



## BOARD OF TRUSTEES

April 25, 2024

Minutes

Loughman Living Room, Scanlon Hall

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

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**MEMBERS PRESENT:** Chair Ali Salehi, Vice Chair Melissa Alvarado, Secretary Dr. Gloria Williams, and Trustees, Paul Boudreau, Daniel Currier, George Gilmer, Theresa Jasmin, Dr. Robert Martin, Chris Montemayor, and William Reichelt

**MEMBERS EXCUSED:** Madeline Landrau

Also present were Westfield State University President Dr. Linda Thompson, and cabinet members Dr. David Caruso, Dr. Michael Freeman, Richard Lenfest, Jr., Lisa McMahon, Dr. LaRue Pierce, and Stephen Taksar.

Chair Salehi called the meeting to order at 3.10 PM and announced the meeting was being livestreamed and recorded.

**MOTION** made by Trustee Currier seconded by Trustee Gilmer, to approve the minutes of the February 8, 2024 meeting. There being no discussion, **motion passed unanimously.**

Chair Salehi thanked the supporting staff to make the meeting possible. He's also thankful for the health and safety of this campus. The search Committee for the new Provost has been working diligently and the President will make an announcement soon. An active search involving students for a new JEDI Vice President will commence in September.

President's Report. Dr. Thompson discussed past and upcoming events on campus, Keeper of the Dream, General Clara Adams-Ender Presentation and Supporting Our Super Women Speaker Series, Mary Lou McDonald Reception, Blue Diamond Ball, CURCA Presentations 2024, Neighborhood Advisory Board party, and Fresh Check Day. Our Strategic Planning Committee has an operating strategy by focusing on 3 topics; (1) Optimizing value to our students, (2) financial stewardship and (3) focus on campus culture.

Student Trustee Report. Trustee Currier opened his presentation with campus life update and discussed 2<sup>nd</sup> annual Notecard-a-thon to help achieve funds for a new laboratory. HE went on to talk about Student Spotlights, Relay-For-Life event, and SGA Projects.

Governance and Nomination Committee. Committee Chair Melissa Alvarado updated the Board on it's upcoming self-assessment, and Association Governing of Boards National Conference in Boston.

Enrollment Management and Student Affairs Committee. Committee Chair William Reichelt updated the Board on discussions held in the committee meeting on April 16, 2024. Enrollment is trending in the right

directions despite FAFSA issues.

Advancement, Marketing, and External Relations Committee. Committee Chair Dr. Gloria Williams updated the Board on discussions held in the committee meeting. Summer conferences maximizing revenues and events occurring around 185<sup>th</sup> anniversary.

Trustee Boudreau left the meeting at 4:06 PM.

Academic Affairs Committee. Committee Chair Dr. Robert Martin updated the Board on discussions held in the committee meeting and presented the following Motions approved by the committee.

**MOTION** made by Trustee Currier, seconded by Trustee Alvarado, to approve the granting of promotion to the rank of Associate Professor, effective September 1, 2024, to:

Dr. Charles DiStefano Political Science  
Dr. Ashley Evanoski-Cole Chemical & Physical Science  
Dr. Mao-Lun Weng Biology

The granting of promotion to the rank of Professor, effective September 1, 2024, to:

Dr. Peter Coutsouridis	Music
Dr. Sinuk Kang	Communications
Dr. Joan Kuhnly	Nursing
Dr. Liem Nguyen	Accounting & Finance
Dr. Marcia Scanlon	Nursing
Dr. Robin White	Biology

The granting of promotion to the rank of Senior Librarian effective September 1, 2024, to:

Ms. Rebecca Brody	Library
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There being no discussion or abstentions, **motion passed unanimously.**

**MOTION** made by Trustee Currier, seconded by Trustee Reichelt, to approve the granting of tenure, effective September 1, 2024, to:

Dr. Amanda Salacinski	Sports Medicine and Human Performance
Dr. Lauren DiCarlo	Environmental Science

The granting of tenure with automatic promotion, effective September 1, 2024, to:

Dr. Roderico Acevedo	Chemical & Physical Science
Dr. Maureen Dimock Clark	Social Work

There being no discussion, **motion passed unanimously.**

Financial Affairs and Advancement Committee. Committee Chair George Gilmer updated the Board on discussions held in the committee meeting with third quarter FY23-24 budget with being 2-3 million for operating budget. The following Motions approved by the committee;

**MOTION** made by Trustee Jasmin, seconded by Trustee Currier, to approve capital project allocation of up to \$800,000 to replace the hot water system in Lammers Hall over the next two fiscal years. This may involve implementing a temporary solution in FY25, in collaboration with the MSCBA, in planning for a full system replacement in FY25-FY26. The funding source for this project is FY24 residence hall bond refinancing and restructuring. Any unspent capital project funding for this project will be rolled over into the FY25 budget. There being no discussion, **Motion passed unanimously.**

