



Board of Trustees

Advancement and Enrollment Management Committee

8:30 AM

June 29, 2021

Owl's Nest (Room 018), Ely Campus Center

A live stream of the meeting for public viewing will also take place on YouTube at the following link:

<https://www.westfield.ma.edu/live>

- | | |
|---|----------------------------|
| 1. Call to Order | Trustee Martinez-Alvarez |
| 2. Approval of Minutes
April 29, 2021 | Trustee Martinez-Alvarez |
| 3. Items for Information | |
| a) Fall Enrollment Numbers | Dan Forster/Jessica Tansey |
| b) Summer Melt/Summer Push Strategy | Dan Forster |
| c) Institutional Advancement Dashboard | Erica Broman |
| d) Take A Seat Campaign Launch | Erica Broman |

Attachment(s):

- a) Minutes – April 29, 2021
- b) CGCE Fall Recruitment Funnel Comparison
- c) CGCE FY22 Graduate Funnel
- d) CGCE Summer 2021 Enrollment Report
- e) Fall Enrollment Numbers - Admissions Funnel Report
- f) Fall Enrollment Numbers - Admissions Velocity Report
- g) Fall Enrollment Numbers - Housing Scholarship Summary
- h) Summer Melt/Summer Push
- i) Institutional Dashboard - May 31, 2021



Board of Trustees

Advancement and Enrollment Management Committee

April 29, 2021

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, Committee Vice Chair Boudreau, Secretary Magovern, and Trustees Alvarado, Martin, Neves, and Salehi

TRUSTEE GUESTS PARTICIPATING REMOTELY: Trustee Queenin

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 and a roll call was taken of the committee members participating as listed above. It was announced that the meeting is being livestreamed, and, as a result, will be captured as recorded.

MOTION made by Trustee Magovern, seconded by Trustee Martin, to approve the minutes of the December 17, 2020 meeting.

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

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

Motion passed unanimously.

Institutional Advancement Dashboard Progress. Dr. Erica Broman, Vice President for Institutional Advancement, stated it has been the best fundraising year and we are tracking above the last two years, even without the large planned gift. The number of donors has decreased, in part due to the significant personnel turnover in the Advancement office and specifically challenges on the annual fund side. An additional few hundred thousand dollars is expected to be received before the end of the year to help support more students next year.

Westfield State Foundation FY22 Disbursement to the University. Dr. Broman stated that funds received are aligned with student needs. In the coming fiscal year the Foundation will support the institution and students with just over \$1 million, the most ever given, to be focused on scholarships and retention. The Memorandum of Understanding (MOU) with the Foundation represents the baseline to be given to the University, with additional gifts received from donors throughout the year. The fundraiser for the dedicated hockey locker room at Amelia Park Ice Arena continues and the Dever Stage campaign will be launched soon. Collaboration with Financial Aid and the Community Foundation has brought emergency aid to those students who need it.

Give A Hoot Results. Give a Hoot raised nearly \$70,000 and had 100% participation from all the boards. There were 327 unique donors, some larger gift amounts, and 50 donors that had not given before. Donations have gone from \$8,800 seven years ago to \$70,000 this year. Goals were made earlier in year with the Westfield State Foundation Board with the anticipation that most, if not all, of the goals will be met.

Scholarship Update. Dr. Broman stated there is never enough money to award to all the students who have a need. A total of nearly 2,000 applications have been received from every county in Massachusetts and as far away as Helsinki, Finland. The largest number are from Criminal Justice and Education majors. Five Paul Dower Live Strong scholarships were offered this year. Advancement continues to collaborate with Enrollment Management and Admissions to identify the best possible students to come to Westfield.

Evening of Discovery-May 7, 2021. Dr. Jennifer Hanselman, Dean of the College of Mathematics and Sciences, expressed excitement to be planning the Evening of Discovery fundraiser to celebrate student excellence. Witness Newton's law of gravity in action to win cash prizes. Funds raised will support undergraduate research and the departments in the College of Mathematics and Sciences. Our Biology program is ranked in the top 25% and Environmental Science is number one in Massachusetts and number four in the United States for quality, access, and affordability.

Spring/Fall Enrollment Update. Jessica Tansey, Director of the College of Graduate and Continuing Education (CGCE), stated that summer enrollments for sessions I and II are up from last year, partly due to the Owl Voucher Program implemented in fall 2020 to give incoming students a free course. There are 35 students currently registered for that program. Some students are taking additional courses to catch up and graduate. Part-time credits for matriculated students are up 31% and non-matriculated student numbers are down a little, which is the same across the state. The cycle for fall is different, with the busiest times in July and August. For now, undergraduate enrollment is great. With a strong summer II, we will start FY22 strong. Virtual events are being maintained to get more prospective students. The dollar amount increases are given back to the University, which comes back and asks for an additional increase to the give-back. We were hitting the extra amounts needed to bring in.

Mr. Daniel Forster, Vice President for Enrollment Management, share the following highlights:

- First-year deposits are up slightly from last year and transfer deposits are dragging a little behind, but up a total of 7%.
- Financial aid packages were sent two weeks earlier this year and offers were increased based on decreased student numbers due to COVID-19.
- Total numbers are weak compared to fall 2019, reflecting a year of complete reliance on digital social media and virtual visits. It is believed the trend will be up to between 1,000-1,100 students the number for the three previous consecutive years before the pandemic year, which was closer to 860 students.

