



## Board of Trustees

### Advancement & Enrollment Management Committee

8:30 AM

October 13, 2020

Virtual Meeting via Zoom

---

- |  |                          |
|--|--------------------------|
| <b>1. Call to Order</b>  | Trustee Martinez-Alvarez |
| <b>2. Approval of Minutes</b><br>June 25, 2020                   | Trustee Martinez-Alvarez |
| <b>3. Items for Discussion</b>                                   |                          |
| a) Focus Group Research – On Campus and Springfield Schools      | Dan Forster              |
| <b>4. Items for Action</b>                                       |                          |
| a) Motion: Revised MOU Between the University and the Foundation | Erica Broman             |
| <b>5. Items for Information</b>                                  |                          |
| a) CGCE Fall 2020 Update   | Stefanie Sanchez         |
| b) Fall 2020 Update  | Dan Forster              |
| • New Initiatives for Admission for Spring and Fall 2021         |                          |
| • Scholarship Updates  |                          |
| • Marketing Digital and Social Media                             |                          |
| • Campaign 2020  |                          |
| c) IA Dashboard  | Erica Broman             |
| d) Enhanced Alumni Website                                       | Erica Broman             |
| e) Fall Appeal   | Erica Broman             |
| f) Targeted Campaigns for Hockey and Dever Auditorium            | Erica Broman             |
| g) Virtual Sweet Success Event                                   | Erica Broman             |

#### Attachment(s):

- a) Minutes – June 25, 2020
- b) Draft Revised MOA tracked changes
- c) Draft Revised MOA
- d) Motion - Accept Draft Revised MOA 10-3-2020
- e) CGCE Presentation 2020 (PowerPoint Presentation)
- f) CGCE Summer II 2020 Enrollment Report Final

- g) CGCE Fall 2020 Enrollment Report BOT Oct 2020
- h) CGCE Spring 2021 Recruitment Funnel
- i) Supplemental Information CGCE Fall 2020 Recruitment Funnel
- j) Supplemental Information CGCE Graduate Recruitment funnel Fall 2020
- k) Fall 2020 update (EM PowerPoint Presentation)
- l) Dashboard-2020-September 30
- m) Enhanced Alumni Website Video



## Board of Trustees

Advancement and Enrollment Management Committee

June 25, 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:** Committee Chair Martinez-Alvarez and Trustees Alvarado, Magovern, Martin and Neves

**MEMBERS EXCUSED:** Committee Vice Chair Hagan and Secretary Boudreau

**TRUSTEE GUESTS PARTICIPATING REMOTELY:** Trustee Queenin

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

The meeting was called to order at 8:30 AM by Committee Chair Martinez-Alvarez, who asked for a Motion to approve the previous meeting's minutes.

**MOTION** made by Trustee Magovern, seconded by Trustee Martin, to approve the minutes of the April 30, 2020 meeting.

There being no discussion, **ROLL CALL VOTE** taken:

Trustee Alvarado	Yes
Trustee Magovern	Yes
Trustee Martin	Yes
Trustee Martinez-Alvarez	Yes
Trustee Neves	Yes

**Motion passed unanimously.**

### Institutional Advancement Staffing

Dr. Erica Broman, Vice President for Institutional Advancement, stated that Marts and Lundy, campaign consultants, previously indicated the need for five-to-six additional staff in Institutional Advancement to run a multi-year campaign in the range of \$10 million to \$12 million. While that is not realistic at this time, alumna Sara Borden has been hired to fast-track data integrity and Kate Burke was hired as the Alumni Relations and Annual Fund Associate Director. Due to savings from the Voluntary Separation Incentive Plan, the department was able to give back over \$100,000 to the University. Because staffing levels do not

support a comprehensive campaign, Advancement will be starting a targeted campaign for a dedicated hockey locker room and seating for Dever Auditorium.

#### Public Higher Education Endowment Incentive Program

Dr. Broman shared that the state offered this incentive program earlier this year. For funds received from July 1, 2019 through June 30, 2021, every \$2 raised in capital, permanent or restricted gifts and pledges will create a state match of \$1, up to a total of \$277,000. Applicable donations received from July 1, 2019 to March 5, 2020 were \$140,000, and a match of \$70,000 was received. Since March 25, the donations have been much smaller, but the fundraiser for athletics and Dever seating will count toward the match. The matched funds will be directed to go into unrestricted funds to help build our unrestricted endowment, helping the University in the long run. Not counted in the match are unrestricted and temporarily unrestricted funds.

#### Board of Trustees Yearly Gifts

Dr. Broman noted that there is not yet 100% donor participation from the Board of Trustees. When approaching foundations for support in the targeted campaigns mentioned above, we are always asked if we have 100% participation from our Trustees and Foundation Boards. Yearly gifts should be made before June 30.

#### Institutional Advancement Dashboard

Dr. Broman shared the dashboard and stated that giving will continue to be more erratic, and low donor amounts are disappointing but mostly related to COVID-19. The Pathways event was canceled this year (usually raising up to \$200,000), and many other alumni engagement events were also canceled. It was anticipated that this year donations would get to \$1 million to \$2 million in order to grow the program. Calls to donors through our phonathon program did not happen because the students left campus. A planned gift is being cultivated and hoped to be realized in FY21. It would be used to increase student opportunities and support and would count toward the match. The Advancement and Alumni offices are taking advantage of every opportunity to contact people. Ms. Burke will be doing outreach through the summer through calls, emails, and notes. Except for FY20, all other years listed on the dashboard are for full years.

#### Deposit Numbers and Fall Projections

Daniel Forster, Vice President for Enrollment Management, stated that all decisions on housing, online and on-ground classes, and social interactions will have an effect on enrollment.

- Dr. Stefanie Sanchez, Interim Dean of the College of Graduate and Continuing Education, stated that their summer enrollments have stayed steady and strong, with Summer I breaking even with last year and Summer II trending higher to date than last year. Matriculated undergraduate and graduate numbers are the strongest highest yield. Non-matriculated numbers are still down and private schools have been offering incentives. Virtual information and chat sessions are being offered for fall information.
- The Fall 2019 to Fall 2020 Funnel shows 200 less incoming first-year students this year. There were many less denials this year. A new standard for SATs was implemented because the College Board did not hold the March SAT. State universities can waive the SAT for those unable to take it and Westfield has applied to participate in a SAT optional pilot program next year.
- We were on target at the beginning of March and COVID-19 is the number one reason for the shortfall. As people went into shutdown, deposits slowed at all universities. Other schools repackaged financial aid, which is common when deposits are low. The new financial aid strategy is increasing the yield for the pool. Marketing to students will continue through the summer with rolling admissions.

- President Torrecilha shared that the guidelines have changed where institutions will be penalized for doing financial aid repackaging. Mr. Forster stated that that is tied more directly with the CARES Act. Some campuses did not use financial aid offices to process CARES Act funds. Westfield State did. Of the \$2.2 million received, over \$1.2 million has been issued so far through applications and then over 3,000 block grants were awarded based on whether the student had qualified for financial aid for 2019-2020. There were many appeals requesting additional funding and 40 to 50 students received additional amounts over previously awarded funds. Appeals are submitted because the family situation may have changed since filing or the student really wants to come to Westfield State but just cannot afford it. In some cases, we can offer a grant that may help make the difference in their making a deposit.
- Students who decided against coming to Westfield are being polled. They are choosing other state universities closer to home and are hesitant to commit financially. There has not been a tremendous amount of MELT. We projected a smaller number of first-time, first-year and transfer students and a higher percentage of returning students this year, but it has not happened yet.
- This summer the Owl's Nest is being launched, a great virtual program to keep students and families engaged to campus.
- Lansdowne would be the best place to quarantine students if needed. Health and dining support would be given at that location. There are 85 students currently assigned to Lansdowne who would need to be moved to housing on campus.
- Housing for returning students has been steady as opposed to the MELT typically seen. There has been phenomenal contact with new students with 78% of them selecting housing before last week.

Plans for Fall Visitation

Dr. Kelly Hart, Executive Director of Admissions, stated that when students visit campus, the yield is higher. While keeping the safety of guests and staff in mind, they are creating opportunities for smaller visits on campus and hybrid events. Admissions staff are exploring a phone app to download a GPS-type device to walk the campus and incorporate videos of programs. They are continually looking for creative new ways to introduce the campus to prospective students.

Trustee Neves questioned how the 85 students registered in Lansdowne are going to find out they will need to move. It was answered that there will be communication sent to each student to work with them to find the best alternative housing.

In response to a question by Trustee Martin, it was stated that most campuses were down 15% to 25% this spring and the decline in community colleges is approximately 30%. We were consistent in deposits with sister institutions.

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

There being no discussion, **ROLL CALL VOTE** taken:

Trustee Alvarado	Yes
Trustee Magovern	Yes
Trustee Martin	Yes
Trustee Martinez-Alvarez	Yes
Trustee Neves	Yes

**Motion passed unanimously.**

Meeting adjourned at 9:27 AM.

Attachments presented at this meeting:

- a. Minutes of April 30, 2020
- b. Institutional Advancement Dashboard
- c. Deposit Numbers: CGCE Fall 2020 Funnel
- d. Deposit Numbers: Summer 2020 CGCE Enrollment Data
- e. Deposit Numbers: FY21 Graduate Funnel
- f. Deposit Numbers: Day Admissions
- g. Plans for Fall Visitation

**Secretary's Certificate**

I hereby certify that the foregoing is true and correct copy of the approved minutes of the Westfield State University Board of Trustees Advancement and Enrollment Management Committee meeting held on June 25, 2020.

\_\_\_\_\_  
Paul Boudreau, Secretary

\_\_\_\_\_  
Date



## **Board of Trustees**

October 13, 2020

---

### **MOTION**

To accept the revised draft MOA between the Westfield State Foundation and Westfield State University and forward to the Westfield State Foundation for final approval subject to further non-substantive edits.

---

Kevin R. Queenin, Chair

---

Date

## MEMORANDUM OF AGREEMENT

This Memorandum of Agreement is made as of the \_\_\_ day of \_\_\_\_\_, ~~2015, 2020~~ by and between Westfield State University (~~the "University";~~), an agency of the Commonwealth of Massachusetts, and Westfield State Foundation, Inc. (~~the "Foundation";~~), a not-for-profit charitable corporation organized and operating as such, pursuant to Massachusetts General Laws, chapters 15A, §37, and 180 ~~of the General Laws of said Commonwealth.~~

WHEREAS, the Foundation is organized and operated exclusively for the benefit of the University and consistent with the policies and goals of the University;

WHEREAS, the Foundation was organized for the purpose of facilitating voluntary private support from alumni, friends, corporations, foundations and others;

WHEREAS, the Foundation plays a significant role in receiving, holding and disbursing moneys and other assets dedicated to the support of the University;

WHEREAS, the Foundation is dedicated to assisting the University by fostering a culture of philanthropy, growing the endowment and providing financial and other support for long-term academic and other University priorities;

WHEREAS, as stated in the articles of incorporation, the Foundation is a separate, incorporated 501(c)3 organization and is responsible for identifying and nurturing relationships with potential donors and other friends of the University, receiving funds, securities, real and intellectual property and other private resources for the support of the University and acknowledging and stewarding such gifts in accordance with donor intent and fiduciary responsibilities;

WHEREAS, the University designates the Foundation as the repository of private and corporate gifts made in support of the University unless otherwise specified by the donor;

WHEREAS, in fundraising activities, the University retains personnel with expertise in advancement services, fundraising, gift planning and other capacities necessary for the fulfillment of its mission;

WHEREAS, the Foundation working with the University shall jointly establish gift acceptance policies, naming policies and provisions for the establishment of scholarships, chairs and other endowment purposes; and,

WHEREAS, the University and the Foundation are desirous of recording certain understandings concerning the manner in which the Foundation and the University will coordinate, and otherwise cooperate in, their efforts to raise moneys and secure other assets from private donors for the support and benefit of the University.

Formatted: DocID

NOW, THEREFORE, in consideration of the foregoing premises and of the mutual covenants herein contained, the University and the Foundation hereby agree as follows.

