



Board of Trustees

Advancement and Enrollment Management Committee

8:30 AM
February 17, 2022

Loughman Living Room, Scanlon Hall

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>

COVID-19 procedures: Masks are required when indoors on the Westfield State campus, regardless of vaccine status. For more information about Westfield State's COVID-19 procedures, visit: <https://www.westfield.ma.edu/spring-2022covid/faq>

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- | | |
|---|--------------------------|
| 1. Call to Order | Trustee Martinez-Alvarez |
| 2. Approval of Minutes
a) December 16, 2021 | Trustee Martinez-Alvarez |
| 3. President's Remarks | Dr. Linda Thompson |
| 4. Items for Information | |
| a) Enrollment Update | Mr. Dan Forster |
| b) Spring Events | Mr. Dan Forster |
| c) Quarterly Dashboard | Ms. Lisa McMahon |
| d) Fundraising Report | Ms. Lisa McMahon |
| e) Owls in Florida/Hogan '77 Classic | Mr. William Hynes |
| g) Give a Hoot | Mr. William Hynes |
| h) Take a Seat | Ms. Marnie Dacko |
| i) Owls Around the Globe (OATG) | Mr. Ryan Meersman |

Attachment(s):

- a) Minutes – December 16, 2021
- b) Enrollment Update
- c) Spring Events PowerPoint
- d) Quarterly Dashboard
- e) Owls in Florida
- f) Give A Hoot Postcard
- g) Take a Seat Poster
- h) Owls Around the Globe (OATG)



Board of Trustees

Advancement and Enrollment Management Committee

December 16, 2021

Minutes

Conference Room A (Garden Level), Horace Mann Center

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

MEMBERS PRESENT: Committee Chair Lydia Martinez-Alvarez, Secretary Theresa Jasmin (entered at 8:34 AM), and Trustees Chloe Sanfacon and William Reichelt (joined at 8:34 AM).

MEMBERS PARTICIPATING REMOTELY: Vice Chair Melissa Alvarado

TRUSTEE GUESTS PRESENT: Trustees Paul Boudreau, Madeline Landrau, Dr. Robert Martin, Kevin Queenin, and Ali Salehi

Dr. Linda Thompson, President of Westfield State University, was also present.

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

MOTION was made and seconded to approve the minutes of the October 13, 2021 meeting.

There being no discussion, ROLL CALL VOTE taken:

Trustee Alvarado	Yes	Trustee Reichelt	Not yet in meeting
Trustee Jasmin	Not yet in meeting	Trustee Sanfacon	Yes
Trustee Martinez-Alvarez	Yes		

Motion passed unanimously.

A roll call was taken of committee members Alvarado, Martinez-Alvarez, and Sanfacon at the meeting. It was announced that the meeting was being livestreamed and captured as recorded.

President's Remarks. President Thompson stated she has been doing friendraising events and is hoping the Boards of Trustees and Foundation and the Alumni Association will host additional events. [Trustees Jasmin and Reichelt entered the meeting at 8:34 AM]

Staff Emeritus/a Status. The candidates for staff emerita designation represent incredibly talented staff with a total of 80 years served on the campus. Information on each candidate was presented.

MOTION made by Trustee Sanfacon, seconded by Trustee Jasmin, to approve the granting of staff emerita status, effective December 16, 2021 to the following individuals:

Nancy Goodness
Mary Ann Roussi
Cynthia Siegler

There being no discussion, ROLL CALL VOTE taken:

Trustee Alvarado	Yes	Trustee Reichelt	Yes
Trustee Jasmin	Yes	Trustee Sanfacon	Yes
Trustee Martinez-Alvarez	Yes		

Motion passed unanimously.

Institutional Advancement Update. President Thompson is sharing a wonderful story of Westfield State everywhere she goes and there are many alumni in the groups she sees. Fundraising initiatives for January through June were shared.

- The annual campaign started on December 15. The number of donors and dollars has increased this year.
- Day of Giving. Giving Tuesday has helped promote philanthropy over the last couple of years.
- The Take A Seat Campaign is looking to raise the last \$50,000 and in the holiday spirit has changed the slogan to “Give” A Seat in memory or honor of someone. Six trustees have purchased a seat.
- The 4th Annual Hogan Golf Classic is scheduled for March 12-14, 2022, at Club Pelican Bay in Naples, a premier golf course in southern Florida. The reception always has great engagement and funds raised will go to presidential initiatives. It is hopeful that there will also be a St. Patrick’s Day parade in Naples with a strong alumni presence.

Westfield State Foundation, Inc. Report. The Memorandum of Agreement between the Foundation and the University is being updated with the hope that the Foundation can provide more funding to the University this year. The Albert and Amelia Ferst Interfaith Center is part of the Foundation and their report of the critical work they are doing will be sent soon.

Alumni Report. One goal of the Alumni Relations office has been to refocus on alumni and connect them with current students. The SGA Executive Council alumni are hosting a reunion of councils to honor Barbara Hand, the SGA assistant for 31 years. They have raised over \$5,000 toward student senate scholarships in her honor. The next alumni trustee election is taking place in early 2022. Large reunions are taking place this coming spring and fall. An assessment will be conducted in the new year with current alumni standing and where the alumni association wants to go. The industry standards on alumni engagement include volunteerism, experiential, philanthropic and communication. The annual appeal gained 150 donors and \$7,000 from the mailing. Trustees said they looked forward to receiving benchmarking on alumni.

Financial Aid Update. The maximum amount of aid is being provided to the neediest students, but there is still a gap to be bridged of approximately \$4,000, which is not covered by anything. Each year we try to increase Financial Aid.