**MOTION** made by Trustee Montemayor seconded by Trustee Currier To approve the recommendation to fully fund pool repairs estimated at \$4,000,000 using the revised funding plan in the 5-Year Critical Repair Plan. This plan already assumes the use of \$1,000,000 in reserves and allocates another \$1,000,000 from campus savings/reserves to fully fund the pool repair project. Further, it is anticipated that most of the repairs will be completed in FY25 but not all, requiring the reserve funds to roll over into the next fiscal year. There being no (further) discussion, **Motion passed unanimously.**

**MOTION** made by Trustee Alvarado, seconded by Trustee Williams to approve the allocation of \$25,160 from Student Activity Reserves as requested in the March 29, 2024, memorandum from the Director of Student Activities, Involvement, and Leadership (SAIL). The student fees generated in this account were accumulated over a period of time and are managed by the Student Government Association (SGA) in conjunction with their advisor. The total fund balance in the Student Activity Reserve account, as of June 30, 2023, is \$381,991.52.

There being no discussion, **Motion passed unanimously with Trustee Currier abstaining.**

**Discussion:** Trustee Alvarado noted that policy indicates that the SGA doesn't need to come to the Board in the future to allocate monies, it can be approved through VP Stephen Taksar.

**MOTION** made by Trustee Jasmin, seconded by Trustee Currier to accept the newly revised investment Policy (0430), as presented. There being no discussion, **Motion passed unanimously.**

Audit Committee. Committee Vice Chair William Reichelt updated the Board on discussions held in the committee meeting which included a final audit by Boston Consortium. The committee presented the following Motions approved by the committee.

**MOTION** made by Trustee Martin, seconded by Trustee Reichelt, To approve engaging the financial audit services of WithumSmith & Brown, PC, for FY24. There being no discussion, **Motion passed unanimously with Trustee Currier abstaining.**

Other Business. Board Chair Salehi's is looking forward to the KPI's being drafted and the Strategy Plan coming forward. Also, there will be turnovers on the Board due to terms being fulfilled.

There being no further business,

**MOTION** made by Trustee Alvarado, and seconded by Trustee Landrau, to adjourn. **Motion passed unanimously.**

Meeting adjourned at 4:45 PM.

**Attachments:**

- a. Draft Minutes of February 8, 2024 Full Board meeting
- b. President's Presentation
- c. Student Trustee Presentation

**Academic Affairs Committee:**

- d. Motion – Promotion to Associate Professor, Professor and Senior Librarian

b. Motion- of Tenure

**Financial Affairs Committee:**

a. Motion – Capital Project Allocation

b. Motion – Pool Repairs

c. Motion – Student Activity Funds

d. Motion – Investment Policy (0430)

**Audit Committee:**

e. Motion – Engaging with WithumSmith & Brown PC

**Secretary's Certificate**

I hereby certify that the foregoing is a true and correct copy of the approved minutes of the Westfield State University Board of Trustees meeting held on April 25, 2024.

\_\_\_\_\_  
Dr. Gloria Williams, Secretary

\_\_\_\_\_  
Date





Dr. Linda Thompson

*President*

Westfield  
STATE UNIVERSITY

Westfield State University was built and currently sits on unceded traditional ancestral territory of the Nipmuc, Pocumtuc, Agawam, and the Woronoco peoples.

# A fitting tribute to our graduates



At our commencement ceremonies we had a lot to celebrate, and I think we packaged it up very effectively.



# Presidential Medal of Achievement

Dr. Catherine Shannon has made many positive contributions to Westfield State, including the development of our Honors Program and most significantly the creation of Irish American Studies Program.



# Keynote Speaker, Honorary Degree recipient, Mary Lou McDonald



President McDonald has demonstrated her belief in the quality and importance of higher education, and her devotion to lifelong learning and volunteer service is an inspiration to the people of Ireland and throughout the world.









## Trustee appointed to WSU board

WESTFIELD — Vermont resident and Ludlow native Tessa Lucey has been appointed to the Westfield State University Board of Trustees.

Lucey replaces former board Chair Robert A Martin, whose 10-year term as a trustee ended March 1. Martin was able to continue serving as a holdover until Lucey's appointment on May 6.

Lucey has over 20 years' experience as a compliance officer having extensive professional experience in healthcare and higher education compliance, operations, labor relations, policy development, program implementation, investigations, government reviews, and audits.

She is currently director of compliance services and chief privacy officer at the University of Vermont in Burlington. Previously, she served as corporate compliance officer and chief privacy officer at Hallmark Health System in Medford, Massachusetts, and before that as director of compliance and chief privacy officer at South Shore Hospital in Weymouth.