- Last year’s yield was 23% overall, with a slightly higher yield for Pell students and those closer to the University. We are now somewhere between 24-27% for a projected yield.
- High school graduates by states was shown, with the northeast trending downward. New York and New Jersey are the next priorities for recruitment, continuing our outreach there. Changes in student demographics from 2019-2036 reflect where recruitment needs to focus.
- An employment market survey was shared, together with a competitor and outcome analysis. Our marketing always pushes affordability and outcomes.
- A cross-search of competing colleges and top feeder high schools was done, showing some of our biggest competitors. Increased and more strategic travel to an additional 100 high schools has happened in the last few years.
- Out-of-state recruitment is up 2-3%, partially due to the new scholarship created, but also marketing the proximity and programs. We are traveling further distances to visit students.
- The Athletics, Honors, Banacos, Urban Ed, and International Student programs were discussed.
- We will be converting to the Common App this summer, which will be huge in generating more applications.

HERF II Student funding. Michael Mazeika, Director of Financial Aid, shared information on the Higher Education Emergency Relief Fund II. Sixty percent of funding went to Pell grant students and 3,778 students received a block grant. Two separate options for additional disbursements to students for fall 2021 were also presented.

Web Update. There was an investment from the University in the last year to update the website, which was crashing every 30-60 seconds. Alyssa Goodreau, Director of Marketing, stated that research, discovery, and focus groups were done July through November. We were able to identify the challenges, aspirations, and focus areas and expanded the academic major content, improved the conversion paths, and better communicate the campus experience with the student. We are also able to effectively express diversity and inclusion. All of this data sets the stage to be able to gauge our success metrics. The new website is hoped to be launch in the summer of 2021.

There being no further business, **MOTION** made and seconded to adjourn.

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

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

Motion passed unanimously.

Meeting adjourned at 9:43 AM.

Attachments presented at this meeting:

- Minutes – December 17, 2020
- Dashboard-20-March-update
- Scholarship Update
- Give A Hoot Results
- Discovery Save the Date Rack Card.pdf

- f) Discovery Sponsorship Booklet–web.pdf
- g) CGCE Fall Recruitment Funnel Comparison
- h) CGCE FY22 Graduate Funnel
- i) CGCE Summer 2021 Enrollment
- j) Spring/Fall Enrollment Update, HERF II Student Funding, Web Update Presentation

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 April 29, 2021.

Robert Magovern, Secretary

Date

Fall Funnel Report

Data for Fall 2021 pulled on June 15, 2021 _ Registration for Fall courses begins July 6, 2021

		Fall 2017		Fall 2018		Fall 2019		Fall 2020		Fall 2021		Date-to-Date Comparison Fall 2020 as of June 16, 2020	
LEVL	SOURCE	COUNT	RATIO	COUNT	RATIO	COUNT	RATIO	COUNT	RATIO	COUNT	RATIO	COUNT	RATIO
GR	RECRUITED	544	.00%	862	.00%	1042	.00%	985	.00%	884	.00%	992	.00%
	APPLIED	352	64.71%	342	37.66%	436	41.84%	410	41.62%	402	45.48%	422	42.54%
	ACCEPTED	244	69.32%	250	87.11%	251	57.57%	256	62.44%	241	59.95%	228	54.03%
	ENROLLED	197	80.74%	204	81.60%	192	76.49%	219	85.55%	2	.83%	0	.00%
PB	RECRUITED	30	.00%	56	.00%	48	.00%	36	.00%	25	.00%	40	.00%
	APPLIED	29	96.67%	37	66.07%	29	60.42%	27	75.00%	7	28.00%	30	75.00%
	ACCEPTED	19	65.52%	26	70.27%	24	82.76%	26	96.30%	5	71.43%	24	80.00%
	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%	31	.00%	22	.00%
	APPLIED	23	92.00%	24	50.00%	26	53.06%	9	33.33%	10	32.26%	6	27.27%
	ACCEPTED	22	95.65%	19	79.17%	22	84.62%	8	88.89%	8	80.00%	5	83.33%
	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%	359	.00%	380	.00%
	APPLIED	221	75.17%	207	51.11%	216	43.37%	153	37.59%	160	44.57%	150	39.47%
	ACCEPTED	155	70.14%	148	71.50%	160	74.07%	127	83.01%	98	61.25%	89	59.33%
	ENROLLED	104	67.10%	103	69.59%	137	85.63%	118	92.91%	1	1.02%	3	3.37%
TOTAL RECRUITS		893		1371		1637		1455		1299		1434	
TOTAL APPS		625		610		707		599		579		608	
TOTAL ACCEPTS		440		443		457		417		352		346	
TOTAL ENROLL		327		342		361		360		3		3	

Notes:

Registration for fall does not begin until July 6, 2021

Funnel by Graduate Program for Fiscal Year 2021

FY22 Funnel Numbers in CGCE: Fall 2021 - Fall 2021 Registration begins July 6, 2021

FY22 Enrollment Funnel - Includes Fall 2021 as of June 15, 2021																				
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	299	275	108.7%		115	75	153.3%		155	90	172.2%		62	60	103.3%		35	30	116.7%	
Applications Submitted	165	175	94.3%		60	50	120.0%		67	50	134.0%		18	30	60.0%		12	29	41.4%	
App Complete	127				30				50				14				8			
Admits	118	115	102.6%		27	30	90.0%		43	28	153.6%		12	16	75.0%		8	15	53.3%	
Confirmed	98				25				32				12				7			
Enrolled	1	86	1.2%		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. 9 certificate apps. Plus 3 certificates	Rolling admissions for Fall 2021 and Spring 2022.
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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	263	250	105.2%		41	35	117.1%		57	35	162.9%		105	110	95.5%		15	15	100.0%			884
Applications Submitted	99	175	56.6%		12	29	41.4%		25	27	92.6%		39	75	52.0%		4	12	33.3%			402
Admits	0	30	0.0%		6	22	27.3%		10	22	45.5%		16	48	33.3%		1	10	10.0%			241
Confirmed	0	30	0.0%		5				8				14				0					201
Enrolled	0	30	0.0%		0	18	0.0%		1	17	5.9%		0	39	0.0%		0	7	0.0%			2