- The costs for students, loans, grants, and the gaps for each need-based ladder were explained.
- For neediest students, we are offering approximately \$14,000 with the help of some state funding.
- Many families do not want to borrow. The federal formula is based on family support, but many students do not have that and need to borrow on their own.
- The best way to assist without affecting other services is to target fundraising toward scholarships. It is also important to encourage all staff at the institution to remind students to apply for existing scholarships as some of them go unused.
- Everyone connected to the campus should mentor and encourage a child in K-12 schools. If we are going to become a Hispanic Service Institution (HSI) and a first student campus, this is even more important.
- We have a very low loan default rate of 3%, which is very similar to a private school. We were recognized as a good value for graduates as they get jobs and can pay back their loans.

Admissions Update. The funnel reports show a large increase in the number of applications compared to 2019 because of the ability to use the common app. Inquiries still increased due to social media and direct/email initiatives. Applications are being completed at a much greater rate and we have never had this many accepts so early in the year. The ISERS, an institution’s version of the FAFSA, is monitoring the rate of downloads of the FAFSA into our system, which is an indicator of an intent to deposit. The SATs have been taken off the table and there is no sliding scale being used in the review of applications. This has made it easier for students to apply, which will also help our HSI students. Not all other state universities are seeing this increase.

Enrollment Management Advisory Board. Condensed notes from the first meeting were shared. The advisory board has an eagerness to increase collaboration with others that impact students on a regular basis. Trustee Martinez-Alvarez’s passion and experience on campus informed the other participants and challenged them to mentor students. The advisory board will be used to increase enrollment by looking outside the campus for assistance.

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

There being no discussion, ROLL CALL VOTE taken:

Trustee Alvarado	Yes	Trustee Reichelt	Yes
Trustee Jasmin	Yes	Trustee Sanfacon	Yes
Trustee Martinez-Alvarez	Yes		

Motion passed unanimously.

Meeting adjourned at 9:27 AM.

Attachments presented at this meeting:

- a) Minutes - October 13, 2021
- b) Motion: Staff Emeritus/a Status
- c) IRA Minimum Required Distribution Postcard
- d) Financial Aid Update Pell InOn Gap Packaging Groups 21-22 FR
- e) Admissions Update-Funnel
- f) Advisory Board Agenda

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 December 16, 2021.