*Tessa Lucey.* (SUBMITTED)

In accepting the appointment, Lucey, a 1989 graduate of Westfield State College, said, "Returning to Westfield State University as a trustee fills me with immense pride. WSU not only provided me with the knowledge and skills to succeed in my career, but also provided me with a solid foundation to succeed in life. I am looking forward to giving back by working with the board and with university leadership to ensure the continued success and impact of the university for generations to

come."

The 11-member Westfield State University Board of Trustees is appointed by the governor of Massachusetts. Each member is appointed for a five-year term, with the possibility of one additional term of five years.

"Tessa's business and higher education experience will complement the work of the board," said Linda Thompson, president of Westfield State University.

"Her connection as an alumna is certainly something we appreciate. Tessa's connection with Westfield State makes this appointment meaningful and personal. I very much look forward to working with her as a board trustee."

Board Chairman Ali Salehi added, "The Board of Trustees welcome Trustee Lucey to the board, and look forward collaborating to advance university objectives."

In addition to her WSU bachelor of science degree in business, with minors in both psychology and women's studies, Lucey earned a master of health care administration degree from Simmons College.

# Reinforcing our commitment to innovation

The President's Innovation Fund was created to increase student engagement and accessibility by creating or supporting programs and practices that accelerate innovation at Westfield State University.





# Winner of Smith Cup four years in a row



This accomplishment underscores the hard work of our entire athletics department. Our coaches are extremely dedicated to their respective areas. And our students respond in such a positive and inspiring way.



# Welcome, Dr. William Salka

I am pleased to welcome  
Dr. William Salka as Provost and  
Vice President of Academic  
Affairs.



# Celebrating Excellence



Dr. Sackett Taylor will have the opportunity to represent Westfield State in the best possible way, and lead to more effective messaging that shows we are an institution of high achieving individuals.





# SCORE: Redesigning our future



The SCORE committee, led by co-chairs Megan Kennedy and Lynn Shelley, have done yeomen's work to advance this effort and I am proud of what they have accomplished.



# Strategic Plan: Shaping our mission, values, goals

We have invited  
Dr. Richard Freeland, former  
Massachusetts Commissioner of  
Higher Education, to join us to help  
guide our conversation.



# Fostering unity and inclusion for all members of our campus



When we have more diversity at the table, good things happen. I am optimistic we are on the correct path in reinforcing a culture of kindness, patience, understanding, and knowledge.





Expanding our reach to build relationships

The importance of cultivating relationships not only in this region, but throughout the country and the world is imperative in helping to recognize and promote our University's impact as we look forward after our 185<sup>th</sup> year.





Outreach in Atlanta: Telling our story



# Funding to support our mission



This grant will have a direct impact on addressing staffing shortages and lifts our University in becoming an integral part of finding solutions to healthcare issues impacting our communities.

## The Economic Value of Westfield State University to Western Massachusetts





✕

# Dr. Linda Thompson

President,  
Westfield State University



*I am forever concerned with the well-being of our communities. Our physical, mental, and spiritual health provides us the strength to take on life's challenges.*

DR. LINDA THOMPSON, WINNER FOR HEALTH & WELLNESS

## INCLUSIVE LEADER AWARDS

[www.globalminded.org](http://www.globalminded.org)



2023

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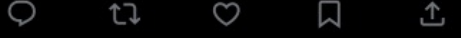
**GlobalMindED**  
@GlobalMindEDorg



🌟 Announcing the first of our fifteen 2024 Inclusive Leader Awards Recipients! Meet Dr. Linda Thompson at our 10th Annual Awards Dinner on June 17th! 🌟 We are thrilled to honor Dr. Thompson. Read more in the article: [linkedin.com/feed/update/ur...](https://www.linkedin.com/feed/update/urn:li:activity:7151234567890123456) #InclusiveLeaders #nurses

3:27 PM · Jan 3, 2024 · 43 Views

1 Like





Thank you

## The Economic Value of Westfield State University to Western Massachusetts



Westfield State University (Westfield State) creates a significant positive impact on the business community and generates a return on investment to its major stakeholder groups—students, taxpayers, and society. Using a two-pronged approach that involves an economic impact analysis and an investment analysis, this study calculates the benefits received by each of these groups. Results of the analysis reflect fiscal year (FY) 2022-23.

### **Economic impact analysis**

In FY 2022-23, Westfield State added **\$369.7 million** in income to the Western Massachusetts' economy, a value approximately equal to **0.9%** of the region's total gross regional product (GRP). Expressed in terms of jobs, Westfield State's impact supported **4,984 jobs**. For perspective, the activities of Westfield State and its students support **one out of every 100 jobs** in Western Massachusetts.

