApprovedVers-WEB.pdf](http://www.westfield.ma.edu/images/uploads/strategicplan/StratPlan_Update_ApprovedVers-WEB.pdf)

- Students complete their second and third semesters of Clinical Music Therapy Practicum in partnership with community institutions and supervised by a board-certified music therapist. Student placements are designed to provide experiences with a variety of clinical settings and populations in the community. Students experience civic engagement through their work in the community.
- Coursework directly impacts their practicum experience, as students apply their musicianship and knowledge of theory and evidence-based practice of music therapy in their practicum work.

4. *“In the fourth year, students are supported in their transition from the university to either graduate school or career.”*

- Students in their final semester complete a Clinical Capstone in Music Therapy, consisting of a clinical placement in the community where the student conducts supervised individual music therapy sessions. They also prepare a Clinical Case Study connecting their experiences in sessions with research findings and evidence-based practice. In this course, students take greater responsibility for the treatment process as they prepare to transition to professional practice.
- All music therapy students in their final semester enroll in a seminar on Professional Topics in Music Therapy that addresses ethics, issues related to small-business ownership and private practice, reimbursement practices, options for specialized training and graduate school, and self-care for resilience and professional sustainability.
- With support and advising from music therapy faculty, students apply for AMTA-approved 1,010-hr internship. This provides in-depth opportunities for clinical training and prepares the student for employment as a music therapist.

### **Enrollment**

This will be the only public institution in MA, and New England, with a music therapy degree program that leads to becoming a Board-Certified Music Therapist. As a professional music degree leading to eligibility for board-certification, we expect that the program will have a positive impact in enrollment in the music department, and WSU at large. Nationwide, student enrollment in AMTA-approved music therapy programs grew by 111.5% from 2005-2016<sup>27</sup>. We expect this trend to be reflected in the WSU music therapy program, particularly since New England currently has only 3 of the 88 AMTA-approved music therapy programs and there are currently no public options in the region. Despite anticipated reductions in enrollment due to COVID-19, we anticipate that there will still be student demand for this program because there are no other public institutions offering such a program.

Support for enrollment growth through non-traditional and second-degree students: In addition to the 4-year + internship program for traditional students, we will offer a 2-year + internship post-baccalaureate program through CGCE for students who already have a bachelor’s degree and a substantial background in music. See Item C.1 for more detail on enrollment projections.

### **Culture**

Music therapy is a therapeutic profession grounded in culture and oriented towards making positive, lasting change while honoring the intrinsic value of a person. Accordingly, music therapy coursework

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<sup>27</sup> Iwamasa, D. A. (2019). Music therapy degree program enrollment trends: What the numbers tell us. *Music Therapy Perspectives*, 37, 196–204.

at WSU is designed to incorporate cultural competence and support reflexivity. In supervised fieldwork, students will work with a diverse range of clients from the community at institutions serving persons with a wide variety of strengths, needs, and disabilities to better understand the relationships among music, health, and culture.

**Resources**

All costs associated with adding the music therapy program, other than adjunct faculty, will come from existing budget lines. The cost for adjunct instructors is low, and largely off-set by savings from the reduced need for Applied Music instruction. The program will rely largely on existing university resources, with 75% of the degree requirements fulfilled by courses already offered by the university. No new facilities or substantial investment in equipment are required. See Item C.2 and Form D below.

2. List the overall goals and learning objectives of the program and describe the strategy for achieving each goal. Use the **LOI Program Goals and Objectives** table in addition to any narrative comments.

Goals, objectives, strategies, and timetables are described on Form B. Goals and objectives are based on the American Music Therapy Association’s (AMTA) Professional Competencies, Standards for Education and Clinical Training, and Scope of Music Therapy Practice document, as well as the National Association of Schools of Music (NASM) standards and competencies for undergraduate degrees in music therapy. Adherence to AMTA standards is required for graduating students to become eligible for board-certification as a music therapist, and adherence to NASM standards is required for degree accreditation. A full list of required competencies for entry-level practice as a music therapist is available upon request. With these requirements as a starting point, the music therapy program was then designed to fit the mission and values of Westfield State University.

**C. Alignment with Operational and Financial Objectives of the Institution**

1. Provide enrollment projections for the first five years of the program using the Program Enrollment form (Form C). Describe below any anticipated impact that the program may have on enrollment in other programs.

See Form C for enrollment projections. We believe that these are conservative projections that represent growth towards a target of 48 majors. The Music Therapy program would substantially increase enrollment in the music department’s core musicianship courses such as Music Theory I, II, III (MUSC 111, 112, 211) and clinical foundations classes such as psychology courses (see Form A1). Since enrollment in the music therapy program will increase student numbers in the music department’s primary and secondary ensembles as well as all core musicianship courses, we anticipate that this will increase the music department’s draw for students wishing to study general music, music performance, and music education, and thus may increase enrollment in these programs. We anticipate that the music therapy program will not negatively impact enrollment in other programs like Psychology or Music Education since it is oriented towards a specific professional track.

Of the 28 credits of new courses proposed for the Bachelor of Music in Music Therapy degree, 14 credits are open to students in other majors. These courses are of particular relevance to students majoring in music education, music performance, general music, psychology, social work, sociology, health sciences, and education. See Form A1 for details. In addition to providing expanded

educational opportunities for students at WSU, this increases the enrollment possibilities for new music therapy courses. For example, 15 students enrolled in Introduction to Music Therapy (MUSC 0107) the first time it was offered in Fall 2019, drawing students majoring in criminal justice, psychology, business, liberal studies, music education, music performance, and general music.

Average Course Enrollment: In the first five years while the program grows, we project an average course enrollment of 4.9 students per 1 workload credit of music therapy courses (based on a projected schedule of course offerings, available upon request). This translates to the equivalent of 14.6 students per 3 credit course. Once the program completes the initial growth period and reaches enrollment projections of 12 new incoming students per year, music therapy courses will have a projected average course enrollment of 8.1 students per 1 workload credit, translating to the equivalent of 24.3 students per 3 credit course, not counting non-majors who enroll in these courses.

2. Describe the resources that the program will require (additional faculty and/or staff, space and equipment, on-line infrastructure, startup and maintenance of the program).  
 See Form D. All costs associated with adding the music therapy program, other than adjunct faculty, will come from existing budget lines. Changes to existing departmental equipment and operating costs will be nominal, and no additional support staff is needed. The majority of the instruction load for the program is met by existing full-time faculty resources. Approximately 75% of the coursework required for the degree utilizes existing courses already offered by the university. New music therapy courses will be offered in existing classroom space within the music department, and primarily taught by full-time faculty holding existing faculty lines in the music department. The additional resources required by the program are primarily for adjunct faculty. The costs for Part-Time/Adjunct Faculty, however, are offset by savings in Applied Music. See details in Form D. To further reduce the need for Part-Time/Adjunct faculty, *Music Therapy & Education with Exceptional Learners* may be taught by existing full-time faculty in the Education department in consultation with the Music Therapy Program Coordinator. Should the need arise, additional courses may be taught by full-time faculty outside of the music department, for example clinical psychology faculty teaching content related to mental healthcare.

3. Complete the LOI Curriculum Outline form (Form A) with course titles and credits.

4. Complete the LOI Program Goals and Objective form (Form B).

***Comments and Response***

*The submitted LOI will be reviewed for completeness by staff. This process typically occurs within 15 business days from when it is received. Once deemed complete, the LOI is circulated by the Deputy Commissioner of Academic Affairs and Student Success (the Deputy), to the AAC and SPC members of the BHE, public campus CAO's, and to the Association of Independent Colleges and Universities of Massachusetts (AICUM) representatives for relevant comments.*

**Institution:** Westfield State University

**Proposed Degree:** Bachelor of Music in  
Music Therapy

*Formal commentary to an LOI must come from an institution's President, be addressed to the Commissioner of Higher Education, with a cc to the Deputy, and received within 20 business days from the date the LOI is circulated.*

*All commentary is sent to the community colleges and state university institution, where the proposed program LOI originated. University of Massachusetts commentary is sent to the Senior Vice President for Academic Affairs, and International Relations, who is responsible to forward the information to the specific campus*

*Responses to any commentary are required. Responses must come from the LOI institution President and be addressed to the Commissioner of Higher Education, with a cc to the Deputy and submitted to [awilliams@dhe.mass.edu](mailto:awilliams@dhe.mass.edu). This written response to commentary must be received within 20 business days from the date it is sent to the President.*



*A Note About Timelines*

Program review is a serve-and-return process, which means that there are several communications back and forth between the institution and DHE staff as the submission is being reviewed.

A campus should expect that an LOI (or proposal application) template submitted for staff validation and review for completion will be subject to a **15-business-day period of review**. Following this time frame the campus can expect staff to provide information regarding any further data that are needed for the LOI to be deemed complete. This communication **resets the 15-business-day time frame**. Responsibility rests with the campus to provide data in a timely manner, this may be important to a campus working within a targeted timeline for program development and launch. Once the campus has responded to staff by submitting the additional data, **the 15-business-day** clock begins anew.

After an LOI is validated and deemed complete it is circulated by the Deputy to the AAC and SPC, public campus CAO's and to AICUM representatives for commentary (as described above). The **comment period is open for 20 business days**. At the end of this time frame, all comments are reviewed by staff and sent to the LOI institution's CAO, who then has **20 business days** to submit a written response to the Deputy. Comments and responses are included in the motion brought forward for BHE action.

An LOI is brought forward either within **20 business days** of receiving the institution's response or at the next scheduled AAC meeting.

Following AAC action, the next step of the process is submission of the application proposal, which must be submitted **within two years** of the BHE action on the LOI for either a Fast Track or Standard process review.

A proposed program application template is validated and reviewed for completion **within 20 business days** of receipt. As noted above, the campus can expect staff to provide information regarding any further data that are needed for the proposal to be deemed complete. As previously noted, this communication **resets the time frame**. Once the campus has responded by submitting the additional data, **the 15-business-day** clock begins anew. Once validated and deemed complete, Fast Track proposals are forwarded to the Commissioner with a recommendation for action **within 30 business days**. The 30-business day timetable begins on the date DHE staff notify the campus that the proposal is deemed complete. BHE follows the guidelines on all proposal applications in accordance with either the Fast Track or the Standard Process.

**ATTACHMENTS:**

<b>Form A</b>	<b>LOI Curriculum Outline</b>
<b>Form B</b>	<b>LOI Goals and Objectives</b>
<b>Form C</b>	<b>LOI Enrollment Projections</b>
<b>Form D</b>	<b>LOI Budget</b>

**Additional attachments:**

- 1. EAB Market Pulsecheck – Music Therapy**
- 2. Letters of Support from area employers demonstrating economic demand for music therapists**

**Form A1: LOI Undergraduate Program Curriculum Outline**

The proposed Bachelor of Music in Music Therapy degree has 28 credits of new courses, comprising approximately 25% of the degree requirements. New courses are listed in the table below in blue font. These courses fall into two categories: 1) music skills for the music therapist and 2) music therapy theory/practice.

**1. Music skills:** 9 credits of new courses. Four of these courses (5 credits) are open to all students who are music majors/minors or who can demonstrate music literacy:

- Functional Guitar I (1)
- Functional Guitar II (1)
- Functional Piano (2)
- Music and Expressive Movement (1)

The remaining two courses, Clinical Improvisation I & II, are advanced experiential courses for senior music therapy majors who have completed the majority of their music therapy coursework.

**2. Music therapy theory and practice:** 19 credits of new courses. Four of these courses (9 credits) are open to all WSU students:

- Introduction to Music Therapy (3)
- Music Therapy and Education with Exceptional Learners (2)
- Neurologic Systems in Music Therapy (2), pre-requisite Intro to Music Therapy
- Music Therapy with Children and Adolescents (2), pre-requisite Intro to Music Therapy

The remaining courses are designed to be co-requisite with fieldwork experiences in Clinical Music Therapy Practicum, and therefore are open only to music therapy majors.

All new courses are specifically designed to address the competencies required for accreditation by the American Music Therapy Association (AMTA) and National Association of Schools of Music (NASM).

