



## Board of Trustees

Advancement, Marketing, and External Relations Committee

11:10 AM – 12:10 AM

October 23, 2024

Minutes

President's Boardroom, Horace Mann Center

A live stream of the meeting for public viewing also took place on YouTube.

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**MEMBERS PRESENT:** Committee Chair Dr. Gloria Williams, Vice Chair Chris Montemayor, Secretary Daniel Currier, Trustee Melissa Alvarado, Trustee Michael O'Rourke and Board Chair Ali Salehi, ex-officio member

Also present and participating were Westfield State University President Dr. Linda Thompson; Institutional Advancement Vice President Ms. Lisa McMahon; Director of Advancement and Major Gifts, Mr. William Hynes; Director of Conference and Event Services Ms. Joanne Bigelow; Assistant Director of Events Management; Director of Alumni Relations, Ryan Meersman and General Counsel, Melinda Phelps.

The meeting was called to order at 11:10 AM by Committee Chair Dr. Gloria Williams and it was announced that the meeting was being livestreamed and captured as recorded.

**MOTION** made by Trustee Alvarado, seconded by Trustee Montemayor, to accept the minutes from the June 20, 2024 meeting. There being no discussion, a roll call was conducted, all in favor with Trustee O'Rourke abstaining. The **Motion passed with majority.**

Ms. Lisa McMahon welcomed and introduced General Counsel Melinda Phelps. She has been with Westfield State University for seven weeks with her focus being policy review and working with the Board of Trustees.

Ms. McMahon shared with the Board, Institutional Advancement's dashboard, updating everyone on a total gifts, and grants along with an increase of donors. There was discussion on whether graduates from the 1980s stepping in to the donor role of the 1970s graduates.

Also discussed:

- Outcome of Homecoming weekend and 185<sup>th</sup> events.
- Trustee Currier discussed bringing students together for involvement with getting funds for deferred maintenance through a legislative breakfast.
- Capital Campaign – will be discussed at the next meeting

Assistant Director of Events Management, Ryan Begin spoke about the overnight summer groups that visited campus. He focused on the successes and highlights including changes to protocols, and key

partnerships. Revenue from summer events and how it's distributed through various departments were displayed in a chart. Ryan Begin then discussed the upcoming events being held on campus including Girls on the Run, and the Western Massachusetts Racial Equity Summit. He's looking to expand day events on campus to bring in more revenue.

**MOTION** made by Trustee Montemayor, seconded by Trustee O'Rourke, to adjourn the meeting. There being no discussion, a roll call was conducted, **Motion passed unanimously**

Meeting adjourned at 12:10AM.

**Attachments:**

- a. Draft Minutes of June 20, 2024
- b. Conference & Event Services Presentation
- c. FY25 Q1 IA Dashboard

**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, Marketing, and External Affairs Committee meeting held on October 23, 2024.

\_\_\_\_\_  
Daniel Currier, Secretary

\_\_\_\_\_  
Date

# Integrated Marketing and Communications

**Dr. Leslie Rice**

*Executive Director of Communication, Marketing, and Branding*



# WHOOOOO ARE WE?

WESTFIELD STATE UNIVERSITY  
REBRANDING: THE PROCESS



# The BVK Approach

Securing buy-in.

Uncovering uniqueness.

Ensuring differentiation & relevancy.

Gaining internal alignment.



## COMPLETE

### Planning & Discovery

- Kickoff & Immersion
- Audit of Existing
- Competitive Audit
- Qualitative Research

## COMPLETE

### Quantitative Research

- Survey Development
- Deployment/Fielding
- Analysis & Findings

## Sept-Oct

### Positioning & Strategy

- Strategy Presentation
- Brand Framework
- Creative Brief

## Nov-Dec

### Creative Concepting

- Concept Development
- Logo Redesign
- Presentation

# WHOOOOO ARE WE?

WESTFIELD STATE UNIVERSITY  
REBRANDING: THE RESEARCH



# BRAND RESEARCH

- Stakeholder Interviews
- Focus Groups
- Online Survey
- Market Scan & Competitive Analysis
- Past & Current Promotional Material Review



While campus is perceived to be safe, there is a need to create more of a culture of belonging on campus in order attract more residential students.

There is an opportunity to build new traditions to not only create a more welcoming culture but can also serve as way to engage with alumni. Alumni typically remember and connect with cohort-specific experiences rather than campus/university due to lack of traditions.

While the mascot is an asset, it has not been used strategically, especially compared to other institutions.

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“We stay on campus to have fun.”

Current students shared the student experience vibe is campus-based.

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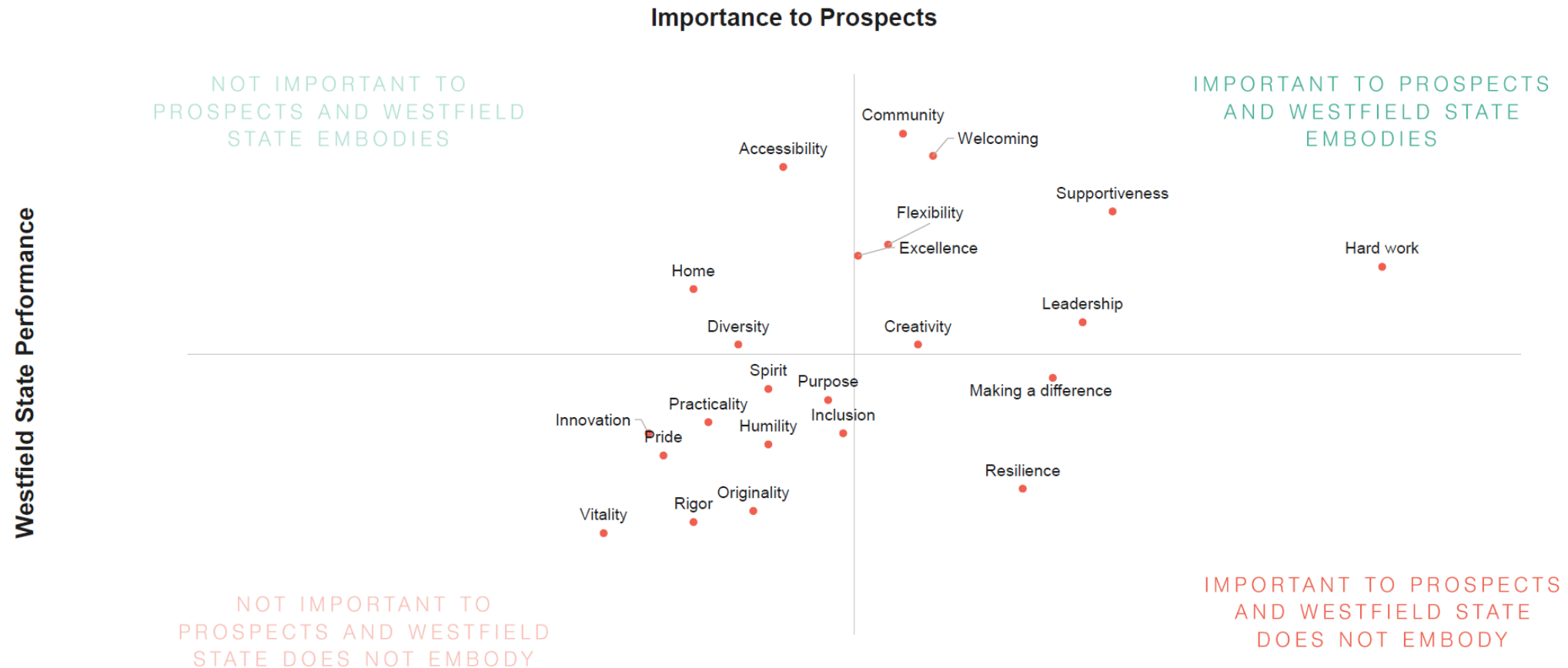
Nestor the Owl is loved by all.