### **Operations spending impact**

- Westfield State employed 700 full-time and part-time faculty and staff. Payroll amounted to \$61.5 million, much of which was spent in the region for groceries,

\* For the purposes of this analysis, Western Massachusetts is comprised of Berkshire, Franklin, Hampden, and Hampshire Counties.

mortgage and rent payments, dining out, and other household expenses. The university spent another \$41.8 million on its day-to-day expenses related to facilities, supplies, and professional services.

- The net impact of the university's operations spending added **\$79.9 million** in income to the regional economy in FY 2022-23.

#### Construction spending impact

- Westfield State spends money on construction each year to maintain its facilities, create additional capacities, and meet its growing educational demands, generating a short-term infusion of spending and jobs in the regional economy.
- The net impact of Westfield State's construction spending in FY 2022-23 was **\$7.5 million** in added income for Western Massachusetts.

#### Student spending impact

- Around 35% of students attending Westfield State originated from outside the region. Most of these students relocated to Western Massachusetts. In addition, some in-region students, referred to as retained students, would have left Western Massachusetts for other educational opportunities if not for Westfield State. These relocated and retained students spent money on groceries, mortgage and rent payments, and other living expenses at regional businesses.
- The expenditures of relocated and retained students in FY 2022-23 added **\$9.2 million** in income to the Western Massachusetts economy.

#### Volunteerism impact

- The work of Westfield State's student and alumni volunteers allows businesses and organizations to grow, increasing their output and impacting the economy at large. Using the value per volunteer hour for Massachusetts, the work of Westfield State student and alumni volunteers is equivalent to \$3 million in earnings.
- In terms of actual impact to the regional economy, Westfield State student and alumni volunteers generated an impact of **\$2.1 million** in added income in FY 2022-23.

#### Alumni impact

- Over the years, students have studied at Westfield State and entered or re-entered the workforce with newly acquired knowledge and skills. Today, thousands of these former students are employed in Western Massachusetts.
- The net impact of Westfield State's former students currently employed in the regional workforce amounted to **\$271 million** in added income in FY 2022-23.

### Impacts created by Westfield State in FY 2022-23



Operations spending impact  
**\$79.9 million**

+



Construction spending impact  
**\$7.5 million**

+



Student spending impact  
**\$9.2 million**

+



Volunteerism impact  
**\$2.1 million**

+



Alumni impact  
**\$271 million**



Total economic impact  
**\$369.7 million**

OR

Jobs supported  
**4,984**



## Investment analysis

### Student perspective

- Westfield State's FY 2022-23 students paid a present value of **\$45.4 million** to cover the cost of tuition, fees, supplies, and interest on student loans. They also forwent a value of **\$25.1 million** in time and money had they been working instead of attending college.
- In return for their investment, students will receive a cumulative present value of **\$290.7 million** in increased earnings over their working lives. This translates to a return of **\$4.10** in higher future earnings for every dollar students invest in their education. Students' average annual rate of return is **18.6%**.

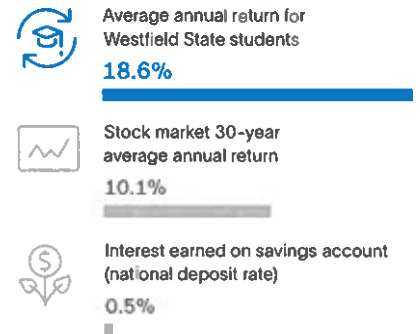
### Taxpayer perspective

- Taxpayers provided Westfield State with **\$66.9 million** of funding in FY 2022-23. In return, they will benefit from added tax revenue, stemming from students' higher lifetime earnings and increased business output, amounting to **\$71.9 million**. A reduced demand for government-funded services in Massachusetts will add another **\$17 million** in benefits to taxpayers.
- Total taxpayer benefits amount to **\$88.9 million**, the present value sum of the added tax revenue and public sector savings. For every dollar of public money invested in Westfield State, taxpayers will receive **\$1.30** in return over the course of students' working lives. The average annual rate of return for taxpayers is **2.3%**.

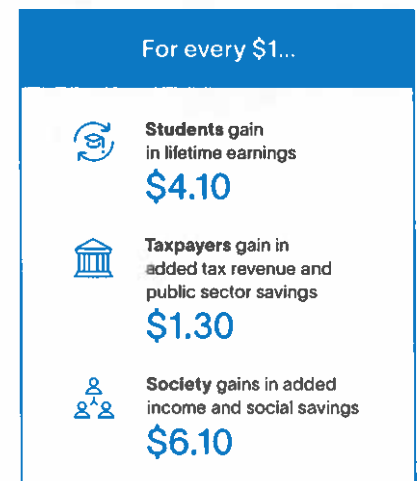
### Social perspective

- In FY 2022-23, Massachusetts invested **\$158.5 million** to support Westfield State. In turn, the Massachusetts economy will grow by **\$913.2 million**, over the course of students' working lives. Society will also benefit from **\$59.8 million** of public and private sector savings.
- For every dollar invested in Westfield State in FY 2022-23, people in Massachusetts will receive **\$6.10** in return, for as long as Westfield State's FY 2022-23 students remain active in the state workforce.