1. Use of Name. The University and the Foundation acknowledge and agree that the University, in accordance with and subject to the provisions of chapter 15A, section 37, of the General Laws of Massachusetts, has accorded to the Foundation the right and authority to use the name of the University in the Foundation's own name; however, the Foundation will operate under its own seal and logotype.
2. Foundation's Mission and Purpose. The Foundation's mission and purpose ~~are~~ is to receive, steward or invest, manage and disburse private and corporate resources, in accordance with the Foundation's policies in support of the mission and priorities of the University, as the University may determine those to be from time to time. It is the ~~University's and the Foundation's~~ expectation of the University and Foundation, therefore, that the Foundation will, consistent with the terms of this Memorandum of Agreement, play a supportive role in the University's fundraising activities and, in accordance with University policy and applicable provisions of law, in the management of privately raised moneys and other assets. Nothing in this agreement shall require the Foundation to accept or disburse funds raised by the University if the Foundation finds ~~that~~ the anticipated raising and disbursing of funds to be ~~a~~ inconsistent with, or in violation of, the Foundation's fiduciary responsibilities.
3. University's Support and Assistance.
  - a) ~~At the Foundation's request, the~~The University may, at no cost to the Foundation, provide the Foundation with ~~such~~ space and facilities on or near the University's campus, including suitably equipped office and meeting space, ~~as~~, as is mutually agreed upon by the University and the Foundation ~~as reasonably necessary~~, to permit the Foundation to fulfill its obligations under this Memorandum of Agreement. The University shall also provide the Foundation with appropriate telephone and computer connectivity through the University's own telephone and computer networks.
  - ~~b)~~The University shall provide, support and maintain ~~the~~ necessary and appropriate computer software to advance the success of the University's fundraising efforts, as well as the proper management of all records pertaining to such efforts. Further, the University shall ~~provide~~ proper training of individuals charged with the support and maintenance of such software and the records contained therein, including the development of business practices and confidentiality policies related thereto.
  - ~~c)~~The Foundation may, in its discretion, elect to provide financial support to specific development efforts for which the university has declined support.
  - c) The University's Vice President for Institutional Advancement and University Relations (or such other employee of the University as ~~the University~~ it may designate from time to time) shall serve as the ~~chief operating officer~~ Executive Director of the Foundation. When the position becomes vacant and a search is undertaken for a replacement, the Foundation shall have two foundation board members participate in the selection process.

Formatted: Font color: Red

Formatted: DocID

- d) At the request of the Foundation, the University, at its sole cost and expense, shall, ~~endeavor to~~ assign staff from its Advancement Department to include, but not be ~~limiteded~~ limited to, administrative and information technology services. The University, after consultation with the Foundation, shall determine the assignments and responsibilities of these employees. ~~after consultation with the Foundation.~~ The rendering of all such personnel services (including those of the ~~chief development officer~~ Executive Director) to the Foundation shall be subject to applicable provisions of law, including those contained in Massachusetts General Laws, chapter 15A, section 37, ~~of the General Laws of Massachusetts.~~ In no event, shall a University employee assigned to the Foundation be authorized or permitted to distribute Foundation resources, of any kind or value, without the express permission of the Foundation Executive Committee ~~of the Foundation's Board.~~ The Foundation ~~may develop,~~ from time to time, ~~internal processes to ensure that sufficient~~ shall review internal controls ~~are in place so to ensure~~ that any and all distributions made from the Foundation are authorized in a manner which reflects good business practices, ~~oversight and shall provide such processes to the University.~~
- e) The University ~~shall,~~ from time to time, shall communicate to the Foundation the University's priorities and long-term plans, together with such other information as the University ~~thinks~~ deems necessary or appropriate to assist the Foundation in the fulfillment of its obligations hereunder. The University shall include the Foundation Chair or his or her designee as ~~an active and prominent~~ a participant in appropriate strategic planning for the University.
- f) ~~In order to~~ To enhance communication between the Foundation Board and the University's University Board of Trustees, representatives of the two entities shall meet no fewer than two times each fiscal year to discuss matters of mutual best interest.
- g) The Foundation Board of Directors will work ~~in conjunction~~ with the University's University Board of Trustees, ~~the~~ President and other senior administrators ~~of the University~~ to identify, cultivate and solicit prospects for private gifts.
- h) ~~The~~ Subject to University ~~shall~~ policies, budgets and applicable laws, the University, from time to time, shall give to the Foundation ~~such~~ additional support and assistance as ~~(but subject always to University policies, University budgets and applicable provisions of law)~~ the University deems necessary ~~or~~ and appropriate for the Foundation to assist it in the accomplishment of fulfill its ~~purposes~~ purpose and ~~the fulfillment of its~~ mission.
- i) Any and all support and assistance provided by the University to the Foundation shall, at all times ~~remain subordinate~~ and subject to appropriation, conform with University policy and applicable provisions of law.
- j) In consultation with the Foundation, and consistent with its policies and prescriptions ~~as they are from time to time,~~ the University shall have, and assume, principal responsibility for planning and executing comprehensive programs to develop and foster private fundraising and donor acquisition for the support of the University. The programs shall include annual giving, major gifts, planned gifts, special projects and special fundraising ~~and,~~ capital campaigns and, in support of the same, the general cultivation of donor and alumni/ae relations.

Formatted: Font color: Text 1

Formatted: Font color: Text 1

Formatted: Font color: Red

Formatted: Font color: Text 1

Formatted: Font color: Text 1

Formatted: Font color: Text 1

Formatted: Font color: Green

Formatted: Font color: Green

Formatted: Font color: Green

Formatted: Font color: Green

4. Foundation's Responsibilities.

~~4.~~

Formatted: Indent: Left: 0.25", No bullets or numbering

Formatted: DocID

- a) The Foundation shall maintain its status as a separately incorporated 501(c)(3) non-profit organization created to receive, manage, distribute and steward private and corporate resources in exclusive support of the various priorities of the University.
- b) The ~~Foundation's~~ Foundation Board of Directors is responsible for the prudent management of all assets of the Foundation, and the administration of gifts ~~consistently~~ consistent with the intent of the donors.
- c) The Foundation shall maintain copies of plans, budgets and donor and alumni records developed in connection with the performance of its obligation.
- d) The Foundation shall provide ~~data and records~~ to the University ~~on a need to know basis data and records, where appropriate and~~ in accordance with applicable laws, ~~Foundation policies and guidelines.~~
- e) The Foundation shall not accept grants from private, state or federal agencies, except in ~~those~~ circumstances that are approved by the ~~Foundation's~~ Foundation Board of Directors and said funding agency.
- f) The Foundation shall receive, hold, manage, invest, and disburse contributions of cash, securities, patents, copyrights and other forms of property, including immediately vesting gifts and deferred gifts that are contributed in the form of planned and deferred-gift instruments. The Foundation shall not accept a gift of, or otherwise acquire real property or any interest therein, without ~~in each case~~ the express consent of the University.
- g) The Foundation shall establish, adhere to and periodically assess policies governing its acceptance and management of gifts. All such policies, including policies pertaining to restrictions placed on gifts, shall conform to any applicable policies of the University and shall make provision for protecting the anonymity of donors who choose to make ~~anonymous gifts anonymously.~~ No such policy shall permit the Foundation to obligate the University to confer any benefit or honorific on any donor or prospective donor without ~~in each case~~ the prior approval of the University ~~and any.~~ Any and all naming rights of any kind ~~whatever~~ shall be exercisable ~~solely~~ by the University ~~and at~~ its sole discretion.
- h) The Foundation shall adhere to the University's Procedures for Implementing the Public Higher Education Endowment Incentive Program and such other programs and/or policies as may be in force ~~from time to time.~~
- i) The Foundation shall establish asset-allocation, disbursement and spending policies that conform to applicable provisions of law, including the Uniform Prudent Management of Funds Act (~~e. 180A of the Massachusetts General Laws of Massachusetts as the same is in force for the time being, chapter 180A~~). In connection therewith, the Foundation, ~~subject to applicable restrictions,~~ shall develop an annual budget and spending plan and ~~(but subject to applicable restrictions)~~ may annually expend a reasonable percentage of its funds for the support of its programs, services and operations.
- j) In consultation with the ~~University, and in response to a formal request from~~ Foundation, the University shall deliver to ~~be received by~~ the Foundation ~~no later than on or before~~ March 1<sup>st</sup> of each year ~~a formal request for funds to support University initiatives.~~ The Foundation shall deliver to the University no later than April 15<sup>th</sup> of each year, a plan of disbursements to the University for the ~~University's~~ upcoming fiscal year ~~next ensuing.~~ When disbursing funds or other assets to the University, the Foundation shall disclose to the University any terms, conditions or limitations to which any such funds or assets are subject. This planning does not

Formatted: Font color: Green

Formatted: Font color: Green

Formatted: DocID

preclude the two entities from discussing additional needs ~~as they that~~ might arise ~~from time to time~~ throughout the year.

Formatted: Font color: Red

k) ~~The~~ Annually, the Foundation shall ~~annually~~ cause a complete, audited financial statement of its accounts to be prepared in accordance with ~~such~~ generally accepted accounting principles and reporting practices as may be prescribed from time to time by the American Institute of Certified Public Accountants (or any successor organization), ~~and the same~~. The statements shall be examined by an independent certified public accountant for the purpose of expressing an opinion in accordance with generally accepted auditing standards ~~for the purpose of expressing an opinion thereon~~. A. Upon its completion, a copy of such statement shall be transmitted to the University ~~upon its completion~~. The. Where appropriate and by agreement, the Foundation and ~~the~~ University, ~~by agreements made from time to time hereafter~~, may arrange to have such audit conducted in conjunction with the annual audit the University causes to be conducted of its own accounts. In such cases, donor-requested anonymity will be ensured prior to the commencement of the joint audit. The Foundation shall furnish copies of said audits to such governmental entities as may be ~~prescribed by law or regulation~~.

l) ~~l)~~ —The Foundation shall maintain accurate records of all gifts received by it, including any restrictions or other terms ~~that are of application to each~~, together with accurate records of all other matters that are relevant to the fulfillment of its obligations under this Memorandum of Agreement.

Formatted: Numbered + Level: 1 + Numbering Style: a, b, c, ... + Start at: 1 + Alignment: Left + Aligned at: 0.25" + Indent at: 0.5", Tab stops: Not at 0.5"

Formatted: Font: 11 pt

5. Direct Assistance to the University. In order to provide direct assistance to the University in its development activities, the Foundation shall reimburse the University for costs and expenses incurred for the benefit and support of the University subject to:

- a. the ~~Foundations's "Foundation's Fiscal Policies and Procedures Manual," in effect at the time, its By Laws in effect at the time, Bylaws~~ and/or, any other Foundation governance or regulatory policies and procedure(s) in effect at the time;
- b. the availability of funds pursuant to sections 4(h) and 5(c) hereof; and,
- c. the express written acknowledgement of the Foundation that any such reimbursement is consistent with all terms and provisions hereof.

Formatted: Font: Italic

Formatted: Font color: Red

The University may seek reimbursement for the costs and expenses it incurs in connection with its efforts to raise moneys and secure other assets from private donors, ~~and it. It~~ may do so whether such efforts of the University are made for, or in the name of, the University ~~itself~~ or ~~for or in the name of the~~ Foundation. The Foundation may decline any request for reimbursement that ~~is not specified in the Foundation annual budget and~~ had not been approved previously by the ~~Foundation's Foundation~~ Executive Board ~~that is not specified in the Foundation's annual budget Committee~~.

Appropriate reimbursements include costs and expenses ~~the University's that University~~ employees reasonably incur for travel, lodging and related expenses (but not including the cost of any ~~such~~ employee's compensation), the costs of entertainment, meals, receptions, ~~the costs of~~ publications, exhibits and other forms of publicity, and the costs of any like events and activities (but not including any component of the University's general overhead) that support or relate to such efforts.

Formatted: Font color: Red

Formatted: DocID

No more frequently than monthly, the University shall submit to the Foundation, in the form of an invoice or like statement, a request for reimbursement of any costs and expenses ~~that it has~~ incurred (whether paid or payable) and that the Foundation has not already reimbursed or has declined to reimburse. All requests shall include a description of the costs and expenses (or the categories thereof) and the purposes ~~therefore~~ as they relate to ~~the~~ efforts to raise moneys and secure other assets from private donors. The University shall provide to the Foundation ~~any more particular~~ information that the Foundation may reasonably require with respect to any such request. The Foundation shall consider all such requests in light of its fiduciary responsibilities for prudent management and custody of funds. Any such requests that, in the judgment of the Foundation Treasurer and its officers, do not conform ~~as stated above~~ to this standard shall be denied.

