



## Board of Trustees

### Advancement & Enrollment Management Committee

8:30 AM  
December 17, 2020  
Zoom

- 
- |  |                              |
|--|------------------------------|
| <b>1. Call to Order</b>                                    | Trustee Martinez-Alvarez     |
| <b>2. Approval of Minutes</b><br>October 13, 2020          | Trustee Martinez-Alvarez     |
| <b>3. Items for Discussion</b>                             |                              |
| <b>4. Items for Action</b><br>Motion: Staff Emerita Status | Erica Broman                 |
| <b>5. Items for Information</b>                            |                              |
| a) Institutional Advancement Dashboard                     | Erica Broman                 |
| b) Spreading Our Wings                                     | Erica Broman                 |
| c) Internship Outreach                                     | Erica Broman                 |
| d) Fall Appeal-Board Participation                         | Erica Broman                 |
| e) Bequest Gift Announcement                               | Erica Broman                 |
| f) Spring & Fall Update                                    | Dan Forster/Stefanie Sanchez |
| g) Admissions Virtual Visits                               | Dan Forster                  |
| h) Financial Aid Award Timeline                            | Dan Forster                  |
| i) Marketing Update  | Dan Forster                  |
| j) 3E Partnership  | Dan Forster                  |

#### Attachment(s):

- a) Minutes – October 13, 2020
- b) Motion – Staff Emerita
- c) Staff Emeriti Justifications
- d) Institutional Advancement Dashboard
- e) CGCE Spring 2021 Recruitment Funnel
- f) CGCE Fall 2021 Recruitment Funnel
- g) CGCE FY22 Graduate Program Funnel
- h) Enrollment Management December PowerPoint Presentation



## Board of Trustees

Advancement and Enrollment Management Committee

October 13, 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:** Committee Chair Martinez-Alvarez, Secretary Magovern, and Trustees Alvarado, Boudreau, Martin, and Neves

**MEMBERS EXCUSED:** Committee Vice Chair Hagan

**TRUSTEE GUESTS PARTICIPATING REMOTELY:** Trustees Queenin and Williams (joined the meeting at 8:45 AM)

Dr. Roy H. Saigo, Interim President of Westfield State University, was also participating remotely.

The meeting was called to order at 8:30 AM by Committee Chair Martinez-Alvarez.

**MOTION** made by Trustee Martin, seconded by Trustee Neves, to approve the minutes of the June 25, 2020 meeting.

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

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

**Motion passed unanimously.**

Focus Group Research – On Campus and Springfield Schools. Mr. Daniel Forster, Vice President for Enrollment Management, shared the need to reach out to Springfield Public School (SPS) students to ascertain what they are looking for in an institution and their perceptions of Westfield State University (WSU). Virtual sessions with WSU counselors and SPS students have taken place and there are plans to bring SPS students to Westfield State to interact with on-campus students to hear what drew them to WSU from Springfield, Holyoke and Chicopee. Conversations need to take place with Westfield Promise students to find out why they are not choosing WSU at the end of their program. Corrections then need to be made to programming to make WSU more prominent and inviting to all these students. President Saigo stated that Holyoke and Springfield Technical Community Colleges have a 25 percent Latinx population and Westfield State is at 11 percent. We need to find the barriers and challenges for these students and turn it around quickly.

Revised Memorandum of Understanding (MOU) between the University and the Foundation. Dr. Erica Broman, Vice President for Institutional Advancement, stated the Memorandum of Understanding was crafted in 2015, and a recent review of the materials was led by Foundation members Mr. Andy Oleksak, Mr. John Davies, and Honorable Elizabeth Scheibel. Hon. Scheibel was participating in the meeting and stated the MOU was updated and contained two substantive changes.

- Language was added that the Foundation would have representation on the search committee for any future Executive Director.
- Foundation funds distributed to the University will be no more than 4% of the Foundation’s restricted investment income based on a twelve-quarter average as the Foundation endeavors to limit its use of unrestricted funds until its unrestricted endowment reaches \$3 million. The Westfield State Foundation endowment is far below all other sister universities. We need to do a better job of raising funds that could be designated as unrestricted in order to give more support to the University.

**MOTION** made by Trustee Martinez-Alvarez, seconded by Trustee Magovern, 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.

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

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

**Motion passed unanimously.**

College of Graduate and Continuing Education (CGCE) Fall 2020 Update. Dr. Stefanie Sanchez, Dean of CGCE, shared a presentation on enrollment for CGCE.

- Higher than projected Summer II session with largest gain in day division students, increasing by 19 but number of credits increased to 80 percent over last year.
- A decline of 30 full-time equivalents (FTEs) in undergraduates this fall from last year but the graduate program showed an increase of 50 FTEs from last year, due to the Criminal Justice 4+1 and the counseling programs. There were 27 more FTEs than last year, higher than anticipated.
- Trustee Williams joined the meeting at 8:45 AM.
- Graduate and undergraduate spring recruitment funnels were shared as well as marketing initiatives.
- Risks and opportunities for FY21 were shared. The Continuing Education undergraduate students are showing a decline in enrollment and program rejuvenation is being focused on.
- Enrollment goals have been met or exceeded. Enrollment is reviewed weekly and revenue by term. There is a surplus for Summer II and fall sessions and they are still recruiting. It was requested to share at the next meeting what those goals are and what formula is used is for them.
- CGCE is less affected by the pandemic as most of their classes were already online so the switch to an online format is not as significant. They also offer many professional development opportunities and certificate programs to bolster new enrollments. Their contribution to the University has risen considerably over the last several years.

Day Division Fall 2020 Update. Mr. Forster gave a presentation and shared current funnels, showing we are slightly ahead of projections in all categories. A very successful social media and marketing campaign has been initiated.

- Virtual meetings with high school students are not what they usually are as students are still adjusting to online life.

- In-person tours continue to fill up, but usual open houses cannot be held this fall. Alternatives such as a COMEVO pre-recorded open house event and OnCell phone tour apps are being utilized.
- New Admissions initiatives for spring and fall 2021 have been launched and were shared. These initiatives target students who did not attend college this fall, the NEST Incentive encouraging application by November 15, the Housing Grant Initiative for new commuter and returning students, the Alumni Legacy Award for children of WSU alumni, the WINGS Initiative to nominate a prospective student, and Welcome to the Nest: Where Leaders are Hatched where students will receive a sweatshirt if a student they recommended makes a deposit by May 1.
- The Teams Initiative consists of a team created in each college to work together to market and promote the University and connect with prospective and accepted students.
- Increased communication with prospective students through Customer Relationship Management (CRM) and direct mailings. Additional names have also been purchased in New Jersey, New York, Pennsylvania, and Massachusetts.
- A marketing and social media campaign has started. Contingencies will fund billboards on I-90, I-291, and I-290 and the Spreading our Wings initiative provides lawn signs for a donation of \$10 toward the internship fund for students.

Dr. Broman shared the following information.

Institutional Advancement Dashboard. The first quarter Dashboard has been revised to provide more detail. In-person and extra events cannot be scheduled at this time. This year, fundraising is a little behind last year (due to the annual appeal not being able to be sent out), but ahead of the prior year. We have spent two years cultivating larger gifts and anticipate having a good year. The new campaigns for the hockey locker room and Dever stage seats were explained.

Enhanced Alumni Website. A video clip of the new alumni website was viewed. It is providing great communication engagement with alumni and furthers the work of the major gift officers.

Fall Appeal. An e-appeal will be sent this week followed by a mailer later.

Virtual Sweet Success Event. This year the scholarship event will consist of a virtual portal on the website where donors with endowed scholarships can go online at any time to see where their scholarship is in the process and who received it. There has been 100 percent thank you note participation from students, and donors with endowed scholarships will receive a virtual thank you from the recipient. This event will be uploaded in November.