Theresa Jasmin, Secretary

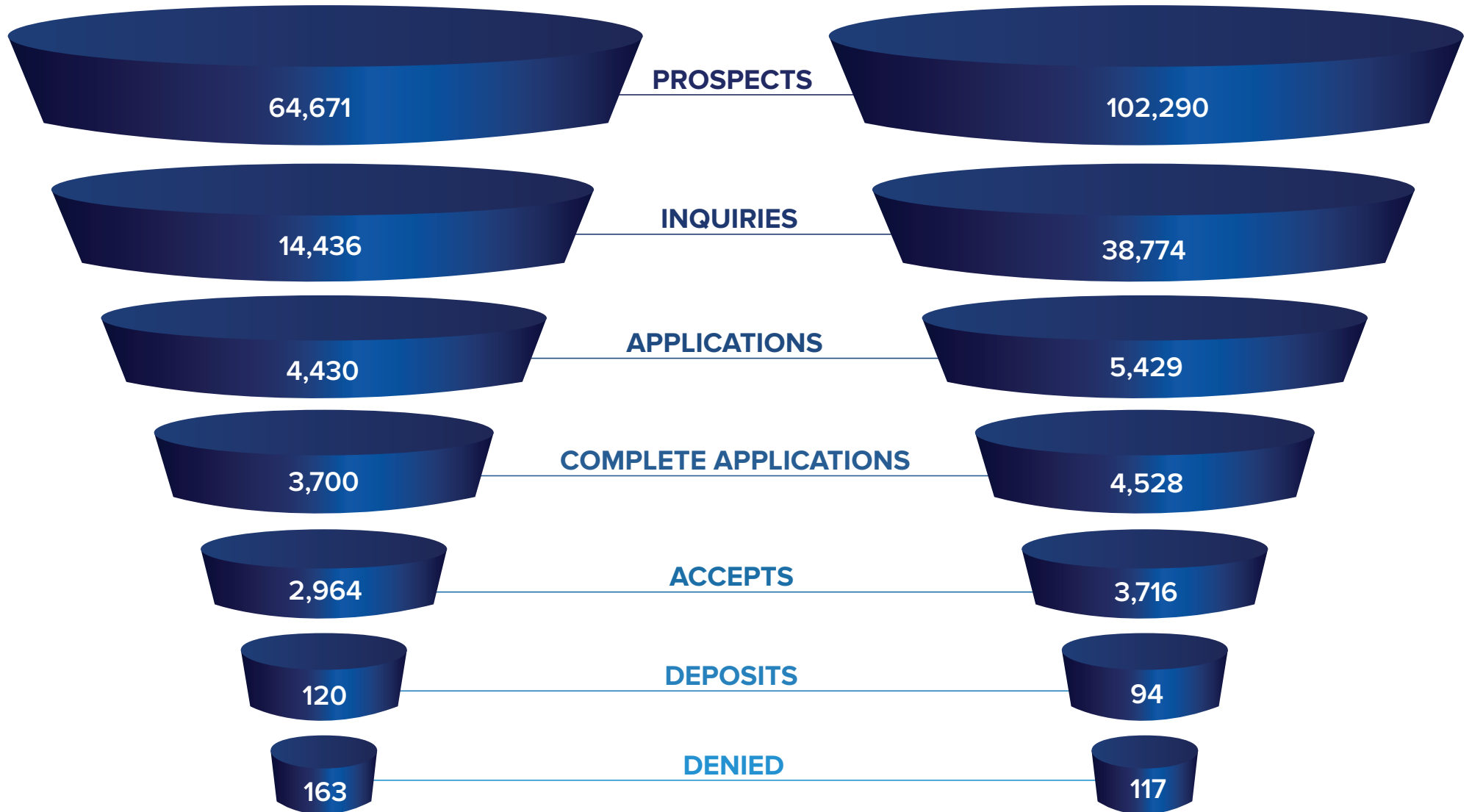
Date

ADMISSION FUNNEL REPORT — FIRST-YEARS

2/9/2022

FALL 2019

FALL 2022

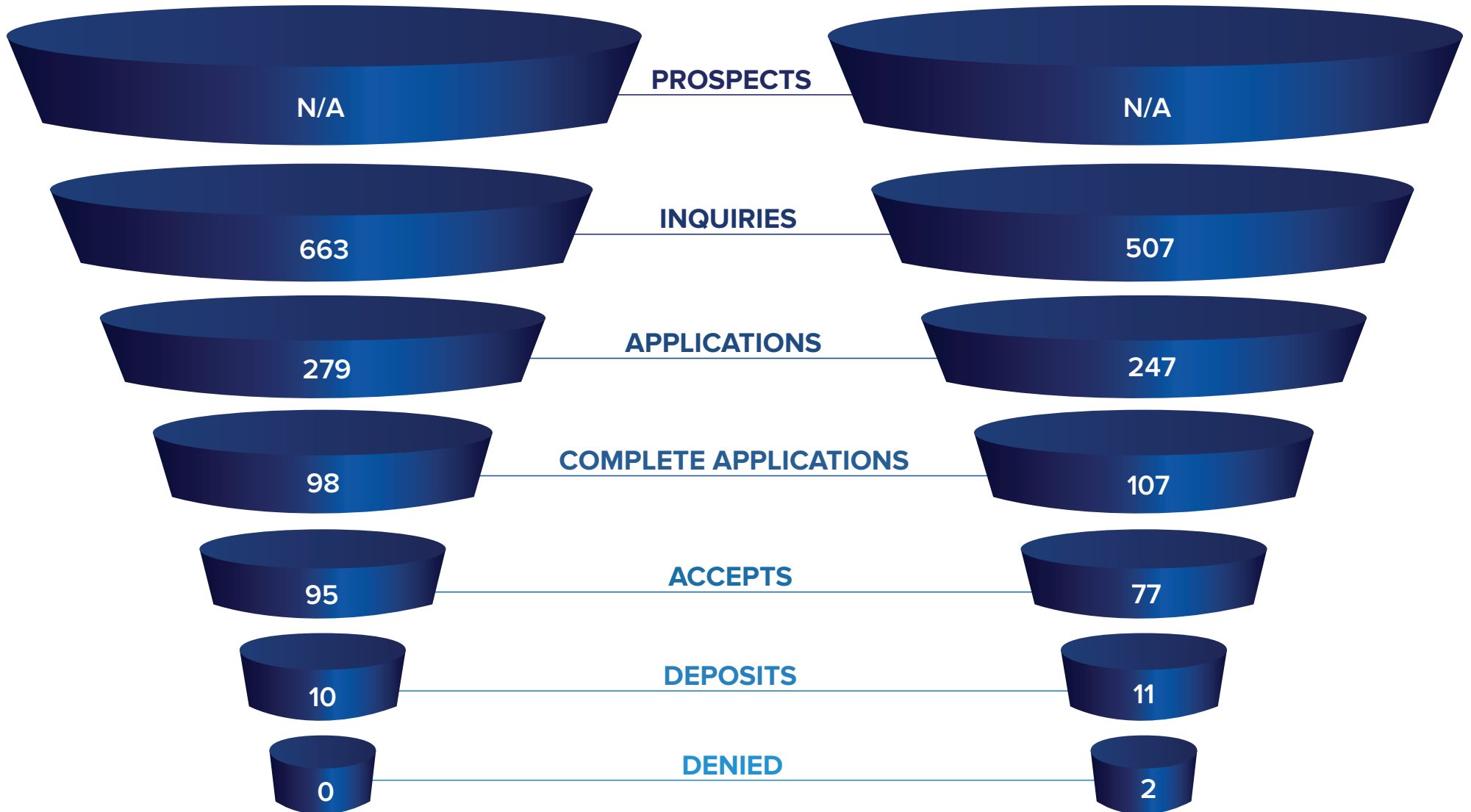


ADMISSION FUNNEL REPORT — TRANSFERS

2/9/2022

FALL 2019

FALL 2022

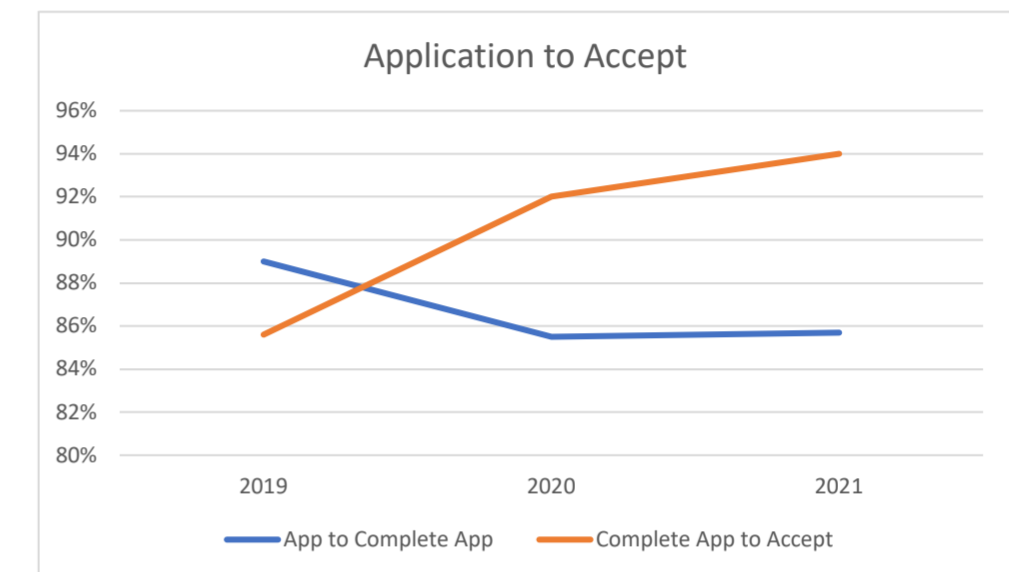
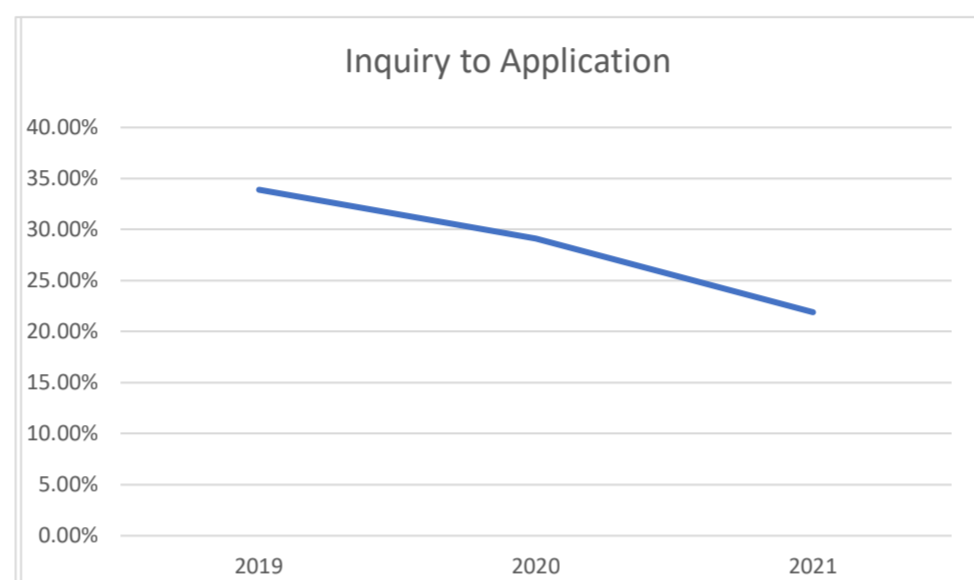