<i>Required (Core) Courses in the Major (Total # courses required = 45)</i>		
*Denotes courses that fulfill General Education core requirements		
<i>Course Number</i>	<i>Course Title</i>	<i>Credit Hours</i>
MUSIC 0110	Basic Music Theory (majors/minors)	3
MUSIC 0111	Music Theory I	2
MUSIC 0112	Music Theory II	2
MUSIC 0211	Music Theory III	2
MUSIC 0113	Sight-Singing and Ear Training I	2
MUSIC 0114	Sight-Singing and Ear Training II	2
MUSIC 0113	Sight-Singing and Ear Training III	2
MUSIC 0201	Music History II	3
MUSIC 0152	Class Piano I	1
MUSIC 0153	Class Piano II	1
MUSIC 0252	Class Piano III	1
<b>MUSIC 01XX</b>	<b>Functional Piano</b>	2
<b>MUSIC 01XX</b>	<b>Functional Guitar I</b>	1
<b>MUSIC 01XX</b>	<b>Functional Guitar II</b>	1
MUSIC 0156	Voice Class	1

MUSC 0157	Percussion Class	1
MUSC 0235	Music Technology	2
<b>MUSC 03XX</b>	<b>Clinical Improvisation I: Principles and Techniques</b>	2
<b>MUSC 03XX</b>	<b>Clinical Improvisation II: Group Process</b>	2
<b>MUSC 01XX</b>	<b>Music and Expressive Movement</b>	1
MUSC 0230	Basic Conducting	2
	Primary Ensemble	2 (0.5 x 4 sem)
	Secondary Ensemble (traditional)	1 (0.5 x 2 sem)
MUSC 0240	Performance Ensemble (Music Therapy)	1 (0.5 x 2 sem)
MUSC 0174-7	Applied Music I-IV	8 (2 x 4 sem)
MUSC 0280	Music Studio	0 (0 x 4 sem)
<b>MUSC 0107</b>	<b>Introduction to Music Therapy</b>	3
<b>MUSC 0108</b>	<b>Clinical Foundations of Music Therapy</b>	1
<b>MUSC 0210</b>	<b>Music Therapy and Music Education with Exceptional Learners</b>	2
<b>MUSC 02XX</b>	<b>Neurologic Systems in Music Therapy</b>	2
<b>MUSC 02XX</b>	<b>Music Therapy with Children and Adolescents</b>	2
<b>MUSC 02XX</b>	<b>Theories of Health in Music Therapy</b>	2
<b>MUSC 02XX</b>	<b>Music Therapy in Mental Healthcare</b>	2
<b>MUSC 03XX</b>	<b>Medical Music Therapy</b>	2
<b>MUSC 03XX</b>	<b>Professional Topics in Music Therapy</b>	1
<b>MUSC 03XX</b>	<b>Clinical Music Therapy Practicum</b>	4 (1 x 4 sem)
<b>MUSC 03XX</b>	<b>Music Therapy Practicum Seminar</b>	0 (4 sem)
<b>MUSC 03XX</b>	<b>Clinical Capstone in Music Therapy</b>	1
<b>MUSC 03XX</b>	<b>Internship in Music Therapy</b>	0
PSYC 0207	Lifespan Development	3
PSYC 0201	Theories of Personality	3
PSIC 0303	Abnormal Psychology	3
	<b>Sub Total Required Credits (Major)</b>	<b>79</b>

<p><b><i>Elective Courses (Total # courses required) = 0</i></b></p> <p><b>Note:</b> Students choose 5 courses (15 credits) from categories in a list of 96 course options in partial fulfillment of their general education requirements. This totals 12.5% of the degree requirements, more than double the number of elective credits recommended by the National Association of Schools of Music. Additional free electives were not included so that the degree could be limited to 120 credits while still addressing all Music Therapy Professional Competencies. Students may elect to take additional courses, but are not required to do so.</p>	
<p style="text-align: center;"><b><i>Distribution of General Education Requirements</i></b></p> <p><b>Note:</b> See <b>List of General Education Offerings</b>, included below this table. Students fulfill WSU’s General Education requirements by enrolling in 8 prescribed Common Core courses as identified below, in addition to selecting 5 courses from the categories listed below.</p>	<p><b># of Gen Ed Credits</b></p> <p>Course credits are only listed in this column once, even if they fulfill more than one General Education requirement.</p>
<b>Humanities</b>	
<p><b><i>English Composition</i></b> – (4 credits)</p> <ul style="list-style-type: none"> <li>• ENGL 0101 English Composition 1 (4)</li> </ul>	4
<p><b><i>Literature and Philosophical Analysis</i></b> – (6 credits)</p> <ul style="list-style-type: none"> <li>• Two courses from the list below (6)</li> </ul>	6
<p><b><i>Appreciation of the Arts</i></b> – (6 credits)</p> <ul style="list-style-type: none"> <li>• MUSC 0103 Music Appreciation (majors/minors) (3)</li> <li>• MUSC 0104 World Music (3)</li> </ul>	6
<b>Social Science</b>	
<p><b><i>United States History and Government</i></b> – (3 credits)</p> <ul style="list-style-type: none"> <li>• One course from the list below</li> </ul>	3
<p><b><i>Social Understanding</i></b> – (9 credits)</p> <ul style="list-style-type: none"> <li>• PSYC 0101 Introduction to Psychology (3)</li> <li>• EGST 0208 Hip Hop Cultures (3)</li> <li>• One course from the list below (3)</li> </ul>	9
<b>Mathematics/Applied Analytic Reasoning</b>	
<p><b><i>Traditional Mathematics</i></b> – (3-8 credits)</p> <ul style="list-style-type: none"> <li>• MATH 0108 Elementary Statistics (3)</li> </ul>	3
<p><b><i>Applied Analytic Reasoning</i></b> – (0-4 credits)</p> <ul style="list-style-type: none"> <li>• GARP 0246 Quant Methods of Phys/Soc Sci (3)</li> </ul>	3
<b>Science</b>	
<p><b><i>Laboratory Science</i></b> – (4-8 credits)</p> <ul style="list-style-type: none"> <li>• BIOL 0104 Human Biology (4)</li> </ul>	4
<p><b><i>Allied Science</i></b> – (0-4 credits)</p> <ul style="list-style-type: none"> <li>• One Allied Science course from the list below (3)</li> </ul>	3

<b>Diversity</b>	
<b>Global Diversity</b> – (3 credits)	
<ul style="list-style-type: none"> <li>• <i>Fulfilled by MUSC 0104 World Music (3), listed under Appreciation of the Arts</i></li> </ul>	
<b>United States Diversity</b> – (3 credits)	
<ul style="list-style-type: none"> <li>• <i>Fulfilled by EGST 0208 Hip Hop Cultures (3), listed under Social Understanding</i></li> </ul>	
<b>Sub Total General Education Credits</b>	
41	
<b>Curriculum Summary</b>	
Total number of courses required for the degree	58 (including Gen Eds)
Total credit hours required for degree	120
<b>Prerequisite, Concentration or Other Requirements:</b> N/A	

### General Education Offerings

**Note:** Course titles that are underlined and bolded are required for the BM in Music Therapy degree and fulfill General Educational Requirements for WSU.

**Humanities Section - 16 credits:**

**English Composition - 4 Credits [CMP]**

ENGL 0101 - English Composition I Credits: 4

**Literary & Philosophical Analysis - 6 Credits [LPA]**

- EDUC 0207 - Philosophy of Education Credits: 3
- EGST 0210 - U.S. Latino/a Literatures Credits: 3
- EGST 0232 - Puerto Rican Literatures Credits: 3
- ENGL 0112 - Introduction to Black American Literature Credits: 3
- ENGL 0115 - Introduction to Native American Literature Credits: 3
- ENGL 0117 - Introduction to Asian American Literature Credits: 3
- ENGL 0210 - British Literature to 1780 Credits: 3
- ENGL 0212 - British Literature from 1780 to the Present Credits: 3
- ENGL 0213 - Introduction to British Literature Credits: 3
- ENGL 0215 - Introduction to American Literature Credits: 3
- ENGL 0216 - American Literature to 1865 Credits: 3
- ENGL 0217 - American Literature Since 1865 Credits: 3
- ENGL 0218 - Postcolonial Literature and Theory Credits: 3
- ENGL 0221 - World Literature Credits: 3
- ENGL 0228 - Introduction to Shakespeare Credits: 3
- GARP 0106 - Envir., Sustain. & Society Credits: 3
- LFRE 0201 - Reading French Texts Credits: 3
- LLIT 0201 - Women Writers of the Americas: Global Credits: 3
- LLIT 0202 - Women Writers of the Americas: US Credits: 3
- LLIT 0210 - Studies in the Literature of Africa and the African Diaspora: (Varying Topics): Credits: 3
- LLIT 0220 - Studies in European Cultures (Varying Topics) Credits: 3
- LLIT 0232 - Puerto Rican Literatures Credits: 3
- LLIT 0310 - Seminar in Hispanic Studies Credits: 3

LSPA 0217 - Reading Spanish Texts Credits: 3  
MATH 0216 - Studies in the Literature of Mathematics Credits: 3  
PHIL 0101 - Introduction to Social and Political Philosophy Credits: 3  
PHIL 0102 - Introduction to Ethics Credits: 3  
PHIL 0104 - Great Philosophical Issues Credits: 3  
PHIL 0109 - Introduction to Philosophy of Religion Credits: 3  
PHIL 0110 - Introduction to Philosophy of Science Credits: 3  
PHIL 0211 - Asian Philosophy Credits: 3  
THEA 0260 - Script Analysis & Interpretation Credits: 3

**Appreciation of the Arts - 6 Credits [AAPP]**

ART 0104 - Design Fundamentals Credits: 3  
ART 0106 - Art Survey: Prehistoric to Middle Ages Credits: 3  
ART 0107 - Art Survey: Renaissance to Present Credits: 3  
ART 0108 - Computer Graphics for Art Applications I Credits: 3  
ART 0206 - Introduction to Electronic Publication Design Credits: 3  
ART 0354 - Women Artists in the Western World Credits: 3  
COMM 0245 - The Silent Film Credits: 3  
ENGL 0108 - Introduction to Film Credits: 3 **or** COMM 0108  
ENGL 0240 - Cultural Studies Credits: 3  
ENGL 0276 - Writing About the Arts Credits: 3  
MUSC 0101 - Music Appreciation Credits: 3  
**MUSC 0103 - Music Appreciation (Music majors/minors) Credits: 3**  
**MUSC 0104 - World Music Credits: 3**  
MUSC 0110 - Basic Music Theory Credits: 3  
MUSC 0160 - History of Jazz Credits: 3  
THEA 0104 - Introduction to Theatre Credits: 3  
THEA 0121 - Acting Styles: Techniques, Theory and Practice Credits: 3  
THEA 0151 - Introduction to Performance Credits: 3  
THEA 0261 - Theatre History: Early Stages Credits: 3  
THEA 0262 - Theatre History: Renaissance to Romanticism Credits: 3  
THEA 0263 - Theatre History: The Modern Stage Credits: 3

**Social Science Section - 12 Credits Required:**

At least 3 credits must be from the U. S. History & Government area

**U. S. History and Government - at least 3 Credits [HSGV]**

HIST 0131 - United States History and Government to 1865 Credits: 3  
HIST 0132 - United States History and Government 1865 – Present Credits: 3  
POLS 0101 - American National Government Credits: 3  
POLS 0103 - State and Local Government Credits: 3

**Social Understanding - maximum 9 Credits [SOCU]**

ANTH 0101 - Introduction to Anthropology Credits: 3  
ART 0241 - African Art: Ritual, Performance, and Theatre Credits: 3  
ART 0332 - The Art History of The Black Body Credits: 3  
CAIS 0101 - Computers in Society Credits: 3  
COMM 0101 - Introduction to Mass Communication Credits: 3  
COMM 0233 - Documentary Film Credits: 3  
CRJU 0101 - Introduction to Criminal Justice Credits: 3  
ECON 0101 - Principles of Macroeconomics Credits: 3  
ECON 0102 - Principles of Microeconomics Credits: 3  
EDUC 0220 - Schools in American Culture Credits: 3

**EGST 0208 - Hip Hop Cultures Credits: 3**

EGST 0209 - Images in Black and Brown Credits: 3  
EGST 0235 - Queer Studies and Popular Cultures Credits: 3

EGST 0237 - U.S. Latino/a Diasporic Communities Credits:  
GARP 0101 - World Regional Geography Credits: 3  
GARP 0105 - Introduction to Community Planning Credits: 3  
GARP 0203 - Geography of Hunger and Poverty in the United States Credits:  
GERO 0101 - Introduction to Gerontology Credits: 3  
HIST 0101 - Western Experience I Credits: 3  
HIST 0102 - Western Experience II Credits: 3  
HIST 0215 - Introduction to the Middle East, Africa and Asia Credits: 3  
HIST 0276 - Latin America to 1800 Credits: 3  
HIST 0277 - Latin America Since 1800 Credits: 3  
LANG 0210 - Language Culture and Society Credits: 3  
LCUL 0220 - Envisioning the Americas Credits: 3  
POLS 0105 - Law, Courts and Politics Credits: 3  
POLS 0209 - International Relations Credits: 3  
**PSYC 0101 - Introduction to Psychology Credits: 3**  
SOC1 0101 - Principles of Sociology Credits: 3

**Mathematics/Applied Analytical Reasoning Section - 6 Credits Required:**

3 credits must be from the Traditional Mathematics area

**Traditional Mathematics - at least 3 Credits [TMTH]**

MATH 0104 - Pre-Calculus Credits: 3

MATH 0105 - Calculus I Credits: 4

MATH 0106 - Calculus II Credits: 4

**MATH 0108 - Elementary Statistics Credits: 3**

MATH 0110 - Mathematical Explorations Credits: 3

MATH 0111 - Mathematical Applications Credits: 3

MATH 0115 - Mathematics for Business and Social Sciences Credits: 3

MATH 0153 - Foundations: Number Systems Credits: 3

MATH 0250 - Foundations: Patterns, Reasoning and Algebra Credits: 3

MATH 0251 - Foundations: Geometry Credits: 3

MATH 0252 - Foundations: Data Analysis and Probability Credits: 3

**Applied Analytical Reasoning [ARSN]**

BIOL 0278 - Biostatistics Credits: 3

CAIS 0117 - Introduction to Computer Programming Credits: 3

CAIS 0120 - Computer Science/Program Design I Credits: 4

CRJU 0313 - Statistics in Criminal Justice Credits: 3

ECON 0204 - Introduction to Mathematical Economics Credits: 3

ECON 0305 - Introduction to Econometric Methods Credits: 3

**GARP 0246 - Quantitative Methods for Social and Physical Science Credits: 3**

MATH 0123 - Mathematical Methods in the Natural Sciences Credits: 3

PHIL 0103 - Symbolic Logic I Credits: 3

PHIL 0206 - Symbolic Logic II Credits: 3

SOCI 0251 - Research Methods II Credits: 3

**Science Section - 7 Credits**

4 must be a Lab. Science

**Laboratory Science - at least 4 Credits [LSCI]**

BIOL 0102 - Environmental Biology Credits: 4

**BIOL 0104 - Human Biology Credits: 4**

BIOL 0106 - Biology Today Credits: 4

BIOL 0237 - Human Anatomy and Physiology I Credits: 4

CHEM 0101 - Introduction to Chemistry Credits: 4

CHEM 0103 - Chemistry of the Life Sciences Credits: 4

CHEM 0109 - General Chemistry I Credits: 4



CHEM 0111 - General Chemistry II Credits: 4  
GARP 0102 - Physical Geography Credits: 4  
GEOL 0101 - Physical Geology with Laboratory Credits: 4  
GEOL 0107 - Historical Geology with Lab Credits: 4  
GNSC 0101 - Physical Science Credits: 4  
PHSC 0101 - Introduction to Physics Credits: 4  
PHSC 0115 - General Physics I Credits: 4  
PHSC 0117 - General Physics II Credits: 4  
PHSC 0125 - Physics I Credits: 4  
PHSC 0127 - Physics II Credits: 4