### Students see a high rate of return for their investment in Westfield State



Source: Forbes' S&P 500, 1992-2021. FDIC.gov, 2-2022.





# The Economic Value of Westfield State University to Western Massachusetts

## About Westfield State

**4,862**  
Credit students

**708**  
Non-credit students

**700**  
Employees



Western Massachusetts

## Economic impact analysis

**Alumni impact**  
Impact of the increased earnings of Westfield State alumni and the businesses they work for

**\$271 million**  
Added income

**3,814** Jobs supported

An economic boost similar to hosting the World Series  
**42x**

OR



**1** out of every **100** jobs in Western Massachusetts is supported by the activities of Westfield State and its students.



**Operations spending impact**  
Impact of annual payroll and other spending

**\$79.9 million**  
Added income

**874**  
Jobs supported

Enough to buy **1,691** new cars

OR



**Student spending impact**  
Impact of the daily spending of Westfield State students attracted to or retained in the region

**\$9.2 million**  
Added income

**152**  
Jobs supported

Enough to buy **631** families\* a year's worth of groceries

OR



**Construction spending impact**  
**\$7.5 million** Added income  
OR **89** Jobs supported

**Volunteerism Impact**  
**\$2.1 million** Added income  
OR **55** Jobs supported

● = 50 jobs \* = family of four

## Investment analysis

### For every \$1...

Students gain **\$4.10** in lifetime earnings

Taxpayers gain **\$1.30** in added tax revenue and public sector savings

Society gains **\$6.10** in added income and social savings

The average bachelor's degree graduate from Westfield State will see an increase in earnings of **\$29,600** each year compared to someone with a high school diploma working in Massachusetts.



Sources: Lightcast Economic Impact Study; <https://www.bizjournals.com/washington/news/2019/10/16/nats-could-face-yearlong-or-earlier-in-world-series.html>; <https://www.commodon.com/market-insights/abb-stp-february-2021/>; [https://pro-prod.azureedge.us/sites/default/files/resource-files/Cost\\_Of\\_Food\\_low\\_Moderate\\_Liberal\\_Food\\_Plans\\_February\\_2021.pdf](https://pro-prod.azureedge.us/sites/default/files/resource-files/Cost_Of_Food_low_Moderate_Liberal_Food_Plans_February_2021.pdf)



# Student Trustee Report

June 20, 2024

Trustee Daniel Currier '25



# Campus Life Update

- Congrats Class of 2024!
- Welcome Class of 2028!
  - Summer orientation sessions underway!
  - OWL Welcome Weekend in September
  - First Day of Classes: Wednesday, September 4th
- Another Smith Cup!
  - Best athletic program in the MASCAC for the 4th straight year!



next  
DESTINATION

**Annelise Rivera**  
Security Specialist  
U.S. Department of Defense



next  
DESTINATION

**Nora O'Connor**  
English Teacher Abroad  
(Madrid, Spain)  
CIEE (Counsel on International  
Educational Exchange)



next  
DESTINATION

**Stefanos Touloupakis**  
Customer Relationship  
Advocate (CRA)  
Fidelity Investments



next  
DESTINATION

**Ava Diggs**  
Customer Service Associate  
National Grid



next  
DESTINATION

**Michael Fitzgerald**  
Claims Representative -  
Personal Lines Auto  
Plymouth Rock Assurance



# Student Spotlight – Career Placements



next  
DESTINATION

**Angelle Lopez**  
Events and Program Coordinator  
Springfield Business Improvement  
District, Inc.



next  
DESTINATION

**Sean Morrison**  
Financial Accountant  
The TJX Companies, Inc.



next  
DESTINATION

**Deion Boateng**  
Investment Consultant  
Charles Schwab



next  
DESTINATION

**Kaytlyn Samuels**  
Box Office Associate  
Barrington Stage Company



next  
DESTINATION

**Nicholas Marcinowski**  
Group Event Specialist  
Lehigh Valley Phantoms



# A Focus on the Budget

- Lack of Funding for Capital Improvements
  - House Version: \$10 million
  - Senate Version: \$0
- Proposals to punt deferred maintenance bonds to committee discussions.
  - H4601 Section 80
- SGA Letter to Legislative Leaders



# SGA Projects

- Common Hour Policy
  - Proposal for Ad-Hoc Committee submitted to Governance.
  - Consideration of additional items, including class start/end times.
- Constitutional Review
  - Triennial review to begin in September.