Conversion Rates 2019 - 2021

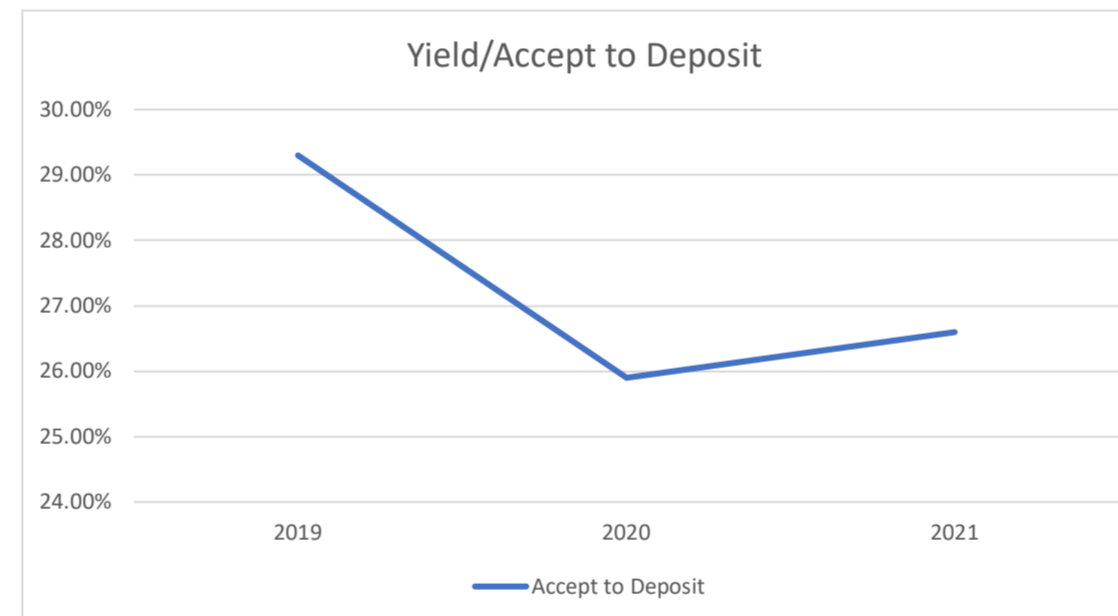
	2019	2020	2021
Prospect to Inquiry	23%	27%	30.30%
Inquiry to Application	33.90%	29.10%	21.90%
App to Complete App	89%	85.50%	85.70%
Complete App to Accept	85.60%	92%	94%
Accept to Deposit	29.30%	25.90%	26.60%
Inquiry to Deposit	0.07%	0.05%	0.04%