Formatted: Font color: Green

Nothing in this section shall be deemed to obligate the Foundation to reimburse to the University, in any fiscal year, any sum or sums that in the aggregate exceed the maximum ~~sum~~ amount the Foundation shall have fixed for such purpose or expense.

In accordance with section 4 of this Agreement, the Foundation and ~~the~~ University shall ~~confer concerning~~ discuss the maximum sum the Foundation will commit, for the next fiscal year ~~next ensuing~~, for the purposes described in this section. In doing so, they will have regard ~~both to~~ for the Foundation's ~~then~~ available financial resources and the University's anticipated expenditures for development. Funds distributed to the University shall come primarily from income in the Foundation's restricted investment funds. At the present time, the Foundation Investment Committee has determined that its spending policy will be no more than 4% of these restricted funds based on a rolling 12-quarter average. The Foundation will endeavor to limit its use of unrestricted funds until such time as the unrestricted endowment surpasses \$3 million, with the exception of its support to the Interfaith Center. Notwithstanding the foregoing, each fiscal year, the Foundation shall determine its total distributable income from all sources and will distribute no more than 95% of those funds. The 5% balance will remain to grow the Foundation fund balances.

6. State and Federal Compliance. ~~The Foundation may, subject~~ Subject to Board approval, the Foundation, to the extent that state and federal laws allow, may serve as an instrument for entrepreneurial activities for the University and engage in such activities as purchasing, developing or managing real estate for campus expansion and student housing, or participating in joint ventures that advance the mission of the University. It also may hold licensing agreements and other forms of intellectual property, borrow or guarantee debt issued by their parties, or engage in other activities to increase foundation revenue with no direct connection to a University purpose.
7. Interpretation. This Memorandum of Agreement shall be construed ~~to the end~~ so that the Foundation might broadly and effectively promote and support the University's efforts to raise moneys and secure other assets from private donors.
8. Authorities of the University; Authorities of the Foundation. Nothing in this Memorandum of Agreement shall impair or limit the authority of the University to determine, in its sole discretion,

Formatted: DocID

by whom and by what activities it shall or may pursue its efforts to raise moneys and secure other assets from private donors, and no such authority shall be deemed to be vested hereby in the Foundation.

In the exercise of its authorities and the discharge of its obligations under this Agreement, the University shall act by its Board of Trustees or by any such person or body (whether one or more, or in combination) as the Board of Trustees ~~may~~, from time to time, may appoint or designate for the purpose of exercising any such authority or discharging any such obligation.

In the exercise of its authorities and the discharge of its obligations under this Agreement, the Foundation shall act by its Board of Directors or by any such person or body (whether one or more or in combination) as the Board of Directors ~~may~~, from time to time, may appoint or designate for the purpose of exercising any such authority or discharging any such obligation.

9. Amendment; Termination. The parties ~~may~~, at any time, may amend this Memorandum of Agreement by an instrument in writing, executed with the same formalities as those that attended the making of this instrument. ~~Either~~ At any time, either party may terminate this Memorandum of Agreement ~~at any time~~ by giving to the ~~Chairperson~~ chair of the other party not less than ninety (90) days advance written notice of its election so to do. The party initiating termination of the agreement must act in good faith to provide an opportunity for a meeting, to include the ~~Board~~ Chair ~~board chairs~~ (or board chair designee) and all appropriate executives, within thirty (30) days of initial written notice to terminate the agreement. Notwithstanding the foregoing, either party may terminate this agreement in the event that the other party defaults in its performance of its obligation and fails to cure the default within a reasonable time after receiving written notice to the executive and board chair of the defaulting party.
10. Non-Profit Corporation. Consistent with provisions appearing in the Foundation bylaws and its articles of incorporation, should the Foundation cease to exist or cease to be an IRS Code 501(c)3 nonprofit corporation, the Foundation ~~will~~ shall transfer its assets and property to the University, ~~to~~ a reincorporated successor foundation ~~to~~, another 501(c)3 organization affiliated with the University or ~~to~~ the state or federal government for public purposes, in accordance with the law and donor intent.
11. Subordination. To the extent any prior agreement(s) ~~exist which exists that~~ set forth understandings between the University and ~~the~~ Foundation concerning the manner in which the University and Foundation ~~and the University~~ coordinate and cooperate in their efforts to raise moneys and secure other assets from private donors for the support and benefit of the University, such other agreements shall be subordinate to this MOA; provided ~~further~~ that, if such other agreements contain provisions that are in conflict with any term or provision of this MOA, the terms and/or provisions of this MOA shall control.
12. Dispute Resolution. If a dispute between the Foundation and ~~the~~ University should arise regarding the interpretation of this agreement ~~which is not that cannot be~~ resolved between the management of the Foundation and the University, the Foundation shall have the right to request a

meeting with the appropriate committee of the Board of Trustees to seek resolution prior to formal termination of the agreement.

WHEREFORE, the University and the Foundation, acting by persons duly authorized ~~therein~~, hereunder set their signs and seals on the dates subscribed below.

WESTFIELD STATE UNIVERSITY \_\_\_\_\_ WESTFIELD STATE FOUNDATION, ~~Inc.~~  
~~Board of Trustees~~ \_\_\_\_\_ Board of Directors  
By: \_\_\_\_\_ By: \_\_\_\_\_  
\_\_\_\_\_  
By: \_\_\_\_\_  
~~Name: Kevin R. Queenin, Chair~~ Elizabeth D. Scheibel \_\_\_\_\_ ~~Name: Robin Jensen,~~  
~~Chair~~  
~~Title: Chairperson~~ \_\_\_\_\_ ~~Title: Chairperson~~  
Date: \_\_\_\_\_ Date: \_\_\_\_\_  
\_\_\_\_\_  
By: \_\_\_\_\_  
\_\_\_\_\_  
Andrew Oleksak, Past Chair  
\_\_\_\_\_  
Date: \_\_\_\_\_  
\_\_\_\_\_

Formatted: Indent: Left: 0", First line: 0"  
Formatted: Not All caps  
Formatted: Not All caps

Formatted: DocID

## MEMORANDUM OF AGREEMENT

This Memorandum of Agreement is made as of the \_\_\_ day of \_\_\_\_\_, 2020 by and between Westfield State University (University), an agency of the Commonwealth of Massachusetts, and Westfield State Foundation, Inc. (Foundation), a not-for-profit charitable corporation organized and operating as such, pursuant to Massachusetts General Laws, chapters 15A, §37 and 180.

WHEREAS, the Foundation is organized and operated exclusively for the benefit of the University and consistent with the policies and goals of the University;

WHEREAS, the Foundation was organized for the purpose of facilitating voluntary private support from alumni, friends, corporations, foundations and others;

WHEREAS, the Foundation plays a significant role in receiving, holding and disbursing moneys and other assets dedicated to the support of the University;

WHEREAS, the Foundation is dedicated to assisting the University by fostering a culture of philanthropy, growing the endowment and providing financial and other support for long-term academic and other University priorities;

WHEREAS, as stated in the articles of incorporation, the Foundation is a separate, incorporated 501(c)3 organization and is responsible for identifying and nurturing relationships with potential donors and other friends of the University, receiving funds, securities, real and intellectual property and other private resources for the support of the University and acknowledging and stewarding such gifts in accordance with donor intent and fiduciary responsibilities;

WHEREAS, the University designates the Foundation as the repository of private and corporate gifts made in support of the University unless otherwise specified by the donor;

WHEREAS, in fundraising activities, the University retains personnel with expertise in advancement services, fundraising, gift planning and other capacities necessary for the fulfillment of its mission;

WHEREAS, the Foundation working with the University shall jointly establish gift acceptance policies, naming policies and provisions for the establishment of scholarships, chairs and other endowment purposes; and

WHEREAS, the University and the Foundation are desirous of recording certain understandings concerning the manner in which the Foundation and the University will coordinate, and otherwise cooperate in, their efforts to raise moneys and secure other assets from private donors for the support and benefit of the University.

NOW, THEREFORE, in consideration of the foregoing premises and of the mutual covenants herein contained, the University and the Foundation hereby agree as follows.

1. Use of Name. The University and the Foundation acknowledge and agree that the University, in accordance with and subject to the provisions of chapter 15A, section 37, of the General Laws of Massachusetts, has accorded to the Foundation the right and authority to use the name of the University in the Foundation's own name; however, the Foundation will operate under its own seal and logotype.
2. Foundation's Mission and Purpose. The Foundation's mission and purpose is to receive, steward or invest, manage and disburse private and corporate resources, in accordance with the Foundation's policies in support of the mission and priorities of the University, as the University may determine those to be from time to time. It is the expectation of the University and Foundation, therefore, that the Foundation will, consistent with the terms of this Memorandum of Agreement, play a supportive role in the University's fundraising activities and, in accordance with University policy and applicable provisions of law, in the management of privately raised moneys and other assets. Nothing in this agreement shall require the Foundation to accept or disburse funds raised by the University if the Foundation finds the anticipated raising and disbursing of funds to be inconsistent with, or in violation of, the Foundation's fiduciary responsibilities.
3. University's Support and Assistance.
  - a) The University may, at no cost to the Foundation, provide the Foundation with space and facilities on or near the University's campus, including suitably equipped office and meeting space as is mutually agreed upon by the University and the Foundation to permit the Foundation to fulfill its obligations under this Memorandum of Agreement. The University shall also provide the Foundation with appropriate telephone and computer connectivity through the University's own telephone and computer networks.
  - b) The University shall provide, support and maintain necessary and appropriate computer software to advance the success of the University's fundraising efforts, as well as the proper management of all records pertaining to such efforts. Further, the University shall train individuals charged with the support and maintenance of such software and the records contained therein, including the development of business practices and confidentiality policies related thereto. The Foundation may, in its discretion, elect to provide financial support to specific development efforts for which the university has declined support.
  - c) The University's Vice President for Institutional Advancement (or such other employee of the University as it may designate from time to time) shall serve as the Executive Director of the Foundation. When the position becomes vacant and a search is undertaken for a replacement, the Foundation shall have two foundation board members participate in the selection process.
  - d) At the request of the Foundation, the University, at its sole cost and expense, shall assign staff from its Advancement Department to include, but not be limited to, administrative and information technology services. The University, after consultation with the Foundation, shall determine the assignments and responsibilities of these employees. The rendering of all such personnel services (including those of the Executive Director) to the Foundation shall be subject

to applicable provisions of law, including those contained in Massachusetts General Laws, chapter 15A, section 37. In no event, shall a University employee assigned to the Foundation be authorized or permitted to distribute Foundation resources of any kind or value, without the express permission of the Foundation Executive Committee. The Foundation, from time to time, shall review internal controls to ensure that any and all distributions made from the Foundation are authorized in a manner which reflects good business practices.

- e) The University, from time to time, shall communicate to the Foundation the University's priorities and long-term plans, together with such other information as the University deems necessary or appropriate to assist the Foundation in the fulfillment of its obligations hereunder. The University shall include the Foundation Chair or his or her designee as a participant in appropriate strategic planning for the University.
- f) To enhance communication between the Foundation Board and the University Board of Trustees, representatives of the two entities shall meet no fewer than two times each fiscal year to discuss matters of mutual best interest.
- g) The Foundation Board of Directors will work with the University Board of Trustees, President and other senior administrators to identify, cultivate and solicit prospects for private gifts.
- h) Subject to University policies, budgets and applicable laws, the University, from time to time, shall give to the Foundation additional support and assistance as the University deems necessary and appropriate for the Foundation to fulfill its purpose and mission.
- i) Any and all support and assistance provided by the University to the Foundation shall, at all times and subject to appropriation, conform with University policy and applicable provisions of law.
- j) In consultation with the Foundation, and consistent with its policies and prescriptions, the University shall have, and assume, principal responsibility for planning and executing comprehensive programs to develop and foster private fundraising and donor acquisition for the support of the University. The programs shall include annual giving, major gifts, planned gifts, special projects and special fundraising, capital campaigns and, in support of the same, the general cultivation of donor and alumni/ae relations.