**Allied Science [ASCI]**

ASTR 0101 - Astronomy Credits: 3  
ASTR 0105 - The Solar System Credits: 3  
ASTR 0121 - Life in The Universe Credits: 3  
ENVS 0101 - Principles of Environmental Science Credits: 3  
GARP 0106 - Envir., Substain. & Society Credits: 3  
GARP 0107 - Climate Change Credits: 3  
GARP 0110 - Science for Future Presidents Credits: 3  
GARP 0230 - Meteorology Credits: 3  
GEOL 0102 - Physical Geology Credits: 3 (no laboratory)  
GEOL 0106 - Historical Geology Credits: 3  
GEOL 0108 - General Oceanography Credits: 3  
GEOL 0109 - Oceanography in the Field Credits: 3  
GEOL 0124 - Geologic Hazards Credits: 3  
GEOL 0205 - Environmental Geology Credits: 3  
GEOL 0211 - Geology in the Field: Selected Locations Credits: 3  
MOVP 0100 - Science of Physical Activity and Health Credits: 3  
PHSC 0103 - Energy, Environment and Society Credits: 3

**Diversity Section - 6 Credits**

3 credits from each area

**Global Diversity [GDIV]**

ANTH 0101 - Introduction to Anthropology Credits: 3  
ANTH 0200 - Methods of Ethnography from 1900-Present Credits: 3  
ART 0333 - Early Twentieth Century Art Credits: 3  
ART 0357 - Islamic Art Credits: 3  
COMM 0213 - Global Film Studies Credits: 3  
COMM 0222 - Intercultural Communication Credits: 3  
EGST 0102 - Introduction to Women's and Gender Studies Credits: 3  
EGST 0206 - Introduction to Islamic Studies Credits: 3  
EGST 0211 - Indian Cinema: Gender and Identity Credits: 3  
EGST 0213 - Contemporary Issues in Islamic Studies Credits: 3  
EGST 0217 - Culture and Personality Credits: 3  
EGST 0260 - Introduction to Medical Anthropology Credits: 3  
ENGL 0218 - Postcolonial Literature and Theory Credits: 3  
ENGL 0221 - World Literature Credits: 3  
ENGL 0287 - World Drama Credits: 3  
ENGL 0327 - Contemporary Cross-Cultural Literature Credits: 3  
GARP 0210 - Cultural Geography Credits: 3  
HIST 0113 - World History to 1600 Credits: 3  
HIST 0276 - Latin America to 1800 Credits: 3  
HIST 0277 - Latin America Since 1800 Credits: 3  
LACS 0101 - Introduction to Latin American and Caribbean Studies Credits: 3

LARA 0102 - Arabic II Credits: 3  
LARA 0103 - Arabic III Credits: 3  
LARA 0104 - Arabic IV Credits: 3  
LCHI 0102 - Chinese II Credits: 3  
LCHI 0103 - Chinese III Credits: 3  
LCHI 0104 - Chinese IV Credits: 3  
LCUL 0201 - Women in the Hispanic World Credits: 3  
LCUL 0220 - Envisioning the Americas Credits: 3  
LFRE 0102 - French II Credits: 3  
LFRE 0103 - French III Credits: 3  
LFRE 0104 - French IV Credits: 3  
LFRE 0201 - Reading French Texts Credits: 3  
LFRE 0205 - Speaking and Writing: Intermediate Level Credits: 3  
LFRE 0305 - Speaking and Writing French: Advanced Level Credits: 3  
LLIT 0201 - Women Writers of the Americas: Global Credits: 3  
LLIT 0210 - Studies in the Literature of Africa and the African Diaspora: (Varying Topics): Credits: 3  
LLIT 0220 - Studies in European Cultures (Varying Topics) Credits: 3  
LLIT 0310 - Seminar in Hispanic Studies Credits: 3  
LSPA 0102 - Spanish II Credits: 3  
LSPA 0103 - Spanish III Credits: 3  
LSPA 0104 - Spanish IV Credits: 3  
LSPA 0215 - Speaking and Writing Spanish Credits: 3  
LSPA 0217 - Reading Spanish Texts Credits: 3  
MGMT 0338 - International Business Credits: 3  
**MUSC 0104 - World Music Credits: 3**  
PHIL 0217 - Philosophy and Film Credits: 3  
POLS 0110 - Introduction to Asian Studies Credits: 3  
POLS 0209 - International Relations Credits: 3  
SOC 0326 - The Global Experience Credits: 3

**United States Diversity [UDIV]**

ART 0358 - African American Art Credits: 3  
COMM 0212 - Film and Gender Credits: 3  
CRJU 0312 - Women in the Criminal Justice System Credits: 3  
ECON 0304 - Urban Economics Credits: 3  
EDUC 0380 - Critical Multicultural Education Credits: 3  
EGST 0101 - Introduction to Comparative Ethnic Studies Credits: 3  
EGST 0203 - Introduction to African American Studies Credits: 3  
EGST 0204 - Introduction to Latino/a Studies Credits: 3  
EGST 0205 - Introduction to Gay And Lesbian Studies Credits: 3  
**EGST 0208 - Hip Hop Cultures Credits: 3**  
EGST 0209 - Images in Black and Brown Credits: 3  
EGST 0212 - Introduction to Asian American Studies Credits: 3  
EGST 0216 - Deviance and Culture Credits: 3  
EGST 0220 - Religion, Gender and Society Credits: 3  
EGST 0221 - Women in Modern Organizations Credits: 3  
EGST 0232 - Puerto Rican Literatures Credits: 3  
EGST 0237 - U.S. Latino/a Diasporic Communities Credits:  
ENGL 0112 - Introduction to Black American Literature Credits: 3  
ENGL 0115 - Introduction to Native American Literature Credits: 3  
ENGL 0117 - Introduction to Asian American Literature Credits: 3  
ENGL 0240 - Cultural Studies Credits: 3  
GARP 0203 - Geography of Hunger and Poverty in the United States Credits:  
GARP 0204 - Housing in America Credits: 3

**Institution:** Westfield State University

**Proposed Degree:** Bachelor of Music in Music Therapy

HIST 0263 - U.S. Women's History Credits: 3  
HIST 0264 - African American History Credits: 3  
HIST 0265 - The Minority Experience: A Multicultural History of the United States Credits: 3  
HIST 0275 - African-American History and Civil Rights Since 1865 Credits: 3  
LANG 0210 - Language Culture and Society Credits: 3  
LCUL 0210 - U.S. Latino/a Cultural Studies Credits: 3  
LLIT 0202 - Women Writers of the Americas: US Credits: 3  
LLIT 0232 - Puerto Rican Literatures Credits: 3  
MOVP 0325 - Women and Sport Credits: 3  
MUSC 0160 - History of Jazz Credits: 3  
SOC1 0202 - Race and Ethnic Relations Credits: 3  
SOC1 0319 - Sociology of Sexualities Credits: 3

**Form B: LOI Goals and Objectives**

Goal	Measurable Objective	Strategy for Achievement	Timetable
1. Develop clinical musicianship	<p>Demonstrate entry-level competence in the following areas, as evaluated by successful completion of coursework, passing clinical skills evaluations, and passing the Music Therapy Advanced Placement and Pre-Internship Juries:</p> <ul style="list-style-type: none"> <li>• Technical skill for artistic self-expression</li> <li>• Advanced keyboard skills</li> <li>• Skills in voice including ability to sing and lead groups</li> <li>• Guitar skills sufficient to accompany self and groups</li> <li>• Skills in performing and facilitating use of a variety of percussion instruments appropriate to therapeutic setting</li> <li>• Use of music technology appropriate to clinical settings</li> <li>• Conducting skills adequate to leading small and large therapeutic ensembles</li> <li>• Ability to lead structured and improvisatory movement with music</li> <li>• Clinical improvisation skills appropriate to clinical settings</li> <li>• Applied use of clinical musicianship skills in supervised clinical training coursework</li> </ul>	<ul style="list-style-type: none"> <li>• Applied study on primary instrument/voice with juried performance</li> <li>• Participation in primary and secondary ensembles using primary and clinical instruments/voice</li> <li>• Successful completion of applied clinical musicianship courses in voice, piano, guitar, percussion, technology, and improvisation</li> <li>• Demonstration of applied use of clinical musicianship in Clinical Practicum, Capstone in Music Therapy, and supervised internship in music therapy</li> </ul>	<p>Developed over 8 semesters and assessed at the following timepoints:</p> <ul style="list-style-type: none"> <li>• Juried solo performance in each semester enrolled in applied lessons</li> <li>• Advanced placement jury in second year</li> <li>• Pre-Internship Jury in final year</li> <li>• Clinical skills evaluations in each of five semesters enrolled in clinical music therapy training: four semesters of Clinical Practicum in Music Therapy and one semester of Clinical Capstone in Music Therapy</li> <li>• Clinical skills evaluation at the completion of the culminating internship in music therapy</li> </ul>
2. Develop an understanding of music theory, composition, and arranging	<p>Demonstrate entry-level competence in the following areas, as evaluated by successful completion of coursework, clinical skills evaluations, and Music Therapy Advanced Placement and Pre-Internship Juries:</p> <ul style="list-style-type: none"> <li>• Compose music to meet the therapeutic needs of individuals and groups</li> <li>• Identify the elemental, structural, and stylistic characteristics of music from various periods, cultures, and genres</li> <li>• Transpose, arrange, and simplify music compositions for clinical settings</li> <li>• Sight-read and learn by ear melodies, rhythms, and chord progressions</li> </ul>	<ul style="list-style-type: none"> <li>• Foundational music theory coursework in the first two years of study</li> <li>• Composition and arranging integrated into music therapy and clinical musicianship coursework</li> <li>• Music theory, composition, and arranging integrated into applied clinical context with supervision by a board-certified music therapist</li> </ul>	<p>Developed over 8 semesters and assessed at the following timepoints:</p> <ul style="list-style-type: none"> <li>• Completion of music theory coursework</li> <li>• Music Therapy Advanced Placement Jury in second year</li> <li>• Completion of Pre-Internship Jury in final year</li> <li>• Clinical skills evaluations in each of five semesters enrolled in clinical music therapy training and at the completion of a culminating internship</li> </ul>
3. Develop basic knowledge of music history and repertoires	<p>Demonstrate acquisition of the following at a level sufficient for entry-level competence in music therapy, as assessed by completion of coursework, functional music exams, clinical skills evaluations, and Music Therapy Advanced Placement and Pre-Internship Juries:</p> <ul style="list-style-type: none"> <li>• Understanding of music within historical, cultural, and stylistic contexts</li> <li>• Facility with a basic repertory of traditional, folk, and popular songs</li> <li>• Ability to recognize standard works in the literature</li> </ul>	<ul style="list-style-type: none"> <li>• Coursework surveying Western art music and music from other cultures with their historical, cultural, and stylistic contexts</li> <li>• Study of standard repertory in applied instrument/voice lessons and primary and secondary ensembles</li> <li>• Integration of a variety of popular genres from the 20<sup>th</sup> and 21<sup>st</sup> centuries into clinical musicianship and music therapy coursework</li> <li>• Development of a repertory of clinically appropriate music in clinical musicianship courses</li> <li>• Applied use of music repertoires in supervised music therapy internship</li> </ul>	<p>Developed over 8 semesters and assessed at the following timepoints:</p> <ul style="list-style-type: none"> <li>• Completion of music history coursework in the first two years</li> <li>• Completion of Music Therapy Advanced Placement Jury in second year</li> <li>• Completion of Pre-Internship Jury in final year</li> <li>• Clinical skills evaluations in each of five semesters enrolled in clinical practicum and clinical capstone</li> <li>• Internship Clinical Evaluation</li> </ul>