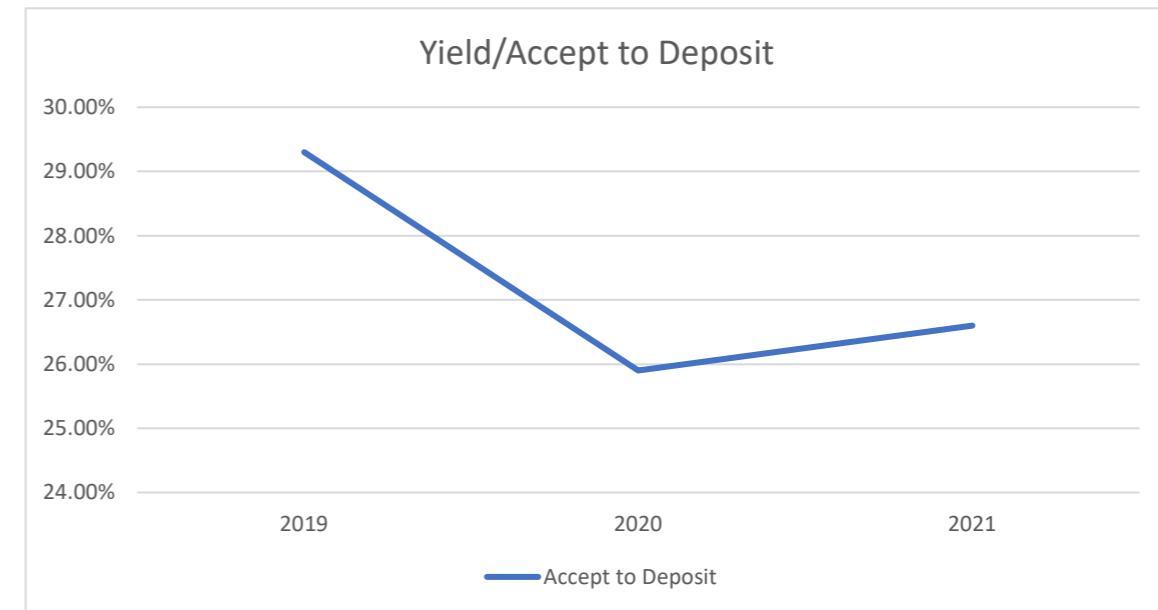
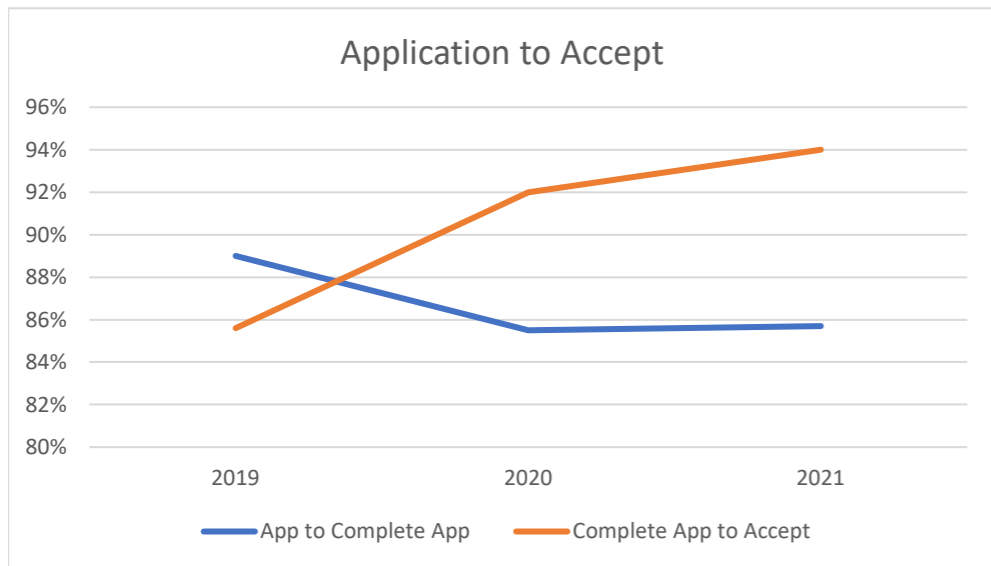
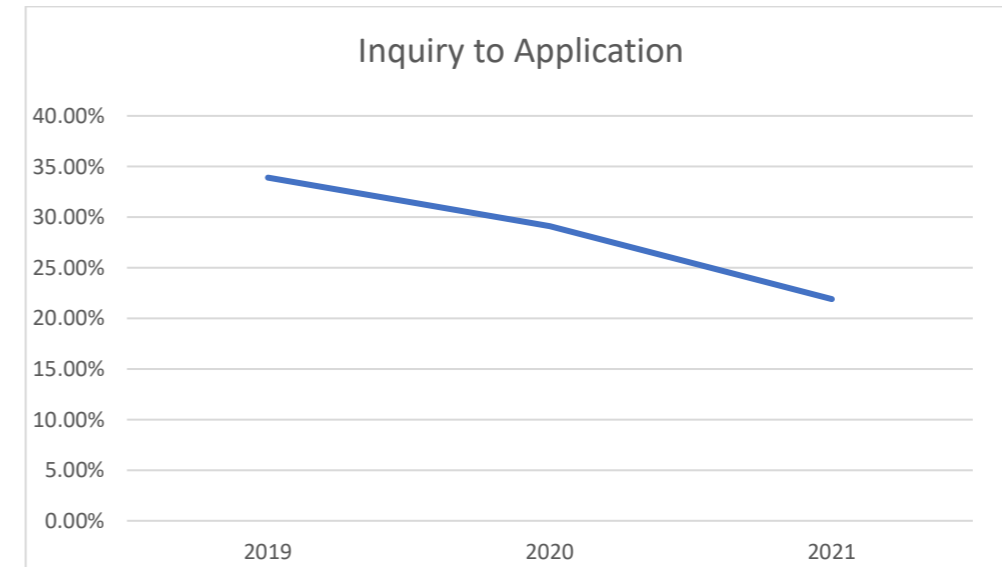
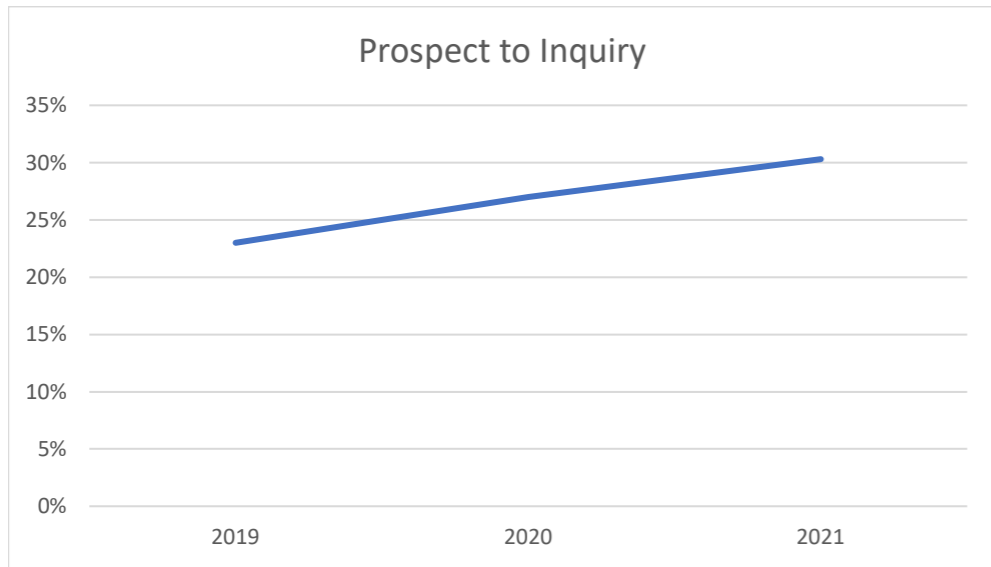
	2019	2020	2021
Inquiry to Application	33.90%	29.10%	21.90%
App to Complete App	89%	85.50%	85.70%
Complete App to Accept	85.60%	92%	94%
Accept to Deposit	29.30%	25.90%	26.60%
Inquiry to Deposit	0.07%	0.05%	0.04%