Westfield  
STATE UNIVERSITY

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## Student Government Association

Friday, June 14, 2024

The Honorable Michael J. Rodrigues  
Chair, Senate Committee on Ways and Means  
24 Beacon Street Room 212  
Boston, MA 02133

The Honorable Aaron Michlewitz  
Chair, House Committee on Ways and Means  
24 Beacon Street Room 243  
Boston, MA 02133

The Honorable Cindy F. Friedman  
Vice Chair, Senate Committee on Ways and Means  
24 Beacon Street Room 313  
Boston, MA 02133

The Honorable Ann-Margaret Ferrante  
Vice Chair, House Committee on Ways and Means  
24 Beacon Street Room 238  
Boston, MA 02133

The Honorable Patrick M. O'Connor  
Ranking Member, Senate Committee on Ways and Means  
24 Beacon Street Room 419  
Boston, MA 02133

The Honorable Todd M. Smola  
Ranking Member, House Committee on Ways and Means  
24 Beacon Street Room 124  
Boston, MA 02133

To the Honorable Members of the Conference Committee on the Fiscal Year 2025 Budget:

On behalf of the nearly 5,000 students enrolled at Westfield State University, we write regarding proposed capital investment in the Commonwealth's public higher education system as part of the Fiscal Year 2025 Budget.

As students, we recognize the vital role that safe, modern, and accessible facilities play in the decision to attend a particular institution and thrive academically. Research concurs with this assessment, with one study finding that quality of facilities influenced nearly 60% of students at one university in their final college decision<sup>1</sup>. An additional survey of college students found that outdated facilities, broken furniture, and leaky roofs on their campuses have had a detrimental effect on their academic achievement<sup>2</sup>. Unfortunately, deferred maintenance<sup>3</sup> and inaccessible facilities<sup>4</sup> throughout the public higher education system, including at Westfield State University, hinder our fellow students in their quest to receive a quality education and are a detriment to institutions as they work to attract and retain students.

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<sup>1</sup> Norton, T. (2023). *The Influence of Campus Facilities on the Satisfaction and Retention of Students in a Higher Education Setting* [Doctoral Dissertation]. St. Cloud State University.

<sup>2</sup> Ezarik, M. (2022, November 22). *Survey: Campus facilities' impact on student success*. Inside Higher Ed | Higher Education News, Events and Jobs. <https://www.insidehighered.com/news/2022/11/22/survey-campus-facilities-impact-student-success>

<sup>3</sup> Systems across the Westfield State University campus, for example, are at the end of their useful lives and are failing. The costs associated with temporary solutions to these emergencies are eating up a greater portion of our facilities budget every year.

<sup>4</sup> Many facilities are not in compliance with the Americans with Disabilities Act (ADA), with some students unable to access their classrooms or a friend's dormitory room.

As you are aware, Governor Maura Healey’s proposed budget (House Bill 2) includes a proposed allocation of \$125 million from the Education and Transportation Fund “for the study, design, construction, . . . planning, and improvements of campus facilities” across the Commonwealth’s public higher education system<sup>5</sup>. In addition, this line-item calls for the formation of a working group to discuss the potential for ten-year higher education bond legislation, which could see \$2.5 billion devoted to capital needs across the higher education system. Such funding would positively impact campuses as they address challenges such as deferred maintenance, accessibility, and decarbonization compliance.

While we are grateful to the House of Representatives for including the Governor’s proposal to establish a working group in their budget bill, we remain concerned that the current budget line-items<sup>6</sup> pertaining to capital funding on the part of the House and Senate do not adequately address the needs of public higher education institutions across the Commonwealth, including Westfield State University. With deferred maintenance estimated at \$160 million on the campus of Westfield State University alone, a \$10 million allocation (as proposed by the House) split between the UMASS campuses, state universities, and community colleges will only put a band aid on a growing issue facing the public higher education system<sup>7</sup>.

President John D. Keenan, JD of Salem State University, on behalf of the State University Council of Presidents (COP), noted the following in remarks made to the Board of Higher Education (BHE):

The Governor’s budget recommendations include \$125 million of Fair Share funding to address capital needs across the higher education system. Although \$125 million is only a fraction of what is needed to begin addressing the condition of our aging campus infrastructure, the administration intends to use this funding to leverage capital construction and deferred maintenance bond funds.

Today, campus infrastructure and facilities needs are so great (in the billions) that a capital or special obligation bond is the only way for the state to meaningfully address the condition of the Commonwealth’s public higher education properties. The Council of Presidents wholeheartedly supports the Governor’s recommendations.