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

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

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

**Motion passed unanimously.**

Meeting adjourned at 9:37 AM.

Attachments presented at this meeting:

- 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

**Secretary's Certificate**

I hereby certify that the foregoing is true and correct copy of the approved minutes of the Westfield State University Board of Trustees Advancement and Enrollment Management Committee meeting held on October 13, 2020.

\_\_\_\_\_

Robert Magovern, Secretary

\_\_\_\_\_

Date



## Board of Trustees

December 17, 2020

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### MOTION

To approve the granting of staff emerita status, effective December 17, 2020 to the following individuals:

Sue Krieg

Pat Berube

Amy Szlachetka

Katherine Tansey

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Kevin R. Queenin, Chair

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Date

## **STAFF EMERITA JUSTIFICATIONS**

**December 17, 2020**

**Sue Krieg** helped transform the lives of thousands of Westfield State students during her thirty plus year tenure at the institution. Beginning part-time in 1990, and then full-time in 1996, Sue was synonymous with the incredible work being done at the Banacos Center. Her voice, leadership and ideas helped shape our Learning Disabilities program. Just as importantly, her loyalty, kindness and unconditional support allowed so many students to excel despite their learning differences. Sue has been described in the words of her own advisees as a “lifesaver” and my “college mom”. So many have expressed their indebtedness to her for smoothing their path to life beyond college. Her impact was so significant that an endowed scholarship was established in her name.

**Pat Berube** was hired in 1985 and spent the next 34 years ensuring Westfield State students were as healthy as they could be. In addition to her role as Director, Pat served as a co-advisor to the Emergency Medical Services Club, served on the student threat assessment team, advised and mentored countless students and served on the city-wide Emergency Response Team. Pat was behind the development of the first true Health and Wellness department at the University, she developed the first Health Fairs, Flu Clinics, Sexually Transmitted Disease Clinics, Stop Smoking Workshops and held events focused on eating disorders, substance abuse and general health and well-being. When the city was struck by a significant snowstorm, Pat stepped up and coordinated an emergency shelter at the Woodward Center.

**Amy Szlachetka's** title was Director, Campus Center and Commuter Student Services, but that does not begin to explain her impact at Westfield State over her 25 plus years of service. She came to Westfield State in 1994 and during her tenure here served as Class Advisor twice, advisor for the Student Ambassadors and also for the Commuter Council. She volunteered for an untold number of student activities and often chaperoned student trips. She taught exercise science classes and conducted health and wellness workshops. She designed the Fitness Center, served as its founding director, trained all the staff and made it the premier fitness facility in the area. She was a lead staffer on the re-design of the Campus Center and an innovator in the best use of its limited space.

**Katherine Tansey** came to Westfield State in a temporary position. This temporary position was evolved into a permanent one lasting twenty-six years and several different roles. She began her time at Westfield as a contract employee in Conference Services; from there she migrated to Alumni Affairs and from there to the Library. She started in 2004 in the Education Department and there she stayed until she retired. She is best known for being the “glue” that held the Education Department together. When asked to describe her, the most frequently used words were “queen of multi-tasking”, she had a place for everything and everything was always in its place. Her organizations skills were the reason the Education Department could sail through its accreditations with ease. She was always calm, cool and collected with a warm sense of humor. During registration and advising periods, over 700 students contacted her with intricate and detailed questions. She needed to know the ins and outs of each of the programs, and of course, being Katherine, she did.

# Institutional Advancement DASHBOARD

July 1, 2020 - November 30, 2020

## Executive Summary

**\$307,235**  
Dollars

**451**  
Donors

**\$20.00**  
Median

**\$263.72**  
Ave. Gift

Dollars: \$307,235

- Up: \$89,625 from Nov. 2019
- Up: \$52,305 from Nov. 2018

Donors: 451

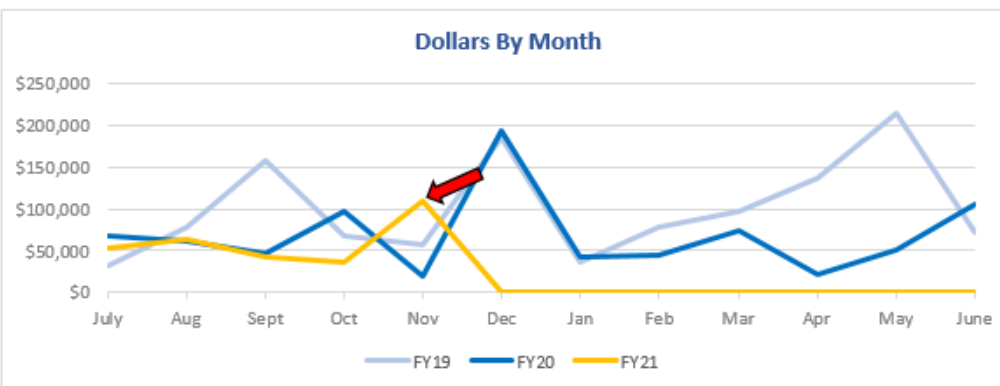
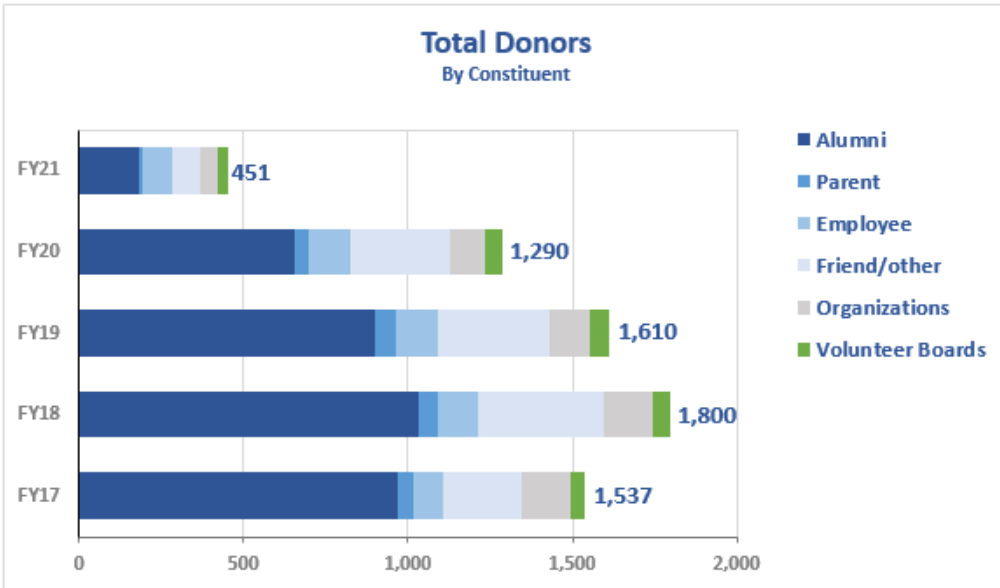
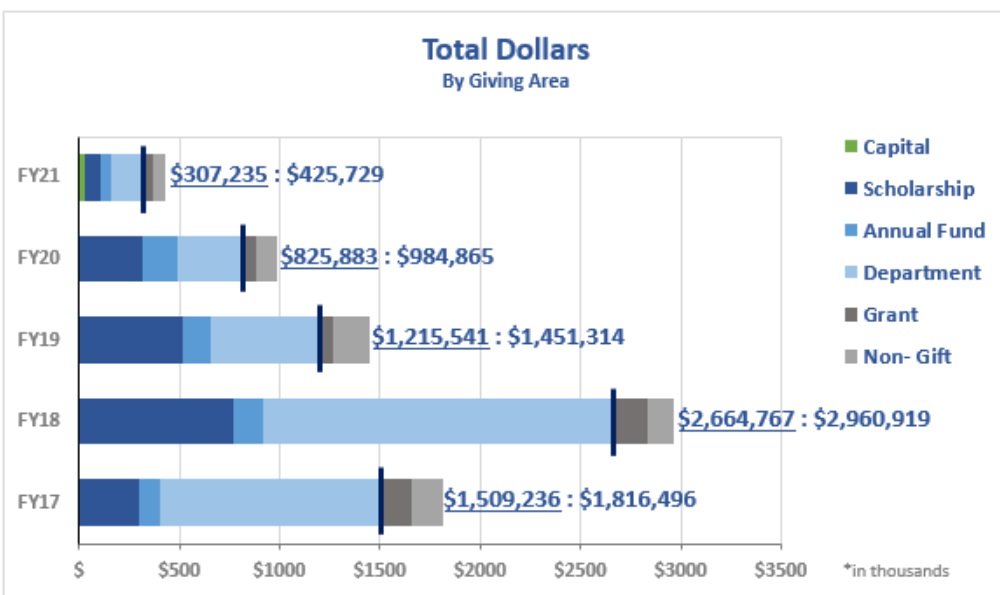
- 96 New Donors ( 21% of total )
- 124 Reactivated Donors
- 231 Retained Donors