<p>4. Develop knowledge of therapeutic principles</p>	<p>Demonstrate basic knowledge of the following sufficient for entry-level competence, as assessed by completion of clinical foundations coursework, clinical skills evaluations, and Music Therapy Advanced Placement and Pre-Internship Juries:</p> <ul style="list-style-type: none"> <li>• The dynamics and processes of a therapist-client relationship</li> <li>• The dynamics and processes of therapy groups</li> <li>• The accepted methods of major therapeutic approaches</li> <li>• The ability to apply integrated knowledge of therapeutic principles into the music therapy treatment process</li> <li>• Respect for and understanding of the influence of intersecting social and cultural identities on the therapeutic process</li> <li>• The influence of therapist’s psychological and emotional responses in music therapy</li> </ul>	<ul style="list-style-type: none"> <li>• Cross-disciplinary coursework in psychology, human biology, and music therapy to learn and integrate information</li> <li>• Sequenced music therapy coursework designed to scaffold therapeutic principles of increasing complexity</li> <li>• Clinical application of therapeutic principles in five semesters of clinical training plus music therapy internship with supervision by a board-certified music therapist</li> <li>• Assignments to support experiential learning and reflexivity built into all music therapy courses</li> </ul>	<p>Developed over 8 semesters and assessed at the following timepoints:</p> <ul style="list-style-type: none"> <li>• Successful completion of cross-disciplinary coursework on therapeutic principles</li> <li>• Music Therapy Advanced Placement Jury in second year</li> <li>• Completion of Pre-Internship Jury in final year</li> <li>• Clinical skills evaluations in each of five semesters</li> <li>• Internship Clinical Evaluation</li> </ul>
<p>5. Develop applied therapeutic knowledge for clinical settings</p>	<p>Demonstrate knowledge of the following sufficient for entry-level music therapy practice, as assessed by successful completion of coursework and clinical skills evaluations:</p> <ul style="list-style-type: none"> <li>• Typical and atypical human development, exceptionality, and psychopathology</li> <li>• The causes, symptoms of, and basic terminology used in medical, mental health, and educational classifications</li> <li>• The potentials and limitations of various clinical populations served by music therapists</li> </ul>	<ul style="list-style-type: none"> <li>• Cross-disciplinary coursework</li> <li>• Music therapy coursework to integrate therapeutic knowledge in context</li> <li>• Music therapy coursework organized around the unique strengths and needs of different clinical populations</li> <li>• Assigned research papers to apply knowledge of persons with clinical needs in real-world clinical training with supervision by a board-certified music therapist</li> </ul>	<p>Developed over 8 semesters and assessed at the following timepoints:</p> <ul style="list-style-type: none"> <li>• Successful completion of cross-disciplinary coursework on therapeutic principles</li> <li>• Music Therapy Advanced Placement Jury in second year</li> <li>• Completion of Pre-Internship Jury in final year</li> <li>• Clinical skills evaluations in each of five semesters</li> <li>• Internship Clinical Evaluation</li> </ul>
<p>6. Develop knowledge of foundations and principles of music therapy</p>	<p>Demonstrate entry-level competence in the following areas, as assessed by successful completion of music therapy coursework, clinical evaluations, and Music Therapy Advanced Placement and Pre-Internship Juries:</p> <ul style="list-style-type: none"> <li>• Music therapy methods, techniques, equipment, and materials</li> <li>• The psychological aspects of musical behavior and experience including but not limited to perception, cognition, affective response, learning, development, preference, and creativity</li> <li>• The physiological aspects of the music experience including but not limited to the central and peripheral nervous system and psychomotor responses</li> <li>• The philosophical, physiological, and sociological basis of music as therapy</li> </ul>	<ul style="list-style-type: none"> <li>• Sequenced music therapy coursework to support scaffolded development of knowledge and skill acquisition</li> <li>• Real-world application of knowledge in five semesters of clinical training courses with supervision by a board-certified music therapist</li> <li>• Integration of music therapy foundations and principles in a supervised internship</li> </ul>	<p>Developed over 8 semesters and assessed in:</p> <ul style="list-style-type: none"> <li>• Music therapy coursework exams</li> <li>• Music Therapy Advanced Placement in the second year</li> <li>• Pre-Internship Jury in the final year</li> <li>• Internship Clinical Evaluation</li> </ul>
<p>7. Develop knowledge of the music therapy treatment process</p>	<p>Demonstrate entry-level competence in the following areas of the music therapy treatment process:</p> <ul style="list-style-type: none"> <li>• Assessment</li> <li>• Treatment planning</li> <li>• Therapy implementation</li> <li>• Therapy evaluation</li> <li>• Documentation</li> <li>• Discharge Planning</li> </ul> <p>with clinical populations in the following areas of clinical service specified by the American Music Therapy Association Standards of Clinical Practice:</p> <ul style="list-style-type: none"> <li>• Addictive disorders</li> <li>• Consultant</li> <li>• Intellectual and developmental disabilities</li> <li>• Educational settings</li> <li>• Older adults</li> <li>• Medical settings</li> <li>• Mental health</li> <li>• Physical disabilities</li> </ul>	<ul style="list-style-type: none"> <li>• Introduction to the music therapy treatment process in the student’s first two music therapy courses, Introduction to Music Therapy and Clinical Foundations of Music Therapy</li> <li>• Application of the music therapy treatment process in five semesters of supervised clinical training plus a supervised music therapy internship in a variety of clinical settings</li> </ul>	<p>Developed over 8 semesters and assessed in:</p> <ul style="list-style-type: none"> <li>• Music therapy coursework exams</li> <li>• Music Therapy Advanced Placement in the second year</li> <li>• Pre-Internship Jury in the final year</li> <li>• Clinical skills evaluations</li> <li>• Internship Clinical Evaluation</li> </ul>

	<ul style="list-style-type: none"> <li>• Private practice</li> <li>• Wellness practice</li> </ul>		
8. Develop knowledge of professional issues in music therapy	<ul style="list-style-type: none"> <li>• Engage effectively in interpersonal collaboration</li> <li>• Engage effectively in individual and group music therapy supervision</li> <li>• Demonstrate an understanding of the following, as evaluated by successful completion of music therapy coursework and clinical skills evaluation:             <ul style="list-style-type: none"> <li>• The professional role of a music therapist</li> <li>• Practical application of the AMTA Code of Ethics</li> <li>• Clinical music therapy program development and administration</li> <li>• Professional standards of clinical practice in music therapy</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Introduction of professional issues in Introduction to Music Therapy</li> <li>• Discussion of ethical dilemmas and the AMTA code of ethics in the context of each music therapy course</li> <li>• Opportunities for practicing the professional role and interprofessional collaboration in five semesters of supervised clinical training</li> <li>• Applied practice of program administration and development in the student's supervised music therapy internship</li> <li>• Professional Issues in music therapy, develop music therapy program proposal for a clinical institution according to the student's interests</li> </ul>	Developed over 8 semesters and assessed in: <ul style="list-style-type: none"> <li>• Music therapy coursework exams</li> <li>• Pre-Internship Jury in the final year</li> <li>• Clinical skills evaluations</li> <li>• Internship Clinical Evaluation</li> </ul>
9. Synthesize knowledge and skills	<ul style="list-style-type: none"> <li>• Interpret and apply information from professional research literature</li> <li>• Demonstrate a basic knowledge of various research methods</li> <li>• Apply integrated knowledge and skills in a clinical setting</li> <li>• Demonstrate ability to engage in independent learning</li> </ul>	<ul style="list-style-type: none"> <li>• Research methods coursework</li> <li>• Music therapy coursework that requires synthesis of research findings</li> <li>• Application of integrated knowledge and skills in five semesters of supervised clinical practice in music therapy, including one where the student writes a clinical case study following scholarly standards</li> <li>• 1,010 hour supervised Music Therapy Internship</li> </ul>	Developed over 8 semesters and assessed in: <ul style="list-style-type: none"> <li>• Music therapy coursework exams</li> <li>• Clinical Capstone in Music Therapy case study paper</li> <li>• Pre-Internship Jury in the final year</li> <li>• Clinical skills evaluations</li> <li>• Internship Clinical Evaluation</li> </ul>

Additional strategies to help students achieve the required music therapy competencies include:

- Targeted advising in which the student and faculty collaborate in the student's first semester to create a four-year plus internship plan.
- An emphasis on applied use of classroom knowledge and skill in real-world clinical environments. This happens in five semesters of supervised music therapy practice at various community institutions and culminates in an AMTA-approved music therapy internship.
- Midterm and final clinical evaluations in all five semesters of clinical training and internship. At each evaluation, the student and supervisor meet to discuss the student's strengths and needs, and if necessary, create a formal plan for remediating any deficiencies. These plans must include specific skills and criteria that must be met, strategies for meeting those criteria, and a timeline.

**Form C: LOI Program Enrollment**

	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
New Full-Time	2	3	5	7	11 <sup>+</sup>
Continuing Full-Time	2	4	7	12	19
New Part-Time**	0	1	1	1	1
Continuing Part-Time**	0	0	1	1	1
<b>Totals</b>	<b>4</b>	<b>8</b>	<b>14</b>	<b>21</b>	<b>32<sup>+</sup></b>

<sup>+</sup> Once established, the Music Therapy program has a **target of 12 new students per year for a total enrollment of 48**. This Program Enrollment Plan represents a conservative estimate of program growth, and the music department can accommodate more students and a faster rate of growth than this projection.

\* Total is calculated on the assumption that students graduate after four years so that by Year 5, the four total students enrolled in Year 1 have graduated and are no longer included in the total.

\*\* Part-time students included here are students who enroll through the College of Graduate and Continuing Education. This track, designed to take two years, is for students who already have a bachelor’s degree to take the requisite music therapy courses to fulfill AMTA and NASM clinical training requirements to become eligible for Board Certification as a Music Therapist.

**Form D: LOI Program Budget**

In designing this program to be responsive to new concerns in light of COVID-19, we have emphasized cost-savings and efficiencies so that the Music Therapy program is revenue-generating for the university. See Item C.1, *Average Course Enrollment*.

All costs associated with adding the music therapy program, other than adjunct faculty, will come from existing budget lines.

A note on Part-Time/Adjunct costs: The costs for Clinical Supervision are directly offset by savings in Applied Music. Music Therapy students enroll in four (4) semesters of Music Therapy Practicum for which they receive clinical supervision, but enroll in four (4) fewer semesters of Applied Music than other music majors. In the first five years of the program, we project 57 student-semesters of enrollment in MT Practicum, bringing the cost of clinical supervision for MT Practicum to \$45,396.60. The same number of student-semesters enrolled in Applied Music totals \$39,014.22 (non-unit) to \$59,107.86 (unit), meaning that the additional costs for Clinical Supervision are offset by savings in Applied Music.

One Time/ Start Up Costs		Annual Enrollment				
		4 students	8 students	14 students	21 students	32 students
	<i>Cost Categories</i>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
\$0	Full Time Faculty (Salary & Fringe*) This is a current full-time faculty member in a long-standing existing faculty line, who will coordinate the music therapy program.	\$83,508 (Pre-existing faculty line). No new full-time faculty are to be added in the first 5 years.	\$85,178 (Pre-existing faculty line)	\$86,881.56 (Pre-existing faculty line)	\$88,619.19 (Pre-existing faculty line)	\$90,391.57 (Pre-existing faculty line)
\$0	Part Time/Adjunct Faculty**					
	Clinical Supervision <sup>Ⓟ</sup>	\$0	\$0	\$8,694.19	\$13,070.88	\$31,417.56
	Classroom teaching <sup>Ⓟ</sup>	\$0	\$0	\$0	\$0	\$7,785.84
	<b>Total Part Time/Adjunct:</b>	\$0	\$0	\$8,694.19	\$13,070.88	\$39,203.40
	Savings from Applied Music offset over the first 5 years: \$59,107.86 (unit rate)					
\$0	Staff	\$0	\$0	\$0	\$0	\$0
\$0	General Administrative Costs	No additional costs	No additional costs	No additional costs	No additional costs	No additional costs
\$0	Instructional Materials, Library Acquisitions, Musical Instruments	\$750 drawn from existing Music Dept ESTF	\$1,000 drawn from existing Music Dept ESTF	\$1,500 drawn from existing Music Dept ESTF	\$2,000 drawn from existing Music Dept ESTF	\$2,500 drawn from existing Music Dept ESTF
\$0	Facilities/Space/Equipment, including musical instrument purchases over \$200	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000
\$0	Field & Clinical Resources	\$75 <i>mileage for clinical supervision</i>	\$100 <i>mileage for clinical supervision</i>	\$200 <i>mileage for clinical supervision</i>	\$250 <i>mileage for clinical supervision</i>	\$300 <i>mileage for clinical supervision</i>
\$500	Marketing	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000
\$3500	Accreditation Fees: American Music Therapy Association	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000



One Time/Start-Up Support	Revenue Sources	Annual Income				
		Year 1	Year 2	Year 3	Year 4	Year 5
N/A	Grants	N/A	N/A	N/A	N/A	N/A
N/A	Tuition <sup>x</sup>	\$3,880	\$6,790	\$11,640	\$18,430	\$29,100
N/A	Fees <sup>x</sup>	\$39,516	\$69,153	\$118,548	\$187,701	\$296,370
N/A	Housing & Dining <sup>o</sup> (For 60% of projected full-time students)	\$25,417	\$44,480	\$76,252	\$120,732	\$317,715
N/A	Tuition <sup>+</sup> Part-time CGCE students	\$0	\$2,550	\$5,100	\$5,100	\$5,100
N/A	Fees <sup>+</sup> Part-time CGCE students	\$0	\$7,050	\$14,100	\$14,100	\$14,100
N/A	Departmental	N/A				
N/A	Reallocated Funds	N/A				
N/A	Other (specify)	N/A				
	<b>Income TOTALS</b>	<b>\$68,813</b>	<b>\$130,023</b>	<b>\$225,640</b>	<b>\$346,063</b>	<b>\$662,385</b>

**Totals Over the First Five Years**

Total NEW SPENDING <sup>*</sup> :	\$21,785.61
Total Re-Allocated Use of EXISTING RESOURCES:	\$442,328.32
<b>Total COSTS:</b>	<b>\$464,113,93</b>
<b>Total INCOME:</b>	<b>\$1,207,509.64</b>
<b>Total REVENUE</b> over the first 5 years:	<b>\$743,395.71</b>

\*Salary increase estimate of 2% annually, and calculated with estimated fringe for FY 21, FY22, FY23, and FY24

\*\* These figures represent the maximum possible cost of clinical supervision by part-time instructors. When students are placed at a practicum site with a board-certified music therapist on staff, facility guidelines often prohibit compensation for that therapist to supervise students. In these cases, part-time faculty costs may be lower than the listed figure.

⊕ Part-time adjunct faculty expense estimates were calculated according to the following rates:

Yr 3 Adjunct for Clinical Supervision: non-unit rate, since adjunct will be new faculty

Yr 4 Adjunct for Clinical Supervision: half unit-rate, half non-unit rate

Yr 5 Adjunct for Clinical Supervision: all unit-rate

Yr 5 Adjunct for classroom teaching: non-unit rate, since that faculty is likely to be new

× Tuition revenue is based on enrollment projections (see Form C) and cost of tuition and fees from 2019-2020. It is calculated based on our projected enrollment, minus projections for part-time students enrolling through CGCE. See note <sup>+</sup> below.

∘ Approximately 60% of students at Westfield State University are residential. Therefore, we anticipate revenue from housing and dining for 60% of full-time students in the music therapy program. Cost of housing and dining were calculated using figures from 2019-2020. On-campus housing costs ranged from \$6,850-\$10,200, so we used the average of \$8,525 in our calculation. For dining, we used the Basic Meal Plan at \$2,065.50.

- <sup>+</sup> This represents tuition and fees for part-time students enrolling through the College of Graduate and Continuing Education who already have bachelor's degrees and enroll in courses for the music therapy program in order to become eligible for board-certification as a music therapist. The estimated numbers for these part-time students are conservative at just one new student per year, and are subtracted from the full enrollment projections. We see this as a potential area for substantial enrollment growth beyond our enrollment projections. Amounts are based on CGCE tuition and fees for 2019-2020.
- New spending includes new accreditation fees, marketing, field & clinical resources, equipment, part-time faculty not off-set by Applied Music savings. All other costs associated with the program are reallocated existing resources.