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.
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Date-to-Date Comparison: FY21 Enrollment Funnel - Fall 2020 as of June 16, 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%	==	35	30	116.7%	==
Applications Submitted	196	175	112.0%	==	64	50	128.0%	==	60	50	120.0%	==	21	30	70.0%	==	12	29	41.4%	==
App Complete	167			==	48			==	46			==	16			==	10			==
Admits	114	115	99.1%	==	24	30	80.0%	==	41	28	146.4%	==	12	16	75.0%	==	9	15	60.0%	==
Confirmed	105			==	21			==	32			==	12			==	7			==
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. Apps due Feb 1. for Fall 2020 start	Enrollment cap of 24. Apps due Feb 1. for Fall 2020 start	Enrollment cap of 20. Apps due Feb 1. for Fall 2020 start	Enrollment cap of 15. Apps due June 1. for Fall 2020 start; still accepting students and collecting deposits	Rolling admissions for Fall 2020 and Spring 2021.
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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	309	250	123.6%	==	46	35	131.4%	==	47	35	134.3%	==	82	110	74.5%	==	13	15	86.7%	==		992
Applications Submitted	105	175	60.0%	==	11	29	37.9%	==	17	27	63.0%	==	38	75	50.7%	==	3	12	25.0%	==		422
Admits	0	30	0.0%	==	4	22	18.2%	==	7	22	31.8%	==	16	48	33.3%	==	1	10	10.0%	==		228
Confirmed	0	30	0.0%	==	1			==	7			==	12			==	1			==		198
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, final numbers for spring 2020. due in August. 500 in CASPA	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.
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CGCE Summer I 2020 FINAL vs. Summer I 2021 enrollment as of 6.14.2021 - FINAL		DISTINCT STUDENT COUNT						SEAT COUNT						CREDITS					
COLLEGE	STUDENT_TYPE	Summer I 2018	Summer I 2019	Summer I 2020	Summer I 2021	D2D Variance 2020 to 2021	Final 202050	Summer I 2018	Summer I 2019	Summer I 2020	Summer I 2021	D2D Variance 2020 to 2021	Final 202050	Summer I 2018	Summer I 2019	Summer I 2020	Summer I 2021	D2D Variance 2020 to 2021	Final 202050
Evening Undergraduate (UCE)	MATRIC	223	306	237	220	-7.17%	237	328	306	334	311	-6.89%	334	1072	959	1,117	1,033.0	-7.52%	1,117
	NON-MATRIC	148	161	114	48	-57.89%	114	166	161	140	62	-55.71%	140	579	553	494	206.0	-58.30%	494
*TOTAL COLLEGE Evening Undergraduate (UCE)		371	467	351	268	-23.65%	351	494	467	474	373	-21.31%	474	1,651	1,512	1,611	1,239.0	-23.09%	1,611
Graduate (GCE)	MATRIC	145	194	169	204	20.71%	169	170	194	219	265	21.00%	219	510	582	656	796.0	21.34%	656
	NON-MATRIC	44	32	30	27	-10.00%	30	48	32	33	32	-3.03%	33	148	99	107	101.0	-5.61%	107
*TOTAL COLLEGE Graduate (GCE)		189	226	199	231	16.08%	199	218	226	252	297	17.86%	252	658	681	763	897.0	17.56%	763
*TOTAL COLL_TYPE CGCE		560	693	550	499	-9.27%	550	712	693	726	670	-7.71%	726	2,309	2,193	2,374	2,136.0	-10.03%	2,374
Undergraduate Day School	MATRIC (XRG)	3	6	1	17	1600.00%	1	4	8	2	23	1050.00%	2	12	25	6	73.0	1116.67%	6
	MATRIC (non-XRG)	506	450	403	448	11.17%	403	657	568	518	614	18.53%	518	2027	1735	1,610	1,906.0	18.39%	1,610
Grand Total		1069	1149	954	964	1.05%	954	1,373	1,269	1,246	1,307	4.90%	1,246	4,348	3,953	3,990	4,115.0	3.13%	3,990

CGCE Summer II 2020 on 6.16.2020 vs. Summer II 2021 Comparison - 2021 enrollment as of 6.14.2021 6:23 a.m.		DISTINCT STUDENT COUNT						SEAT COUNT						CREDITS					
COLLEGE	STUDENT_TYPE	Summer II 2018	Summer II 2019	Summer II 2020	Summer II 2021	D2D Variance 2020 to 2021	Date to Date Comparison Last Yr.	Summer II 2018	Summer II 2019	Summer II 2020	Summer II 2021	D2D Variance 2020 to 2021	Date to Date Comparison Last Yr.	Summer II 2018	Summer II 2019	Summer II 2020	Summer II 2021	D2D Variance 2020 to 2021	Date to Date Comparison Last Yr.
Evening Undergraduate (UCE)	MATRIC	137	156	166	114	-18.57%	140	188	195	229	152	-23.23%	198	576	588	712	469.0	-16.25%	560.0
	NON-MATRIC	110	131	91	43	-38.57%	70	120	158	107	47	-40.51%	79	418	535	371	155.0	-61.35%	401.0
*TOTAL COLLEGE Evening Undergraduate (UCE)		247	287	257	157	-25.24%	210	308	353	336	199	-28.16%	277	994.0	1,123.0	1,083	624.0	-35.07%	961.0
Graduate (GCE)	MATRIC	116	194	146	129	6.61%	121	123	107	150	142	15.45%	123	370	321	451	427.0	45.24%	294.0
	NON-MATRIC	38	25	21	11	-35.29%	17	40	27	23	12	-33.33%	18	122	83	77	38.0	-46.48%	71.0
*TOTAL COLLEGE Graduate (GCE)		154	219	167	140	1.45%	138	163	134	173	154	9.22%	141	492.0	404.0	528	465.0	27.40%	365.0
*TOTAL COLL_TYPE CGCE		401	506	424	297	-14.66%	348	471	487	509	353	-15.55%	418	1,486.0	1,527.0	1,611	1,089.0	-17.87%	1,326.0
Undergraduate Day School	MATRIC (XRG)	1	5	1	6	200.00%	2	1	5	2	9	200.00%	3	3	15	6	28.0	211.11%	9.0
	MATRIC (non-XRG)	340	267	291	258	6.61%	242	433	322	384	330	5.10%	314	1317	975	1,193	1,014.0	16.69%	869.0
Grand Total		742	778	716	561	-5.24%	592	905	814	895	692	-5.85%	735	2,806.0	2,517.0	2,810	2,131.0	-3.31%	2,204.0