Alumni Participation Rate: .37%  
159 undergraduate alumni donors  
(Fall direct mail appeal postponed until December)

### IN THE WORDS OF OUR STUDENTS

“ I cannot express my sincerest gratitude enough to all of the supporters of our nursing program. It is so encouraging to know that there are so many people who truly believe in my classmates and I, and your contributions to our continuing education journey means more than you may realize. Thank you so very much! ”

-Madison Gage '22, Nursing Major





# Institutional Advancement DASHBOARD

July 1, 2020 - November 30, 2020

## Fundraising Focus



### FOUNDATION GOLF

Donors: 42  
Dollars: \$30,907



### OWLS HELPING OWLS

(Emergency Covid-19 Funding)  
Donor: 1  
Dollars: \$21,250



### HOCKEY LOCKER ROOM

Donors: 7  
Dollars: \$32,655



### 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

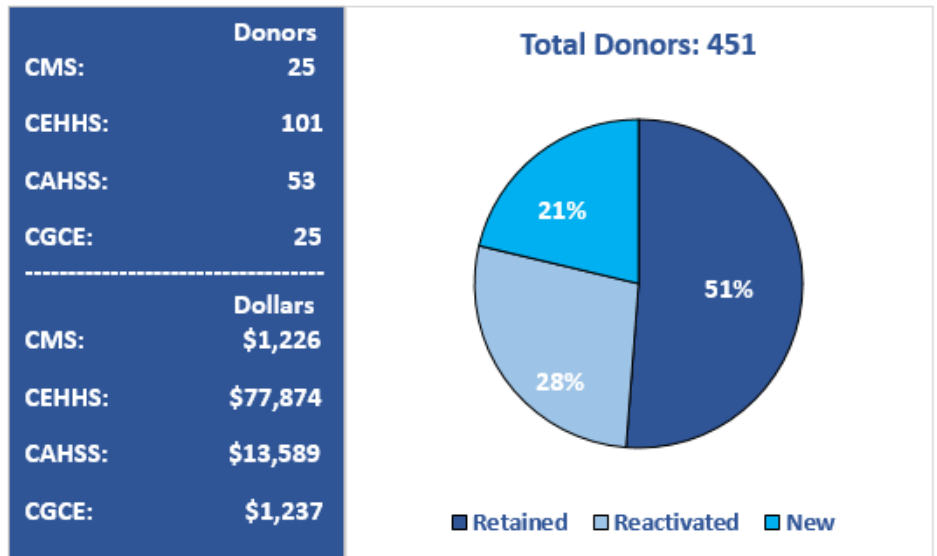
CAHSS: College of Arts, Humanities, and Social Sciences

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	3	\$105,253
University Circle	\$10,000-\$24,999	5	\$76,800
Trustees Circle	\$5,000-\$9,999	4	\$26,626
Dickinson Circle	\$2,500-\$4,999	6	\$19,116
Scanlon Circle	\$1,000-\$2,499	21	\$28,507
President's Circle	\$500-\$999	38	\$21,712
Westfield Society	\$250-\$499	27	\$8,261
Century Club	\$100-\$249	96	\$13,132
Gifts up to \$99	\$1-\$99	251	\$7,829
<b>Total</b>		<b>451</b>	<b>\$307,235</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	6	55%	\$ 215	\$ 2,365
FY20	11	10	91%	\$ 4,480	\$ 49,283
<b>Foundation Board of Directors</b>					
FY21	25	13	52%	\$ 175	\$ 4,365
FY20	26	24	92%	\$ 2,221	\$ 57,757
<b>Alumni Association Executive Council</b>					
FY21	18	7	39%	\$ 4	\$ 70
FY20	15	14	93%	\$ 235	\$ 3,520
<b>Cabinet</b>					
FY21	7	7	100%	\$ 877	\$ 6,141
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.

**College of Graduate and Continuing Education - Recruit Funnel for Spring Terms  
Data Pulled for Spring 2021 on December 7, 2020**

		Spring 2017		Spring 2018		Spring 2019		Spring 2020		Spring 2021		Spring 2020 as of 12/9/2019	
LEVL	SOURCE	COUNT	RATIO	COUNT	RATIO	COUNT	RATIO	COUNT	RATIO	COUNT	RATIO	COUNT	RATIO
GR	RECRUITED	72	.00%	102	.00%	120	.00%	145	.00%	110	.00%	153	.00%
	APPLIED	49	68.06%	56	54.90%	55	45.83%	59	40.69%	60	54.55%	58	37.91%
	ACCEPTED	33	63.27%	28	50.00%	44	80.00%	37	62.71%	32	53.33%	27	46.55%
	ENROLLED	25	67.74%	20	71.43%	41	93.18%	36	97.30%	9	28.13%	10	37.04%
PB	RECRUITED	20	.00%	23	.00%	21	.00%	22	.00%	14	.00%	29	.00%
	APPLIED	17	85.71%	15	65.22%	15	71.43%	14	63.64%	9	64.29%	17	58.62%
	ACCEPTED	11	61.11%	10	66.67%	13	86.67%	10	71.43%	7	77.78%	14	82.35%
	ENROLLED	9	81.82%	9	90.00%	6	46.15%	6	60.00%	0	.00%	3	21.43%
SB	RECRUITED	14	.00%	20	.00%	29	.00%	18	.00%	15	.00%	22	.00%
	APPLIED	12	85.71%	11	55.00%	14	48.28%	12	66.67%	9	60.00%	14	63.64%
	ACCEPTED	10	83.33%	10	90.91%	10	71.43%	5	41.67%	8	88.89%	6	42.86%
	ENROLLED	5	40.00%	5	50.00%	7	70.00%	5	100.00%	1	12.50%	2	33.33%
UG	RECRUITED	154	.00%	175	.00%	200	.00%	194	.00%	162	.00%	182	.00%
	APPLIED	99	64.29%	106	60.57%	132	66.00%	106	54.64%	71	43.83%	100	54.95%
	ACCEPTED	62	59.60%	65	61.32%	87	65.91%	72	67.92%	43	60.56%	63	63.00%
	ENROLLED	38	50.85%	46	70.77%	65	74.71%	63	87.50%	12	27.91%	18	28.57%
<b>TOTAL RECRUITS</b>		<b>260</b>		<b>320</b>		<b>370</b>		<b>379</b>		<b>301</b>		<b>386</b>	
<b>TOTAL APPS</b>		<b>177</b>		<b>188</b>		<b>216</b>		<b>191</b>		<b>149</b>		<b>189</b>	
<b>TOTAL ACCEPTS</b>		<b>116</b>		<b>113</b>		<b>154</b>		<b>124</b>		<b>90</b>		<b>110</b>	
<b>TOTAL ENROLL</b>		<b>77</b>		<b>80</b>		<b>119</b>		<b>110</b>		<b>22</b>		<b>33</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 2021 pulled on December 7, 2021