### 1) Sample Course Plan

Westfield State University  
 Bachelor of Music in Music Therapy  
 Credits Required: 120  
 Average: 15 credits/semester

<b>FALL Freshman</b>	Credits	<b>SPRING Freshman</b>	Credits
Introduction to Music Therapy	3	Functional Guitar II	1
Functional Guitar I	1	Music Theory I	2
Applied Music I	2	Sight Singing Ear Training I	2
Basic Music Theory (majors)	3	Primary Ensemble	0.5
Primary Ensemble	0.5	Applied Music II	2
Music Appreciation (majors) (Arts Ap I)	3	Class Piano I	1
ENGL 0101 English Composition I	4	Secondary Ensemble (Trad)	0.5
		PSYC 0101 Intro to Psyc (Soc Und I)	3
		Lit & Phil I	3
	<b>Total</b>	<b>Total</b>	<b>15</b>
	16.5		

<b>FALL Sophomore</b>	Credits	<b>SPRING Sophomore</b>	Credits
Clinical Foundations of Music Therapy	1	Neurologic Systems in Music Therapy	2
Music Therapy & Ed with Exceptional Learners	2	Clinical Music Therapy Practicum (I)	1
Applied Music III	2	Music Therapy Practicum Seminar	0
Primary Ensemble	0.5	Applied Music IV	2
Secondary Ensemble (Trad)	0.5	Primary Ensemble	0.5
Voice Class	1	Music History II	3
Music Theory II	2	Music Theory III	2
Sight Singing Ear Training II	2	Sight Singing Ear Training III	2
Class Piano II	1	Class Piano III	1
PSYC 0207 Lifespan Development	3	Social Understanding II	3
	<b>Total</b>	<b>Total</b>	<b>16.5</b>
	15		

<b>FALL Junior</b>	Credits	<b>SPRING Junior</b>	Credits
Music Therapy with Children and Adolescents	2	Theories of Health in Music Therapy	2
Functional Piano	2	Clinical Music Therapy Practicum (III)	1
Clinical Music Therapy Practicum (II)	1	Music Therapy Practicum Seminar	0
Music Therapy Practicum Seminar	0	Music and Expressive Movement	1
PSYC 0201 Theories of Personality	3	Secondary Ensemble (MT)	0.5
GARP 0246: Quant Methods of Phys/Soc Sci (ARSN)	3	Music Technology	2
MATH 0108 Elementary Statistics (TMTH)	3	Percussion Class	1
		PSYC 0303 Abnormal Psychology	3
		BIOL 0104 Human Biology (Lab Sci)	4
	<b>Total</b>	<b>Total</b>	<b>14.5</b>
	14		

<b>FALL Senior</b>	Credits	<b>SPRING Senior</b>	Credits
Music Therapy in Mental Healthcare	2	Medical Music Therapy	2
Clinical Improvisation I: Principles and Techniques	2	Clinical Improvisation II: Group Process	2
Clinical Music Therapy Practicum (IV)	1	Clinical Capstone in Music Therapy	1
Music Therapy Practicum Seminar	0	Professional Topics in Music Therapy	1
Secondary Ensemble (MT)	0.5	US History and Govt	3
Basic Conducting	2	Allied Science	3
World Music (AAPP, Global Div)	3	Lit & Phil II	3
EGST 0208 Hip Hop Cultures (US Div & Soc. Und. III)	3		
	<b>Total</b>	<b>Total</b>	<b>15</b>
	13.5		

### INTERNSHIP (0)

Music Therapy  
 Music Core

Clinical Foundations  
 Core / General Studies

# Baystate Home Health

## PEDIATRIC PALLIATIVE CARE PROGRAM

30 Capital Drive, West Springfield, MA 01089

413-794-6411; Fax 413-794-6412

3/2/2020

To Whom It May Concern:

I am writing in support to document the need for music therapists in the Western Massachusetts area. I am the manager of the Baystate Pediatric Palliative Care Program, in West Springfield, MA. The state-funded Pediatric Palliative Care Network (PPCN) serves the unmet physical, emotional, social and spiritual needs of eligible children in Massachusetts and their families. Services are provided at no cost to children 18 years old and younger who have a life-limiting illness. Based on the current MA Department of Public Health requirements for the Pediatric Palliative Care Network (PPCN) program, we are required to offer music therapy to our patients. Our program currently serves 80 children and their families and at this time, we have 1 full time music therapist and 1 per diem music therapist to meet our program needs. It is anticipated that the Baystate Pediatric Palliative Care Program may expand to serve additional patients. However, the music therapy workforce available in Western MA, will not meet the need for increased demand in music therapy services.

Please feel free to contact me if you have questions or need additional information.

Sincerely,



Michele O'Neill, MA, LICSW, CCLS  
Manager, Pediatric Palliative Care Program  
413-657-3169



## **Board of Trustees**

June 25, 2020

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### **MOTION**

To approve the FY21 provisional operating budget as presented and to authorize the President to make budget adjustments to these funds.

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Kevin R. Queenin, Chair

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Date

**Westfield State University**  
Finance and Capital Assets Committee

**FY21 Provisional Budget Narrative**

June 13, 2020

**EXECUTIVE SUMMARY**

The FY21 budget cycle presents a significant amount of uncertainty with the COVID-19 pandemic and its effect on campuses across the country. Every campus has been impacted by this event and providing definitive plans for the next year is nearly impossible. Given these circumstances, the campus is proposing a provisional budget for approval now and will submit a final annual budget at the October board meeting. State appropriation and enrollment are the primary revenue drivers for the university and without a stable understanding of those revenue categories, developing a realistic budget is problematic. By September, we will have a much better idea on those revenue categories and their impact on our resources.

This budget approach also includes a variety of budget reductions, temporary and permanent, of over \$10M compared to the FY20 budget but there is still a ways to go. While the first set of reductions have been made in the provisional budget represented today, the budget still results in a projected loss of \$7.4M. Our goal is to refine the projected loss as new information becomes available and work to close that gap by the October board meeting in the most prudent manner possible. The health and safety our of students and community is of utmost importance as we prepare for a fall opening.

It is important to note that the residential life budget is represented as a neutral impact to our budget. As of this writing, a decision has not been made on how the residential program will operate in FY21. But, we do know that MSCBA will provide financial relief of approximately \$8M in the form of debt restructuring, refinancing and release of reserves to fund interest payments, for one year (there will be some reductions in FY22 but not at the level in FY21). The overall impact of these events make it difficult to accurately predict the impact on our budget until decisions are made during the summer months and the debt restructuring has been finalized.

The two step approach to developing an annual budget makes the most logical sense to the campus to ensure that our resources can align with external factors which impact developing our annual budget. Careful consideration must be given to ensure the quality of our programs balanced with available resources and a long term view to sustain the university in very challenging times.

**CAMPUS STRATEGY TO BALANCE BUDGET**

**FY21 Cost Reduction Strategy**

The campus implemented a 3-Tiered cost reduction strategy, executing \$7.6m of reductions across multiple funds for Tier 1. The reductions included a hiring freeze totaling \$4.0M; a

\$2.0M reduction to the adjunct budget; a \$500k reduction to temporary workers; \$600k reduction to department operating budgets; and \$400k reduction to strategic plan funding. A decision on implementing Tiers 2 & 3 is dependent upon additional indication of key factors affecting the revenue budget such as State Appropriation, Enrollment, and a potential change to the campus operating modality following further guidance from the state as it pertains to Covid-19.

In addition to the Tiered budget balancing strategy mentioned above, the campus implemented the following permanent savings totaling \$3.3M in December in response to the FY20 enrollment shortfall:

- \$920k of divisional budget reductions.
- FY21 VSIP savings of \$1.7M
- \$700k of various funding categories were reduced from the FY21 Provisional Budget.

## **ENROLLMENT**

FY20 enrollment was budgeted at 4,223 average annual billable students, however, the FY21 Provisional Budget reflects an undergraduate enrollment decrease of approximately 943 average billable students. The previous fall entering class was expected to be comprised of 1,050 new entering students and 340 transfer students for a total of 1,390 students. The FY21 enrollment target is a fall entering class of 978 new entering students and 234 transfer students for a total of 1,212. Current deposits are tracking significantly lower than prior year; as of June 2<sup>nd</sup>, the Admission Funnel Report reflected 888 deposits and 183 transfers, for a total of 1,122; resulting in a current gap of 90 students (1,212 – 1,122) compared to budget. It is expected that the final enrollment budget will be lower than the FY21 Provisional Budget based on current enrollment data.

## **REVENUES**

Total Revenues are projected to decrease by 14% or \$17.9m over last year's budget mainly due to a significant decrease in Tuition and Fee Revenue totaling \$9.5m, a 10% reduction in State Appropriations totaling \$2.9m; a 19% reduction in Residence Fees totaling \$3.6m; and a 13% reduction in Dining Fees totaling \$1.4m. The FY21 Provisional Budget assumes a 10% decrease in State Appropriations compared to the FY20 Budget, an entering class enrollment decline of 15%, and a 7% reduction in enrollment due to retention issues.

Board approved fee increases for undergraduate and CGCE have been integrated in the budget (refer to FY21 *Schedule of Annual Tuition and Fees – Approved and Revised as Final 5/27/2020*). Total cost of attendance increase for an in-state on campus residential student would be 2.6% or \$583 and 2.7% or \$290 for a commuter student. This increase places Westfield's relative "sticker price" in the median range compared to other Massachusetts state universities.

- Residential Life rent revenue is expected to be significantly lower than prior year due to a decrease in occupancy rates offset by a 3% increase in room rates.

- Dining Services revenue is projected to decline by 13% or approximately \$1.4M due to the decline in occupancy in housing which requires a meal plan.
- CGCE revenue is decreasing by approximately \$0.3M or approximately 2.7% over last year's budget for a total of \$11.8M due to the COVID-19 pandemic for all undergraduate and graduate programming. Based upon preliminary enrollment data, it is projected there will be a decline in the following areas: (1) 10% in credits in overall undergraduate (except RN-BSN) and graduate (except MSW and PA), (2) 8% decline in RN-BSN, (3) 5% reduction in MSW, (4) 20% in XRG, (5) 10% in waivers, and (6) 5% in ed service fees.

## **EXPENSES**

Operating expenses are decreasing by \$8.1M or roughly 8% below FY20 as a result of the following:

- Compensation and fringe expenses are \$3.0M lower than FY20 due to \$1.7M of VSIP savings and \$4.0M due to the hiring freeze offset by a \$2.9M increase in campus payroll obligation due to lower state appropriation, which is applied directly to base compensation. The fringe rate increased from 37.99% to 39.18%.
- No increases in salaries are assumed in this budget.
- Operating budgets decreased by \$3.1M mainly due to implementing the Tier 1 cost reductions which included \$2.0M in Adjunct costs; \$0.6m in Department Operating Expense; and \$500k in temporary worker expenses.
- Strategic investments were reduced from \$500k in FY20 to \$350k in FY21 and will be allocated mainly to increasing Financial Aid by \$250k, \$100k for One-time initiatives, and funding \$20k for the Innovation Fund.
- Early indications from MSCBA are that roughly \$8M of debt service relief will likely be provided through restructuring in order to support housing operations following the impact of the Covid-19. As a result, the MSCBA Assessment was reduced as a temporary placeholder until a more accurate amount is provided and the fall opening model is determined.

While expenses exceed revenues by \$11.18M, it is important to note the following:

- 1) Capital rollover funds represents approximately \$1.7M due to several projects that are expected to remain incomplete by year-end including \$900k for DCAMM funded projects, \$360k for ITS projects, and \$400k for other University funded projects.
- 2) Operating contingency of \$760k is built into the expense category and is a combination of true contingency which includes \$425k in operating contingency for the campus and a projected surplus of \$290k in CGCE. The contingency is used to hedge against an unplanned tuition shortfall or one-time unplanned expenses which are necessary to fund.
- 3) Potential planned use of reserves totaling \$2.03M is mainly due to Dining use of reserves to fund capital projects including the Dining Common floor replacement (structural issue) and Wilson Café. Additional use of reserves totaling \$630k represents CURCA, SGA, Residential Life, Grants, and Athletics.



## **COLLEGE OF GRADUATE AND CONTINUING EDUCATION (CGCE)**

FY21 revenue of \$11.8M represents a decrease of \$300k when compared to prior year based on a projected decline in credits counts affecting both graduate and undergraduate. Expenses are decreasing by \$300k as CGCE has made efforts to balance their budget across multiple operational expense lines. In alignment with the campus operating assumption, the CGCE budget does not include increases for collective bargaining. CGCE has added one new faculty line to support accreditation requirements for the PA program. The net result for CGCE is a projected surplus of \$300k.

Non-credit programs administered by CGCE are represented within the Other Trust Fund category in the *Detailed Budget by Trust Fund* summary document. Non-credit is projecting a minor surplus of \$28k which is also identified as an operating contingency.

## **AUXILIARIES (RESIDENTIAL LIFE AND DINING SERVICES)**

- **Residential Life** – Rates are increasing by 3% in FY21 while occupancy rates are projected to decline by 19% from prior year. Residential Life will require debt service relief from MSCBA in order to balance its budget in FY21 mainly because the Covid-19 pandemic coupled with declining enrollment and a competitive off-campus housing market are expected to further cause financial limitations. In FY20, Housing Operations provided refunds totaling \$4.2M and expected an additional enrollment related revenue decline of \$1.2M. Covid-19 may have an additional impact on housing operations in FY21, but the full impact is currently unknown. Due to Covid-19, Residential Life will not have additional summer conference revenue as summer conferences have been cancelled.
- **Dining Services** - Despite a 3% increase to the average meal plan, revenue is expected to be \$1.4M lower than prior year mainly due to lower on campus housing occupancy. For instance, revenue was projected at \$10.6M in FY20 and \$9.2M in FY21. Budget adjustments have been made to produce a balanced budget. While Dining Services historically contributes \$2.4M to the campus through a university assessment, at this time, the contribution has been reduced to \$2.0M. Dining commons floor requires structural repairs and is targeted as a priority capital improvement \$1.3M project for Dining Services, in addition to \$100k for the Wilson Cafe project; both projects are funded by reserves.
  - Dining services proposed, and the board approved a one meal plan option for residential students next year in lieu of multiple meal plan options in response to the requirements to operate under COVID -19 parameters.