	2019	2020	2021
App to Complete App	89%	85.50%	85.70%
Complete App to Accept	85.60%	92%	94%
Accept to Deposit	29.30%	25.90%	26.60%
Inquiry to Deposit	0.07%	0.05%	0.04%



	2019	2020	2021
Accept to Deposit	29.30%	25.90%	26.60%
Inquiry to Deposit	0.07%	0.05%	0.04%





Conversion Rates 2019 - 2021

	2019	2020	2021 Projection		Funnel 2/9 % to Proj.	Conversion Projection	After Melt	
Prospect to Inquiry	23%	27%	30.3%	40%	Prospects	102290	100%	
Inquiry to Application	33.9%	29.1%	21.9%	15%	Inquiries	38774	95%	
App to Complete App	89%	85.5%	85.7%	86%	Apps	5429	90%	
Complete App to Accept	85.6%	92%	94%	95%	Complete Apps	4528	87%	
Accept to Deposit	29.3%	25.9%	26.6%	24%	Accepts	3716	86%	
Inquiry to Deposit	0.07%	0.05%	0.04%	3.1%	Deposits	94	8%	
							1201.994	1086

Upcoming Events

Accepted Student Days

- Wednesday, February 23rd
- Thursday, March 24th
- Thursday, March 31st

Events to be scheduled

- English Department Event
- Parent Accepted Student Event
- Owl Chats (with current students)
- Welcome to the Nest!

Accepted Student Events

- Undecided/Exploratory Night
 - Thursday, February 17th
- Environmental Science Department Meeting
 - Thursday, February 17th
- Theatre Accepted Student Day
 - Friday, February 18th
- Biology Department Meeting
 - Tuesday, March 1st
- Accepted Student Career Night
 - Wednesday, March 9th

Enrollment Advisory Board

- Wednesday, February 16th

Upcoming Initiatives

Text Messaging

- First message was sent Monday, February 7
 - Introduction to the Chatbot (3,348 messages sent)
 - 99% of students are still opted-in
 - 152 students interacted with the message
- Accepted Student Day reminder will be sent Friday, February 11
 - Interactive Option with the message
 - Will help to generate more insight for the Admission Staff
- Messages will continue throughout the Spring
 - Promoting Events
 - Generating excitement around enrolling

EduCo

- Profile is live on site
- Working on setting up an outreach event with International Agents

Note Cards

- Signed by members of Enrollment Management Division
- Will be sent beginning next week
- Contains sticker designed by WSU student



Further Outreach

- Phone Calls
- Email campaigns
- 3E Conversion Deposit Campaign
- Letter from President Thompson
- Video with Dr. Thompson

EdSights

Knowledge Analytics

What topics are students asking about most?



Top Questions students are asking

Where can I find information on how to visit campus?

When will I receive my financial aid package?

What types of financial aid are there?

When is the deadline to apply?

What majors do you offer?

How do I contact Financial Aid?

Where is the office of financial aid?

What is the cost of attendance?

How can I view my account balance?

What is the deadline to submit the FAFSA?

Institutional Advancement DASHBOARD

December 31, 2021 – 2nd Quarter

Executive Summary

Total Donors

- 82 New Donors
- 269 Reactivated Donors
- 390 Retained Donors

Alumni Participation Rate: 0.97%

This number represents 456 alum donors out of 47,119 alumni of record*

* In accordance with CASE reporting standards, "Alumni of Record" is defined as the number of living alumni for whom we WSU has a valid address, email or phone number.