		Fall 2017		Fall 2018		Fall 2019		Fall 2020		Fall 2021		Fall 2020 as of December 9, 2019	
LEVL	SOURCE	COUNT	RATIO	COUNT	RATIO	COUNT	RATIO	COUNT	RATIO	COUNT	RATIO	COUNT	RATIO
GR	RECRUITED	544	.00%	862	.00%	1042	.00%	985	.00%	549	.00%	817	.00%
	APPLIED	352	64.71%	342	37.66%	436	41.84%	410	41.62%	119	21.68%	215	26.32%
	ACCEPTED	244	69.32%	250	87.11%	251	57.57%	256	62.44%	1	.84%	4	1.86%
	ENROLLED	197	80.74%	204	81.60%	192	76.49%	219	85.55%	0	.00%	0	.00%
PB	RECRUITED	30	.00%	56	.00%	48	.00%	36	.00%	10	.00%	13	.00%
	APPLIED	29	96.67%	37	66.07%	29	60.42%	27	75.00%	2	20.00%	6	46.15%
	ACCEPTED	19	65.52%	26	70.27%	24	82.76%	26	96.30%	1	50.00%	3	50.00%
	ENROLLED	16	84.21%	22	84.62%	16	66.67%	18	69.23%	0	.00%	0	.00%
SB	RECRUITED	25	.00%	48	.00%	49	.00%	27	.00%	13	.00%	7	.00%
	APPLIED	23	92.00%	24	50.00%	26	53.06%	9	33.33%	5	38.46%	1	14.29%
	ACCEPTED	22	95.65%	19	79.17%	22	84.62%	8	88.89%	2	40.00%	1	100.00%
	ENROLLED	10	33.33%	13	68.42%	16	72.73%	5	62.50%	0	.00%	0	.00%
UG	RECRUITED	294	.00%	405	.00%	498	.00%	407	.00%	147	.00%	235	.00%
	APPLIED	221	75.17%	207	51.11%	216	43.37%	153	37.59%	24	16.33%	35	14.89%
	ACCEPTED	155	70.14%	148	71.50%	160	74.07%	127	83.01%	4	16.67%	5	14.29%
	ENROLLED	104	67.10%	103	69.59%	137	85.63%	118	92.91%	0	.00%	0	.00%
<b>TOTAL RECRUITS</b>		<b>893</b>		<b>1371</b>		<b>1637</b>		<b>1455</b>		<b>719</b>		<b>1072</b>	
<b>TOTAL APPS</b>		<b>625</b>		<b>610</b>		<b>707</b>		<b>599</b>		<b>150</b>		<b>257</b>	
<b>TOTAL ACCEPTS</b>		<b>440</b>		<b>443</b>		<b>457</b>		<b>417</b>		<b>8</b>		<b>13</b>	
<b>TOTAL ENROLL</b>		<b>327</b>		<b>342</b>		<b>361</b>		<b>360</b>		<b>0</b>		<b>0</b>	

**Notes:**

CGCE recruits and accepts applications until a few weeks before the semester begins in the fall.

# Funnel by Graduate Program for Fiscal Year 2021

FY22 Funnel Numbers in CGCE: Fall 2021

FY22 Enrollment Funnel - Includes Fall 2021 as of December 8, 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	227	275	82.5%		61	75	81.3%		120	90	133.3%		51	60	85.0%		18	30	60.0%	
Applications Submitted	71	175	40.6%		15	50	30.0%		23	50	46.0%		6	30	20.0%		0	29	0.0%	
App Complete	8				3				1				1				0			
Admits	0	115	0.0%		0	30	0.0%		0	28	0.0%		0	16	0.0%		0	15	0.0%	
Confirmed	0				0				0				0				0			
Enrolled	0	86	0.0%		0	24	0.0%		0	20	0.0%		0	15	0.0%		0	15	0.0%	

Enrollment cap of 86; Fall 2021 start

Enrollment cap of 24; Fall 2021 start

Enrollment cap of 20; for Fall 2021 start

Enrollment cap of 15. Fall start 2021

Rolling admissions for Fall 2021 and Spring 2022.

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	0	250	0.0%		26	35	74.3%		13	35	37.1%		37	110	33.6%		9	15	60.0%			562
Applications Submitted	0	175	0.0%		3	29	10.3%		3	27	11.1%		2	75	2.7%		2	12	16.7%			125
Admits	0	30	0.0%		0	22	0.0%		1	22	4.5%		0	48	0.0%		0	10	0.0%			1
Confirmed	0	30	0.0%		0				1				0				0					1
Enrolled	0	30	0.0%		0	18	0.0%		0	17	0.0%		0	39	0.0%		0	7	0.0%			0

Enrollment cap of 30; Spring 2022 has not opened yet.

Rolling admissions for Fall 2021, Spring 2022 and Summer 2022.

Rolling admissions for Fall 2021, Spring 2022 and Summer 2022.

Rolling admissions for Fall 2021, Spring 2022 and Summer 2022.

Rolling admissions for Fall 2021, Spring 2022 and Summer 2022.

FY21 Enrollment Funnel - Includes Fall 2020 as of December 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	335	275	121.8%	==	134	75	178.7%	==	136	90	151.1%	==	74	60	123.3%	==	22	30	73.3%	==
Applications Submitted	117	175	66.9%	==	46	50	92.0%	==	43	50	86.0%	==	14	30	46.7%	==	5	29	17.2%	==
App Complete	26			==	13			==	10			==	1			==	1			==
Admits	0	96	0.0%	==	0	30	0.0%	==	3	25	12.0%	==	0	16	0.0%	==	1	15	6.7%	==
Confirmed	0			==	0			==	1			==	0			==	1			==
Enrolled	0	86	0.0%	==	0	24	0.0%	==	0	20	0.0%	==	0	15	0.0%	==	0	15	0.0%	==

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	480	250	192.0%	==	42	35	120.0%	==	21	35	60.0%	==	61	110	55.5%	==	10	15	66.7%	==		835
Applications Submitted	287	175	164.0%	==	5	29	17.2%	==	3	27	11.1%	==	8	75	10.7%	==	0	12	0.0%	==		241
Admits	30	30	100.0%	==	0	22	0.0%	==	0	22	0.0%	==	0	48	0.0%	==	0	10	0.0%	==		34
Confirmed	30	30	100.0%	==	0			==	0			==	0			==	0			==		32
Enrolled	30	30	100.0%	==	0	18	0.0%	==	0	17	0.0%	==	0	39	0.0%	==	0	7	0.0%	==		30



**WESTFIELD STATE UNIVERSITY**  
**ENROLLMENT MANAGEMENT**  
BOARD OF TRUSTEES | DECEMBER 17, 2020

**Westfield**  
STATE UNIVERSITY

# ADMISSION FUNNEL REPORT — FIRST-YEARS

12/16/2020

**FALL 2020**

**FALL 2021**

PROSPECTS

---



INQUIRIES

---

APPLICATIONS

---

COMPLETE APPLICATIONS

---

ACCEPTS

---

DEPOSITS

---

DENIED

---

# ADMISSION FUNNEL REPORT — TRANSFERS

12/16/2020

**FALL 2020**

**FALL 2021**

PROSPECTS

---



INQUIRIES

---

APPLICATIONS

---

COMPLETE APPLICATIONS

---

ACCEPTS

---

DEPOSITS

---

DENIED

---

A photograph of a campus scene with a blue banner overlay. The banner contains the text "DAY DIVISION ADMISSION" and "Virtual Visitation Fall 2020". The background shows a modern building with large windows, trees with autumn foliage, and a person walking on a path. In the foreground, a person is sitting on a white chair using a laptop.