The mascot's story is critical to Westfield's future.



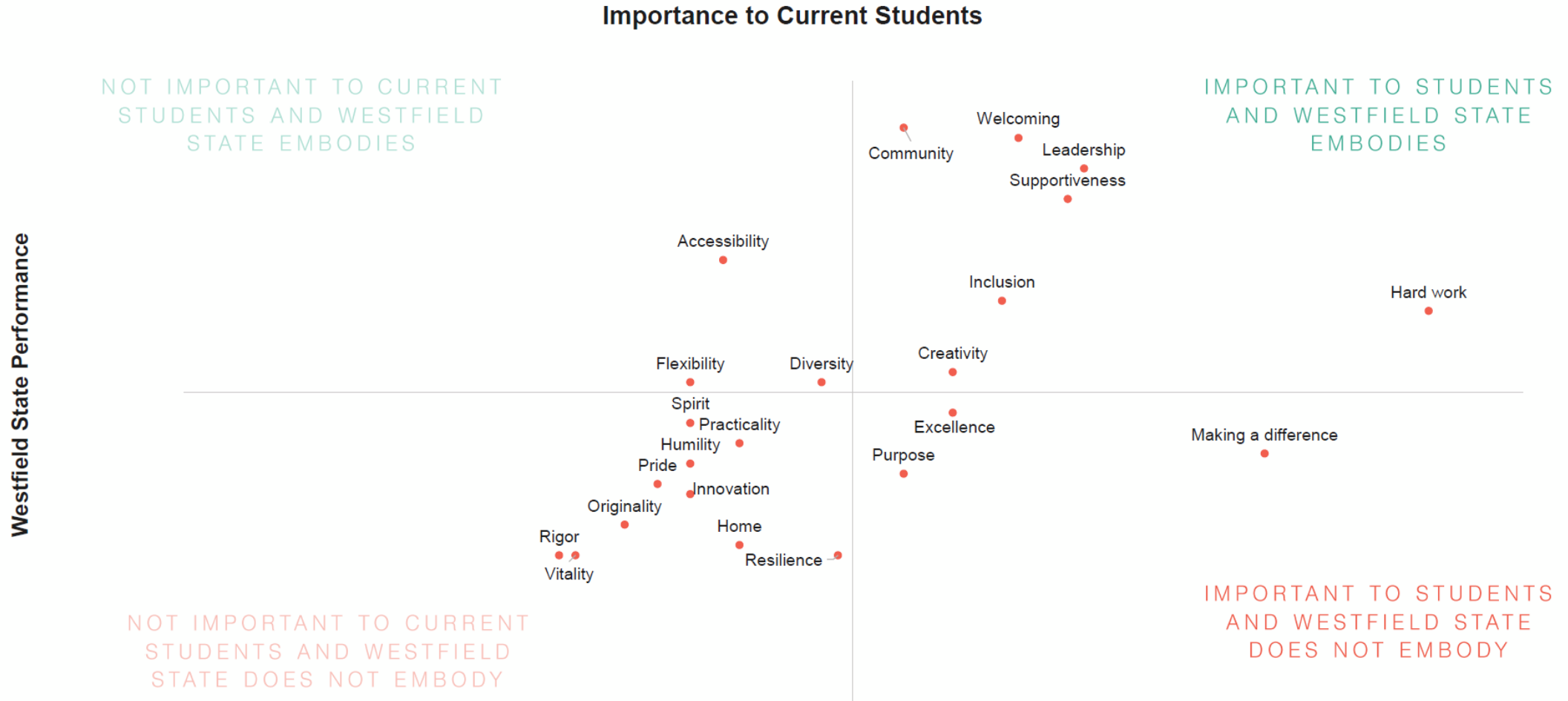
VALUE MAP - PROSPECTS

Prospects feel Westfield State embodies a variety of values that are important to them, including community, welcoming, supportiveness, flexibility, excellence, creativity, leadership and hard work. The two important values they do not associate with the university are making a difference and resilience.