*NonMatriculated CE does not include dual-enrollment

Summer Session II begins July 6, 2021

*Students are allowed to register for 6-credits per summer session. Additional credits requires approval.

For Summer 2021 Professional Prog- M.S. in Physician Assistant Studies

*Excludes all remote courses subject to discounting

*Includes all registered, withdrawn, and no-shows

Shows Full Enrollment in 2 cohorts

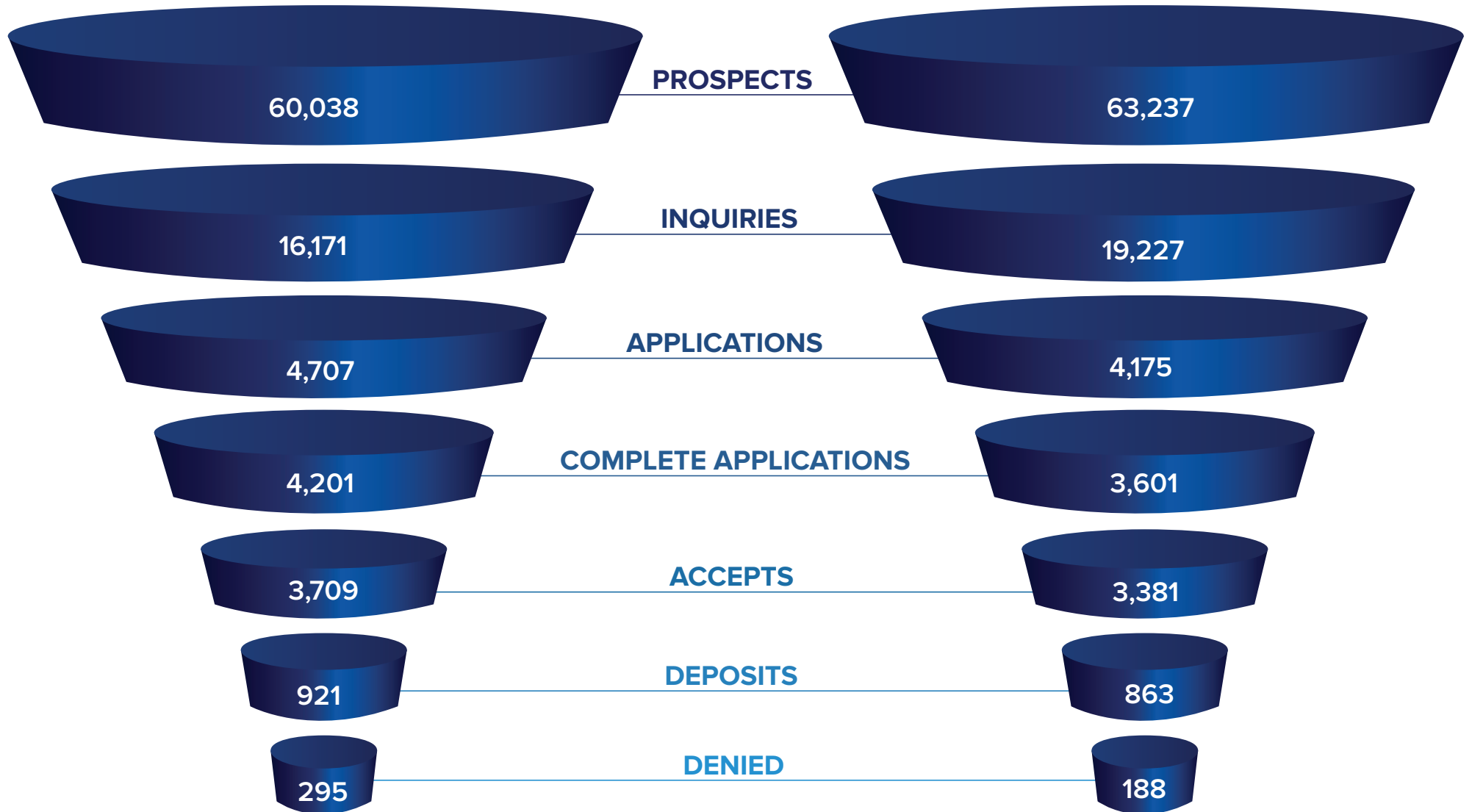
COLLEGE	STUDENT_TYPE	DISTINCT STUDENT COUNT	SEAT COUNT	CREDITS	AVG SEATS TAKEN
Graduate (GCE)	MATRIC	60	570	1,950.0	9.5000
*TOTAL COLLEGE Graduate (GCE)		60	570	1,950.0	9.5000
*TOTAL COLL_TYPE CGCE		60	570	1,950.0	9.5000
*TOTAL TERM 202145		60	570	1,950.0	9.5000