# DAY DIVISION ADMISSION

## Virtual Visitation Fall 2020







## WEDNESDAYS WITH WESTFIELD

**Start Date:** December 16

**Details:** An Admission Counselor will host an Information Session and prospective students will be able to hear about the student experience from 3 of our current students at the same event.

Hosting approximately 2 per month.



## COLLABORATION WITH COLLEGE DEANS

To date we have worked with the 3 College Deans to host **45 academic programs** highlighting different majors and programs.

195 students attended these virtual events.

## 2<sup>nd</sup> VIRTUAL OPEN HOUSE

Thursday, **December 10** from **4-6:30 p.m.**

**42 prospective students** currently registered.



## OUR SELF-GUIDED TOUR APP IS LIVE!

QR code on the main visitation page for students to scan so they can download the app from the App Store or Google Play. Students can also access the link on our University website.

### **Analytics as of December 8**

- 33 people download the app
- 1297 people click the tour link on the website
- 220 actively participating in the tour

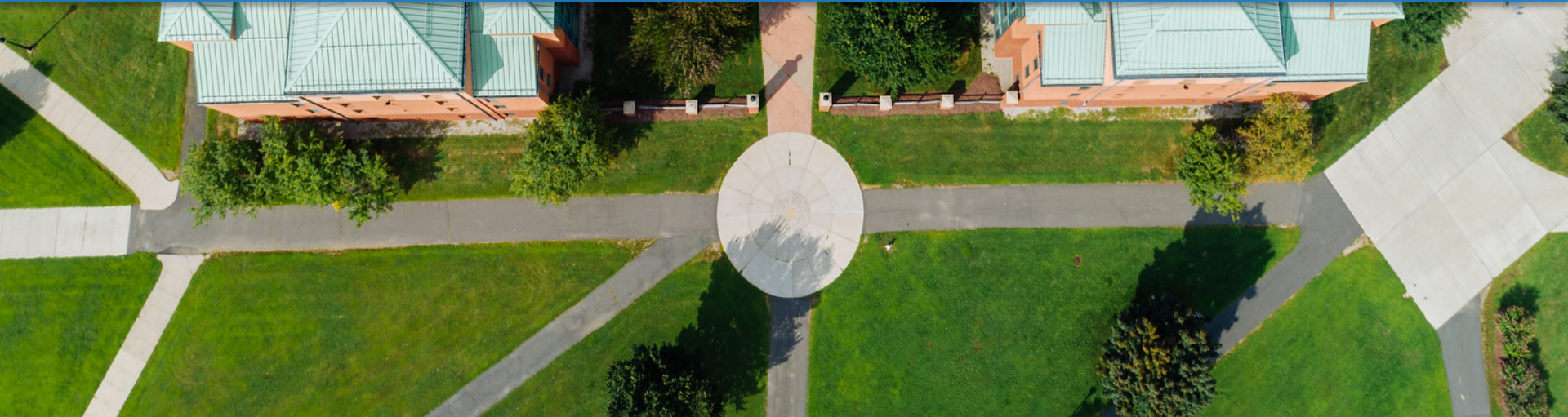
### **Postcard Communication**

Sending to accepted students and inquiries after the new year promoting this virtual opportunity!



# FINANCIAL AID

## Fall 2021



# FINANCIAL AID AWARD TIMELINE

## FALL 2021

Proposed timeline for awarding aid for new students entering for the Fall 2021 semester. This is an aggressive timeline, though manageable if the processes go through without any issue.

### WEEK OF DECEMBER 7

- Finalize Packaging Groups
- Aid Year Roll
- Award Guide draft review & edits
- Award letter updates

### WEEK OF DECEMBER 14

- Finalize Aid Year Roll
- Award guide is sent to Print
- Award letter finalized
- 2021-2022 ISIRs loaded

### WEEK OF DECEMBER 21

- Simulation run using new packaging groups
- Scholarship batch posting

### WEEK OF DECEMBER 28/JANUARY 4

- Completed Awards mailed
- First round of Missing Items letters



# MARKETING

Billboards, Lawn Signs, and Radio Ad

VINYL BILLBOARD

I-291 at 160 Cottage Street

10/26—12/20

**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

## VINYL BILLBOARD

I-90 MA Turnpike, Exit 3, Westfield  
10/16—12/13

**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



DIGITAL BILLBOARD

I-290 Worcester

10/19—12/13

**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

DIGITAL BILLBOARD

I-290 Worcester

10/19—12/13

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Westfield  
STATE UNIVERSITY

Westfield  
STATE UNIVERSITY

DIGITAL BILLBOARD

I-290 Worcester

10/19—12/13

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

Westfield  
STATE UNIVERSITY

Westfield  
STATE UNIVERSITY

DIGITAL BILLBOARD

I-290 Worcester

11/24—12/13

It's all *here.*

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

Westfield  
STATE UNIVERSITY

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Westfield  
STATE UNIVERSITY

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DIGITAL BILLBOARD

I-290 Worcester

11/24—12/13

**MAKE A WISE CHOICE.**

*Be an Owl.*

[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

# RADIO AD

## Partnership with iHeartMedia

### DETAILS

- 6-week program
- January launch
- 30 second ads
- Primetime 6 a.m.—7 p.m.
- 180 Total Ads
- 1,098,000 Impressions
- Listeners age range 18+

### BOSTON

**WBWL-FM (Country, 101.7)**

*LatinX: 4%*

*Black: 5%*

*Other: 91%*

### WORCESTER

**WSRS-FM (Soft Rock, 96.1)**

*LatinX: 5%*

*Other: 95%*

### SPRINGFIELD

**WHYN-FM (Hot AC, 93.1)**

*LatinX: 26%*

*Other: 74%*



A photograph of a campus scene featuring a brick building, trees, and a clear blue sky. The foreground is filled with out-of-focus yellow and green leaves.

# WESTFIELD STATE + 3E PARTNERSHIP

## Awareness Overview & Campaign Results



**This campaign will support fall 2021 application generation and conversion among prospective first-time freshman to meet enrollment goals.**

**Launching January 2021**

## **3E CONVERT NOW**

**AN INTENSE BOOST TO 3E CONVERSION APPLY**

**Student Persona | Fear of Missing Out | Students want to know they are not missing out.**



### **3E PERCEPTIVE EMAIL SERIES**

#### **10 emails in 28 days**

Attention-grabbing, pointing directly to your application, making a connection with a student based on their mindset, lowering anxiety and removing barriers.

WEEK 1 & 2

3 Reasons to Not Miss Out (CTA is applying)

WEEK 2 & 3

**Did You Know?**

You can afford it (scholarship fact)

You'll get a job (career fact)

You can apply now, it's not too late

WEEK 3 & 4

Applying is as Easy as 1, 2, 3 (CTA is applying)

### **3E DIGITAL STRATEGY – 8 Weeks**

Email list matching, retargeting ads, programmatic display ads, and social media ads (Facebook and Instagram)

HOW WE DO IT

# 3E ENGAGEMENT TRACKING & BEHAVIORAL SCORING

**BEHAVIORAL SCORING:**  
Tracking student engagement, actions, and behaviors and assigning points based on each behavior.

Real-time prediction based on a student's actual actions is more telling than historical modeling.

Scores reflect interest and intent and are predictive of a student's likelihood to apply and enroll.

With our comprehensive and sensible scoring, you will always know how to target your resources.