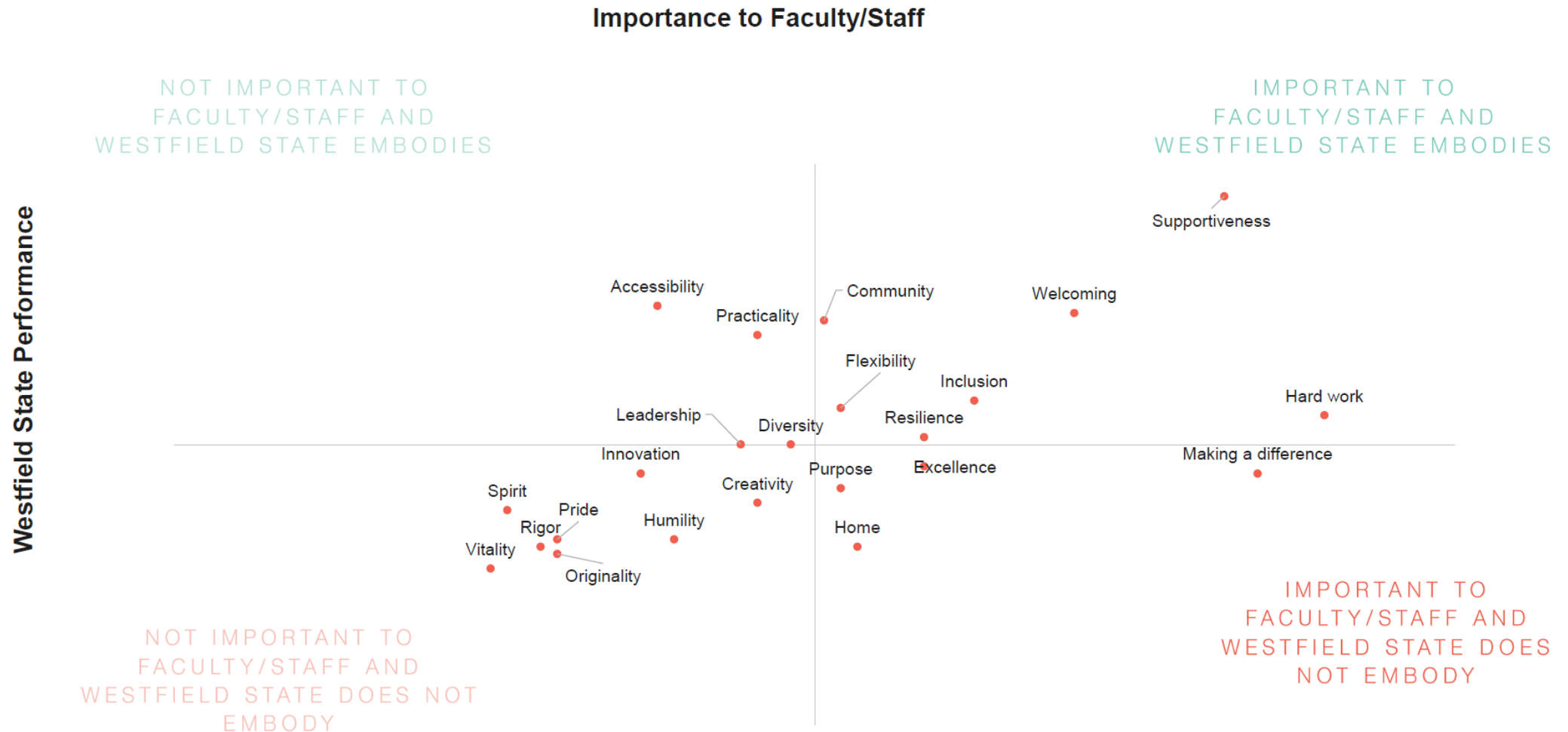
VALUE MAP – CURRENT STUDENTS

**Current students feel Westfield State embodies a variety of values that are important to them, including community, welcoming, supportiveness, leadership, inclusion, creativity and hard work. They do not feel Westfield State embodies excellence, purpose or making a difference.**



VALUE MAP – FACULTY AND STAFF

Finally, faculty and staff feel Westfield State embodies community, welcoming, supportiveness, flexibility, inclusion, hard work and resilience. They do not feel Westfield State embodies the important values of excellence, purpose, home or making a difference.



THREE WORDS THAT DESCRIBE WESTFIELD STATE STUDENTS/PROSPECTS

Current campus audiences describe Westfield State students as friendly, kind, dedicated, hardworking, diverse, curious and motivated. Prospects describe themselves as kind, hardworking, funny, outgoing, smart, caring and determined.

3 Words That Describe Westfield State Students – Among Current Students and Faculty/Staff



3 Words That Describe Themselves – Among Prospects



# WHOOOOO ARE WE?

WESTFIELD STATE UNIVERSITY  
REBRANDING: THE DEVELOPMENT



## **GROW PERCEPTION.**

Minimal perceptions exist about Westfield State but it is on the way up with positive experiences from those who are connected.

**Opportunity: Establish a clear brand and expand awareness**

## **EMPOWER STUDENT SUCCESS & ENHANCE ACADEMICS.**

Student support is an existing strength of the institution while audiences identify a need to enhance academic offerings.

**Opportunity: Highlight Westfield State's history of inclusion— how their distinctive support of students from various backgrounds results in a richer, more transformative learning environment.**

## **CULTIVATE WESTFIELD CULTURE.**

Stakeholders identify a need to cultivate a robust campus culture of belonging to build on the positive perceptions of being safe and having values of community.

**Opportunity: Leverage Nestor the Owl to foster affinity across connected and prospective audiences. Embrace unique on-campus student activities. Explore appropriate uses of colloquial phrases such as “Westy.”**

## **EXTEND COMMUNITY CONNECTION.**

The institution has a desire to grow community engagement and connections to internships were a top important factor across audiences.

**Opportunity: Expand currently available internship experiences and the on-campus leadership and student organization opportunities.**

# BRAND PLATFORM: CENTRAL CONCEPTS

- INQUISITIVENESS & WISDOM
- HEROISM & SERVICE
- CONVERGENCE &  
INNOVATION





# INQUISITIVENESS

Related Values: Wisdom | Perspective | Open-mindedness

: the pursuit of knowledge and new understanding gained through lived experiences and the convergence of people, opportunities and ideas. Actively learning, developing and nurturing one's intellect and character. Fuels rewarding fun and is a fundamental trait of respected leaders that shows honor and dignity towards others.



Single Minded Idea (SMI) + Positioning Statement

[Westfield State is]  
Where the inquisitive converge for  
meaningful success.

Westfield State is an enriching institution where a legacy and vision of convergence, culture of inquisitiveness, and balance between immersive residential and beyond-classroom experiences, yield lifelong success.