ADMISSION FUNNEL REPORT — FIRST-YEARS

6/22/2021

FALL 2020

FALL 2021

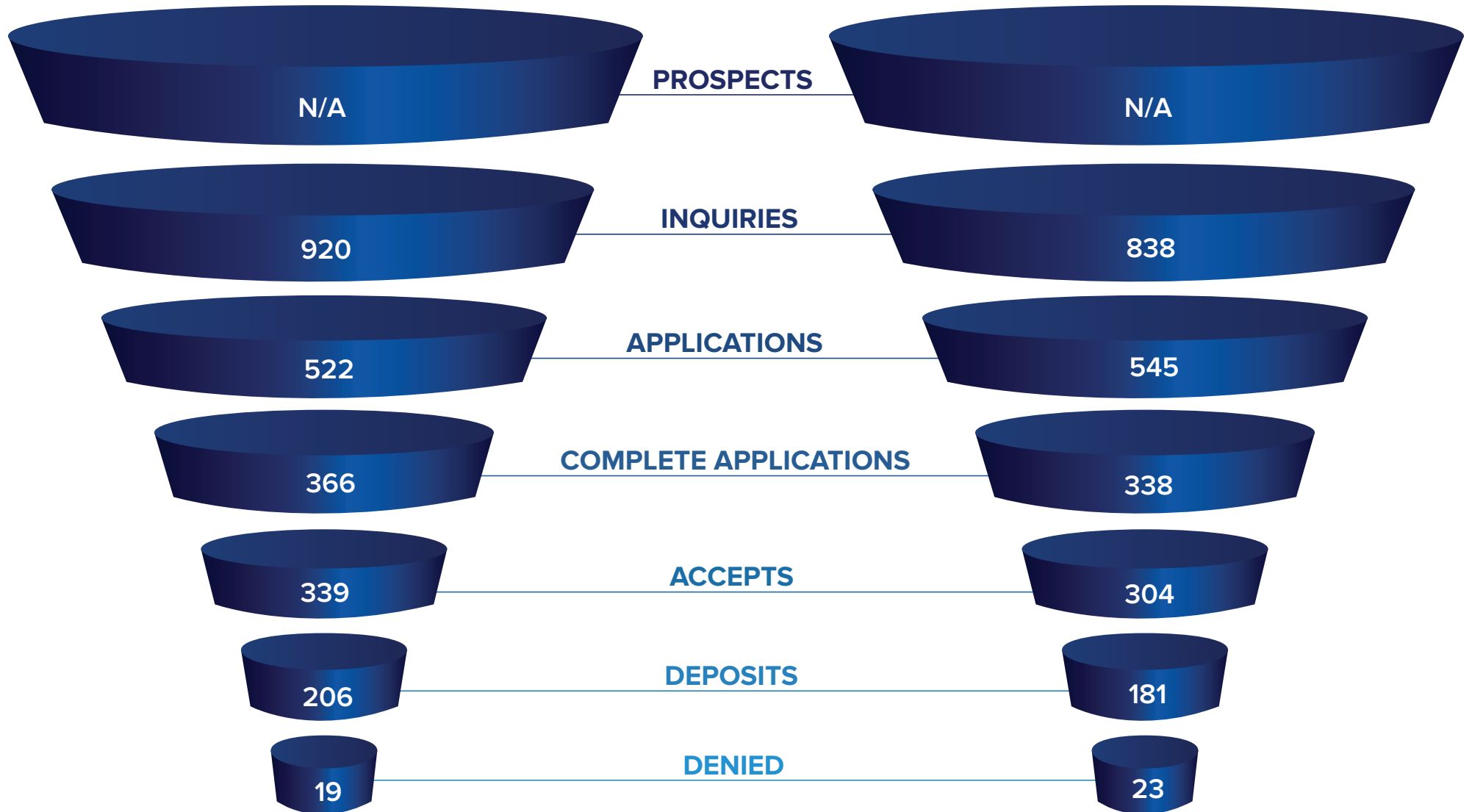


ADMISSION FUNNEL REPORT — TRANSFERS

6/22/2021

FALL 2020

FALL 2021

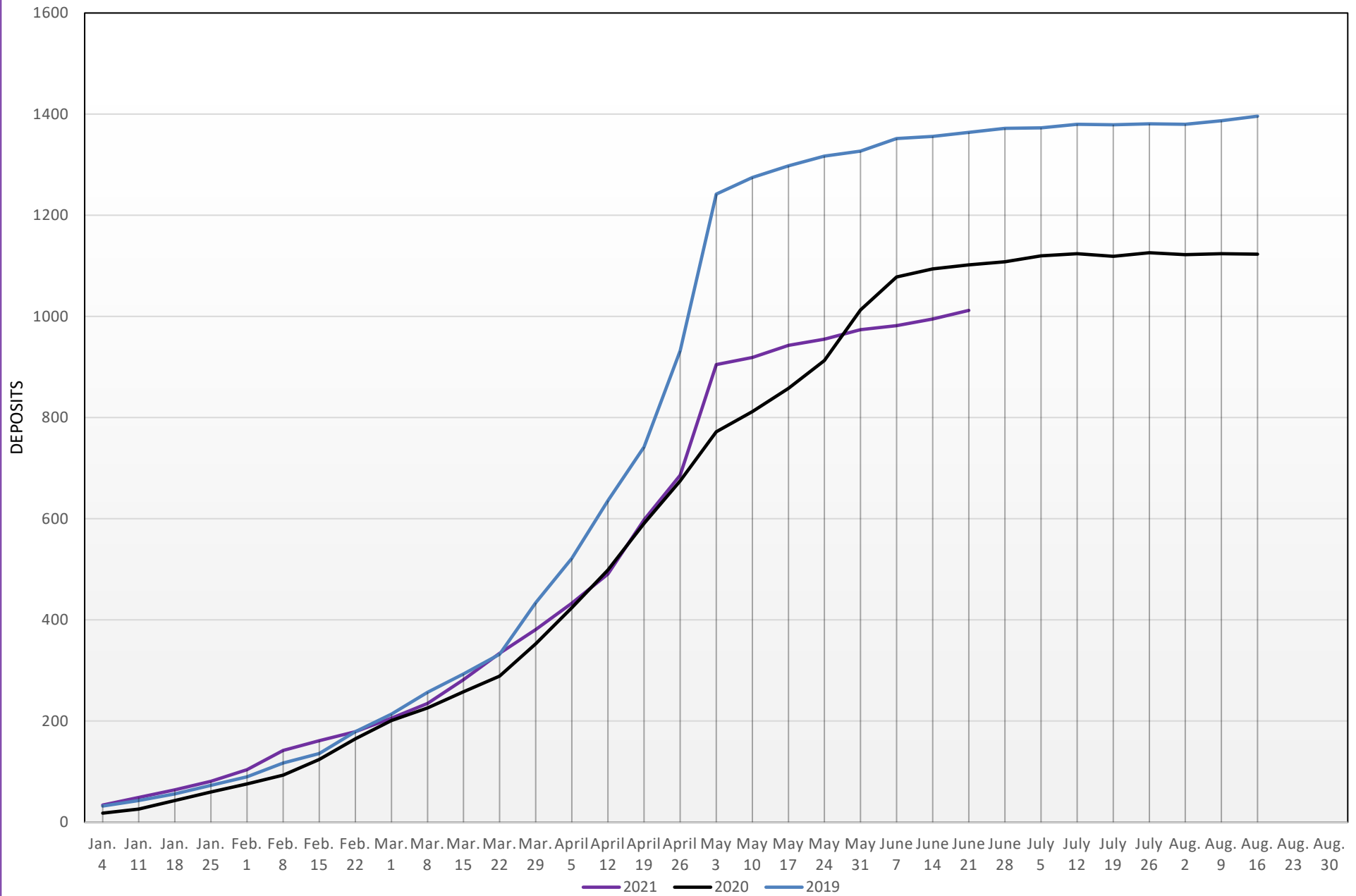


ADMISSIONS VELOCITY REPORT

	2021	2020	2019	2018	2017	2016	2015	2014	2013
Jan. 4	34	18	32	4	17	7	20	3	0
Jan. 11	49	26	43	11	27	11	22	10	14
Jan. 18	64	43	56	13	34	21	35	12	16
Jan. 25	81	60	73	21	55	39	46	15	28
Feb. 1	104	76	90	41	67	54	64	36	52
Feb. 8	142	93	117	64	80	68	86	44	75
Feb. 15	161	124	136	79	108	79	110	84	91
Feb. 22	179	165	179	102	126	116	143	109	113
Mar. 1	206	201	214	136	167	154	182	148	156
Mar. 8	235	226	257	166	207	189	215	184	223
Mar. 15	282	258	293	201	250	259	262	240	280
Mar. 22	334	289	332	249	321	311	360	301	345
Mar. 29	381	353	434	333	379	377	427	359	422
April 5	433	424	522	457	483	455	593	487	528
April 12	491	499	636	551	616	608	791	617	671
April 19	598	591	742	655	721	751	994	804	910
April 26	686	675	932	883	879	986	1320	1021	1143
May 3	905	772	1242	1198	1224	1310	1619	1391	1531
May 10	919	812	1275	1250	1251	1358	1648	1574	1671
