



Board of Trustees

Advancement and Enrollment Management Committee

June 28, 2022

Minutes

Loughman Living Room, Scanlon Hall

and 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 PRESENT: Vice Chair Melissa Alvarado, Secretary Theresa Jasmin [joined at 8:39 AM], and Trustees Chris Montemayor, and William Reichelt

MEMBERS PARTICIPATING REMOTELY: Trustee Chloe Sanfacon

MEMBERS EXCUSED: Committee Chair Lydia Martinez-Alvarez

TRUSTEE GUESTS PRESENT: Trustees Dr. Robert Martin, Ali Salehi, and Dr. Gloria Williams

Also present were Westfield State University President Dr. Linda Thompson; Institutional Advancement Vice President Lisa McMahon; Enrollment Management Vice President Daniel Forster; Interim Director of Advancement and Major Gifts Bill Hynes; Director of Admissions Mike Mazeika; Director of Financial Aid Simone Backstedt; and Associate Registrar/Director of Graduate Program Admission Jessica Tansey.

The meeting was called to order at 8:31 AM by Committee Vice Chair Alvarado and the committee members participating as listed above were announced.

MOTION made by Trustee Reichelt, seconded by Trustee Montemayor, to approve the minutes of the April 27, 2022, meeting.

There being no further discussion, ROLL CALL VOTE taken:

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| Trustee Alvarado | Yes |
| Trustee Jasmin | Not yet in meeting |
| Trustee Montemayor | Yes |
| Trustee Reichelt | Yes |
| Trustee Sanfacon | Yes |

Motion passed unanimously.

It was announced that the meeting was being livestreamed and recorded.

President's Remarks. President Thompson stated she has asked Advancement to train the Board of Trustees, deans, and cabinet to develop a fundraising strategy for campus and to formulate a new committee focused on fundraising. She has also asked the Enrollment team to collaborate with Academic Affairs to develop a long-range plan for improving the enrollment strategy here in this region and to grow more students on a global scale.

Institutional Advancement Metrics May 31, 2022. Ms. McMahon shared highlights of the metrics. Last year was a record year of fundraising, but it is hoped that by the end of June more dollars will be raised than the total dollars raised last year of approximately \$939,000, which excludes bequests and state funding. This has been a year of change and introduction, outreach, and engagement of a new president, which has paid off with total donors year to date of 1,328, which is more than the donors in FY21 of 1,239. The number of alumni donating has grown from 652 in FY21 to 812 year-to-date. There are 12 new scholarships in the Foundation and the minimum to create a scholarship has changed from \$15,000 to \$25,000. Next year will focus on a planned giving platform. The Foundation created a fundraising committee to assist President Thompson. [Trustee Jasmin joined at 8:39 PM.]

Public Higher Ed Endowment Incentive Program (EIP) Match FY22 and FY23. Ms. McMahon stated the Foundation was able to contribute \$118,000 in matching funds toward a state internship program. Through the State's Endowment Incentive Program, we received \$277,000 in FY21, and from July 1, 2022, to June 30, 2023, for every \$2 dollars raised, the state will match \$1 up to \$555,555. Alumni participation is up by 25% because we have focused on engaging them and creating relationships with academic departments. Advancement is also collaborating with the deans to do targeted marketing and create better communication. The goal for alumni participation is 2.0% and it is now at 1.7%. In addition to alumni donors, knowing how many alumni are engaged in events is also important and will be a focus for Institution Advancement in FY23.

Alumni Update. Mr. Hynes gave updates on the alumni Summer of Fun events. The commencement social media challenge resulted in 300 new followers to receive the challenge funds of \$25,000. The Owl Club Athletics and Foundation Golf Tournaments have been scheduled. Alums have been updating their information, participating in Teacher Appreciation week events, winning Tony Awards (James Jackson, Jr. '97), honoring long-time swimming coach Dave Laing, and contributing alumni stories to an oral history project. Homecoming is scheduled for October 22 and will include the distinguished alumni award and a scholarship gala on October 21.