# WHOOOOO ARE WE?

WESTFIELD STATE UNIVERSITY  
REBRANDING: THE LAUNCH



# BRAND PLATFORM: NEXT STEPS

- 12/9 – 12/16: REVIEW OF IMPLEMENTATION CONCEPTS
- 12/16 – 1/15: FINE TUNING & FINAL APPROVALS
- LATE JAN/EARLY FEB: CAMPUS UNVEILING
- SPRING 2025: BRAND ACTIVATION



# WHOOOOO ARE WE?

WESTFIELD STATE UNIVERSITY  
REBRANDING: THE INVESTMENT



# BRAND INVESTMENT

EXPENSE	BUDGETED	TIMELINE & DELIVERABLES
Research, Development, and Launch	\$650,000 (est.)	FY 2025 completion of signature promotional materials, environmental branding, and redesign of office materials
Advertising Redesign	NA	Spring 2025; Redesign accounted for in current contracts (FY25)
Campus Partner Needs	NA	FY25 – FY26; Redesign to take place with new orders (e.g. diplomas, promotional materials, Bookstore Spirit Materials, campus signage, athletics uniforms)

# Questions?

*Thank you!*





# Blue Diamond Ball





# Blue Diamond Ball





# Westfield State Alumni :Updates





# Westfield State Alumni :Updates





# Westfield State Alumni :Updates





# Preparing for a Campaign **Situational Assessment**

December 2024



Kathy  
Howrigan  
CONSULTING



# A Look Back...



# A Look Back to 2019-2020 Campaign Planning Study...

- **Internal Assessment of Advancement**

- **Benchmarking**

*WSU has an emerging giving program, ranked below the cohort for most measures.*

- **Analytics**

*\$7-\$11M from individual donors of \$10K or more is achievable **with additional 5-7 FTE's in Advancement.***

- **\$10M Case for Support**

***“Experience. The Westfield State Difference.”***



# What has happened since 2020

- **External:** Covid
- **University-Wide**
  - Shifts in leadership at all levels of the University and Advancement.
  - President Thompson bringing vision, mending relationships, and leading a strategic planning process.
  - Changes in academic affairs structure
  - President's Cabinet is strong, but a relatively new team.
- **Within Advancement:**
  - Focus has been on building and rebuilding **relationships**, and increasing **engagement** overall
  - IA has made significant progress in improving **collaboration** and culture across campus.
  - **No additional investment** has been made in staffing.



# Key Findings from 2020 Study Report

1. While WSU had vision and aspirational future to share with its constituents, **the external narrative needed to be transformed to one of vision and aspiration.**
2. **Institutional Advancement is insufficiently resourced** to support a comprehensive campaign.
3. The Advancement team was lacking sufficient levels of trust, organizational effectiveness and shared understanding to optimize engagement and philanthropic support.
4. Continued **quality issues within fundraising database.**
5. To nurture a culture of philanthropy and professionalism comprehensive **multi-year plan for Advancement was needed.**





Where do we stand now?



# Current Update on Key Findings

1. With the arrival of President Thompson and through the development of the new Strategic Plan, WSU has made progress on building **vision and aspiration**.

- There are still many competing and emerging priorities.
- WSU is ready to articulate the “why” and “how” of a comprehensive campaign.

2. WSU remains **insufficiently resourced in Advancement** to support a comprehensive campaign.

- Campaign readiness is dependent upon additional resources focused on Advancement Services, Donor Relations, Campaign Management, and Major/Leadership Giving.



# Current Update on Key Findings, continued

3. The Advancement team has built greater levels of **trust, organizational effectiveness and shared understanding** to optimize engagement and philanthropic support.
  - This is the area that has seen the greatest level of progress.
  - Although IA has been intentional in these areas, IA will need to continue to be diligent in focusing on building trust and collaboration, with internal and external relationships.
4. WSU continues to experience **data quality issues**, though there has been improvement
  - This is a critical area of concern.
  - Advancement Services team will need additional resources.
5. A comprehensive **multi-year plan for Advancement is still needed** to nurture a culture of philanthropy and professionalism.
  - Due to organizational instability and lack of resources this has been a challenge.



# The Path Forward



# The Path Forward: Precursors to a Campaign

The following actions should be taken in FY25 to prepare for a potential campaign launch in FY26:

## 1. Optimize Major Giving:

- Add 3-4 **additional staff** (outlined on future slide)
- Work with an **external firm to identify the top 50-100 prospects** for major and principal gift cultivation, and to segment other tiers of prospects.
- **Identify unifying priorities** for a 2-3 year targeted/bridge campaign while WSU readies itself for a comprehensive campaign.
- **Work with a Fundraising Communications Partner** to develop a campaign “Case for Support”.
- Establish clear metrics and performance dashboards for gift officers.



# The Path Forward: Precursors to a Campaign, continued

The following actions should be taken in FY25 to prepare for a potential campaign launch in FY26:

## 2. Address Operational Challenges::

- Develop a **multi-year plan** for Advancement.
- Develop a roadmap and plan for **addressing all data quality issues**.
- Ensure that Volunteer Boards (BOT, FOUNDATION & WSAA) have clear understanding of their roles in fundraising.
- **Increase** Advancement staff's **focus on major gift fundraising** and **strategic donor retention and cultivation** and **less on** producing and organizing fundraising **events**.

## 3. Assess campaign goal: **Determine an aspirational, yet achievable goal** through priority setting, prospect analysis, and potentially some additional external testing through feasibility discussions,



# Precursors to a Campaign: Required Additional Staffing

These staff positions are needed to optimize major giving:

- **Immediately:**

- **Associate/Assistant Director of Advancement Services:** Currently 2.5 FTE execute six different functions.
- **Donor Relations Officer:** Additional resources to cultivate, steward, and communicate to six- and seven- figure prospects.
- **Campaign Director:** Will with the Vice President and WSU Leadership to plan, manage, implement, and evaluate all capital/comprehensive campaign activities.

- **In calendar year 2025:**

- **Gift Officer:** Will cultivate and solicit prospects. Portfolio (Major/Leadership/Planned) will be dependent upon prospect analysis,
- **Communications Staff:** Advancement-specific resources to support Annual Giving, Campaign, Alumni Relations communications (including digital communications) as well as gift proposal writing.



# Precursors to a Campaign: Investment (Very preliminary)

- This illustration estimates an investment of \$350K for FY25, which includes:
  - Prospect Analysis
  - Case for Support,
  - Three additional FTE (Donor Relations, Advancement Services, Campaign Director)
  - Campaign Counsel
- Over three years (FY25-27), the investment is \$2M.