May 17	943	858	1298	1278	1284	1375	1675	1600	1680
May 24	955	913	1317	1317	1315	1405	1722	1615	1691
May 31	974	1013	1327	1336	1338	1423	1724	1618	1697
June 7	982	1078	1352	1346	1353	1423	1725	1626	1706
June 14	995	1094	1356	1350	1358	1427	1708	1620	1706
June 21	1012	1102	1364	1360	1369	1431	1703	1604	1706
June 28		1108	1372	1369	1378	1431	1691	1600	1675
July 5		1120	1373	1370	1388	1432	1687	1590	1667
July 12		1124	1380	1380	1379	1424	1680	1590	1667
July 19		1119	1379	1377	1390	1422	1673	1586	1663
July 26		1126	1381	1379	1391	1416	1666	1581	1650
Aug. 2		1122	1380	1377	1395	1410	1657	1569	1650
Aug. 9		1124	1387	1375	1402	1410	1655	1570	1650
Aug. 16		1123	1396	1382	1406	1412	1636	1558	1650
Aug. 23		1126	1387	1386	1404	1407	1632	1545	1621
Aug. 30		1127	1383	1384	1402	1403	1632	1545	1619

ADMISSIONS VELOCITY REPORT

Deposit Velocity Report 2021



2021-2022 New Student Housing Scholarship

On April 27th, the Financial Aid Office sent out revised award letters to accepted First-Year Students who had not paid their Admission Deposit to join the incoming Fall 2021 class.