Highlights

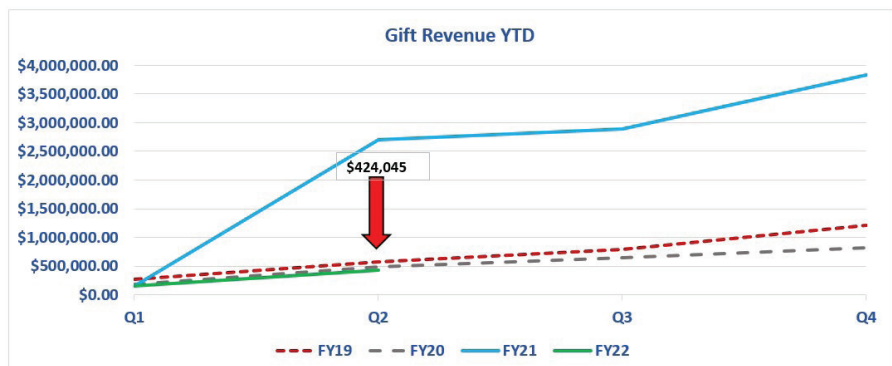
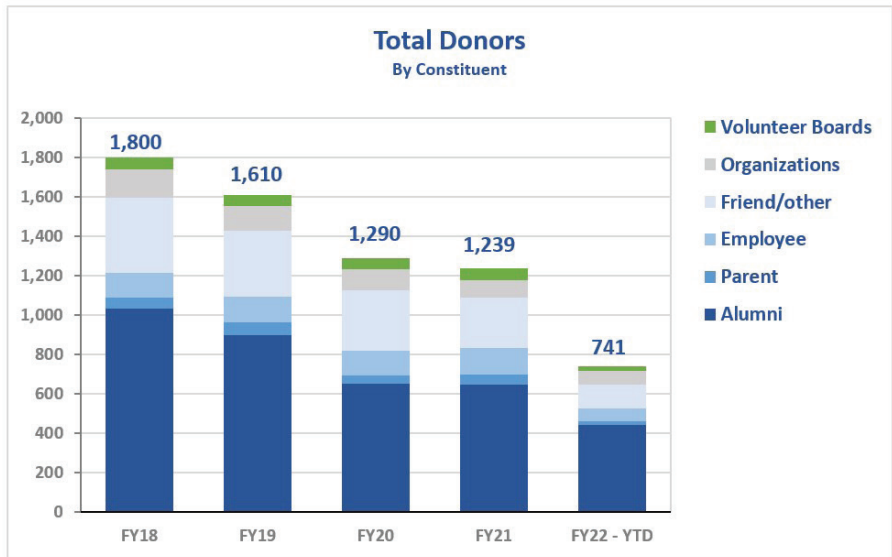
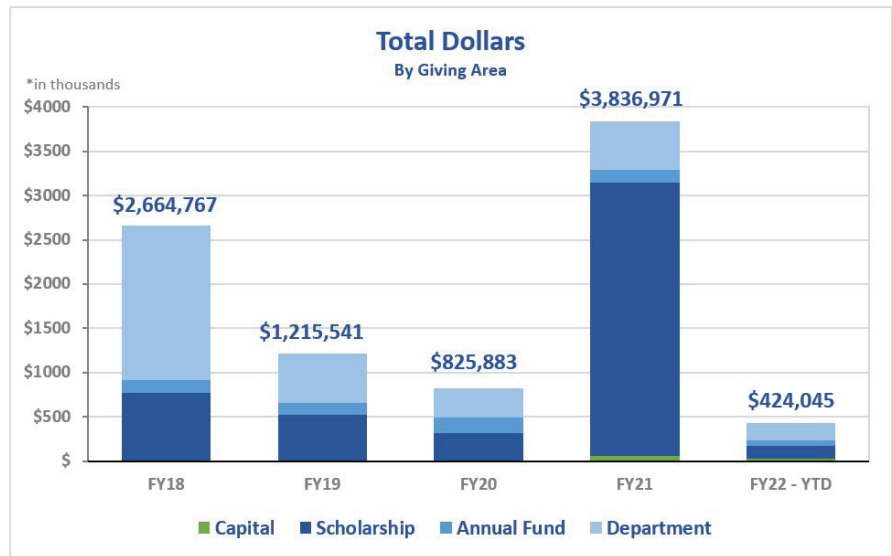
William Hynes has been appointed as the Interim Director of Advancement and Major Gifts.

\$424,045
Dollars

741
Donors

0.97%
Alum Part.

\$262.40
Ave. Gift



Institutional Advancement DASHBOARD

December 31, 2021 – 2nd Quarter

Fundraising Priorities



HOCKEY LOCKER ROOM
DONORS: 18
DOLLARS: \$4,555



DEVER STAGE SEATS
DONORS: 49
DOLLARS: \$18,497



THE WESTFIELD FUND
DONORS: 437
DOLLARS: \$53,448



PRESIDENTIAL INITIATIVE
DONORS: 8
DOLLARS: \$7,500

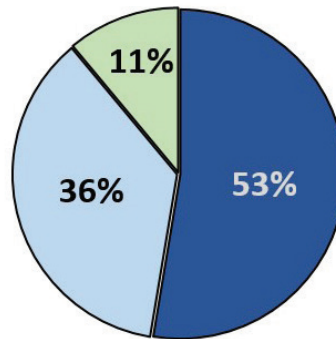
Note: The Volunteer Board figures include gifts that were soft credited to the donor. A donor received a soft credit when their direct actions result in a gift, but they are not entitled to a charitable deduction for that donation

Gift Pyramid

	Donors	Dollars
\$25,000 or higher	5	\$174,572.81
\$10,000-\$24,999	4	\$56,983.46
\$2,500 - \$9,999	13	\$55,280.41
\$500 - \$2,499	83	\$76,747.22
\$1 - \$499	636	\$60,460.98
Total	741	\$424,044.88

Grants Received in FY2022	
	Dollars
As Schools Match Wits Grant	\$45,000

Total Donors: 741



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.