		Staffing							
Proposed Position	Proposed Salary	FY25	FY26	FY27	FY28	FY29	FY30	Total	
Donor Relations	\$75,000	\$37,500	\$76,500	\$78,030	\$79,591	\$81,182	\$82,806	\$435,609	
Advancement Services	\$80,000	\$40,000	\$81,600	\$83,232	\$84,897	\$86,595	\$88,326	\$464,650	
Campaign Director	\$100,000	\$50,000	\$102,000	\$104,040	\$106,121	\$108,243	\$110,408	\$580,812	
Subtotal including contract increase (2%)	\$255,000	\$127,500	\$260,100	\$265,302	\$270,608	\$276,020	\$281,541	\$1,481,071	
Subtotal with 45.05% Fringe	\$369,878	\$184,939	\$377,275	\$384,821	\$392,517	\$400,367	\$408,375	\$2,148,293	
Gift Officer	\$90,000	\$0	\$91,800	\$93,636	\$95,509	\$97,419	\$99,367	\$477,731	
Communications	\$75,000	\$0	\$76,500	\$78,030	\$79,591	\$81,182	\$82,806	\$398,109	
Subtotal including contract increase (2%)	\$165,000	\$0	\$168,300	\$171,666	\$175,099	\$178,601	\$182,173	\$875,840	
Subtotal with 45.05% Fringe	\$239,333	\$0	\$244,119	\$249,002	\$253,982	\$259,061	\$264,242	\$1,270,406	
<b>Total Salaries with Fringe</b>	<b>\$609,210</b>	<b>\$184,939</b>	<b>\$621,394</b>	<b>\$633,822</b>	<b>\$646,499</b>	<b>\$659,428</b>	<b>\$672,617</b>	<b>\$4,027,909</b>	
		<b>Programs and Operations - PRELIMINARY ESTIMATE</b>							
		FY25	FY26	FY27	FY28	FY29	FY30	Total	
Consulting & Training: Campaign Counsel Staff Training, Case for Support Development		\$135,000	\$135,000	\$25,000	\$25,000	\$25,000	\$25,000	\$370,000	
Communications & Marketing		\$10,000	\$30,000	\$30,000	\$30,000	\$30,000	\$30,000	\$160,000	
Cultivation & Stewardship: Travel, Events		\$10,000	\$115,000	\$15,000	\$20,000	\$20,000	\$115,000	\$295,000	
Technology & Prospect Intelligence		\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$60,000	
<b>Program and Operations Totals</b>		<b>\$165,000</b>	<b>\$290,000</b>	<b>\$80,000</b>	<b>\$85,000</b>	<b>\$85,000</b>	<b>\$180,000</b>	<b>\$885,000</b>	
		FY25	FY26	FY27	FY28	FY29	FY30	Total	
<b>Grand Total</b>		<b>\$349,939</b>	<b>\$911,394</b>	<b>\$713,822</b>	<b>\$731,499</b>	<b>\$744,428</b>	<b>\$852,617</b>	<b>\$4,912,909</b>	
			<b>\$1,975,155</b>					13	





# Discussion



## **Board of Trustees**

December 9, 2024

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### **MOTION**

The Advancement, Marketing, and External Relations Committee recommends approval to the full Board:

To approve the granting of staff emeriti status, effective December 9, 2024, to the following individuals:

- Karen Canary
- Rudy Hebert
- Mark St. Jean

**Staff Emeritus/a Nomination Form  
Westfield State University**

Nominee: **Karen Canary**  
Address/Contact Information: [REDACTED]

Date of Hire: 8/5/01      Retirement Date: 12/16/22

Nominator Name: Becca Brody, Senior Librarian, and Tom Raffensperger, Library Director      Date: 9/24/24  
Address/Contact Information: Ely Library, 577 Western Ave, Westfield MA 01086

- Base Criteria:
- Nominee is retired from full-time, benefitted service at Westfield State.
  - Nominee served in full-time capacity at Westfield State for a minimum of 10 years.
  - Nominee is not employed as a member of the full-time staff of any other school, college or university.

Check all that apply to your nomination. Please provide a detailed line of reasoning.

Substantive, sustained achievement at Westfield State in service to students.

Explanation: Karen has worked closely with faculty, staff, and students across the University on many projects, including the President's Office, Alumni Office, Board of Trustees, Athletics, Student Affairs, Political Science Department, and the English Department. Karen gave in-class presentations on materials related to the history of the institution and the development of particular academic programs, and also met with individual students working on capstones and research projects. At times during her career she supervised and mentored students workers who helped prepare scanning and digitization projects for the University Archives and also met with library student interns to explain archives and technical services work.

Substantive, sustained achievement at Westfield State in service to field.

Explanation: Karen has worked with archivists at the Westfield Athenaeum, Boston Public Library, and other local and regional archives, sharing advice on the practical management of archives at smaller institutions. One example was her discovery of Town records for Vernon, Vermont in the Library's collection. She arranged the transfer of those items to the Town of Vernon and provided advice on the archival description and preservation of those materials. Her archives work as presented on the Ely Library website was cited as a model for other small archives at the New England Technical Services Librarians conference.

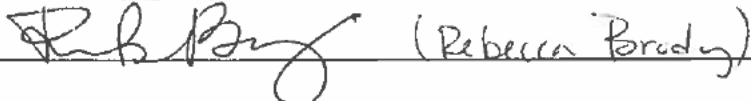
Substantive, sustained achievement at Westfield State in service to the Institution.

Explanation: Karen oversaw the move of the Archives from an old office/meeting room to the current climate-controlled facility. Moreover, she took what was literally a pile of unorganized materials and preserved, described, organized, and provided access to these materials. She stewarded the process of digitization of large portions of the collection, including yearbooks, student newspapers, bulletins, catalogs, and the early papers of the institution, in collaboration with the Boston Public Library working through an LSTA grant. This digitization transformed both access to and preservation of these materials. Karen was instrumental in our acquisition of the Horace Mann-Samuel Newman letter of 1842, the archives' oldest document pertaining to our institution. Karen was a quiet leader in the Technical Services Department. Her willingness to learn new systems and procedures and to collaborate on collection projects ensured the forward momentum of the department. She was a key player in managing our Demand Driven Acquisitions Program and was instrumental in binding and cataloging our MPA Capstones, as well as serving as the main acquisitions and cataloging contact for multiple subject areas. Her book repair skills extended the life of the circulating collections. Karen's knowledge of authors and titles relevant to the history of the institution has improved not just the University Archives, but the Library's circulating collections as well.