Breakdown

The Housing Scholarship has been offered to 667 students as on June 22nd

- Initially, 619 students were awarded the scholarship
- Subsequently, 48 additional students have been awarded since April 27th

Of the 667 students:

- 305 students have declined their offer of Admission
- 4 students have switched their plans from living on-campus to commuting
- 71 students have paid their deposit (see breakdown below)

Housing Paid Breakdown				
EFC Range	# of Students	Amount per Student	Total Spend	
EFC 0-5846	45	3000	131000	
EFC 5847-7000	4	2500	10000	
EFC 7001-8000	2	2500	5000	
EFC 8001-9000	1	2500	2500	
EFC 9001-10000	2	2000	4000	
EFC 10001-11000	2	2000	4000	
EFC 11001-12000	2	1500	3000	
EFC 12001-13000	0	1500	0	
EFC 13001-20000	13	1500	19500	
TOTALS	71		\$179,000	

Notes

- Average award was \$2,521. Most of the offers accepted (63%) were by students who were Pell Grant eligible, a population that would be most impacted by the pandemic.
- The offer of the Housing Scholarship took place too late in the cycle to have any impact on the class. Had this offer been made closer to the beginning of April, the yield would have been much greater.
- The deposit rate is considerably lower than expected. Based on the trend from the class, we were expecting at least 150 students would have deposited.
- The use of reserves to cover the Housing Scholarship will not be needed for the Fall 2021 semester.

SUMMER PUSH

- Additional Senior Name Purchase
 - Over 900 new names for outreach
- Texting Campaign Outreach
 - 50% response rate for polling
 - 1,789 students sent text
 - Polling (IN, OUT)
- Coordination with Area High Schools
 - Missing items
 - New apps
 - Update on students enrolled
- Students Still in Play
 - Active conversations, emails, tours
 - Athletics
- Financial Aid
 - Upping awards for deposits before July 1
 - Additional awards for on-campus
 - Commuters targeted with additional aid for living on-campus
- Parents
 - Email
 - Financial aid incentives
- Students who did not attend in 2020
 - National Clearinghouse information yields new group for transfers

Summer Melt

- Orientation
 - Attendance key predictor
 - Faculty/Staff attendance
 - Follow up with non-attenders
- Continued Outreach Check-in
 - Emails
 - Letters from Departments

- Billing
 - Ease of payment
 - Customer service
 - Late or no response....

- Advising
 - Class scheduling

Institutional Advancement DASHBOARD

July 1, 2020–May 31, 2021

Executive Summary

Total Dollars:

- Down \$161,209 from May 2019
- Up \$3,840 from May 2020

Total Donors:

- 303 New Donors
- 300 Reactivated Donors
- 459 Retained Donors

Alumni Participation Rate: 1.22%

This number represents 526 alum donors out of 43,146 alumni of record

\$3,036,748
Dollars

1,062
Donors

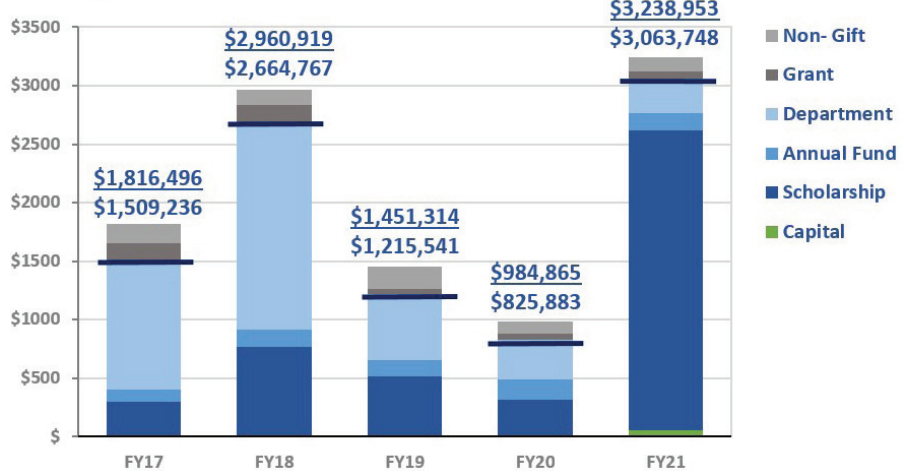
1.22%
Alum Part.