We concur with President Keenan that the Commonwealth should pursue bond legislation as a means of funding the restoration of our public higher education campuses, which we believe will lead to increased admission and retention of students along with improved academic outcomes. As the representatives of the student body at a public higher education institution in the Commonwealth, we humbly request that the Conference Committee consider the following as part of its ongoing negotiations:

- Allocate a minimum of \$100 million from the Education and Transportation Fund for the purpose of addressing deferred maintenance in line with the proposal outlined by Governor Healey in House Bill 2.
- Form a working group charged with examining the potential for higher education bond legislation as outlined by Governor Healey in House Bill 2 and the House of Representatives in House Bill 4601.

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<sup>5</sup> Appropriation #1596-2417

<sup>6</sup> The House Budget proposal appropriates \$10 million for “a deferred maintenance capital program” for institutions of higher education under Appropriation #1596-2417. We could not identify any appropriation of funds by the Senate to address deferred maintenance at institutions of higher education.

<sup>7</sup> Carlson, S. (2023, March 31). The backlog that could threaten Higher Ed’s viability. *The Chronicle of Higher Education*.



The students of tomorrow deserve to attend public institutions of higher education that they can be proud of – campuses that are safe, modern, and accessible. We simply can't wait any longer as systems continue to fail. We believe that this \$100 million 'down payment' and development of bond legislation will finally put a dent in this growing deferred maintenance crisis facing our public higher education system.

Thank you for taking the time to understand our concerns. Should you have any questions, please contact us via email at [sga@westfield.ma.edu](mailto:sga@westfield.ma.edu).

Sincerely,

Joseph Bonilla  
President

Elizabeth Mercer  
Vice President for Publicity

Justin Wald  
Vice President for Student Life

Jacob Constant  
Executive Secretary

Sarah Harrington  
Vice President for Academic Life

Daniel Currier  
Student Trustee

Austin Morgan  
Vice President for Finance

CC: Dr. Linda Thompson, President – Westfield State University

Mr. Timothy Rooke, Special Assistant to the President on Community & Government Affairs – Westfield State University

Mr. Stephen Taksar, Vice President for Administration & Finance – Westfield State University

Mrs. Maureen E. Socha, Associate Vice President – Capital Planning & Facilities

The Honorable John C. Velis, Senator – Hampden & Hampshire District

The Honorable Kelly W. Pease, Representative – 4<sup>th</sup> Hampden District



## Board of Trustees

June 20, 2024

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### MOTION

Propose to the Board to elect the following slate of officers for the 2024-2025 academic year:

, Chair

, Vice Chair

, Secretary



## Board of Trustees

June 20, 2024

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### MOTION

To approve the Master in Business Administration (MBA)

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Ali Salehi, Chair

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Date

**PHASE I: LETTER OF INTENT TEMPLATE**  
**FOR BOARD VOTE ON APPROVAL PROCESS**

Review Guidelines Prior to Submitting Materials

<https://www.mass.edu/foradmin/academic/publicnewdegrees.asp>

Information should be typed directly into the boxes below, which will expand. Letter of Intent (LOI) document should be about five to six pages in addition to appendices. After the local approval process for the LOI has been completed, the President of the institution should submit this template and all required forms addressed to the Commissioner of Higher Education, and to the Academic Affairs Committee (AAC) of the Board of Higher Education (BHE).

*Submissions are required to be in MS Word format. Please direct the completed to:*  
[PublicProgramReview@dhe.mass.edu](mailto:PublicProgramReview@dhe.mass.edu)

**Proposed Degree Title and Intent and Mission of the Program (200 words):**

Westfield State University

Master of Business Administration  
(MBA) Intent and Mission of the  
Program

The Westfield State University (WSU) MBA Program is committed to cultivating visionary leaders with a unique blend of leadership, business analytics, and sustainability skills. Our mission is to empower individuals with the knowledge, skills, and ethical mindset needed to excel in today's dynamic global business landscape.

In the WSU MBA, we foster a learning environment that encourages critical thinking, innovation, and collaboration. We encourage experiential learning opportunities, internships, and industry collaborations to provide our students with hands-on experiences that enhance their leadership and analytical capabilities

We develop leaders who can navigate the complexities of the modern business world, making informed decisions that drive organizational success and contribute to societal and environmental well-being.

As an institution, we are dedicated to fostering a diverse and inclusive community where individuals from different backgrounds can exchange ideas and perspectives. We believe a diverse learning environment enriches the educational experience and prepares students to lead in a globalized world.

We aim to graduate individuals who can drive positive change, lead with integrity, and contribute meaningfully to improving businesses and society.

**Proposed CIP Code:** 52.0201 Business Administration and Management, General

**Chief Academic Officer (CAO) Name and Title:** Dr. David Caruso, Temporary Provost and Vice President, Academic Affairs

**CAO Phone Number:** 413-572-8691

**CAO Email:** dcaruso@westfield.ma.edu

**Has the Chief Academic Officer reviewed this LOI?** Yes

**Date LOI was approved by governing authority:** June 20, 2024

### **A. Alignment with Massachusetts Goals for Public Higher Education**

The FY19 BHE Equity Statement (<https://www.mass.edu/strategic/equity.asp>) provides campuses with insight into the next iteration of the system-level plans.