Substantive, sustained achievement in service to the community.

Explanation: Karen has worked with external organizations such as the Westfield Historical Commission, Westfield Athenaeum, and Boston Public Library. She has also worked closely and productively with many historians, alumni, and donors. She has fielded countless questions from community members and researchers. Even more than her specific accomplishments, Karen has been a friendly, professional, positive, and supportive colleague, often going far above and beyond the call of duty, always with the needs of others in mind.

After completing the above, print this form, sign, and send to: Human Resources Office, Attn: Tracy Daborowski  
It may also be submitted with an electronic signature to [tdaborowski@westfield.ma.edu](mailto:tdaborowski@westfield.ma.edu)

Signature:  (Rebecca Brody)

November 21, 2024

Karen Canary  
[REDACTED]  
[REDACTED]

Re: Staff Emeriti Nomination

Dear Karen:

Congratulations! I am pleased to let you know that you were nominated for emeriti status!

A staff advisory committee, consisting of two APA members, two AFSCME members, and myself have reviewed your nomination and the emeriti committee has voted to forward your nomination to the Board of Trustees for their consideration and approval.

The enclosed bio will be shared with the President of the University and the Board of Trustees as part of this process. The Staff Emeriti policy includes the option of providing additional information regarding your nomination to the Board of Trustees. The policy is available for your reference on the Human Resources page of the University's website.

Please review your bio carefully and forward any corrections and/or additional information you would like included to Jean Beal at [jbeal@westfield.ma.edu](mailto:jbeal@westfield.ma.edu). no later than **November 29, 2024**.

I look forward to reviewing your candidacy with the trustees at their December 9, 2024, board meeting.

Please don't hesitate to let me know if you have questions.

Sincerely,



Lisa G. McMahon  
Vice President, Institutional Advancement and  
Executive Director, Westfield State Foundation

*Karen,  
You are so  
deserving of this  
recognition! 😊*

Enclosure

Horace Mann Center (413) 572-8645  
333 Western Avenue [www.westfield.ma.edu](http://www.westfield.ma.edu)  
P.O. Box 1630  
Westfield, MA  
01086-1630

## **Karen Canary Bio**

Karen has had a broad and impactful role in supporting students and collaborating across various departments at the University. Throughout her career, she has worked closely with faculty, staff, and students on a range of projects which have involved the President's Office, Alumni Office, Board of Trustees, Athletics, Student Affairs, the Political Science Department, and the English Department.

Karen has also delivered in-class presentations on topics related to the institution's history and the development of its academic programs. In addition, she has mentored and guided individual students working on capstones and research projects, offering valuable support for their academic development.

Throughout her career, Karen has supervised student workers who assisted with scanning and digitization projects for the University Archives and provided guidance to library student interns, introducing them to the work of archives and technical services. Her commitment to student mentorship, academic support, and the preservation of University history has made her a vital contributor to the University community.

Karen has demonstrated a strong commitment to her field by collaborating with archivists at a variety of institutions, including the Westfield Athenaeum, Boston Public Library, and other local and regional archives. In these partnerships, she has shared her expertise on the practical management of archives at smaller institutions.

One notable example of Karen's contributions was her discovery of town records for Vernon, Vermont within the library's collection. She facilitated the transfer of these records to the Town of Vernon and offered valuable advice on their archival description and preservation.

Her work in archives has been recognized and highlighted on the Ely Library website and was cited as a model for other small archives at the New England Technical Services Librarians conference. Through these efforts, Karen has made a significant impact on the archival community, particularly in supporting smaller institutions in the effective management and preservation of their collections.

In her service to the institution, Karen played a pivotal role in overseeing the relocation of the University Archives from an old office/meeting room to a modern, climate-controlled facility. Faced with a disorganized collection, she took the initiative to preserve, describe, organize, and provide access to these materials, transforming them into a well-structured archive.

Karen also led the digitization of significant portions of the collection, including yearbooks, student newspapers, bulletins, catalogs, and early institutional papers, in collaboration with the Boston Public Library through an LSTA grant. This effort significantly improved both access to and preservation of these invaluable resources. She was also instrumental in acquiring the Horace Mann-Samuel Newman letter of 1842, the oldest document in the archives related to the institution's history.

A quiet leader within the Technical Services Department, Karen consistently demonstrated a strong willingness to learn new systems and procedures, and her collaborative spirit was essential in driving the department forward. She was a key figure in managing the library's Demand Driven Acquisitions Program and played a central role in binding and cataloging the MPA capstones. Additionally, Karen served as the main acquisitions and cataloging contact for multiple subject areas.

Her expertise in book repair also extended the life of the library's circulating collections, ensuring their continued use by students and faculty. Karen's deep knowledge of authors and titles relevant to the University's history has not only enhanced the University Archives but also strengthened the library's circulating collections, making them more robust and relevant to the academic community.

In her service to the community, Karen has built strong working relationships with external organizations, including the Westfield Historical Commission, the Westfield Athenaeum, and the Boston Public Library. She has also collaborated closely with historians, alumni, and donors, fostering productive partnerships that have benefited both the University and the broader community.

Karen has fielded countless inquiries from community members and researchers, always providing thoughtful and knowledgeable responses. Beyond her specific accomplishments, Karen is known for her friendly, professional, and supportive demeanor. She consistently goes above and beyond the call of duty, prioritizing the needs of others and ensuring that her colleagues and the community have the resources and support they require. Her positive attitude and dedication to service have made her a valued and trusted member of the team.