## **CAPITAL BUDGET**

The capital budget is projected to be approximately \$5.9M, which includes \$4.5M of new/incomplete capital projects and \$1.4M of capital for the dining commons project. The

campus base budget for capital was reduced as part of the cost reduction plan by \$200k and is now \$2.8M.

The projected capital budget excludes funding for the renovation of Parenzo Hall as the campus portion will be funded from cash reserves later in FY21/FY22.

Major capital investments include:

- Several deferred maintenance projects as partially funded by DCAMM - \$720k
- Campus Website Redesign - \$250k
- Campus Electrical System Arc Flash Study - \$200k
- Classroom technology - \$160k
- Lifecycle Computers for Faculty, Staff, and Labs - \$220k

FY20 Capital Rollover includes DCAMM Funding for emergency projects including the water slope \$180k and the Horace Mann Garage Roof for \$290k

FY21 DCAMM Matched Deferred Maintenance Projects are as follows:

	67.8%	32.2%	100.0%
Project Title	DCAMM Funded	WSU Match	FY21 total
Sprinkler Study	40,500		40,500
Dower Center Roof Replacement Construction	406,800	193,200	600,000
Horace Mann Garage Roof	339,000	161,000	500,000
Horace Mann Mass Notification System	135,600	64,400	200,000
Trades (Maintenance) Building roof replacement -Jan doc May start	67,800	32,200	100,000
Campus Steam Tunnel roofs	135,600	64,400	200,000
Horace Mann Center AC replacements Work Study Oct Const March	339,000	161,000	500,000
Horace Mann Center Sewer Ejector replacement- January	33,900	16,100	50,000
Power Plant Condensate Receiver Tank	67,800	32,200	100,000
Wilson Roof Study	32,340		32,340
<b>Total</b>	<b>1,598,340</b>	<b>724,500</b>	<b>2,322,840</b>

### **PLANNED USE OF RESERVES**

Planned use of reserves is an estimate based on the assumption that reserves will be needed next year. For FY21, the estimated amount is \$2.0M mainly due to \$1.4M in Dining Capital projects, which are funded from Dining Reserves, and \$630k of Other Trust Fund rollovers which represents other requests for use of reserves from across various campus groups including Athletics, CURCA, Grants, and SGA Fundraising to name a few. Despite a significant decline in occupancy, it is unclear that Residential Life will use reserves to support its operation mainly as a result of the anticipated MSCBA debt service restructure which is expected to

provide significant financial relief for Housing Operations. The residential life impact on reserves will be revisited prior to the October board meeting.

### **STRATEGIC PLAN INVESTMENT**

Overall the campus has allocated a total of \$802k in Strategic Investments of which \$470k represents FY20 strategic plan funding which is permanent and therefore remains in the budget on a cumulative basis each year. An additional \$350k was allocated in FY21 toward strategic plan funding of which \$250k was applied toward increasing financial aid and the remaining is aligned to multiple divisional one-time initiatives that support fundraising and creating operational efficiencies, and most notably, a \$51k investment in a free winter and summer course incentive program.

### **SUMMARY**

The campus has undergone perhaps one of the most significant obstacles in recent history given the Covid-19 pandemic coupled with declining enrollment. Through diligent planning, the campus has been able to reducing overall expense by a total of \$10.9M since the start of FY20. The campus continues to carefully evaluate the balance between affordability, enrollment, and strategic investments while striving to balance the budget. The FY21 Provisional Budget was developed keeping in mind there are several critical planning elements that are still uncertain. Until key revenue indicators such as enrollment and state appropriation are better known, it is going to be challenging to predict whether additional cost reductions will be necessary. The highest priorities in FY21 are going to be: 1) Campus safety for both students and employees; 2) creating financial stability through enhanced planning which may include further budget reductions; 3) developing ways to attract and retain students; and 3) continuing to invest in the strategic plan in order to remain competitive.

**Westfield State University**  
**FY21 Campus Provisional Budget**  
**Provisional Budget as of June 13, 2020**

	<b>FY21 Budget</b>	<b>FY20 Budget</b>	<b>\$ Change</b>	<b>% Change</b>
<b><u>Revenue</u></b>				
Scholarship Allowance	(10,285,448)	(10,610,448)	325,000	-3%
Tuition and Fees	49,470,231	59,002,807	(9,532,576)	-16%
Federal Grants and Contracts	8,963,998	9,271,568	(307,570)	-3%
State Grants and Contracts	2,728,000	2,585,000	143,000	6%
Private Grants and Contracts	435,000	478,000	(43,000)	-9%
Residence Fees	15,789,402	19,411,659	(3,622,256)	-19%
Dining Fees	9,232,436	10,636,124	(1,403,688)	-13%
Other Operating Revenues	1,760,840	2,255,890	(495,050)	-22%
Commissions	430,194	550,000	(119,806)	-22%
State General Appropriations	26,516,934	29,463,260	(2,946,326)	-10%
Foundation Support	480,000	430,000	50,000	12%
Investment Income	635,188	677,400	(42,212)	-6%
<b>Total Revenue</b>	<b>106,156,775</b>	<b>124,151,260</b>	<b>(17,994,484)</b>	<b>-14%</b>
<b><u>Expenses</u></b>				
Personnel	51,570,997	54,766,124	(3,195,127)	-6%
Fringe Benefits	10,697,631	10,527,350	170,282	1.6%
Operations	28,232,246	31,342,404	(3,110,158)	-10%
Strategic Investments	820,000	500,000	320,000	64%
Utilities	4,364,183	4,541,635	(177,452)	-4%
Debt Payments	2,486,784	2,465,435	21,349	1%
Operating Contingency	761,878	1,309,799	(547,922)	-42%
Capital Projects	4,498,681	4,592,092	(93,411)	-2%
Scholarships	4,789,554	4,270,134	519,420	12%
Transfers	-	-	-	
MSCBA Assessment	9,122,343	12,897,864	(3,775,521)	-29%
<b>Total Expense and Transfers</b>	<b>117,344,298</b>	<b>127,212,838</b>	<b>(9,868,540)</b>	<b>-8%</b>
<b>Net Revenue over Expense</b>	<b>(11,187,523)</b>	<b>(3,061,579)</b>	<b>(8,125,944)</b>	<b>265%</b>
Planned Use of Reserves	2,035,959	1,529,486	506,473	33%
Capital Rollover	1,698,681	1,532,092	166,589	11%
<b>Total Use of Reserves</b>	<b>3,734,641</b>	<b>3,061,579</b>	<b>673,062</b>	<b>22%</b>
<b>Net Surplus/(Loss)</b>	<b>(7,452,882)</b>	<b>-</b>	<b>(7,452,882)</b>	

**Westfield State University**  
**FY21 Detailed Provisional Budget by Trust Fund**  
**Provisional Budget as of June 13, 2020**

	Operating Budget	Grants	Capital Project Fund	CGCE	Residential Life	Dining Services	Other Trust Funds	FY21 Budget All Funds	Notes
<b>Revenue</b>									
Scholarship Allowance		(10,285,448)						(10,285,448)	
Tuition and Fees	37,560,644			11,809,587			100,000	49,470,231	
Federal Grants and Contracts		8,963,998						8,963,998	
State Grants and Contracts		2,728,000						2,728,000	
Private Grants and Contracts		185,000					250,000	435,000	
Residence Fees					15,789,402			15,789,402	
Dining Fees						9,232,436		9,232,436	
Other Operating Revenues	740,008				19,000		1,001,832	1,760,840	(1)
Commissions	340,194				90,000			430,194	
State General Appropriations	26,516,934							26,516,934	
Foundation Support	480,000							480,000	
Investment Income	635,188							635,188	
<b>Total Revenue</b>	<b>66,272,968</b>	<b>1,591,550</b>	<b>-</b>	<b>11,809,587</b>	<b>15,898,402</b>	<b>9,232,436</b>	<b>1,351,832</b>	<b>106,156,775</b>	
<b>Expenses</b>									
Personnel	43,650,537	275,000		3,416,692	2,057,846	1,982,294	188,629	51,570,997	
Fringe Benefits	7,589,081	106,648		1,414,220	755,330	758,274	74,079	10,697,631	
Operations	13,368,196	829,902		4,097,618	2,845,527	5,551,778	1,539,225	28,232,246	
Strategic Investments	820,000							820,000	
Utilities	2,678,323				1,685,860			4,364,183	
Debt Payments	2,173,763					313,021		2,486,784	
Operating Contingency	425,000			286,683		25,194	25,000	761,878	
Capital Projects			4,498,681			-		4,498,681	
Scholarships	3,847,995	380,000		105,855	386,704	4,000	65,000	4,789,554	
Transfers	(801,765)	68,453	(2,800,000)	2,488,519	(955,207)	2,000,000		-	(2)
MSCBA Assessment					9,122,343			9,122,343	
<b>Total Expense and transfers</b>	<b>73,751,130</b>	<b>1,660,003</b>	<b>1,698,681</b>	<b>11,809,587</b>	<b>15,898,403</b>	<b>10,634,561</b>	<b>1,891,933</b>	<b>117,344,298</b>	
<b>Net Revenue over Expense</b>	<b>(7,478,162)</b>	<b>(68,453)</b>	<b>(1,698,681)</b>	<b>-</b>	<b>(0)</b>	<b>(1,402,125)</b>	<b>(540,101)</b>	<b>(11,187,523)</b>	
Planned Use of Reserves	25,280	68,453		-	0	1,402,125	540,101	2,035,959	(3)
Capital Rollover			1,698,681					1,698,681	
<b>Total Use of Reserves</b>	<b>25,280</b>	<b>68,453</b>	<b>1,698,681</b>	<b>-</b>	<b>0</b>	<b>1,402,125</b>	<b>540,101</b>	<b>3,734,641</b>	
<b>Net Surplus/(Loss)</b>	<b>(7,452,882)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(7,452,882)</b>	

**Notes:**

1. Other Operating Revenues consist of parking revenues, application fees, phone fee, non-credit program revenue and other miscellaneous fees
2. Transfers represent the movement of cash from one trust fund to another (for example, dining services will transfer \$2.0m to the University's Operating Budget).
3. Planned Use of Reserves may require immaterial adjustments due to year end account validation.

Westfield State University  
 FY21 Scenario Planning

6/13/2020

	FY21 Planning Scenarios			
	FY20 Budget	Scenario B FY21 Base Budget No Reductions	Scenario B-1 Provisional Budget Partial Reductions	Scenario B-2 Potential Worst Case
<b>Revenue:</b>				
State Appropriation	\$ 29,463,260	\$ 26,516,934	\$ 26,516,934	\$ 26,516,934
Total Tuition/Fee Revenue	46,660,681	37,595,843	37,560,644	37,212,401
Other Revenue	3,524,290	3,171,520	3,067,222	3,067,222
CGCE	12,142,126	12,670,567	11,809,587	11,809,587
Residential Life	19,848,659	16,210,985	15,898,402	7,949,201
Dining Services	10,636,124	8,861,989	9,232,436	4,616,218
Foundation	430,000	480,000	480,000	480,000
Grant Revenue	1,446,120	1,591,550	1,591,550	1,591,550
<b>Total Revenue</b>	<b>\$ 124,151,260</b>	<b>\$ 107,099,387</b>	<b>\$ 106,156,775</b>	<b>\$ 93,243,113</b>
<b>Expense:</b>				
Compensation	\$ 46,458,639	\$ 45,671,829	\$ 43,650,537	\$ 43,650,537
Fringe	7,380,588	8,381,062	7,589,081	7,589,081
Department Operations	21,139,607	21,200,412	17,982,172	17,982,172
Strategic Investments	500,000	750,000	350,000	350,000
Financial Aid	3,048,875	3,207,751	3,452,995	3,405,935
Debt Service	2,152,431	2,173,763	2,173,763	2,173,763
Contingency	650,000	425,000	425,000	425,000
Capital Investments	2,900,000	2,800,000	4,498,681	4,498,681
CGCE	9,675,685	10,182,048	9,321,068	9,321,068
Residential Life	21,066,961	20,705,305	16,853,610	16,853,610
Dining Services	8,395,317	7,661,988	8,634,561	8,634,561
All Other	2,312,643	2,412,830	2,412,830	2,412,830
<b>Total Expense</b>	<b>\$ 125,680,746</b>	<b>\$ 125,571,990</b>	<b>\$ 117,344,298</b>	<b>\$ 117,297,238</b>
<b>Profit/(Loss)</b>	<b>\$ (1,529,486)</b>	<b>\$ (18,472,603)</b>	<b>\$ (11,187,523)</b>	<b>\$ (24,054,125)</b>
<b>Reserve Funding</b>	<b>\$ 1,529,486</b>	<b>\$ 4,092,740</b>	<b>\$ 2,035,959</b>	<b>\$ 2,035,959</b>
<b>Capital Rollover</b>			<b>\$ 1,698,681</b>	<b>\$ 1,698,681</b>
<b>Net Profit/(Loss)</b>	<b>(1)</b>	<b>(14,379,863)</b>	<b>(7,452,882)</b>	<b>(20,319,485)</b>

**Westfield State University**  
**FY21 Scenario Planning Assumptions**

	<b>FY20 Budget</b>	<b>Scenario B FY21 Base Budget No Reductions</b>	<b>Scenario B-1 Provisional Budget Partial Reductions</b>	<b>Scenario B-2 Potential Worst Case</b>
<b>Revenue Assumptions:</b>				
Billable Students	4223	3,280	3,280	3,280
% Change YoY	-3%	-22%	-22%	-22%
Housing Students	2331	1,978	1,882	941
% Change YoY	-3%	-15%	-19%	-60%
Modality		Open in the Fall	Open in the Fall	No Housing Students in the Fall; 50% Reduction to Auxiliary Revenue
Residential Student COA Incr.	3.5%	2.8%	2.6%	2.6%
In-State Tuition and Fees Incr.	4.0%	2.7%	2.7%	2.7%
General Fee Increase	\$ 420	\$ 290	\$ 290	\$ 290
State Appropriation		10% Decrease	10% Decrease	10% Decrease
State Appropriation as % of Revenue	24%	25%	25%	28%
Investment Earnings	\$ 677,400	\$ 635,188	\$ 635,188	\$ 635,188
Operating Reserve / Contingency	\$ 650,000	\$ 425,000	\$ 425,000	\$ 425,000
<b>Expense Assumptions</b>				
Salary Increases	2% COLA Adj	None Planned	None Planned	None Planned
Expense Reductions	Level Funded	\$3.3m Reduction	Add'l \$7.6M Reduction	Add'l \$7.6M Reduction
Add'l Strategic Plan Funding	\$500k	\$750k	\$350k	\$350k
<b>Contributions to Operating Budget</b>				
Dining Contribution	\$2.4m	\$1.2m	\$2.0m	\$2.0m
CGCE Contribution	\$2.45m	\$2.49m	\$2.49m	\$2.49m
<b>CGCE &amp; Auxiliary Surplus / Deficit</b>				
CGCE Surplus	\$518k	\$317k	\$287k	\$287k
Residential Housing Deficit	\$800k	\$2.99M	Break-Even	\$8.1M
Lansdowne Deficit	\$271k	\$805k	\$805k	\$805k
Dining Deficit	-	-	-	\$4.6M
<b>Use of Reserves</b>			No use of reserves for campus housing operations; Reserves reflects Other Trust Funds & Dining Capital Project.	