#### 4. Foundation's Responsibilities.

- a) The Foundation shall maintain its status as a separately incorporated 501(c)(3) non-profit organization created to receive, manage, distribute and steward private and corporate resources in exclusive support of the various priorities of the University.
- b) The Foundation Board of Directors is responsible for the prudent management of all assets of the Foundation and the administration of gifts consistent with the intent of the donors.
- c) The Foundation shall maintain copies of plans, budgets and donor and alumni records developed in connection with the performance of its obligation.
- d) The Foundation shall provide to the University data and records, where appropriate and in accordance with applicable laws.
- e) The Foundation shall not accept grants from private, state or federal agencies, except in circumstances that are approved by the Foundation Board of Directors and said funding agency.
- f) The Foundation shall receive, hold, manage, invest and disburse contributions of cash, securities, patents, copyrights and other forms of property, including immediately vesting gifts and deferred gifts that are contributed in the form of planned and deferred-gift instruments.

The Foundation shall not accept a gift of, or otherwise acquire real property or any interest therein, without the express consent of the University.

- g) The Foundation shall establish, adhere to and periodically assess policies governing its acceptance and management of gifts. All such policies, including policies pertaining to restrictions placed on gifts, shall conform to any applicable policies of the University and shall make provision for protecting the anonymity of donors who choose to make anonymous gifts. No such policy shall permit the Foundation to obligate the University to confer any benefit or honorific on any donor or prospective donor without the prior approval of the University. Any and all naming rights of any kind shall be exercisable by the University in its sole discretion.
- h) The Foundation shall adhere to the University's Procedures for Implementing the Public Higher Education Endowment Incentive Program and such other programs and/or policies as may be in force.
- i) The Foundation shall establish asset-allocation, disbursement and spending policies that conform to applicable provisions of law, including the Uniform Prudent Management of Funds Act (Massachusetts General Laws, chapter 180A). In connection therewith, the Foundation, subject to applicable restrictions, shall develop an annual budget and spending plan and may annually expend a reasonable percentage of its funds for the support of its programs, services and operations.
- j) In consultation with the Foundation, the University shall deliver to the Foundation on or before March 1 of each year a formal request for funds to support University initiatives. The Foundation shall deliver to the University no later than April 15<sup>th</sup> of each year a plan of disbursements to the University for the upcoming fiscal year. When disbursing funds or other assets to the University, the Foundation shall disclose to the University any terms, conditions or limitations to which any such funds or assets are subject. This planning does not preclude the two entities from discussing additional needs that might arise throughout the year.
- k) Annually, the Foundation shall cause a complete, audited financial statement of its accounts to be prepared in accordance with generally accepted accounting principles and reporting practices as may be prescribed from time to time by the American Institute of Certified Public Accountants (or any successor organization). The statements shall be examined by an independent certified public accountant for the purpose of expressing an opinion in accordance with generally accepted auditing standards. Upon its completion, a copy of such statement shall be transmitted to the University. Where appropriate and by agreement, the Foundation and University may arrange to have such audit conducted in conjunction with the annual audit the University causes to be conducted of its own accounts. In such cases, donor-requested anonymity will be ensured prior to the commencement of the joint audit. The Foundation shall furnish copies of said audits to such governmental entities as may be
- l) The Foundation shall maintain accurate records of all gifts received by it, including any restrictions or other terms, together with accurate records of all other matters that are relevant to the fulfillment of its obligations under this Memorandum of Agreement.

5. Direct Assistance to the University. In order to provide direct assistance to the University in its development activities, the Foundation shall reimburse the University for costs and expenses incurred for the benefit and support of the University subject to:

- a. the Foundation's *Fiscal Policies and Procedures* Manual, Bylaws and any other Foundation governance or regulatory policies and procedure(s) in effect at the time;
- b. the availability of funds pursuant to sections 4(h) and 5(c) hereof; and
- c. the express written acknowledgement of the Foundation that any such reimbursement is consistent with all terms and provisions hereof.

The University may seek reimbursement for the costs and expenses it incurs in connection with its efforts to raise moneys and secure other assets from private donors. It may do so whether such efforts of the University are made for, or in the name of, the University or Foundation. The Foundation may decline any request for reimbursement that is not specified in the Foundation annual budget and had not been approved previously by the Foundation Executive Committee.

Appropriate reimbursements include costs and expenses that University employees reasonably incur for travel, lodging and related expenses (but not including the cost of any employee's compensation), the costs of entertainment, meals, receptions, publications, exhibits and other forms of publicity, and the costs of any like events and activities (but not including any component of the University's general overhead) that support or relate to such efforts.

No more frequently than monthly, the University shall submit to the Foundation, in the form of an invoice or like statement, a request for reimbursement of any costs and expenses that it has incurred (whether paid or payable) and that the Foundation has not already reimbursed or has declined to reimburse. All requests shall include a description of the costs and expenses (or the categories thereof) and the purposes as they relate to efforts to raise moneys and secure other assets from private donors. The University shall provide to the Foundation information that the Foundation may reasonably require with respect to any such request. The Foundation shall consider all such requests in light of its fiduciary responsibilities for prudent management and custody of funds. Any such requests that, in the judgment of the Foundation Treasurer and its officers, do not conform to this standard shall be denied.

Nothing in this section shall be deemed to obligate the Foundation to reimburse to the University, in any fiscal year, any sum or sums that in the aggregate exceed the maximum amount the Foundation shall have fixed for such purpose or expense.

In accordance with section 4 of this Agreement, the Foundation and University shall discuss the maximum sum the Foundation will commit for the next fiscal year for the purposes described in this section. In doing so, they will have regard for the Foundation's available financial resources and the University's anticipated expenditures for development. Funds distributed to the University shall come primarily from income in the Foundation's restricted investment funds. At the present time, the Foundation Investment Committee has determined that its spending policy will be no more than 4% of these restricted funds based on a rolling 12-quarter average. The Foundation will endeavor to limit its use of unrestricted funds until such time as the unrestricted endowment surpasses \$3 million, with the exception of its support to the Interfaith Center. Notwithstanding the foregoing, each fiscal year, the Foundation shall determine its total distributable income from all

sources and will distribute no more than 95% of those funds. The 5% balance will remain to grow the Foundation fund balances.

6. State and Federal Compliance. Subject to Board approval, the Foundation, to the extent that state and federal laws allow, may serve as an instrument for entrepreneurial activities for the University and engage in such activities as purchasing, developing or managing real estate for campus expansion and student housing or participating in joint ventures that advance the mission of the University. It also may hold licensing agreements and other forms of intellectual property, borrow or guarantee debt issued by their parties or engage in other activities to increase foundation revenue with no direct connection to a University purpose.
7. Interpretation. This Memorandum of Agreement shall be construed so that the Foundation might broadly and effectively promote and support the University's efforts to raise moneys and secure other assets from private donors.
8. Authorities of the University; Authorities of the Foundation. Nothing in this Memorandum of Agreement shall impair or limit the authority of the University to determine, in its sole discretion, by whom and by what activities it shall or may pursue its efforts to raise moneys and secure other assets from private donors, and no such authority shall be deemed to be vested hereby in the Foundation.

In the exercise of its authorities and the discharge of its obligations under this Agreement, the University shall act by its Board of Trustees or by any such person or body (whether one or more, or in combination) as the Board of Trustees, from time to time, may appoint or designate for the purpose of exercising any such authority or discharging any such obligation.

In the exercise of its authorities and the discharge of its obligations under this Agreement, the Foundation shall act by its Board of Directors or by any such person or body (whether one or more or in combination) as the Board of Directors, from time to time, may appoint or designate for the purpose of exercising any such authority or discharging any such obligation.

9. Amendment; Termination. The parties, at any time, may amend this Memorandum of Agreement by an instrument in writing, executed with the same formalities as those that attended the making of this instrument. At any time, either party may terminate this Memorandum of Agreement by giving to the chair of the other party not less than ninety (90) days advance written notice of its election so to do. The party initiating termination of the agreement must act in good faith to provide an opportunity for a meeting, to include the board chairs (or board chair designee) and all appropriate executives, within thirty (30) days of initial written notice to terminate the agreement. Notwithstanding the foregoing, either party may terminate this agreement in the event that the other party defaults in its performance of its obligation and fails to cure the default within a reasonable time after receiving written notice to the executive and board chair of the defaulting party.

10. Non-Profit Corporation. Consistent with provisions appearing in the Foundation bylaws and its articles of incorporation, should the Foundation cease to exist or cease to be an IRS Code 501(c)3 nonprofit corporation, the Foundation shall transfer its assets and property to the University, a reincorporated successor foundation, another 501(c)3 organization affiliated with the University or the state or federal government for public purposes, in accordance with the law and donor intent.
  
11. Subordination. To the extent any prior agreement(s) exists that set forth understandings between the University and Foundation concerning the manner in which the University and Foundation coordinate and cooperate in their efforts to raise moneys and secure other assets from private donors for the support and benefit of the University, such other agreements shall be subordinate to this MOA; provided that, if such other agreements contain provisions that are in conflict with any term or provision of this MOA, the terms and/or provisions of this MOA shall control.
  
12. Dispute Resolution. If a dispute between the Foundation and University should arise regarding the interpretation of this agreement that cannot be resolved between the management of the Foundation and the University, the Foundation shall have the right to request a meeting with the appropriate committee of the Board of Trustees to seek resolution prior to formal termination of the agreement.

WHEREFORE, the University and the Foundation, acting by persons duly authorized, hereunder set their signs and seals on the dates subscribed below.

WESTFIELD STATE UNIVERSITY

Board of Trustees

By: \_\_\_\_\_

Kevin R. Queenin, Chair

Date:

WESTFIELD STATE FOUNDATION

Board of Directors

By: \_\_\_\_\_

Elizabeth D. Scheibel, Chair

Date:

By: \_\_\_\_\_

Andrew Oleksak, Past Chair

Date:

# College of Graduate and **CONTINUING EDUCATION**



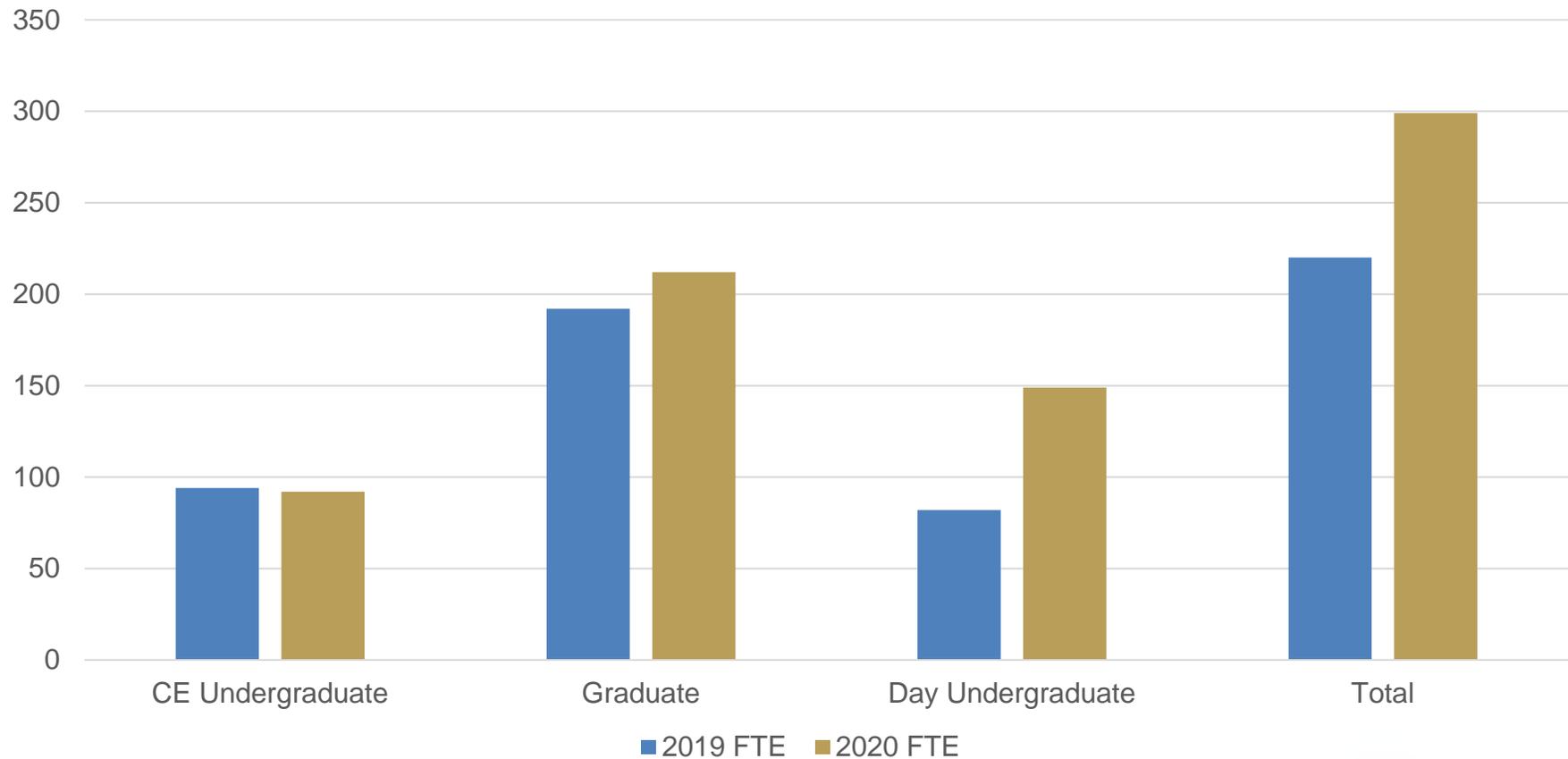
**Board of Trustees**

**October 13, 2020**

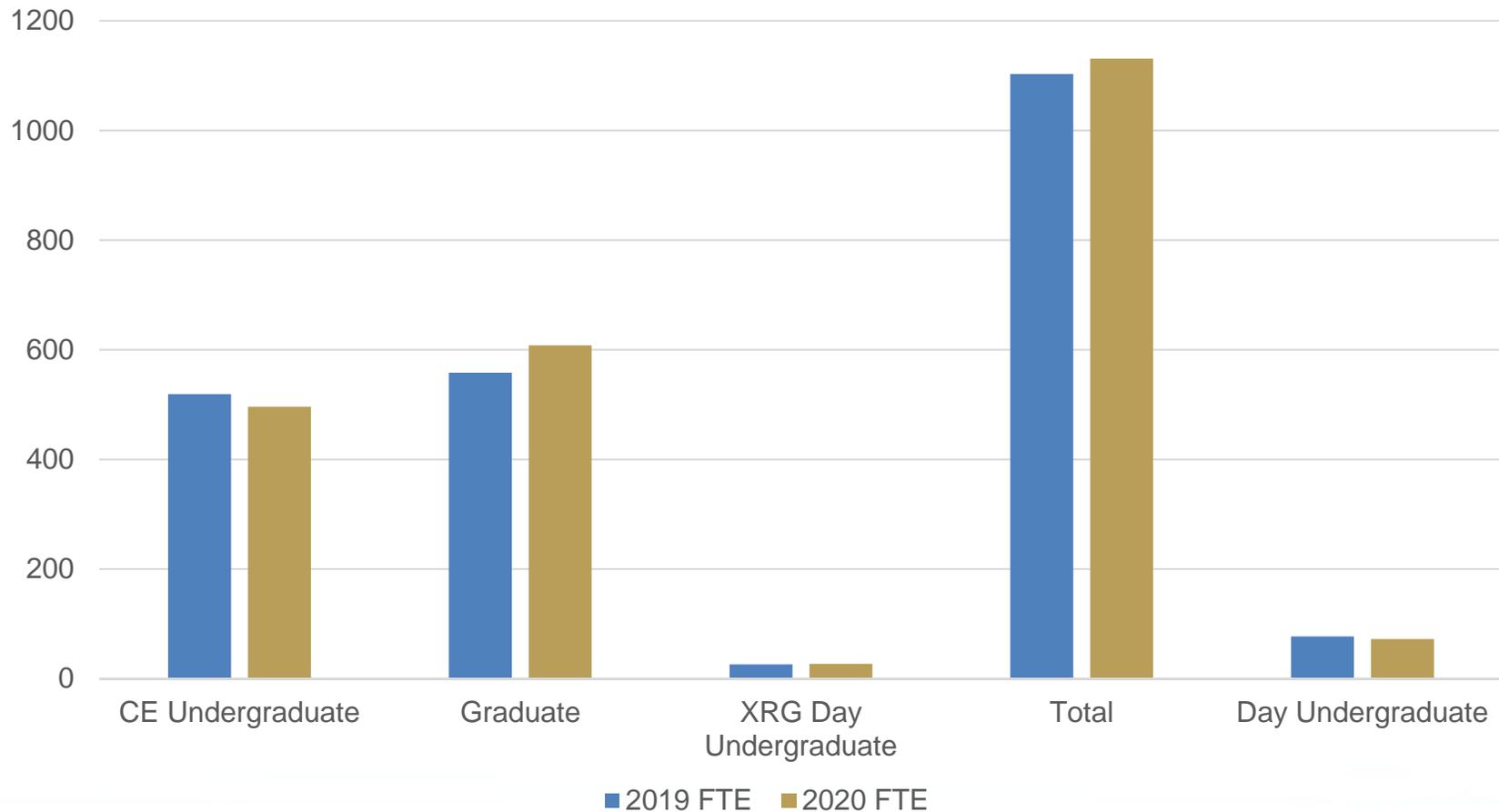
**Dr. Stefanie Sanchez**

**Westfield**  
STATE UNIVERSITY  
COLLEGE OF  
**Graduate &  
Continuing Education**

# Summer II 2019 vs. 2020 Enrollments



# Fall 2019 vs. 2020 Enrollments



# Graduate Spring Recruitment Funnel

		Spring 2020 (Final)		Spring 2021		Spring 2020 as of 10/1/2019	
		COUNT	RATIO	COUNT	RATIO	COUNT	RATIO
Graduate	Recruit	145	.00%	79	.00%	139	.00%
	Applied	59	40.69%	30	37.97%	38	27.34%
	Accepted	37	62.71%	15	50.00%	7	18.42%
	Enrolled	36	97.30%	0	.00%	0	.00%
Post Bac	Recruit	22	.00%	7	.00%	23	.00%
	Applied	14	63.64%	4	57.14%	12	52.17%
	Accepted	10	71.43%	4	100%	5	41.67%
	Enrolled	6	60.00%	0	.00%	0	.00%

# Undergraduate Spring Recruitment Funnel

		Spring 2020 (Final)		Spring 2021		Spring 2020 as of 10/1/2019	
		COUNT	RATIO	COUNT	RATIO	COUNT	RATIO
Under-graduate	Recruit	194	.00%	112	.00%	138	.00%
	Applied	106	54.64%	50	44.64%	73	52.90%
	Accepted	72	67.92%	19	38.00%	11	15.07%
	Enrolled	63	87.50%	0	.00%	0	.00%
Second Bachelor	Recruit	18	.00%	7	.00%	18	.00%
	Applied	12	66.67%	3	42.86%	8	44.44%
	Accepted	5	41.67%	2	66.67%	2	25.00%
	Enrolled	5	100%	0	.00%	0	.00%

# FY21 Risks & Opportunities

## Risks

- Owl Course Voucher
- Decline in prospective students for spring 2021
- Uncertain reaction from non-traditional student market in pandemic

## Opportunities

- Day Admission Initiatives
- Programs to meet workforce demands
- Flexible, accessible, and affordable delivery methods
- Program Rejuvenation

# Questions, Comments, Feedback

[GoBackNow.com](http://GoBackNow.com)

Westfield  
STATE UNIVERSITY  
COLLEGE OF  
Graduate &  
Continuing Education

CGCE Summer II 2019- FINAL vs. Summer II 2020 Comparison		DISTINCT STUDENT COUNT			SEAT COUNT			CREDITS			AVG SEATS TAKEN			FTE Conversion	FTE Conversion	Change in FTE
COLLEGE	STUDENT_TYPE	Summer II 2019	Summer II 2020	Variance	Summer II 2019	Summer II 2020	Variance	Summer II 2019	Summer II 2020	Variance	Summer II 2019	Summer II 2020	Variance	Summer II 2019	Summer II 2020	
Evening Undergraduate (UCE)	MATRIC	156	166	6.41%	195	229	17.44%	588.0	712.0	21.09%	1.2500	1.3795	10.36%	49	59	10
	NON-MATRIC	132	96	-27.27%	159	115	-27.67%	538.0	396.0	-26.39%	1.2045	1.1979	-0.55%	45	33	(12)
<b>*TOTAL COLLEGE Evening Undergraduate (UCE)</b>		<b>288</b>	<b>262</b>	<b>-9.03%</b>	<b>354</b>	<b>344</b>	<b>-2.82%</b>	<b>1,126.0</b>	<b>1,108.0</b>	<b>-1.60%</b>	<b>1.2292</b>	<b>1.3130</b>	<b>6.82%</b>	<b>94</b>	<b>92</b>	<b>(2)</b>
Graduate (GCE)	MATRIC	103	140	35.92%	106	144	35.85%	318.0	433.0	36.16%	1.0291	1.0286	-0.05%	35	48	13
	NON-MATRIC	26	27	3.85%	28	29	3.57%	86.0	95.0	10.47%	1.0769	1.0741	-0.26%	10	11	1
<b>*TOTAL COLLEGE Graduate (GCE)</b>		<b>129</b>	<b>167</b>	<b>29.46%</b>	<b>134</b>	<b>173</b>	<b>29.10%</b>	<b>404.0</b>	<b>528.0</b>	<b>30.69%</b>	<b>1.0388</b>	<b>1.0359</b>	<b>-0.27%</b>	<b>45</b>	<b>59</b>	<b>14</b>
<b>*TOTAL COLL_TYPE CGCE</b>		<b>417</b>	<b>429</b>	<b>2.88%</b>	<b>488</b>	<b>517</b>	<b>5.94%</b>	<b>1,530.0</b>	<b>1,636.0</b>	<b>6.93%</b>	<b>1.1703</b>	<b>1.2051</b>	<b>2.98%</b>	<b>139</b>	<b>151</b>	<b>12</b>
Undergraduate Day School	MATRIC (XRG)	5	2	-60.00%	5	3	-40.00%	15.0	9.0	-40.00%	1.0000	1.5000	50.00%	1	1	(1)
	MATRIC (non-XRG)	267	289	8.24%	322	379	17.70%	975.0	1,780.0	82.56%	1.2060	1.3114	8.74%	81	148	67
<b>Total Date to Date Comparison</b>		<b>689</b>	<b>720</b>	<b>4.50%</b>	<b>815</b>	<b>899</b>	<b>10.31%</b>	<b>2,520.0</b>	<b>3,425.0</b>	<b>35.91%</b>	<b>1.1829</b>	<b>1.2486</b>	<b>5.56%</b>	<b>220</b>	<b>299</b>	<b>79</b>
<b>Grand Total Compared to final SMII 2019 Numbers</b>		<b>689</b>	<b>720</b>	<b>4.50%</b>	<b>815</b>	<b>899</b>	<b>10.31%</b>	<b>2,520.0</b>	<b>3,425.0</b>	<b>35.91%</b>	<b>1.1829</b>	<b>1.2486</b>	<b>5.56%</b>			

\*Notes

2020 Registration opened March 30, 2020

2019 Registration opened April 1, 2019

Summer II 2020 - First day of classes, Mon July 6, 2020

CGCE Summer II 2019 Professional Prog enrollment - Final vs. Fall 2020 - Final		DISTINCT STUDENT COUNT			SEAT COUNT			CREDITS			AVG SEATS TAKEN		
COLLEGE	STUDENT_TYPE	Fall 2019	Fall 2020	Variance	Fall 2019	Fall 2020	Variance	Fall 2019	Fall 2020	Variance	Fall 2019	Fall 2020	Variance
Graduate (GCE)	MATRIC	52	61	17.31%	286	232	-18.88%	838.0	745.0	-11.10%	5.5000	3.8033	-30.85%
<b>*TOTAL COLLEGE Graduate (GCE)</b>		<b>52</b>	<b>61</b>	<b>17.31%</b>	<b>286</b>	<b>232</b>	<b>-18.88%</b>	<b>838.0</b>	<b>745.0</b>	<b>-11.10%</b>	<b>5.5000</b>	<b>3.8033</b>	<b>-30.85%</b>