## Staff Emeritus/a Nomination Form Westfield State University

Nominee: <b>Rudolph (Rudy) Hebert, Jr.</b>	
Address/Contact Information: [REDACTED]	
Date of Hire: 12-6-1982	Retirement Date: 3-18-2020
Nominator Name: Alan Blair Address/Contact Information: 577 Western Ave Wilson Hall 100A Westfield, MA 010185 <a href="mailto:alan@westfield.ma.edu">alan@westfield.ma.edu</a> 413-572-5582	
Date: 9-13-2024	
Base Criteria: <input checked="" type="checkbox"/> Nominee is retired from full-time, benefitted service at Westfield State. <input type="checkbox"/> Nominee served in full-time capacity at Westfield State for a minimum of 10 years. <input type="checkbox"/> Nominee is not employed as a member of the full-time staff of any other school, college or university.	
Check all that apply to your nomination. Please provide a detailed line of reasoning.	<input type="checkbox"/> Substantive, sustained achievement at Westfield State in <u>service to students</u> . Explanation:
	<input type="checkbox"/> Substantive, sustained achievement at Westfield State in <u>service to field</u> . Explanation:
	<input checked="" type="checkbox"/> Substantive, sustained achievement at Westfield State in <u>service to the Institution</u> . Explanation: Rudolph "Rudy" Hebert, Jr. served Westfield State for over 37 years. He began his career in 1982 as an EDP Entry Operator II, was promoted to Staff Assistant, Staff Associate, then to Assistant Director, Associate Director of Management Information Services, before being promoted to Director, Administrative Systems, a position he held from 2006 until his retirement in 2020. Mr. Hebert's service meets the criteria for emeriti status in the area of service to the institution.  He played a critical role in the college's computer operations over the years. Several of the systems he procured help shape the future of the technology landscape for years to come. For example, Ellucian Banner, our current ERP/SIS, the core of our business and student operation, the universities first Web Portal, Degree Works, which allows students to view and manage their degree, as well as Managed Reporting, which brought the universities reporting capabilities to a new and innovative level at the time.  Throughout his career, Mr. Hebert was an outstanding resource for faculty, staff, and students. He was generous with his time and talents; he spoke to computer science classes, participated in seminars on campus and in an area school's systems on numerous occasions and served as an Adjunct Professor.  Mr. Hebert was recognized by the several organizations over his great career for volunteering his own personal time to assist with their technology needs including the Springfield District Court, Westfield District Court, Cub Scouts of America, the Division of Unemployment Assistance. Mr. Hebert also served with distinction as a member, and Chair, of the Massachusetts Higher Education Data Process Directors Council.  The skill and knowledge he contributed to configuring and programming our ERP/SIS helped the university to avoid significant costs that would have otherwise had to be outsourced. His leadership and understanding of the integration of the myriads of

systems with our ERP/SIS were pivotal in keeping the university in compliance with local, state and federal policies, guidelines and regulations.

He played a critical role in so many areas of the college's growth – from housing, registration, student transcripts, the design and implementation of the university's intranet and the first online billing platform.

Mr. Hebert was a friend, a leader, a mentor, an accomplished professional who gave his very best to Westfield State.

Substantive, sustained achievement in service to the community.

Explanation:

**After completing the above, print this form, sign, and send to: Human Resources Office, Attn: Tracy Daborowski  
It may also be submitted with an electronic signature to [tdaborowski@westfield.ma.edu](mailto:tdaborowski@westfield.ma.edu)**

**Signature:**

**Office Use:**

Received: \_\_\_\_\_ Notification to Nominee: \_\_\_\_\_ Resume attached: \_\_\_\_\_ last available \_\_\_\_\_ updated/current



November 21, 2024

Rudolph Hebert, Jr.  
[REDACTED]  
[REDACTED]

Re: Staff Emeriti Nomination

Dear Rudy:

Congratulations! I am pleased to let you know that you were nominated for emeriti status!

A staff advisory committee, consisting of two APA members, two AFSCME members, and myself have reviewed your nomination and the emeriti committee has voted to forward your nomination to the Board of Trustees for their consideration and approval.

The enclosed bio will be shared with the President of the University and the Board of Trustees as part of this process. The Staff Emeriti policy includes the option of providing additional information regarding your nomination to the Board of Trustees. The policy is available for your reference on the Human Resources page of the University's website.

Please review your bio carefully and forward any corrections and/or additional information you would like included to Jean Beal at [jbeal@westfield.ma.edu](mailto:jbeal@westfield.ma.edu). no later than **November 29, 2024**.

I look forward to reviewing your candidacy with the trustees at their December 9, 2024, board meeting.

Please don't hesitate to let me know if you have questions.

Sincerely,

*Lisa*

Lisa G. McMahon  
Vice President, Institutional Advancement and  
Executive Director, Westfield State Foundation

*Congrats Rudy,  
We are so excited to be able  
to honor you in this way!*

Enclosure

## **Rudy Hebert Bio**

Rudy Hebert dedicated over 37 years of exemplary service to Westfield State University, beginning his career in 1982 as an EDP Entry Operator II. His journey through the institution saw him rise through the ranks to become the Director of Administrative Systems, a position he held from 2006 until his retirement in 2020. His extensive service qualifies him for emeriti status, reflecting his significant contributions to the University.

Throughout his tenure, Rudy played a pivotal role in shaping the University's technology landscape. He was instrumental in procuring and implementing several key systems that transformed the institution's operations. Notably, he oversaw the integration of Ellucian Banner, the University's current ERP/STUDENT/FINANCE platform, which serves as the backbone of business and student operations. He also spearheaded the development of the University's first Web Portal and Degree Works, a tool that empowers students to manage their academic progress effectively. Additionally, his work on paperless reporting utilizing the EPRINT for Banner and managed reporting platforms enhanced the University's reporting capabilities, setting a new standard for innovation at the time.

Rudy was not only a technical expert but also a generous mentor and resource for faculty, staff, and students. He frequently shared his knowledge by speaking to computer science classes and participating in seminars both on campus and in local schools. His commitment to education extended to his role as an Adjunct Professor and Computer Science advisor to students, where he inspired the next generation of technology professionals.

His dedication to service extended beyond the University. Rudy volunteered his time and expertise to various organizations, including the Springfield District Court, Westfield District Court, Cub Scouts of America, and the Division of Unemployment Assistance. His leadership was further recognized through his role as a member and Chair of the Massachusetts Higher Education Data Process Directors Council, where he contributed to the advancement of data processing in higher education.

Rudy's technical skills were crucial in configuring and programming the ERP/STUDENT/FINANCE platform, enabling the University to avoid significant outsourcing costs. His deep understanding of system integration ensured compliance with local, state, and federal regulations, safeguarding the institution's operations.