FY21 Scenarios includes budget reductions already assumed into the model.

**WESTFIELD STATE UNIVERSITY**  
**Schedule of Annual Tuition and Fees**  
**FY20-21 Comparison**

	FY20	FY21	\$	%
	Approved	Recommended	Change	Change
<b>TUITION:</b>				
<b>√ Resident</b>	970	970	-	0.0%
Proximity	1,455	1,455	-	0.0%
Non-Resident & Foreign	7,050	7,050	-	0.0%
<b>MANDATORY FEES:</b>				
Student Activity	123	123	-	0.0%
General Fee	8,926	9,216	290	3.2%
Capital Improvement Fee	100	100	-	0.0%
Technology Fee	730	730	-	0.0%
<b>√ Total Mandatory Fees</b>	<b>9,879</b>	<b>10,169</b>	<b>290</b>	<b>2.9%</b>
<b>Total In-State Tuition/Fees</b>	<b>10,849</b>	<b>11,139</b>	<b>290</b>	<b>2.7%</b>
<b>ROOM:</b>				
Apartments (single)	9,800	10,100	300	3.1%
Apartments (double)	8,860	9,130	270	3.0%
<b>√ Traditional Hall Standard - Dormitories</b>	<b>6,850</b>	<b>7,050</b>	<b>200</b>	<b>2.9%</b>
Traditional Hall Premium Single	8,850	9,100	250	2.8%
New Hall (single)	10,200	10,490	290	2.8%
New Hall (double)	8,960	9,220	260	2.9%
University Hall (single)	9,650	9,930	280	2.9%
University Hall (double)	8,400	8,640	240	2.9%
Lansdowne (one bedroom - premium)	9,810	10,000	190	1.9%
Lansdowne (two bedroom)	8,800	10,000	1,200	13.6%
<b>BOARD:</b>				
<b>√ Unlimited Meal Plan with \$250 Dining Dollars</b>	<b>4,371</b>	<b>4,502</b>	<b>131</b>	<b>3.0%</b>
On the Go Dining Plan	1,451	1,509	58	4.0%
DC Basic Plan with \$150 Dining Dollars	4,131	4,214	83	2.0%
<b>Total Residential Cost of Attendance</b>	<b>22,070</b>	<b>22,691</b>	<b>621</b>	<b>2.8%</b>
<b>OTHER FEES:</b>				
Student Teaching (practicum) Fee	250	250	-	0.0%
Nursing Fee	1,194	1,794	600	50.3%
Late Registration Fee	25	25	-	0.0%
Late Payment Fee	100	100	-	0.0%
Bad Check Fee	25	25	-	0.0%
Reinstatement Fee	50	50	-	0.0%
ID Card Replacement Fee	30	40	10	33.3%
Parking	100	100	-	0.0%
Parking-DGCE	60	60	-	0.0%
<b>WAIVABLE FEES:</b>				
Student Health Insurance (see note below)	3,444	3,444	-	0.0%
Wellness Center	185	185	-	0.0%
Lifetime Owls (opt in fee)	75	75	-	0.0%

√ Average student annual cost is calculated using the gray shaded areas.

**Note:**

1. It is estimated that the Student Health Insurance Rate (SHIP) will be available by May 2020.
2. The residential room rates include a \$370.00 infrastructure fee for all residential students.
3. The calculation for Board/Meal Plans uses the Unlimited Meal Plan in FY21, rather than the DC Plan.
4. The Nursing Fee increase includes coverage for increased clinical requirements by healthcare facilities and a change to the payment for Assessment Technology Institutes (ATI)
5. Lansdowne (2 bedroom) is changing from a double and a premium double to two single bedrooms





## Board of Trustees

June 25, 2020

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### MOTION

To approve the FY21 proposed capital budget and capital projects greater than \$500,000, as presented in the FY21 Major Capital Projects for Facilities Plan.

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Kevin R. Queenin, Chair

---

Date

	Deferred Maintenance	Funding Source				Total	Comment
		Campus	DCAMM	MSCBA	Dining Funded from Use of Reserves		
<b><u>Physical Plant Projects</u></b>							
1. Deferred Maintenance	Y	724,500	1,598,340	1,660,714	1,302,125	5,285,679	Dining Common floor replacement & structural improvement
2. Infrastructure Repairs/Maintenance		225,000				225,000	
3. Campus Electrical System Arc Flash Study	Y	200,000				200,000	
4. Road & Sidewalk Repair	Y	55,000				55,000	
5. Wilson Café Renovation					100,000	100,000	
6. Critical Repair Contingency		550,947				550,947	
<b>Sub-total</b>		<b>1,755,447</b>	<b>1,598,340</b>	<b>1,660,714</b>	<b>1,402,125</b>	<b>6,416,626</b>	
<b><u>Information Technology</u></b>							
1. Campus Website Redesign		250,000				250,000	
2. Classroom technology		165,166				165,166	
3. Faculty/Staff Computers		142,767				142,767	
4. Life Cycle Computers - Labs		80,667				80,667	
5. Other Academic Technology Equipment		36,890				36,890	
6. Virtual Host Replacement		35,000				35,000	
7. DegreeWorks Upgrade		20,000				20,000	
<b>Sub-total</b>		<b>730,490</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>730,490</b>	
<b><u>Other Projects</u></b>							
1. Vehicle Leases - Enterprise		202,341				202,341	Refer to Lease/Purchase Motor Vehicle List
2. Athletics Equipment	Y	60,403				60,403	
3. Scanlon Hall Window A/C & Dumpsters	Y	50,000				50,000	
4. Health Services Equipment		1,319				1,319	
<b>Sub-total</b>		<b>314,063</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>314,063</b>	
<b>Total</b>		<b>2,800,000</b>	<b>1,598,340</b>	<b>1,660,714</b>	<b>1,402,125</b>	<b>7,461,179</b>	
<b><u>Projects Funded via Rollover</u></b>							
Rollover Facility Projects		415,859				415,859	
Rollover for DCAMM Projects	Y	925,943				925,943	Multiple Deferred Maintenance Projects
Rollover for IT Projects		356,879				356,879	Banner Project & IT Server Replacements
Rollover for Dining Services						-	
<b>Sub-total</b>		<b>1,698,681</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>1,698,681</b>	
<b>Grand Total</b>		<b>4,498,681</b>	<b>1,598,340</b>	<b>1,660,714</b>	<b>1,402,125</b>	<b>9,159,861</b>	

Westfield State University  
 FY21 Major Capital Projects for Facilities  
 (Projects Greater than 100,000)

6/13/2020

Item	Project	Amount	DCAMM Project	Note
1	Dining Commons Kitchen Floor	1,300,000		Funded from Dining Reserves
2	Water Slope Emergency	1,000,000	Y	
3	Dower Center Roof Replacement	835,000	Y	
4	Horace Mann Garage Roof	797,379	Y	
5	Dower Boilers	570,000	Y	
6	Horace Mann Center A/C Replacements	500,000	Y	
7	Campus Electrical System Arc Flash Study	200,000		Required
8	Horace Mann Mass Notification System	200,000	Y	
9	Campus Steam Tunnel roofs	200,000	Y	
10	Mechanical, Electrical, Plumbing Campus Study	200,000		Part of Master Plan Study
11	Bates Hall Mass Notification System	140,000	Y	
12	Camera Installation Project	117,564		
13	Trades (Maintenance) Building Roof Replacement	100,000	Y	
14	Power Plant Condensate Receiver Tank	100,000	Y	
15	Wilson Café Renovation	100,000		Funded from Dining Reserves
	<b>Total</b>	<b>6,359,943</b>		

Note:

1. Projects greater than \$500,000 require specific approval by the Board of Trustees
2. Funding may be from multiple sources; DCAMM, rollover funding from prior year, FY21 Campus Capital Budget



## **Board of Trustees**

June 25, 2020

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### **MOTION**

To approve FY21 expenditures for the vehicle lease/purchase program, as presented.

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Kevin R. Queenin, Chair

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Date

Westfield State University  
 FY21 Lease and Motor Vehicle Schedule

6/13/2020

Existing Vehicle Summary	Quantity	Cost/ Month	Annual Cost
<b>Existing Lease Commitments:</b>			
Facilities, Public Safety, Media Services, Mail Services, Catering	22	\$ 14,250	\$ 171,000
5% Escalation			\$ 8,550
Program Service fee			\$ 8,082
<b>Total</b>	<b>22</b>		<b>\$ 187,633</b>
<b>FY20 Approved New Lease Commitments</b>			
2020 Transit F250 Cargo (Van)	1	\$ 537	\$ 6,448
2020 F-350 Chassis (Truck)	1	\$ 688	\$ 8,260
<b>Total</b>	<b>2</b>		<b>\$ 14,708</b>
<b>FY21 Lease Schedule</b>			<b>\$ 202,341</b>

**Notes:**

Monthly Lease Agreements Include Maintenance Charges



## **Board of Trustees**

June 25, 2020

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### **MOTION**

To authorize the University to spend up to \$30,000 in FY21 on sponsorship and/or attendance at community events, consistent with University guidelines for the expenditure of such funds. The University will report all expenditures made under this umbrella approval no later than the June 2021 meeting of the Board of Trustees.

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Kevin R. Queenin

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Date



## Board of Trustees

June 25, 2020

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### MOTION

To approve and adopt the updated Westfield State University policy on Fixed Assets, Capitalization, and Inventory Control (0601), as presented, increasing the capital threshold to \$40,000, effective July 1, 2020.

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Kevin R. Queenin, Chair

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Date

## Recommendation to Increase Capitalization Threshold

**June 2017**

Beginning in FY18, the campus is proposing to increase the asset capitalization threshold from \$1,000 to \$10,000 reaching the \$50,000 threshold in 5 years. The impact of this change does not affect the overall budget; it is a year-end financial statement impact. By raising the threshold, we will effectively be expensing more costs in the year they are purchased rather than spreading the cost over multiple years via depreciation. The capitalization threshold of the Commonwealth of Massachusetts is currently \$50,000 and has been for several years. All of our sister state universities use the \$50,000 threshold. This transition will result in the following estimated increase in the average yearly expenditures, moving from the balance sheet to the Statement of Revenues, Expenses, and Changes in Net Position (income statement):

<b>Model: 5-year shift</b>	<b>FY2018</b>	<b>FY2019</b>	<b>FY2020</b>	<b>FY2021</b>	<b>FY2022</b>	<b>FY2023</b>
New Non-Capitalized Expense	\$593,000	580,000	490,000	391,000	277,000	220,000
Annual Threshold	\$10,000	\$17,500	\$25,000	\$40,000	\$50,000	\$50,000

The recommended model proved to be the least impactful of the multiple scenarios analyzed. Over the next several years, we will finish depreciating previously purchased items and expense new items in the year purchased. Over time, older items will finish depreciating and the impact to the income statement diminishes.

This approach is being recommended by the Vice President for Administration and Finance and was approved by the President. Additionally, our audit firm recommends moving to the \$50,000 level as soon as is practical. The Fixed Assets Policy will be changed annually to reflect the new capitalization schedule.



# Westfield State University

Policy concerning:

Section Administrative

Number 0601

Page 1 of 6

APPROVED: April 2015

REVIEWED: June 20~~20~~19

## FIXED ASSETS, CAPITALIZATION, AND INVENTORY CONTROL

### PURPOSE

The purpose of this policy is to ensure that Westfield State University complies with state laws; communicates expectations; and encourages ethical practices, socially responsible behavior, and fiscal responsibility regarding the university's fixed assets.

### POLICY

Accurate records must be created and maintained for each fixed asset with a value of \$1,000 or more and an expected useful life longer than one year, in line with the Comptroller's Fixed Assets Acquisition policy. An asset's value is determined by the cost to acquire the new asset and place it into service. This amount includes freight and installation less any rebates, refunds, or credits. Additionally, all technology devices capable of storing personally identifiable information, as well as all firearms are added to the fixed assets inventory system regardless of cost.

All fixed assets must be physically inventoried at least once during each fiscal year in accordance with the Comptroller's Fixed Assets Accounting and Management policy. Any changes to fixed asset records, including but not limited to location and custodian, must be immediately reported to the Inventory Control office in order to comply with Comptroller policy on annual inventory.

All assets, regardless of the funding source used to purchase them, remain the property of the university for their entire lives and may only be disposed of by the university.

### CAPITALIZATION

All non-collection items with a unit cost of ~~\$40,000~~25,000 or greater are capitalized. Library materials are generally expensed during the year. University capital assets, with the exception of land and construction in progress, are depreciated on a straight-line basis over their estimated useful lives, which can range from three to 40 years. The cost of maintenance and repairs that do not either add to the value of the asset or materially extend the asset's life are not capitalized.