■ Retained ■ Reactivated ■ New



Volunteer Boards	Population	Donors	Participation	Ave Gift	Dollars
Board of Trustees					
FY22 - YTD	11	8	73%	\$ 1,231	\$ 13,543
FY21	11	11	100%	\$ 2,282	\$ 25,106
Foundation Board of Directors					
FY22 - YTD	23	8	35%	\$ 540	\$ 12,420
FY21	25	25	100%	\$ 3,449	\$ 86,225
Alumni Association Executive Council					
FY22 - YTD	17	5	29%	\$ 37	\$ 635
FY21	17	17	100%	\$ 213	\$ 3,615
Cabinet					
FY22 - YTD	6	4	67%	\$ 2,251	\$ 13,505
FY21	7	7	100%	\$ 3,714	\$ 25,996



Are you a Florida Owl all year round? Or maybe you are a *snow owl*? Join us when Westfield State visits Naples, Florida this March! Westfield State President, Dr. Linda Thompson is making her first trip to meet our Florida Owls, and we would love for you to meet her at our upcoming events in the region.

Saturday, March 12, 2022

March in the Naples St. Patrick's Day parade and show off your Owl Pride! Walk alongside President Thompson, Alumni Relations and Advancement Staff, and your fellow Owls. We'll also have a decorated van in the parade to ride in, and a lunch reception following the parade, Hosted by Steven '88 and Renee Marcus!

Monday, March 14, 2022

The return of the Hogan Classic Golf Outing. Get that foursome together for a day on the links at the incredible Club Pelican Bay, Naples, FL.

Hosted by Bill Hogan '77

Not a golfer? Join us for a reception at Club Pelican Bay! Get together with friends new and old, meet President Thompson, and enjoy delicious appetizers.

Hosted by Bill Hogan '77, Kevin Queenin '70, and Steven Marcus '88



Give a Hoot!

Come together for our students

SAVE THE DATE
MARCH 23-24

Westfield
STATE UNIVERSITY



Westfield
STATE UNIVERSITY

Westfield State University
P.O. Box 1630
Westfield, MA 01086-1630

Give a Hoot!

Come together for our students

MARCH 23–24, 2022

Mark your calendar for Give a Hoot, Westfield State University's annual giving day! Your generosity ensures that more Westfield State students have access to opportunities that will transform their lives forever.

How you can show your support:

GIVE: Be counted as an early donor

ADVOCATE: Share the Give a Hoot page to inspire fellow Owls

CHALLENGE: Motivate your Westfield State friends and family with a match or challenge gift



Scan me

or visit westfield.ma.edu/give
for more information

Checks can be made payable to "Westfield State Foundation, Inc." with "Give a Hoot – (designation name)" in the memo line, postmarked by March 28, and mailed to Westfield State Foundation, Inc., Attn: Make a Gift, PO Box 1630, Westfield, MA 01086-1630

Take a Seat

AT DEVER
STAGE

WESTFIELD STATE
FOUNDATION

EVERY GIFT *plays a role.*

westfield.ma.edu/TakeaSeat



118 submissions

Alumni submitted from class years 1971 to 2021

Alumni checked in from 16 states and 3 countries

- Closest to Campus: Karolina (Bak) Weagle '15
- Farthest from Campus: Tracy Fenzl '93, Heilingenhaus, Germany
- Airpod drawing winner: Mary Beth Forsyth '89, Vero Beach, FL

Facebook analytics, combined total,

all OATG posts:

People reached: 19,317

Engagements: 1,150

Reactions (likes, comments, etc.): 170

Post clicks: 980

Twitter analytics, combined total,

all OATG posts:

Impressions: 8,447

Engagements: 331

Likes: 37

Link clicks: 45

Detail expands: 99

Retweets: 8

Profile clicks: 15



Westfield State Alumni

Published by Buffer · January 14 at 8:00 AM ·

Tracy Fenzl '93 joined #OwlsAroundTheGlobe from Germany and Laura Sincage '19 joined from Spain! 🇪🇸
Are you farther from campus? The alum who's farthest away wins a prize! 🌍

Enter here: <https://buff.ly/3ER9qFr>



1,703
People reached

99
Engagements

Boost post

#OwlsAroundTheGlobe from the 90s, 00s, and 10s! 🌍
Today is the last day to enter to win AirPods and other prizes!

Rebecca Sapouckey '18 (California), Kelli Nielsen '04 (Massachusetts), Christopher Streeter '99 (Massachusetts), and Olivia Murphy '15 (California).

Enter here: <https://buff.ly/3pRWo6r>



2,904
People reached

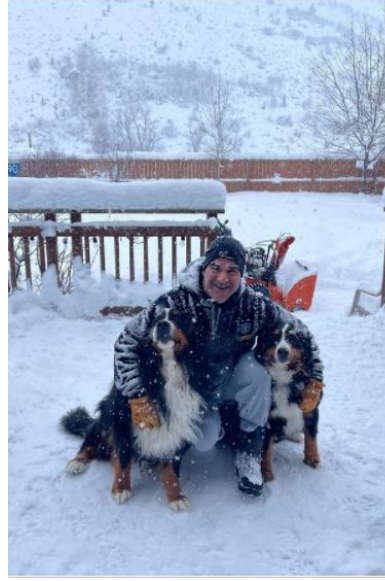
179
Engagements

Boost post

#OwlsAroundTheGlobe from the 70s, 80s, and 90s! 🌍

We've extended the deadline! Tomorrow is the last day to enter for the chance to win AirPods & other prizes!

Ray Gonsalves Jr. '91 (Wyoming), Sheila Boisvert '71 (Rhode Island), Tom Convery '78 (Westfield) & Bernard D'Agostino '88 (Florida)
Enter here: <https://buff.ly/3pRWo6r>



4,528
People reached

273
Engagements

Boost post

Insights

See all

Last 28 days : Jan 4 - Jan 31 ▾

People reached **12,770**
▲134%

Post engagements **2,623**
▲135%

Page likes **9**
▲350%