2

OPENED  
OUTREACH  
EMAIL #1



5

CLICKED TO  
LANDING  
PAGE  
(FROM EMAIL #1)



3

CLICKED ON  
FACEBOOK  
AFFORDABILITY  
AD



5

CLICKED TO  
COLLEGE  
WEBSITE  
(SCHOLARSHIPS  
PAGE)



2

OPENED  
OUTREACH  
EMAIL #3



5

CLICKED TO  
LANDING  
PAGE  
(FROM EMAIL #3)



15

SUBMITTED  
PROGRESSIV  
E FORM  
RESPONSE  
(ACADEMICS)



5

OPENED  
ACADEMIC  
NURTURE  
EMAIL #1



42

CURRENT 3E  
BEHAVIORAL  
SCORE  
(THROUGH 2  
WEEKS OF  
CAMPAIGN)



# WESTFIELD STATE UNIVERSITY - 3E AWARENESS

Launched April 2020 to High School Juniors (Fall 2021 New Students)

## Developing the Audience (61,424 High School Juniors (Fall 2021 entry term))

- Westfield University Inquiries (4,910)
- List Purchase Prospects (56,415)
- Parents

## Engage & Nurture Interest

- Outreach, Nurture, Responsive, Triggered & Parent emails
- Launched Landing pages with progressive form & inquiry/profile form
- 3E Microsite

## Online Awareness (January 2020 – September 2020)

- Digital/Display/Social Ads
- SEM/Google Ads

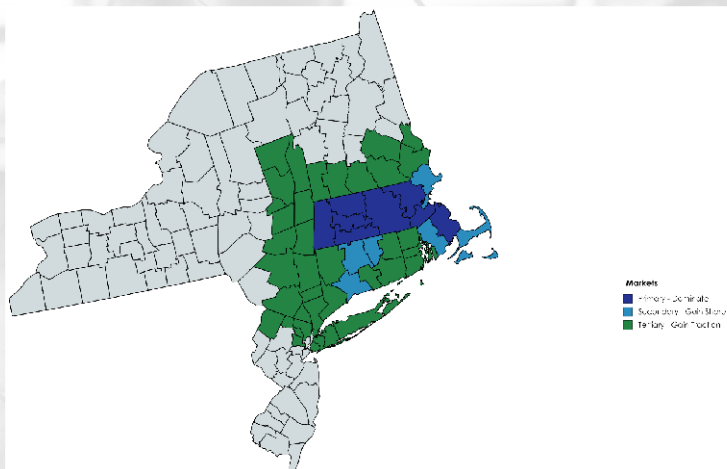
## Westfield State University Digital Presence

- Delivered Recommendations & 3E Social Media Dashboard (March 2020)



HOW WE DO IT

# STRATEGY: WHO & WHERE



## 4 DEFINED MARKETS

### PRIMARY / DOMINATE

Hampden, Middlesex, Worcester, Norfolk, Plymouth, Hampshire, Berkshire, Franklin

### SECONDARY / GAIN SHARE

Essex, Bristol, Suffolk, Barnstable, Nantucket, Dukes, Hartford, Tolland, New Haven

### TERTIARY / GAIN TRACTION

Rest of CT, RI, Select counties in NH, NJ, NY, VT

### OTHER / REST OF US



## HISTORICAL DATA

- Historical data audit (3 years)
- Review of previous list purchases
- Review other predictive models or analysis



## MARKET DEVELOPMENT

- Primary-Dominate
- Secondary-Gain Share
- Tertiary-Gain Traction
- New/Target/Etc.-Targeted Traction



## STRATEGIC OVERLAY

- List Purchase by Market
  - Geographic depth
  - Academic profile
  - Majors
- Marketing Channel Strategy
  - Primary/Secondary
  - New/Targets

**Full coverage across top three markets.**

PRINT

# DRIVE CONVERSATION

WHY Stimulate family discussion  
95% positively respond to personal letters  
Drive visit to landing page

WHAT Personal letter: invite to consider/explore  
  
Insert: why to consider, PURL to landing page  
  
Custom envelope with “open” CTA

Letter

Westfield  
STATE UNIVERSITY

<<Name>>.

Your college search is an exciting time—at  
As you look through all the materials, think

- How can I pursue my passions and
- Who will be my teachers, mentors
- What kind of experiences will I have

Then see how each place inspires you to t

At Westfield State University, you'll find a i  
your life through innovative programs, acc  
gorgeous campus and so much more.

I invite you to campus to see for yourself!

I hope we see you here soon.

Daniel Forster  
Vice President for Enrollment Management

P.S. Visit your personalized page to share  
important to you.

We received your name from <<source>> in order b

WHAT PATH WILL YOU TAKE?  
Go to your personalize

Lindsey—ready to transform your life?  
**A WESTFIELD STATE EDUCATION HAS THE POWER TO DO THAT.**  
Your experience here will be enhanced and anchored by our founding principles:

<b>1. BROAD INTELLECTUAL DEVELOPMENT</b>	<b>2. SOLID PREPARATION FOR A PROFESSION</b>
<b>4-YEAR</b> ROADMAP TO SUCCESS IN THE WESTFIELD STATE EXPERIENCE	<b>50+</b> MAJORS & CONCENTRATIONS
<b>250+</b> STUDY ABROAD PROGRAMS IN OVER 35 COUNTRIES	<b>85%</b> OF GRADUATES EMPLOYED IN CAREERS RELATED TO THEIR MAJOR
<b>3. SIGNIFICANT COMMUNITY SERVICE</b>	<b>\$280K</b> IN ENDOWED SCHOLARSHIPS
<b>70+</b> STUDENT CLUBS & ORGANIZATIONS	<b>700</b> YEARLY INTERNSHIP PLACEMENTS
<b>300+</b> SERVICE PROJECTS EACH YEAR	<b>20</b> NCAA DIVISION II TEAMS

WHAT PATH WILL YOU TAKE? START EXPLORING THE POSSIBILITIES.  
Go to your personalized page to let us know you're interested:  
<<URL>>

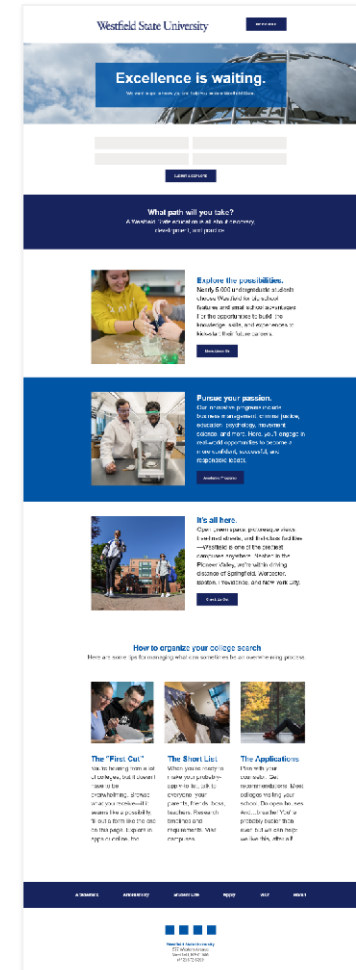
# LANDING PAGE DRIVE TO ENGAGE

**WHY** Capture student information  
A pathway to more content on your site (and track activities)

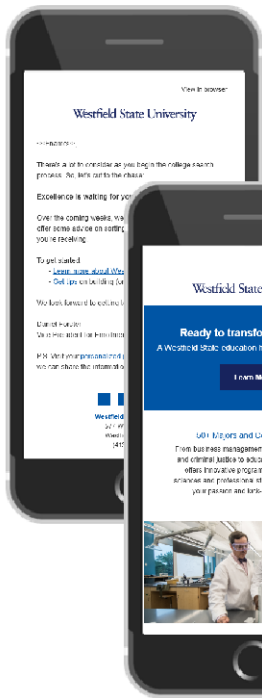
**WHAT** Strong, upfront calls to action (CTA) to inquire  
College-specific content sharing compelling reasons to consider Westfield  
Persona-specific content offering guidance on college search  
More information on core topic related to the subject of the email or Westfield in general