CGCE Fall 2019 as of 10.4.2019 vs. Fall 2020 Comparison-2020 enrollment as of 10.4.2020 at 12:30 p.m.		DISTINCT STUDENT COUNT			SEAT COUNT			CREDITS			AVG SEATS TAKEN			FTE Conversion	FTE Conversion	Change in FTE
COLLEGE	STUDENT_TYPE	Fall 2019	Fall 2020	Variance	Fall 2019	Fall 2020	Variance	Fall 2019	Fall 2020	Variance	Fall 2019	Fall 2020	Variance	Fall 2019	Fall 2020	
Evening Undergraduate (UCE)	MATRIC	608	570	-6.25%	1,642	1,501	-8.59%	5,023.5	4,646.0	-7.51%	2,7007	2,6333	-2.49%	419	387	(31)
	NON-MATRIC	253	283	11.86%	397	432	8.82%	1,199.0	1,305.0	8.84%	1,5692	1,5265	-2.72%	100	109	9
<b>*TOTAL COLLEGE Evening Undergraduate (UCE)</b>		<b>861</b>	<b>853</b>	<b>-0.93%</b>	<b>2,039</b>	<b>1,933</b>	<b>-5.20%</b>	<b>6,222.5</b>	<b>5,951.0</b>	<b>-4.36%</b>	<b>2,3682</b>	<b>2,2661</b>	<b>-4.31%</b>	<b>519</b>	<b>496</b>	<b>(23)</b>
Graduate (GCE)	MATRIC	616	651	5.68%	1,502	1,690	12.52%	4,890.0	5,321.5	8.82%	2,4383	2,5960	6.47%	543	591	48
	NON-MATRIC	42	41	-2.38%	46	47	2.17%	136.0	153.0	12.50%	1,0952	1,1463	4.67%	15	17	2
<b>*TOTAL COLLEGE Graduate (GCE)</b>		<b>658</b>	<b>692</b>	<b>5.17%</b>	<b>1,548</b>	<b>1,737</b>	<b>12.21%</b>	<b>5,026.0</b>	<b>5,474.5</b>	<b>8.92%</b>	<b>2,3526</b>	<b>2,5101</b>	<b>6.70%</b>	<b>558</b>	<b>608</b>	<b>50</b>
<b>*TOTAL COLL_TYPE CGCE</b>		<b>1,519</b>	<b>1,545</b>	<b>1.71%</b>	<b>3,587</b>	<b>3,670</b>	<b>2.31%</b>	<b>11,248.5</b>	<b>11,425.5</b>	<b>1.57%</b>	<b>2,3614</b>	<b>2,3754</b>	<b>0.59%</b>	<b>1077</b>	<b>1104</b>	<b>27</b>
Undergraduate Day School	MATRIC (XRG)	54	52	-3.70%	105	115	9.52%	307.0	323.5	5.37%	1,9444	2,2115	13.74%	26	27	1
	MATRIC (non-XRG)	269	241	-10.41%	302	284	-5.96%	921.0	862.0	-6.41%	1,1227	1,1784	4.97%	77	72	(5)
<b>Grand Total</b>		<b>1,573</b>	<b>1,597</b>	<b>1.53%</b>	<b>3,692</b>	<b>3,785</b>	<b>2.52%</b>	<b>11,555.5</b>	<b>11,749.0</b>	<b>1.67%</b>	<b>2,3471</b>	<b>2,3701</b>	<b>0.98%</b>	<b>1179</b>	<b>1203</b>	<b>24</b>
<b>CGCE Fall 2019 -FINAL vs. Fall 2020 Comparison - 2020 enrollment as of 10.4.2020 at 12:30 p.m.</b>																
COLLEGE	STUDENT_TYPE	Fall 2019	Fall 2020	Variance	Fall 2019	Fall 2020	Variance	Fall 2019	Fall 2020	Variance	Fall 2019	Fall 2020	Variance	Fall 2019	Fall 2020	
Evening Undergraduate (UCE)	MATRIC	611	570	-6.71%	1,655	1,501	-9.31%	5,064.5	4,646.0	-8.26%	2,7087	2,6333	-2.78%	422	387	(35)
	NON-MATRIC	253	283	11.86%	396	432	9.09%	1,196.0	1,305.0	9.11%	1,5652	1,5265	-2.47%	100	109	9
<b>*TOTAL COLLEGE Evening Undergraduate (UCE)</b>		<b>864</b>	<b>853</b>	<b>-1.27%</b>	<b>2,051</b>	<b>1,933</b>	<b>-5.75%</b>	<b>6,260.5</b>	<b>5,951.0</b>	<b>-4.94%</b>	<b>2,3738</b>	<b>2,2661</b>	<b>-4.54%</b>	<b>522</b>	<b>496</b>	<b>(26)</b>
Graduate (GCE)	MATRIC	616	651	5.68%	1,503	1,690	12.44%	4,894.0	5,321.5	8.74%	2,4399	2,5960	6.40%	544	591	48
	NON-MATRIC	42	41	-2.38%	46	47	2.17%	136.0	153.0	12.50%	1,0952	1,1463	4.67%	15	17	2
<b>*TOTAL COLLEGE Graduate (GCE)</b>		<b>658</b>	<b>692</b>	<b>5.17%</b>	<b>1,549</b>	<b>1,737</b>	<b>12.14%</b>	<b>5,030.0</b>	<b>5,474.5</b>	<b>8.84%</b>	<b>2,3541</b>	<b>2,5101</b>	<b>6.63%</b>	<b>559</b>	<b>608</b>	<b>49</b>
<b>*TOTAL COLL_TYPE CGCE</b>		<b>1,522</b>	<b>1,545</b>	<b>1.51%</b>	<b>3,600</b>	<b>3,670</b>	<b>1.94%</b>	<b>11,290.5</b>	<b>11,425.5</b>	<b>1.20%</b>	<b>2,3653</b>	<b>2,3754</b>	<b>0.43%</b>	<b>1081</b>	<b>1104</b>	<b>24</b>
Undergraduate Day School	MATRIC (XRG)	54	52	-3.70%	105	115	9.52%	307.0	323.5	5.37%	1,9444	2,2115	13.74%	26	27	1
	MATRIC (non-XRG)	270	241	-10.74%	305	284	-6.89%	929.0	862.0	-7.21%	1,1296	1,1784	4.32%	77	72	(6)
<b>Total Date to Date Comparison</b>		<b>1,576</b>	<b>1,597</b>	<b>1.33%</b>	<b>3,705</b>	<b>3,785</b>	<b>2.16%</b>	<b>11,597.5</b>	<b>11,749.0</b>	<b>1.31%</b>	<b>2,3509</b>	<b>2,3701</b>	<b>0.82%</b>	<b>1184</b>	<b>1203</b>	<b>19</b>

\*Notes  
Fall 2020 registration opened July 6, 2020  
Fall 2019 registration opened July 8, 2019

CGCE Fall 2019 Professional Prog enrollment as of 10.4.2019 vs. Fall 2020 as of 10.4.2020 at 12:30 p.m.		DISTINCT STUDENT COUNT			SEAT COUNT			CREDITS			AVG SEATS TAKEN		
COLLEGE	STUDENT_TYPE	Fall 2019	Fall 2020	Variance	Fall 2019	Fall 2020	Variance	Fall 2019	Fall 2020	Variance	Fall 2019	Fall 2020	Variance
Graduate (GCE)	MATRIC	53	60	13.21%	435	543	24.83%	1,196.0	1,640.0	37.12%	8,2075	9,0500	10.27%
<b>*TOTAL COLLEGE Graduate (GCE)</b>		<b>53</b>	<b>60</b>	<b>13.21%</b>	<b>435</b>	<b>543</b>	<b>24.83%</b>	<b>1,196.0</b>	<b>1,640.0</b>	<b>37.12%</b>	<b>8,2075</b>	<b>9,0500</b>	<b>10.27%</b>

**College of Graduate and Continuing Education - Recruit Funnel for Spring Terms  
Data Pulled for Spring 2021 on Oct. 2, 2020**

		Spring 2017		Spring 2018		Spring 2019		Spring 2020		Spring 2021		Spring 2020 as of 10/1/2019	
LEVL	SOURCE	COUNT	RATIO	COUNT	RATIO	COUNT	RATIO	COUNT	RATIO	COUNT	RATIO	COUNT	RATIO
GR	RECRUITED	72	.00%	102	.00%	120	.00%	145	.00%	79	.00%	139	.00%
	APPLIED	49	68.06%	56	54.90%	55	45.83%	59	40.69%	30	37.97%	38	27.34%
	ACCEPTED	33	63.27%	28	50.00%	44	80.00%	37	62.71%	15	50.00%	7	18.42%
	ENROLLED	25	67.74%	20	71.43%	41	93.18%	36	97.30%	0	.00%	0	.00%
PB	RECRUITED	20	.00%	23	.00%	21	.00%	22	.00%	7	.00%	23	.00%
	APPLIED	17	85.71%	15	65.22%	15	71.43%	14	63.64%	4	57.14%	12	52.17%
	ACCEPTED	11	61.11%	10	66.67%	13	86.67%	10	71.43%	4	100.00%	5	41.67%
	ENROLLED	9	81.82%	9	90.00%	6	46.15%	6	60.00%	0	.00%	0	.00%
SB	RECRUITED	14	.00%	20	.00%	29	.00%	18	.00%	7	.00%	18	.00%
	APPLIED	12	85.71%	11	55.00%	14	48.28%	12	66.67%	3	42.86%	8	44.44%
	ACCEPTED	10	83.33%	10	90.91%	10	71.43%	5	41.67%	2	66.67%	2	25.00%
	ENROLLED	5	40.00%	5	50.00%	7	70.00%	5	100.00%	0	.00%	0	.00%
UG	RECRUITED	154	.00%	175	.00%	200	.00%	194	.00%	112	.00%	138	.00%
	APPLIED	99	64.29%	106	60.57%	132	66.00%	106	54.64%	50	44.64%	73	52.90%
	ACCEPTED	62	59.60%	65	61.32%	87	65.91%	72	67.92%	19	38.00%	11	15.07%
	ENROLLED	38	50.85%	46	70.77%	65	74.71%	63	87.50%	0	.00%	0	.00%
<b>TOTAL RECRUITS</b>		<b>260</b>		<b>320</b>		<b>370</b>		<b>379</b>		<b>205</b>		<b>318</b>	
<b>TOTAL APPS</b>		<b>177</b>		<b>188</b>		<b>216</b>		<b>191</b>		<b>87</b>		<b>131</b>	
<b>TOTAL ACCEPTS</b>		<b>116</b>		<b>113</b>		<b>154</b>		<b>124</b>		<b>40</b>		<b>25</b>	
<b>TOTAL ENROLL</b>		<b>77</b>		<b>80</b>		<b>119</b>		<b>110</b>		<b>0</b>		<b>0</b>	

**NOTES:**

CGCE has rolling admissions for spring and will take students until the start of the Spring term.