Class Profile. Mr. Forster handed out a June 9 report that showed the difference between Fall of 2021 and Fall 2022 for first year and transfer students at sister institutions that showed our numbers are higher compared to them. We transformed our marketing plan and were aggressive with name purchases and expanding the digital campaign from three to twelve months. Last year we had a 26.7% yield rate for gross deposits and 25.7% on net deposits. This year we are tracking gross deposits at 15.7%, more than a 10% drop. A 1% drop in yield represents 50 students. To maintain the same yield as last year, we would need to be up 500 students. We were planning on a 7-8% drop. We still did not have a full year of campus tours due to COVID, which was true across most campuses.

Mr. Mazeika provided current figures for first year and transfer students, which is not expected to grow exponentially. It is difficult to track when summer melt ends and retention begins so they will start coding students differently that attended for a while and then left. Students coming from out of state has increased. For FY23 all programs have been opened to the proximity rate for all New England states, which is lower for students than the out-of-state rate. Thirty-one percent of first-year deposits were from

students of color, an increase from 22.3% last year. The top five majors and deposits by major for the first year and transfer students was shared.

Open House, Survey Results. Mr. Forster shared the Open House and Accepted Student Days survey results and stated Admissions is working to add Open Houses to other ongoing events like homecoming. The EdSights texting platform has approximately 17% of students actively engaged, with 5% that have opted out. A summer texting campaign will be directed to help with summer melt and identify undecided students to do early interventions. Fun texting campaigns, such as sharing Spotify playlists, are also being planned.

CGCE Summer Enrollment. Ms. Tansey stated the current enrollment for the graduate program is 39 students, the highest yet. The summer term is a rollover semester for some students. Undergraduate students are currently at 9, which needs work. The number students in Summer I session is down for a variety of reasons. Some students just need to take a break. Summer II session starts next week.

Effectiveness of Financial Aid Awarding and Policy. Mr. Forster, Ms. Backstedt, and Mr. Mazeika shared the following statistics for financial aid.

- For FY22, there were 4,042 financial aid recipients broken down for 3,213 day students, 314 CGCE students, and 515 graduate students, which includes loans in addition to grants and scholarships. In FY22, 36% of day division students (this number is typically 33%) and 60% of CGCE students received Pell grants.
- The average gross need for students is \$13,335 and after offers of aid, the average unmet need is \$3,957. The average aid provided to students is \$2,468, but by yield, we are not competing with other institutions in the amount offered. We would need approximately \$5 million to bring our aid closer in line to our competitors. Dining plans and room and board now exceed our tuition and fees.
- To help find out why accepts are not converting to deposits, a survey will be sent within a month to those students who chose not to attend to find out why.
- Consultant 3E has been helping to get digital marketing spread to further areas. The division has been approved for an innovation grant and will be spending time in areas that have large alumni bases around Washington, DC and Florida visiting high schools and holding events.

Texting Platform. There will be more information at a future meeting on the texting platform that is tied to retention.

Dr. Michael Freeman, Chief of Staff, suggested the following:

- Survey students coming to Westfield this fall to ask why they chose to come here.
- Look at the zero expected family contribution (EFC) students, which had a \$2,400 gap on average. Closing that gap for zero EFC students will be critical, especially those of color. Look to see if we are targeting funds in that area.
- Academic merit (full ride) scholarships are significant signals to students of value. It makes them think this is a place they may want to check out.

Of the students who did not attend Westfield, approximately 6% said the financial aid was not enough and 2-3% said it was too expensive to attend, so about 9% indicated financial reasons for not attending.

There being no further business, **MOTION** made by Trustee Reichelt, seconded by Trustee Jasmin, to adjourn.

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

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| Trustee Alvarado | Yes |
| Trustee Jasmin | Yes |
| Trustee Montemayor | Yes |
| Trustee Reichelt | Yes |
| Trustee Sanfacon | Yes |

Motion passed unanimously.

Meeting adjourned at 9:46 AM.

Attachments presented at this meeting:

- a. Draft Minutes of April 27, 2022
- b. IA Metrics May 31, 2022
- c. EIP Guidelines 2022
- d. Alumni Relations Update
- e. Class Profile, Funnel, Open House, Survey Results Presentation
- f. Financial Aid Profile 3 Presentation