His contributions were vital in numerous areas of the University's growth, including housing, registration, student transcripts, and the design and implementation of the University's intranet and the first online student registration for classes platform.

Rudy is remembered not only as a leader and mentor but also as a friend and an accomplished professional who consistently gave his best to Westfield State University. His legacy of service and dedication continues to inspire those who follow in his footsteps.

## Staff Emeritus/a Nomination Form Westfield State University

Nominee: <span style="float: right;">Mark St. Jean</span> Address/Contact Information: <span style="background-color: black; color: black;">[REDACTED]</span>	
Date of Hire: 11/2/1992	Retirement Date: 1/18/24
Nominator Name: <span style="float: right;">Chris Hirtle</span> Address/Contact Information: Media Services, Parenzo 013A	
Date: 9/10/2024	
Base Criteria: <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Nominee is retired from full-time, benefitted service at Westfield State.</li> <li><input checked="" type="checkbox"/> Nominee served in full-time capacity at Westfield State for a minimum of 10 years.</li> <li><input checked="" type="checkbox"/> Nominee is not employed as a member of the full-time staff of any other school, college or university.</li> </ul>	
Check all that apply to your nomination. Please provide a detailed line of reasoning.	[ ] Substantive, sustained achievement at Westfield State in <u>service to students</u> . Explanation: <ul style="list-style-type: none"> <li>• Original Lab Technician for the Department of Communication, directly involved with students in all phases of TV and Video Production for the department.</li> <li>• Mentor to all Broadcast Communication Students.</li> <li>• Creator of the Golden Lens Cap Award for Senior Comm Students.</li> <li>• Advisor to the Television Club</li> </ul>
	[ ] Substantive, sustained achievement at Westfield State in <u>service to field</u> . Explanation:
	[ ] Substantive, sustained achievement at Westfield State in <u>service to the Institution</u> . Explanation: <ul style="list-style-type: none"> <li>• 31 years of commitment to the students, faculty and staff of Westfield State.</li> <li>• Television Coordinator for the Communication Department</li> <li>• Assistant Director of Media Services</li> <li>• Executive Producer of “As Schools Match Wits” 19 years and counting</li> <li>• Integral member of Media Services</li> <li>• Integral member of the Communication Department</li> <li>• Instrumental in the success of many Commencements</li> <li>• Member of various campus committees</li> </ul>

Substantive, sustained achievement in **service to the community**.

Explanation:

- Former Coordinator of the City of Westfield's Public Access Channel, a position coordinated through the University.
- Producer of Local Political programming of elected officials, live broadcast of all major City Council Meetings
- Executive Producer of many local political debates
- Creator of many local video productions for the City of Westfield
- Instrumental in the establishment of the current Westfield Public Radio operations in conjunction with WSKB.
- Live productions of the annual Kiwanis Auction

**After completing the above, print this form, sign, and send to: Human Resources Office, Attn: Tracy Daborowski**  
**It may also be submitted with an electronic signature to [tdaborowski@westfield.ma.edu](mailto:tdaborowski@westfield.ma.edu)**

**Signature:**

*Christopher S Hirtle*

9/16/2024

C11E46F81A0D4E0...

**Office Use:**

Received: \_\_\_\_\_ Notification to Nominee: \_\_\_\_\_ Resume attached: \_\_\_\_\_ last available \_\_\_\_\_ updated/current

November 21, 2024

Mark St. Jean  
[REDACTED]  
[REDACTED]

Re: Staff Emeriti Nomination

Dear Mark:

Congratulations! I am pleased to let you know that you were nominated for emeriti status!

A staff advisory committee, consisting of two APA members, two AFSCME members, and myself have reviewed your nomination and the emeriti committee has voted to forward your nomination to the Board of Trustees for their consideration and approval.

The enclosed bio will be shared with the President of the University and the Board of Trustees as part of this process. The Staff Emeriti policy includes the option of providing additional information regarding your nomination to the Board of Trustees. The policy is available for your reference on the Human Resources page of the University's website.

Please review your bio carefully and forward any corrections and/or additional information you would like included to Jean Beal at [jbeal@westfield.ma.edu](mailto:jbeal@westfield.ma.edu). no later than **November 29, 2024**.

I look forward to reviewing your candidacy with the trustees at their December 9, 2024, board meeting.

Please don't hesitate to let me know if you have questions.

Sincerely,



Lisa G. McMahon  
Vice President, Institutional Advancement and  
Executive Director, Westfield State Foundation

*Congrats to you!  
You are so deserving  
of this recognition!*

Enclosure

## Mark St. Jean Bio

With over 31 years of dedicated service at Westfield State University, Mark St. Jean has profoundly influenced the lives of countless students and the broader community. As the original Lab Technician for the Department of Communication, he was instrumental in shaping the educational experience for students involved in TV and video production. His hands-on approach allowed students to engage directly with industry-standard equipment and techniques, fostering a practical learning environment.

Mark's commitment to mentorship is exemplified by his role as a mentor to Broadcast Communication students, where he provided guidance and support throughout their academic journeys. He established the Golden Lens Cap Award, recognizing outstanding achievements among senior communication students, which has become a cherished tradition within the department. Additionally, as the advisor to the Television Club, he encouraged students to explore their creativity and develop their skills in a collaborative setting.

In his capacity as Television Coordinator and Assistant Director of Media Services, Mark has been a cornerstone of the University's media landscape. He has served as the Executive Producer of "As Schools Match Wits" for 19 years, a program that not only entertains but also educates viewers about local schools and their achievements. His organizational skills and attention to detail have been vital in ensuring the success of numerous commencement ceremonies, where he has played a key role in coordinating media coverage and logistics.

Mark's influence extends far beyond the University. As the former Coordinator of the City of Westfield's Public Access Channel, he produced a variety of local political programming, including live broadcasts of City Council meetings and debates among elected officials. His work has provided the community with vital information and a platform for civic engagement.

In addition to his media work, Mark has produced numerous local video projects that highlight community events and initiatives. His involvement in live productions, such as the annual Kiwanis Auction, showcases his commitment to supporting local charities and fostering community spirit.

Mark St. Jean's legacy is one of unwavering dedication to education, community engagement, and the empowerment of students. His contributions have not only enriched the academic environment at Westfield State University but have also left a lasting impact on the Westfield community, making him a cherished figure in both realms.