The Graduate recruitment number does not reflect the 500 prospective students for the M.S. in Physician Assistant Studies program

# College of Graduate and Continuing Education - Fall Funnel Report

Data for Fall 2020 pulled on September 21, 2020 - FINAL RECRUITMENT NUMBERS

		Fall 2016		Fall 2017		Fall 2018		Fall 2019		Fall 2020	
LEVL	SOURCE	COUNT	RATIO	COUNT	RATIO	COUNT	RATIO	COUNT	RATIO	COUNT	RATIO
GR	RECRUITED	551	.00%	544	.00%	862	.00%	1042	.00%	999	.00%
	APPLIED	304	47.26%	352	64.71%	342	37.66%	436	41.84%	422	42.24%
	ACCEPTED	201	55.81%	244	69.32%	250	87.11%	251	57.57%	253	59.95%
	ENROLLED	170	79.19%	197	80.74%	204	81.60%	192	76.49%	219	86.56%
PB	RECRUITED	33	.00%	30	.00%	56	.00%	48	.00%	40	.00%
	APPLIED	25	75.76%	29	96.67%	37	66.07%	29	60.42%	31	77.50%
	ACCEPTED	15	52.00%	19	65.52%	26	70.27%	24	82.76%	26	83.87%
	ENROLLED	11	73.33%	16	84.21%	22	84.62%	16	66.67%	18	69.23%
SB	RECRUITED	31	.00%	25	.00%	48	.00%	49	.00%	27	.00%
	APPLIED	17	54.84%	23	92.00%	24	50.00%	26	53.06%	9	33.33%
	ACCEPTED	17	94.12%	22	95.65%	19	79.17%	22	84.62%	8	88.89%
	ENROLLED	13	81.25%	10	33.33%	13	68.42%	16	72.73%	5	62.50%
UG	RECRUITED	414	.00%	294	.00%	405	.00%	498	.00%	419	.00%
	APPLIED	256	61.50%	221	75.17%	207	51.11%	216	43.37%	162	38.66%
	ACCEPTED	192	70.47%	155	70.14%	148	71.50%	160	74.07%	128	79.01%
	ENROLLED	125	64.80%	104	67.10%	103	69.59%	137	85.63%	118	92.19%
<b>TOTAL RECRUITS</b>		<b>1029</b>		<b>893</b>		<b>1371</b>		<b>1637</b>		<b>1485</b>	
<b>TOTAL APPS</b>		<b>602</b>		<b>625</b>		<b>610</b>		<b>707</b>		<b>624</b>	
<b>TOTAL ACCEPTS</b>		<b>425</b>		<b>440</b>		<b>443</b>		<b>457</b>		<b>415</b>	
<b>TOTAL ENROLL</b>		<b>319</b>		<b>327</b>		<b>342</b>		<b>361</b>		<b>360</b>	

**Notes:**

Fall 2020 is down for Undergraduate students in comparison to this time last year, however we are on track with previous years. CGCE recruits and accepts applications until a few weeks before the semester begins in the fall.

## Funnel by Graduate Program for Fiscal Year 2021

### Final Fall 2020 Numbers

FY21 Enrollment Funnel - Includes Fall 2020 as of September 21, 2020																				
Funnel Stage	MSW - Westfield	Goal	% to Goal		MSW- Worcester	Goal	% to Goal		Counseling	Goal	% to Goal		ABA	Goal	% to Goal		Accounting	Goal	% to Goal	
Prospect	386	275	140.4%		147	75	196.0%		151	90	167.8%		85	60	141.7%		30	30	100.0%	
Applications Submitted	196	175	112.0%		64	50	128.0%		60	50	120.0%		21	30	70.0%		9	29	31.0%	
App Complete	167				48				46				16				9			
Admits	114	115	99.1%		24	30	80.0%		41	28	146.4%		12	16	75.0%		9	15	60.0%	
Confirmed	104				20				31				12				9			
Enrolled	94	86	109.3%		20	24	83.3%		30	20	150.0%		12	15	80.0%		9	15	60.0%	
Enrollment cap of 86; Fall 2020 start				Enrollment cap of 24; Fall 2020 start				Enrollment cap of 20; for Fall 2020 start				Enrollment cap of 15. Fall start				Rolling admissions for Fall 2020 and Spring 2021.				
Funnel Stage	Physician Assistant	Goal	% to Goal		CJ	Goal	% to Goal		MPA	Goal	% to Goal		Education	Goal	% to Goal		English	Goal	% to Goal	Total
Prospect	500	250	200.0%		42	35	120.0%		48	35	137.1%		83	110	75.5%		13	15	86.7%	985
Applications Submitted	322	175	184.0%		8	29	27.6%		15	27	55.6%		34	75	45.3%		3	12	25.0%	410
Admits	0	30	0.0%		7	22	31.8%		15	22	68.2%		31	48	64.6%		3	10	30.0%	256
Confirmed	0	30	0.0%		7				15				31				3			232
Enrolled	0	30	0.0%		7	18	38.9%		15	17	88.2%		29	39	74.4%		3	7	42.9%	219
Enrollment cap of 30; interviews are in progress so not decisions have been sent				Rolling admissions for Fall 2020, Spring 2021 and Summer 2021.				Rolling admissions for Fall 2020, Spring 2021 and Summer 2021.				Rolling admissions for Fall 2020, Spring 2021 and Summer 2021.				Rolling admissions for Fall 2020, Spring 2021 and Summer 2021.				
FY20 Enrollment Funnel - Includes Fall 2019 as of September 18, 2019																				
Funnel Stage	MSW - Westfield	Goal	% to Goal		MSW- Worcester	Goal	% to Goal		Counseling	Goal	% to Goal		ABA	Goal	% to Goal		Accounting	Goal	% to Goal	
Prospect	408	275	148.4%	==	139	75	185.3%	==	122	90	135.6%	==	92	60	153.3%	==	34	35	97.1%	==
Applications Started	254				96				62				29				23			
Applications Submitted	204	175	116.6%	==	72	50	144.0%	==	45	50	90.0%	==	21	30	70.0%	==	17	33	51.5%	==
Admits	95	96	99.0%	==	38	30	126.7%	==	33	25	132.0%	==	15	16	93.8%	==	11	20	55.0%	==
Confirmed	89				30				28				14				8			
Enrolled	74	86	86.0%	==	22	24	91.7%	==	27	20	135.0%	==	10	15	66.7%	==	7	18	38.9%	==
154 complete				62 complete				40 complete				incl. 2 certs in admit								
Funnel Stage	Physician Assistant	Goal	% to Goal		CJ	Goal	% to Goal		MPA	Goal	% to Goal		Education	Goal	% to Goal		English	Goal	% to Goal	Total
Prospect		250	0.0%	==	54	35	154.3%	==	61	35	174.3%	==	118	110	107.3%	==	16	15	106.7%	== 1044
Applications Started					22				30				71				10			== 597
Applications Submitted	271	175	154.9%	==	13	29	44.8%	==	18	27	66.7%	==	41	75	54.7%	==	8	12	66.7%	== 439
Admits		30	0.0%	==	10	22	45.5%	==	14	22	63.6%	==	32	60	53.3%	==	5	10	50.0%	== 253
Confirmed		30	0.0%		10				13				30				5			== 227
Enrolled		30	0.0%	==	10	18	55.6%	==	13	18	72.2%	==	25	50	50.0%	==	5	7	71.4%	== 193

A photograph of a university campus during autumn. The top half of the image is dominated by the branches and leaves of trees with vibrant red, orange, and yellow foliage against a clear blue sky. Below this, a dark blue horizontal banner contains white text. The bottom half of the image shows a brick building on the left and a brick pillar with a lamp on the right, with a black metal fence in the foreground. The overall scene is bright and clear.

**WESTFIELD STATE UNIVERSITY**  
**ENROLLMENT MANAGEMENT**  
BOARD OF TRUSTEES | OCTOBER 13, 2020

**Westfield**  
STATE UNIVERSITY

# ADMISSION FUNNEL REPORT — FIRST-YEARS

10/2/2020

**FALL 2020**

**FALL 2021**

PROSPECTS

INQUIRIES

APPLICATIONS

COMPLETE APPLICATIONS

ACCEPTS

DEPOSITS

DENIED

# ADMISSION FUNNEL REPORT — TRANSFERS

10/2/2020

**FALL 2020**

**FALL 2021**

PROSPECTS

---

INQUIRIES

---

APPLICATIONS

---

COMPLETE APPLICATIONS

---

ACCEPTS

---

DEPOSITS

---

DENIED

---

A photograph of a modern campus building with a prominent glass tower section. The building is set against a blue sky with scattered white clouds. In the foreground, there are out-of-focus pink flowers on the left and right sides. A dark blue horizontal band is overlaid across the middle of the image, containing white text.

# DAY DIVISION ADMISSION

## Spring 2021 Initiatives

**“You may have missed us in the fall,  
but you won’t fall behind.”**

**TARGET AUDIENCE:**

**2020 fall students who chose not to attend WSU or ANY college or university.**

This initiative is designed to help students catch up by assisting in covering summer 2021 courses at Westfield State through CGCE if they enroll for spring 2021 and are accepted to the University. Students who enroll for spring 2021, would be eligible for a 50% discount on 3 summer courses through CGCE.

# NEST INCENTIVE

## TARGET AUDIENCE:

**Students who apply by November 15<sup>th</sup> for spring 2021**

If they are accepted to the University, they will receive an automatic one-time \$500 award (certificate in their acceptance letter).

# HOUSING GRANT INITIATIVE

## TARGET AUDIENCE:

### **New commuters & returning students**

A \$1,000 one-time scholarship offered to new commuters to live on campus and students who may wish to return to campus. Students must have at least \$1,000 in unmet need in order to receive the scholarship (after all merit and grant aid are calculated). The scholarship will only apply to spring 2021 semester.



DAY DIVISION ADMISSION  
Spring & Fall 2021 Initiatives



# WSU ALUMNI LEGACY AWARD

## TARGET AUDIENCE:

### **Eligible and accepted prospective students**

Prospective students whose parents/guardians attended Westfield State University would be eligible for this \$1,000 per year award, upon acceptance to the University, renewable each semester.

# WINGS INITIATIVE

## TARGET AUDIENCE:

### **Prospective students**

Working collaboratively with the Westfield State AAUR Office, WSU alumni, faculty, staff, parents, friends, will be able to identify prospective students who are a good fit for Westfield State and recommend them to Admission by completing an online form. Once a name is received, a thank you card (from Admissions and AAUR) with a window sticker will be sent to the person recommending the student.

# Welcome to the Nest: Where Leaders are Hatched

## TARGET AUDIENCE:

### Prospective students

With the support of SGA, current WSU students will recommend prospective students to WSU. The current WSU student will submit a form online with the prospect's name. If the prospect applies, is accepted, and deposits by May 1<sup>st</sup>, the current student will receive a WSU sweatshirt – the screen will be designed by one of our WSU students. **There will be a contest in October to design a screen for the sweatshirt – the winner receives a sweatshirt.**

# BILLBOARD & LAWN SIGN ADVERTISEMENTS

## **BILLBOARDS:**

Billboards advertising Westfield State University, our value, and graduate job rate placement will be advertised along I-90 MA TPKE, I-291, and I-290.

## **LAWN SIGNS:**

Lawn sign advertising Westfield State University, our value, and graduate job rate placement. Signs will be available for employees, alumni, community, family & friends.



## TEAMS INITIATIVE

Using a team approach, each of the 3 Colleges is a team comprised of: the **College Dean**, the **Director of Admission**, **1-3 admission counselors**, **department chairs**, **WSU students**, and **Admission student tour guides**.

Each team will work to effectively promote and market WSU to prospective and accepted students.

### Other teams include:

Honors, Urban Education, Banacos, and Athletics.

### Promotions include:

Virtual events by college and/or department, eCards, and publications.



---

### **OPEN HOUSE EVENT** (Pre-recorded)

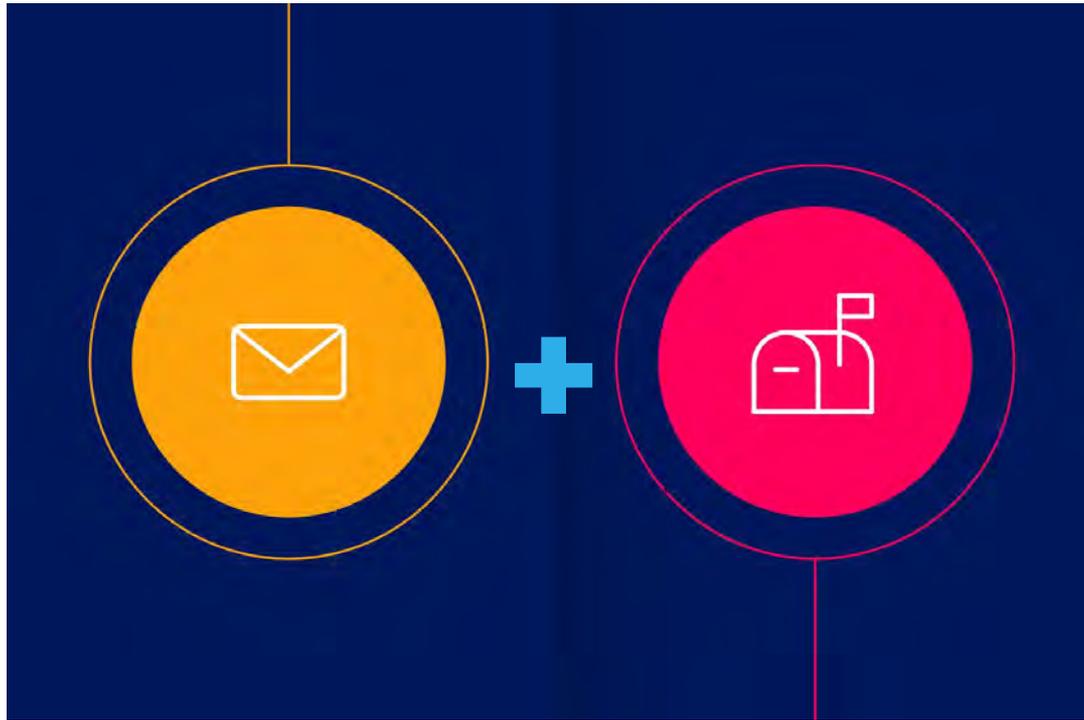
Using the COMEVO platform, the Office of Admission will create a pre-recorded Open House event for prospective students and families to visit at any time throughout the admission cycle. This event will “live” on the WSU website.