Mobile



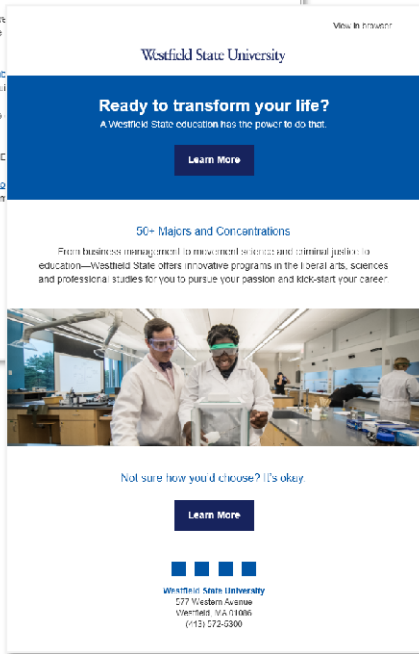
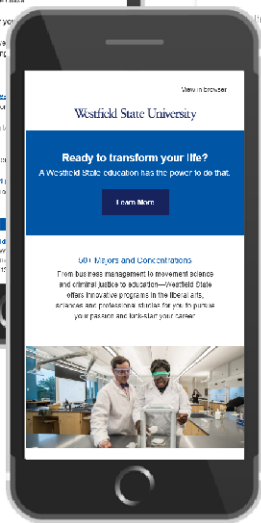
Desktop



Mobile  
Text-Based & HTML



Desktop  
Text-Based & HTML



# OUTREACH EMAILS DRIVE ACTION

**WHY** Pique interest; get student to landing page form.  
8 in 10 students check email at least 1x/day

**WHAT** 10-message series, links to landing page  
Highly visual html + some text versions  
Content is institution-specific and persona-based  
Topical on core top-of-mind areas: academics, affordability, fit  
CTA to landing page; button chosen dictates how the landing page content renders

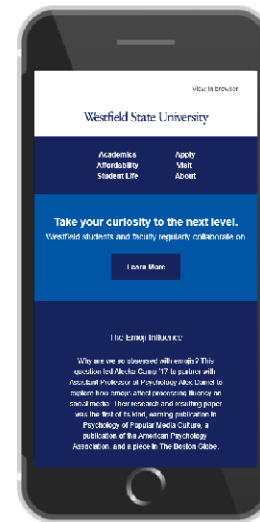


# NURTURE EMAILS

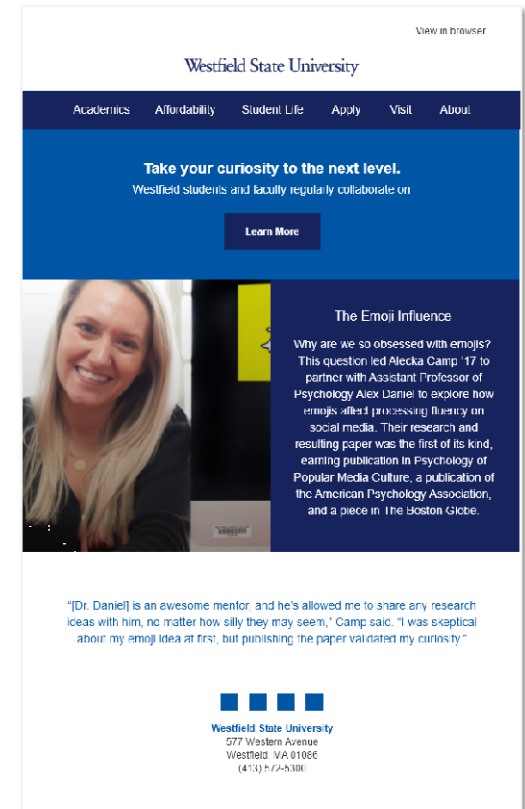
## BUILD A CONNECTION

- WHY** Strengthen, deepen a student's engagement  
Provide the content that matters to them
- WHO** Engagers of specific types of content
- WHAT** Messaging based on content they directly express or indirectly demonstrate interest in (.edu pages visit, email content they choose)  
Academics (3-email series)  
Affordability (3-email series)  
Location (3-email series)  
Links to further engage on .edu

CONFIDENTIAL &  
PROPRIETARY



Mobile



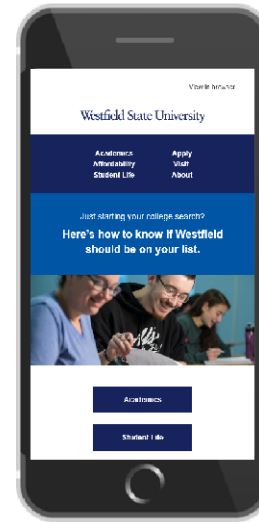
Desktop

# FORM-BASED EMAILS DEEPEN ENGAGEMENT

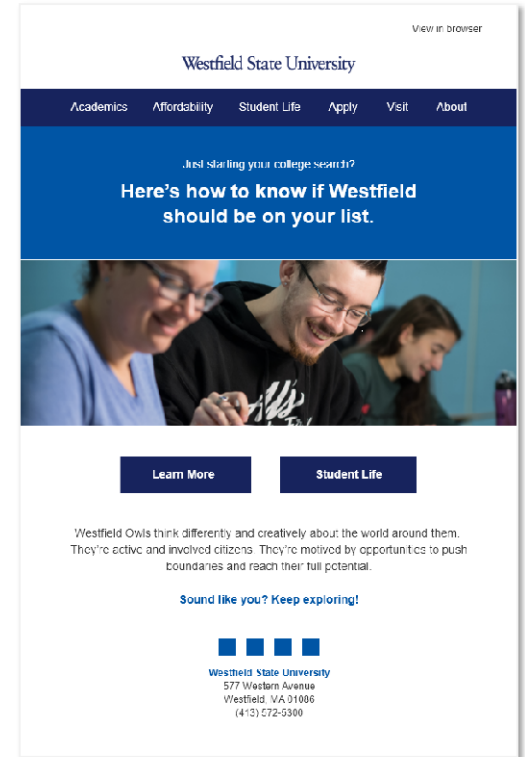
**WHY** Be responsive to what student has shared  
Help the student further explore based on their mindset

**WHO** Those who answer landing page questions

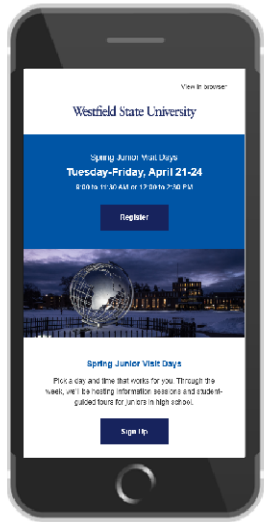
**WHAT** A single poll-like question is asked on the landing page (re-visitors see a new question), with response options. This email acknowledges how student responded (4 questions, each with 3 possible responses)