\$273.05
Ave. Gift

Total Dollars

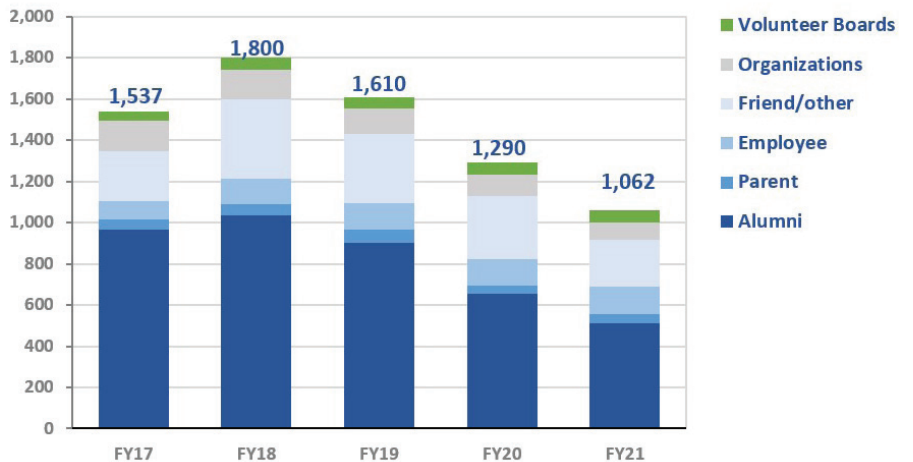
By Giving Area

*in thousands

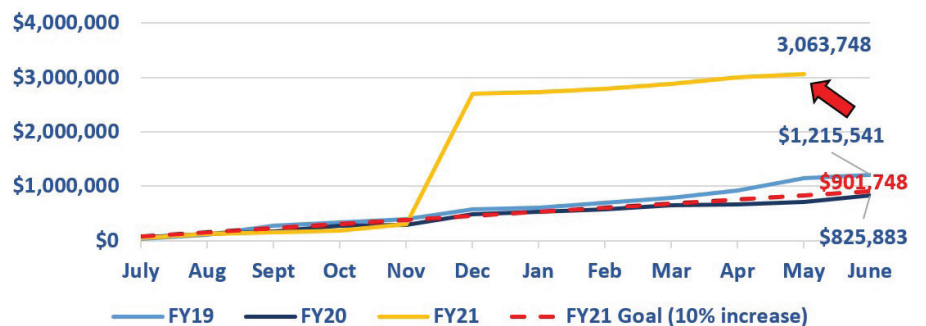


Total Donors

By Constituent



Gift Revenue YTD



Institutional Advancement DASHBOARD

July 1, 2020–May 31, 2021

Fundraising Focus



FOUNDATION GOLF

Donors: 42
Dollars: \$30,907



OWLS HELPING OWLS

(Emergency Covid-19 Funding)
Donors: 103
Dollars: \$52,041



HOCKEY LOCKER ROOM

Donors: 52
Dollars: \$52,639



DEVER STAGE SEATS

Donors: 1
Dollars: \$39



GALA 2021

Donors: 1
Dollars: \$6,750



GIVE A HOOT

Donors: 289
Dollars: \$69,352



STUDENT SUCCESS

Donors: 360
Dollars: \$18,898

CMS: College of Math and Science

CEHHS: College of Education, Health, and Human Services

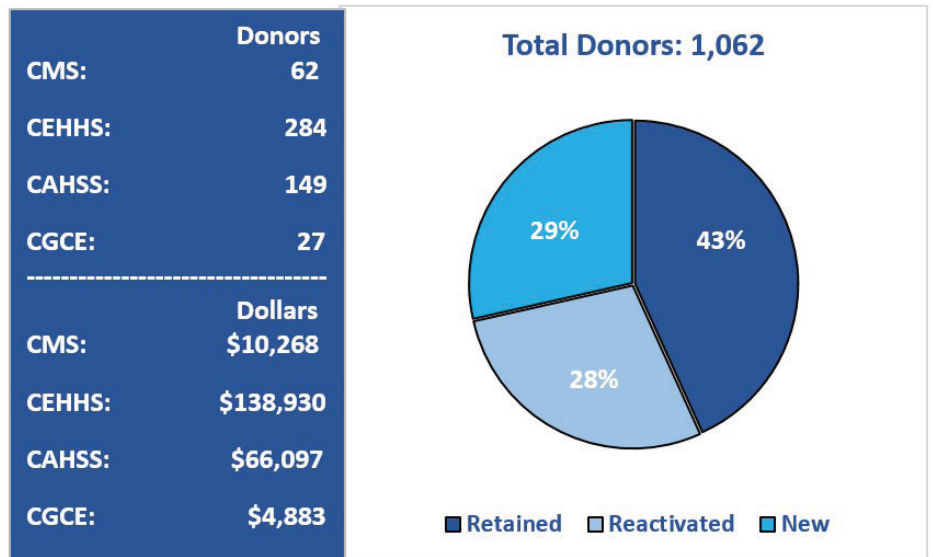
CAHSS: College of Arts, Humanities, and Social Sciences

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	13	\$2,625,740.75
University Circle	\$10,000-\$24,999	6	\$79,550.00
Trustees Circle	\$5,000-\$9,999	13	\$86,261.06
Dickinson Circle	\$2,500-\$4,999	21	\$67,022.78
Scanlon Circle	\$1,000-\$2,499	57	\$73,514.65
President's Circle	\$500-\$999	80	\$46,063.04
Westfield Society	\$250-\$499	96	\$28,597.00
Century Club	\$100-\$249	302	\$39,952.38
Gifts up to \$99	\$1-\$99	474	\$17,046.12
Total		1,062	\$3,063,747.78



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
Board of Trustees					
FY21	11	11	100%	\$ 1,828	\$ 20,106
FY20	11	10	91%	\$ 4,480	\$ 49,283
Foundation Board of Directors					
FY21	25	24	96%	\$ 3,209	\$ 80,225
FY20	26	24	92%	\$ 2,221	\$ 57,757
Alumni Association Executive Council					
FY21	17	17	100%	\$ 213	\$ 3,615
FY20	15	14	93%	\$ 235	\$ 3,520
Cabinet					
FY21	7	7	100%	\$ 3,683	\$ 25,778
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.

Institutional Advancement DASHBOARD

July 1, 2020–May 31, 2021

Westfield Foundation Goals 2021		
	YTD	Goal
1. Grow alumni participation from 1.43% to 2% Goal: 865 undergraduate alumni donors	*1.22%	2.00%
2. Grow size of average donation from \$239 to \$250	**\$237.05	\$250.00
3. Grow new (first-time) donors to from 28.4% to 29% Goal: 375 New Donors	***29%	29%
4. Conduct 25 estate planning conversations with prospects by end of fiscal year	6	25
5. 10% growth in non-restricted fund contributions	\$206,936	\$134,651
6. 10% growth in restricted funds contributions	\$2,993,861	\$767,097
7. Secure \$100,000 to refurbish the hockey locker room	\$52,639	\$100,000
8. Begin campaign for Dever seating by May 1, 2021		
9. Secure at least \$100,000 in support of student success initiatives including internships	\$18,898	\$100,000
10. Secure five endowed scholarships addressing the need for more student support	5	5
11. Expand transparency with full implementation of scholarship portal by February 1, 2021	completed	
12. Further update accuracy of prospect data.	53%	100%

* Currently at 526 undergraduate alumni donors

** Average Gift excludes the outliers of the Mass. Endowment Incentive Program and the Paul W. Dower Bequest

*** Currently at 303 new donors