**Commented [SSC1]:** Incremental increase per fiscal year to eventually get to \$50,000 threshold used by Commonwealth and all sister state institutions.

### RESPONSIBILITIES AND ENFORCEMENT

Employees are considered the official custodians of all assets assigned to them and bear the ultimate responsibility regarding the welfare of those assets. All assets are

# Westfield State University

Policy concerning:

APPROVED: April 2015

Section Administrative

Number 0601

Page 2 of 6

REVIEWED: June 20~~20~~19

restricted to use for official University business. For assets in use by multiple employees, this responsibility lies with the department head. Assets cannot be assigned to non-benefitted employees or students.

It is the responsibility of each custodian to report all asset status changes which they execute. Status change events are described in Section D of Procedures. Information must be reported to the Inventory Control Office within 7 days.

Human Resources and Division Vice Presidents are responsible for consistent enforcement of this policy. Failure to comply with this policy may result in disciplinary action up to and including suspension, termination, or legal action.

At the close of each fiscal year, the Financial Accounting office will provide to the Board of Trustees a progress report of the annual physical inventory conducted at each department.

## PROCEDURES

### A. ANNUAL PHYSICAL INVENTORY

A physical inventory of all fixed assets must be taken annually in every department. The Inventory Manager will keep a log of each department's inventory including the date the inventory was taken and the signature of the respective department head/designee. This log will be regularly shared with Human Resources, Division Vice Presidents, and other necessary personnel.

- a. The Inventory Control Office will arrange to visit each department. The department head/designee must make all assets centrally located and easily accessible. A hand-held scanner will be used to scan the barcode of each room/area and all associated fixed assets. The scanned information will be used to generate a report which indicates all information regarding the assets which were scanned as well as any assets which were not located.
- b. The department is provided a copy of the report. If there are any assets which were not scanned the department has fourteen (14) days to locate the items or provide an explanation by completing Inventory Control forms indicating special circumstances (such as items being out for repair, relocated elsewhere, etc.). A meeting between the Inventory Manager and the department head will be held to review the reconciled report and rescan any previously un-scanned assets.

# Westfield State University

Policy concerning:

Section Administrative

Number 0601

Page 3 of 6

APPROVED: April 2015

REVIEWED: June 20~~15~~<sup>19</sup>

- c. Assets which are still not scanned are classified as “missing” and will be reported to the Division Vice President as well as the Vice President for Administration and Finance.
- d. After an additional fourteen (14) days, any remaining items classified as “missing” will be forwarded to the Vice President for Administration and Finance who, at his/her discretion, may freeze departmental funds, open purchase orders, and online ordering privileges, as well as taking additional appropriate action.

## B. ACQUISITION

1. Requisitions must be entered in Banner by the department funding the acquisition. Items categorized as fixed assets must be line item specific and charged to the correct account code. The requisition must also include information relating to the cost of freight, installation, and/or expected rebates.
2. Assets to be traded in must be identified by their barcode number during the requisition process, as approval is required from the Commonwealth of Massachusetts' Operational Services Division (OSD). Their approval must then be forwarded to the Inventory Control office.
3. The invoice for the asset will be paid by the line item and that information is captured and sent to the fixed assets inventory system. Any subsequent rebates, refunds, or credits must be subtracted from the total cost.
4. When an asset is acquired by lease purchase it is barcoded and entered in the fixed assets system at inception of the lease. The asset “cost” is the outright purchase amount plus costs of putting the asset into use (e.g. freight and installation). Since there is no Banner-generated notice to Inventory Control of these acquisitions, the Procurement office must immediately notify Inventory Control and Financial Accounting of all pertinent information.
5. Equipment may not be purchased with a P-Card (see Policy 0560: *Procurement Card Use and Process*).
6. Equipment may not be purchased with personal funds and qualify for reimbursement (see Policy 0300: *University Business Expenses and Petty Cash Funds*).

# Westfield State University

Policy concerning:

Section Administrative

Number 0601

Page 4 of 6

APPROVED: April 2015

REVIEWED: June 20~~20~~19

## C. RECEIPT AND RELOCATION

1. All equipment deliveries must check in at Central Receiving before being delivered elsewhere on campus. Departments ordering equipment are responsible for notifying their vendors of this requirement. Central Receiving will notify Inventory Control of all equipment deliveries, who will then schedule time for barcoding. Departments ordering equipment which will be delivered AND installed by the vendor must give significant advanced notice to the Inventory Control office. Ordering departments and Central Receiving must share in the responsibility of unboxing items for barcoding by the Inventory Control office.
2. Technology, Media, Facilities, and any staff receiving assets must notify Inventory Control when new equipment is ready to be tagged, have serial numbers recorded, and linked to the barcode and location. They must also provide a copy of the packing slip as it contains the serial numbers for verification. Assets are not permitted to be deployed until they are barcoded.
3. Technology, Media, Facilities, and any staff moving assets are required to promptly report location information for all assets they deploy, relocate, or retrieve to the Inventory Control office. Technology and Media staff are issued hand-held scanners to easily and efficiently report frequent asset movements.

## D. INVENTORY CONTROL

1. Certain assets cannot have a barcode physically attached due to the type of item, including but not limited to non-physical items such as software and items with a lack of a physical surface where a barcode can be adhered. In cases such as these the item is assigned a sequential asset tag number in the inventory system. All items of this nature must have a department code and location assigned to the inventory record. These items will be reviewed annually to ensure that they are still in use or if disposal is necessary.
2. Computing devices make up a significant portion of the University's fixed assets. They are capable of storing information of a confidential, sensitive, and/or personally identifiable nature. These assets must have a custodian assigned if use is restricted to a single employee. Additionally, device names within their operating system must include the device's University inventory control barcode number to allow identification on the University's internal computer network. Custodians must exercise due care in the use of University computing devices, adhering to this policy as well as all applicable Information Technology policies and procedures.

# Westfield State University

Policy concerning:

Section Administrative

Number 0601

Page 5 of 6

APPROVED: April 2015

REVIEWED: June 20~~20~~19

3. In order to maintain proper control of fixed assets, all changes must be communicated promptly to the Inventory Control office and other departments where applicable. The **Inventory Control – Action Report Form**, located on the myWestfield Documents site under Administration and Finance, is used to transmit the necessary information. The following points describe actions which necessitate the use of this form.
  - a. **Off-campus use** – It is assumed that all mobile computing devices will be taken off-campus on an occasional or more frequent basis for the purpose of conducting University business. Every employee must bring all University equipment in their possession to the campus at least once annually for verification and physical inventory, as required by the Comptroller's Fixed Assets Accounting and Management policy.
  - b. **Loss or theft** – As soon as an asset is lost or stolen its custodian must notify the offices of Inventory Control, Public Safety, Financial Accounting, the Information Security Officer, and the appropriate Division Vice President. An investigation will be conducted by Public Safety and further action may be taken. Refer to Policy 0490: *Unaccounted for Variances, Losses, Shortage, or Theft of Funds or Property Reporting*. If an employee is found to be negligent in the care and custody of a University asset, they will be subject to discipline and restitution as described in the Responsibilities and Enforcement section and as allowed by law.
  - c. **Equipment Relocation** – Any time that an asset is moved from its documented location, the new location information must be submitted so that electronic records can be updated accordingly, as required by the Comptroller's Fixed Assets Accounting and Management policy.
  - d. **Exchange/Repair** – Any time an asset is exchanged or returned to the vendor/repair facility. In the case of exchange, the Inventory Control Office must be contacted to set up a time when the new asset can be inventoried. In the case of repair, a copy of any pertinent paperwork must be sent to the Inventory Control Office when the asset has been returned to campus.
  - e. **Employee Departure** – When the Human Resources Office becomes aware of a benefitted employee's resignation, retirement, or termination, they will forward their departure form to that employee's supervisor. Included in this process will be confirmation of all assets and return of all off-campus equipment to the proper department (Technology, Media, or Facilities).

# Westfield State University

Policy concerning:

**Section** Administrative

**Number** 0601

**Page** 6 of 6

APPROVED: April 2015

REVIEWED: June 20~~20~~19

## E. SURPLUS PROPERTY

1. If a department no longer has use for University equipment in their possession, they must submit a request to surplus that item using the Inventory Control form. Upon receipt Inventory Control staff will schedule time to view the asset, confirm its status. The department is responsible for submitting a request to Central Receiving staff to remove the equipment.
2. Assets that are of no use to the university but are not worthless may be transferred to another State agency, Massachusetts municipality, or non-profit firm, or they may be sold at public auction. This process is outlined and governed by OSD and must be completed at no cost to the university.
3. Technology, Media, and Facilities are the only departments authorized to dismantle assets for parts salvage.
4. The Chief Information Security Officer (CISO) governs the process for destroying or otherwise sanitizing data storage contained within technology equipment.

## REVIEW

This policy shall be reviewed annually by the Associate Vice President of Finance.



## **Board of Trustees**

June 25, 2020

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### **MOTION**

To elect the following slate of officers for the 2020-2021 academic year:

Kevin R. Queenin, Chair

Edward C. Sullivan, Vice Chair

Lydia Martinez-Alvarez, Secretary

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Kevin R. Queenin, Chair

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Date



## **Board of Trustees**

June 25, 2020

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Proposed Slate of Officers for the 2020-2021 academic year:

Kevin R. Queenin, Chair

Edward C. Sullivan, Vice Chair

Lydia Martinez-Alvarez, Secretary





## Board of Trustees

June 25, 2020

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### MOTION

Given the high degree of uncertainty related to University Operations for the Fall 2020 and Spring 2021 semesters, a new meal plan has been developed that will streamline and simplify the delivery of a Dining Program to students. University leadership has recommended the adoption of a new residential dining plan called the Owl Plan and suspending the Unlimited and DC Basic meal plans for FY21.

Additionally, final Student Health Insurance rates have been determined and indicated on the revised FY21 Schedule of Annual Tuition and Fees which represent a 4% decrease over FY20.

I hereby move to approve the updated FY21 Schedule of Annual Tuition and Fees for the new Owl Dining Plan and final Student Health Insurance rates, as presented.

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Kevin R. Queenin, Chair

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Date

**WESTFIELD STATE UNIVERSITY**  
**Schedule of Annual Tuition and Fees**  
**FY20-21 Comparison**  
**Revised - 5/27/20**

	FY20 Approved	FY21 Recommended	\$ Change	% Change
<b>TUITION:</b>				
√ Resident	970	970	-	0.0%
Proximity	1,455	1,455	-	0.0%
Non-Resident & Foreign	7,050	7,050	-	0.0%
<b>MANDATORY FEES:</b>				
Student Activity	123	123	-	0.0%
General Fee	8,926	9,216	290	3.2%
Capital Improvement Fee	100	100	-	0.0%
Technology Fee	730	730	-	0.0%
√ Total Mandatory Fees	9,879	10,169	290	2.9%
<b>Total In-State Tuition/Fees</b>	<b>10,849</b>	<b>11,139</b>	<b>290</b>	<b>2.7%</b>
<b>ROOM:</b>				
Apartments (single)	9,800	10,100	300	3.1%
Apartments (double)	8,860	9,130	270	3.0%
√ Traditional Hall Standard - Dormitories	6,850	7,050	200	2.9%
Traditional Hall Premium Single	8,850	9,100	250	2.8%
New Hall (single)	10,200	10,490	290	2.8%
New Hall (double)	8,960	9,220	260	2.9%
University Hall (single)	9,650	9,930	280	2.9%
University Hall (double)	8,400	8,640	240	2.9%
Lansdowne (one bedroom - premium)	9,810	10,000	190	1.9%
Lansdowne (two bedroom)	8,800	10,000	1,200	13.6%
<b>BOARD:</b>				
Unlimited Meal Plan with \$250 Dining Dollars	4,371	0	(4,371)	-100.0%
On the Go Dining Plan	1,451	1,509	58	4.0%
√ AY21 The Owl Plan w/ \$250 Dining Dollars (Replaces AY20 DC Basic Plan w \$150 Dining Dollars)	0	4,464	93	
<b>Total Residential Cost of Attendance</b>	<b>22,070</b>	<b>22,653</b>	<b>583</b>	<b>2.6%</b>
<b>OTHER FEES:</b>				
Student Teaching (practicum) Fee	250	250	-	0.0%
Nursing Fee	1,194	1,794	600	50.3%
Late Registration Fee	25	25	-	0.0%
Late Payment Fee	100	100	-	0.0%
Bad Check Fee	25	25	-	0.0%
Reinstatement Fee	50	50	-	0.0%
ID Card Replacement Fee	30	40	10	33.3%
Parking	100	100	-	0.0%
Parking-DGCE	60	60	-	0.0%
<b>WAIVABLE FEES:</b>				
Student Health Insurance (see note below)	3,444	3,306	(138)	-4.0%
Wellness Center	185	185	-	0.0%
Lifetime Owls (opt in fee)	75	75	-	0.0%

√ Average student annual cost is calculated using the gray shaded areas.

**Note:**

1. Final Student Health Insurance Rate (SHIP) rate
2. The residential room rates include a \$370.00 infrastructure fee for all residential students.
3. The calculation for Board/Meal Plans uses the new Owl Plan in FY21, rather than the DC Plan.
4. The Nursing Fee increase includes coverage for increased clinical requirements by healthcare facilities and a change to the payment for Assessment Technology Institutes (ATI)
5. Lansdowne (2 bedroom) is changing from a double and a premium double to two single bedrooms



## **Board of Trustees**

June 25, 2020

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### **MOTION**

To confirm the appointment of Trustee Paul Boudreau as the Chair of the Audit Committee for 2020-2021.

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Kevin R. Queenin, Chair

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Date



## **Board of Trustees**

June 25, 2020

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### **MOTION**

To authorize the Executive Committee to interview and engage an executive search firm for assisting in the presidential search for Westfield State University's 21<sup>st</sup> President.

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Kevin R. Queenin, Chair

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Date