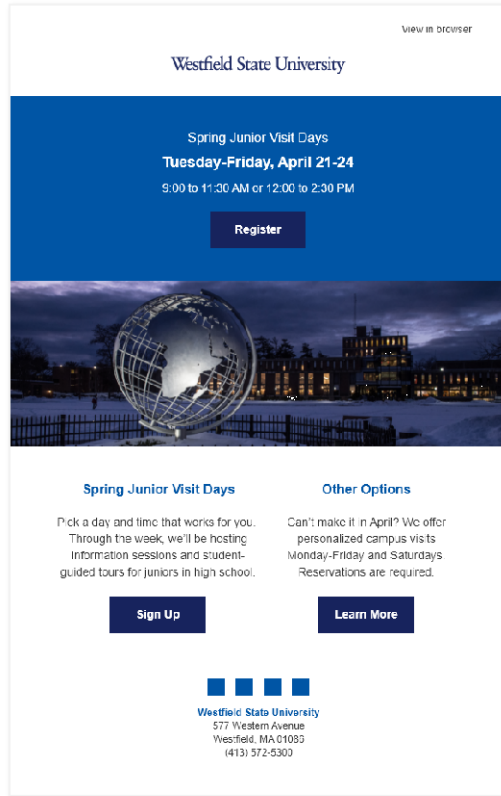
Mobile



Desktop



Mobile



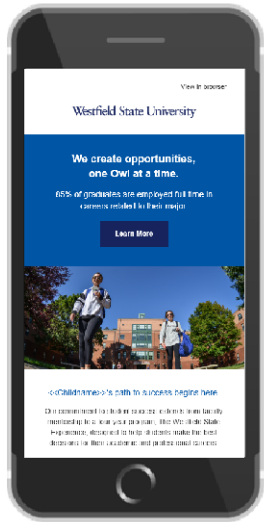
Desktop

## TRIGGERED EMAILS

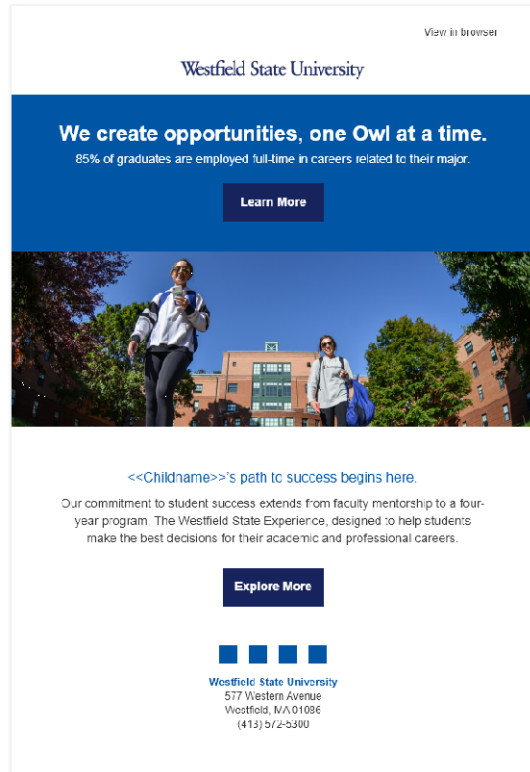
# PUSH TOWARD ACTION

WHY Increase campus visitors & inquiries  
Behavioral score triggers to drive interaction

WHAT Visit Push (3)  
Low/medium/high score-oriented push (3)



Mobile



Desktop

## PARENT EMAILS

# SUPPORT DISCUSSION

- WHY College is a family decision  
Must address their Point of View
- WHAT 5-message series  
Topics that complement student outreach but focus on parent questions  
CTA to landing page and .edu



**15:1 STUDENT-FACULTY RATIO.**  
Personalized attention and guidance.

Westfield  
STATE UNIVERSITY

SEE HOW

**50+ INNOVATIVE PROGRAMS.**  
Excellence is waiting.

Westfield  
STATE UNIVERSITY

SEE MORE

Westfield State University

**PREPARE FOR YOUR CAREER.**  
We'll create the opportunities to get you there.

LEARN HOW

DIGITAL & SOCIAL ADS

# BUILD INTEREST

**WHY** Pique and build interest among searched students, not-yet-known students and influencers  
Nurture interest toward action

**WHAT** Over 40 display, social and retargeting ads for students, parents and social ads for school counselors  
CTAs to landing page and .edu

PROJECT OBJECTIVES & GOALS

# 3E MICROSITE



An improved WSU online presence for student recruitment based on 3E personas

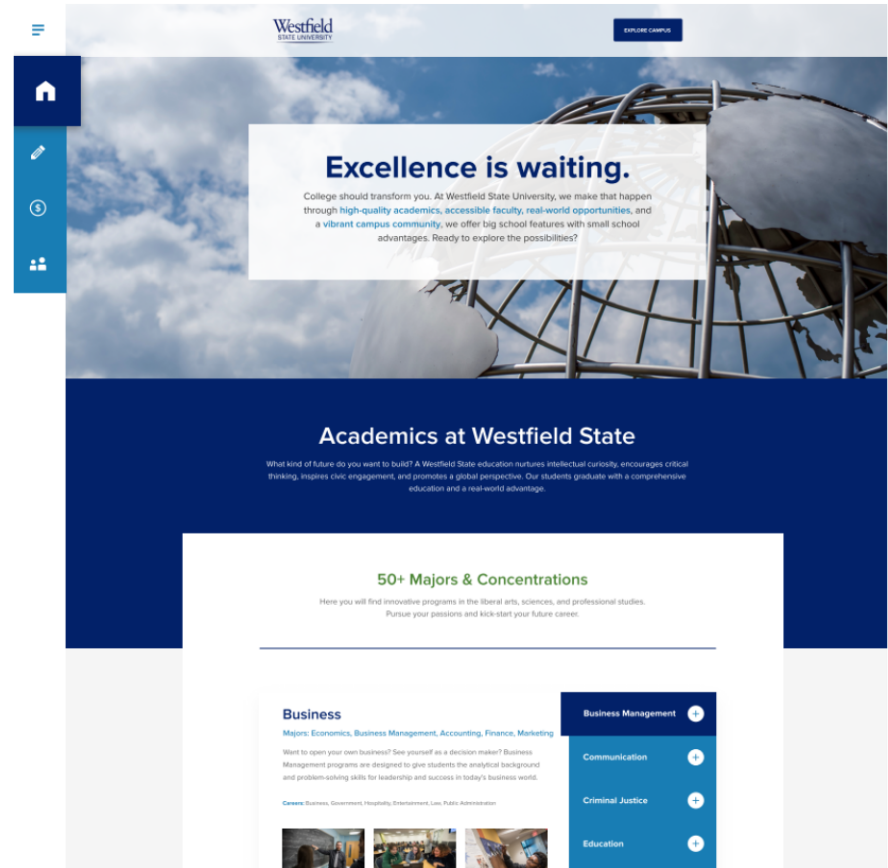


A prospective student-focused reflection of WSU's offerings and opportunities



A seamless experience from 3E Awareness Campaign messaging to WSU's online presence (high school sophomore/junior focus)

CONFIDENTIAL & PROPRIETARY

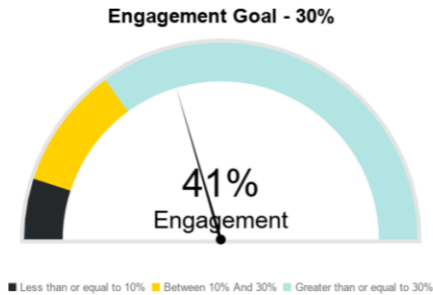


# 3E AWARENESS

## Campaign Performance & Engagement Tracking

3E Awareness generated 6,352 2021 Inquiries, representing 47% of 2021 inquiry pool

25,759  
Student  
Engagement



61,424  
Total Students

### Engagement Performance Highlights

- Exceeded Engagement goal of 30%
  - Overall Engagement: 41%
  - Exceed Started engagement (19,401)
  - Exceeded Highly Engaged (1,580)
- Landing page views: 1,920 from Facebook advertising
- Google ads CTR 3.28% > 2% KPI

Started Engagement Dial-AWR

Started Engagement - Goal: 19%



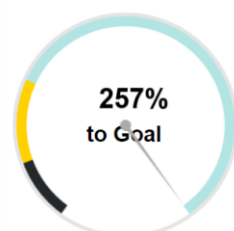
Engaged Dial - AWR

Engaged - Goal: 10%



Highly Engaged Dial - AWR

Highly Engaged - Goal 1%



Engagement Level Subgroups