---

### **ONCELL PHONE TOUR APP**

The University has partnered with OnCell and will create a campus tour experience to prospective students and families visiting the campus at any time. Guests will be able to access the “tour” by either downloading the app to their phone or opening their web browser.



**Increased communication with  
prospective students  
through CRM & direct mailings**

BILLBOARD CONCEPT #1

**85%** *of* **WESTFIELD STATE GRADS**  
*are* **EMPLOYED** *in* **MA**

*2019 Post Graduate Survey respondents reporting employment, indicate working in MA.*

[westfield.ma.edu](http://westfield.ma.edu)

Westfield  
STATE UNIVERSITY

Westfield  
STATE UNIVERSITY

## BILLBOARD CONCEPT #2

**92%** *of* **WESTFIELD STATE GRADS** *are*  
**EMPLOYED** *or in* **GRAD SCHOOL**

2019 Post Graduate Survey respondents reporting employment, indicate working full-time, part-time, or in grad school.

[westfield.ma.edu](http://westfield.ma.edu)

**Westfield**  
STATE UNIVERSITY

**Westfield**  
STATE UNIVERSITY

BILLBOARD CONCEPT #3

**WESTFIELD STATE** *is the*  
**BEST PUBLIC UNIVERSITY** *in MA*  
*for* **GETTING A JOB IN 2020.**  
-Zippia

[westfield.ma.edu](http://westfield.ma.edu)

**Westfield**  
STATE UNIVERSITY

**Westfield**  
STATE UNIVERSITY

**Westfield**  
STATE UNIVERSITY

**BEST PUBLIC MA COLLEGE**  
FOR GETTING A JOB IN 2020.

*Zippia*

[westfield.ma.edu](http://westfield.ma.edu)

**LAWN SIGN**  
CONCEPT #1

**Westfield**  
STATE UNIVERSITY

**Westfield**  
STATE UNIVERSITY

**85%** OF GRADUATES ARE  
**EMPLOYED IN MA**

2019 Post Graduate Survey respondents reporting employment. Indicate working in MA.

[westfield.ma.edu](http://westfield.ma.edu)

**LAWN SIGN**  
**CONCEPT #2**

**Westfield**  
STATE UNIVERSITY



## ADDITIONAL INITIATIVES

- Off-campus Virtual Events (i.e. high school visits, college fairs)
- Live Virtual Information Sessions
- On-campus tours
- Departmental and College Virtual Events
- Pre-recorded Information Sessions
- Outreach to High School Counselors
- Social Media
- Urban Education \$1,000 one-time stipend for students matriculating after the Summer Bridge Program
- \$750 Honors Award (renewable annually)



Westfield  
STATE UNIVERSITY

# Institutional Advancement DASHBOARD

July 1, 2020–September 30, 2020

## Executive Summary

Dollars: \$161,651

- Down: \$4,387 from September 2019
- Down: \$114,730 from September 2018

Donors: 272

- 51 New Donors
- 70 Reactivated
- 151 Retained

The Foundation held a very successful virtual Annual Meeting on September 17. One of the highlights was hearing from two students who received Foundation scholarships and the impact the awards have had on them. The Foundation Stewardship Award this year was given to John Davies for his twenty years of counsel and commitment to the Westfield State Foundation.

We continue to navigate waters made challenging by COVID and very limited resources. Typically, we would have a fall direct mail piece out to alumni by now, but have instead begun an electronic appeal that we hope will result in a similar impact but with reduced expenses.

### IN THE WORDS OF OUR STUDENTS

“ Although it has been a long and nontraditional road for my education, I am determined to achieve my dream of being an accountant. Your generosity will not be forgotten. I hope to attain my career goals and one day will be able to provide the same assistance for students who are in need. ”

- Lavar Jackson '19 Bachelor of Science in Business Management

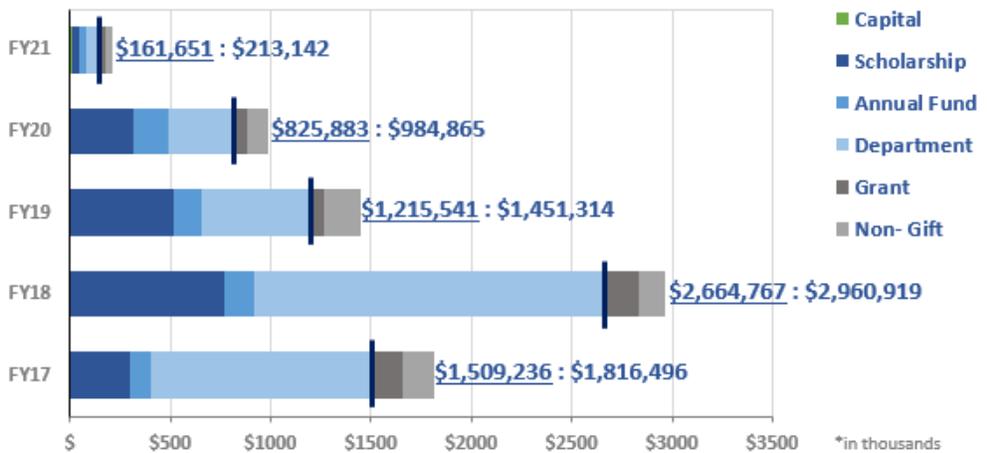
**\$161,651**  
Dollars

**272**  
Donors

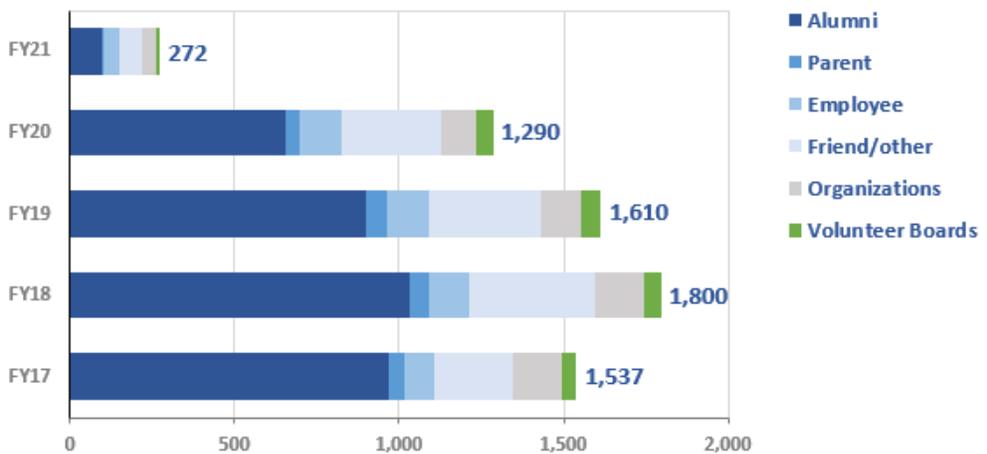
**\$20.00**  
Median

**\$260.72**  
Gift Ave. Gift

Total Dollars  
By Giving Area



Total Donors  
By Constituent



Dollars By Month



# Institutional Advancement DASHBOARD

July 1, 2020-September 30, 2020

## Fundraising Focus



### FOUNDATION GOLF

Donors: 41  
Dollars: \$30,657



### OWLS HELPING OWLS

(Emergency Covid-19 Funding)  
Donor: 1  
Dollars: \$20,000



### HOCKEY LOCKER ROOM

Donors: 1  
Dollars: \$12,500



### DEVER STAGE SEATS

Donors: 0  
Dollars: \$0



### GALA 2021

Donors: 0  
Dollars: \$0



### GIVE A HOOT

Donors: 0  
Dollars: \$0

CMS: College of Math and Science

CEHHS: College of Education, Health, and Human Services

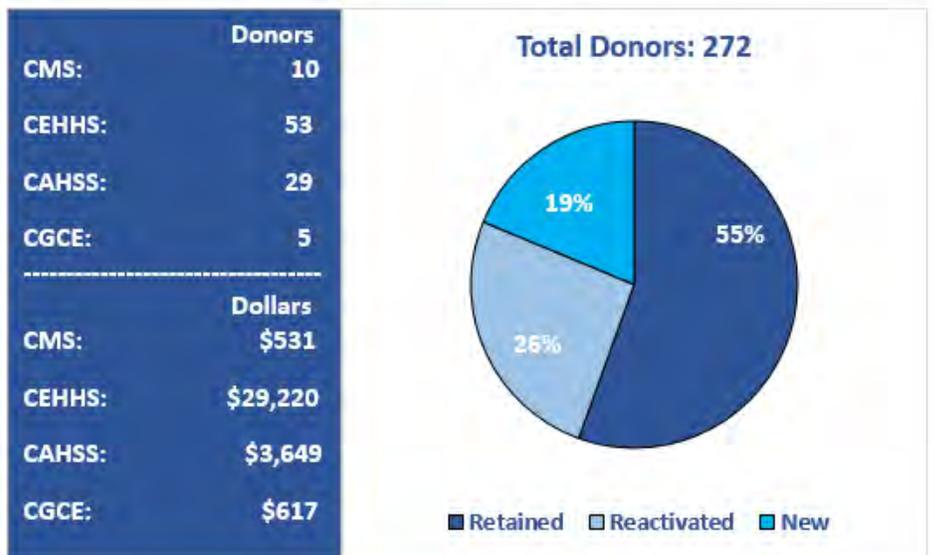
CAHSS: College of Arts, Humanities, and Social Sciences

CGCE: College of Graduate and Continuing Education

Note: Starting January 31, 2020, the Volunteer Board figures include gifts that were soft credited to the donor. A donor receives SOFT CREDIT when their direct actions result in a gift, but they are not entitled to a charitable deduction for that donation.

## Gift Pyramid

		Donors	Dollars
1839 Society	\$25,000 or higher	0	0
University Circle	\$10,000-\$24,999	5	\$74,300
Trustees Circle	\$5,000-\$9,999	3	\$21,126
Dickinson Circle	\$2,500-\$4,999	4	\$11,800
Scanlon Circle	\$1,000-\$2,499	14	\$20,163
President's Circle	\$500-\$999	29	\$16,561
Westfield Society	\$250-\$499	17	\$5,011
Century Club	\$100-\$249	51	\$7,083
Gifts up to \$99	\$1-\$99	149	\$5,608
<b>Total</b>		<b>272</b>	<b>\$161,651</b>



**Retained Donor:** A donor who gave last year and gave again this year.

**Reactivated Donor:** A donor who gave sometime in the past, but not last year, and gave again this year.

**New Donor:** A donor who had given a gift for the first time.

Volunteer Boards	Population	Donors	Participation	Ave Gift	Dollars
<b>Board of Trustees</b>					
FY21	11	2	18%	\$ 117	\$ 1,290
FY20	11	10	91%	\$ 4,480	\$ 49,283
<b>Foundation Board of Directors</b>					
FY21	26	6	23%	\$ 75	\$ 1,955
FY20	26	24	92%	\$ 2,221	\$ 57,757
<b>Alumni Association Executive Council</b>					
FY21	16	2	13%	\$ 2	\$ 30
FY20	15	14	93%	\$ 235	\$ 3,520
<b>Cabinet</b>					
FY21	7	5	71%	\$ 529	\$ 3,706
FY20	8	8	100%	\$ 1,135	\$ 9,081

Note: Volunteer Boards includes Board of Trustees, Foundation Board of Directors, and the Alumni Association Executive Council.