1. How does the program address institutional gaps in opportunity and achievement? How does the program align with campus goals?

The WSU MBA program can effectively address institutional gaps in opportunity and achievement while also aligning with campus goals in the following ways:

**Addressing Institutional Gaps:** The WSU MBA program will promote diversity and inclusion by admitting a diverse group of students. Our recruiting efforts will be designed to remove barriers and obstacles that hinder student success, especially those that may make it difficult for students of color. Westfield State University's MBA will be a more accessible and affordable education option for students who seek advanced education in business. Programming of guest speakers, panels and other opportunities for students to network with business professionals will focus on engaging diverse representatives to acknowledge the experience and knowledge of people of color and to create and cultivate an inclusive environment.

**Aligning with Campus Goals:** The WSU MBA will enhance the overall academic excellence of Westfield State University. It aligns with campus goals to offer high-quality, relevant, and competitive educational programs. Our strategic plan insists we are responsive to the workforce needs in the Commonwealth and the MBA program delivers on the need for skilled finance professionals as one of the high demand areas identified in the Pioneer Valley Workforce Development Programs. It can support state initiatives to address sustainability concerns in business through the Business Sustainability Certificate while also providing strong educational programming to develop in emerging areas such as Business Analytics. MBA graduates with the

Business Analytics Certificate will assist local and regional business organizations to become more efficient in their operations, build stronger consumer relationships, and improve business decision-making. Managers armed with the knowledge from business analytic insights can increase market share, boost profits, improve operational efficiency, and better meet customer demands. These benefits may be particularly critical to firms operating in the Advanced Manufacturing industry as they address challenges in rapidly changing and intensely competitive industry sectors as addressed in the Pioneer Valley Labor Market Blueprint.

In summary, the Master of Business Administration program at Westfield State University with Certificates in Business Leadership, Global Sustainability for Business and Business Analytics was designed to not only address institutional gaps in opportunity and achievement, but also aligns with the strategic goals of the University. The MBA can enhance diversity, accessibility, academic excellence, innovation, and community engagement, while also contributing to the development of a skilled business workforce.

2. What program or department supports and practices are in place to ensure that students persist and complete the certifications and degrees offered by the program?

Westfield State University has many supports and practices in place to ensure that students persist and complete the certifications and degrees offered by the MBA program including:

Program Design: The WSU MBA program was designed to minimize barriers and obstacles to program completion. Admission requirements for students without an undergraduate business degree were simplified to ensure that all students can quickly enter the program and begin MBA coursework without extensive foundational course requirements. Course prerequisites were minimized where possible to permit students to complete requirements regardless of the time of year they are admitted to the program. Few prerequisites make course sequencing much easier for students and permits more efficient completion of degree requirements. Designed as a stackable certificate program, the WSU MBA will appeal to students interested in completing a relevant Certificate program to advance to new positions or upgrade their skills for existing positions while also appealing to students who want to achieve the MBA degree.

Academic Advising: Dedicated MBA advisors will work closely with students to develop personalized plans of study, track their progress, and provide guidance throughout their program. Academic advisors can help students navigate the curriculum, understand certificate and degree requirements, and make informed decisions regarding course selection.

Student Support Services: WSU has a range of student support services available to assist MBA students. These services include financial aid, writing assistance, career assistance, and technology. As a result of our recent NECHE accreditation study, increased support for graduate students has become an important goal. New

initiatives may be forthcoming. Existing services and any new ones that are developed are designed to help students strengthen their academic skills and overcome challenges encountered in their programs.

Faculty Mentorship: Faculty members teaching in the program will provide mentorship and guidance to students. They can offer academic and professional advice and support students in their research for the capstone project. Business professionals teaching in the MBA program will have extensive industry experience and can offer valuable insights into career paths, job market trends, and industry specific skills to help students leverage their MBA education for career advancement. Faculty mentors also serve as role models for professionalism and ethical behavior, guiding students in developing the skills and attributes necessary for success in the business world.

Professional Development Opportunities: Workshops, seminars, and networking events may be offered to help students build their skills and knowledge beyond their classes. Students can engage with experts in the field to enhance their professional development and leadership abilities. Students will also work with business professionals when completing their Applied Integrative Project capstone project as outlined in the next section of this report.

Continuous Program Evaluation: As part of assessment initiatives, the MBA program will engage in ongoing evaluation to assess the effectiveness of its curriculum, teaching methods, and support structures. Soliciting feedback from students through surveys, focus groups, and evaluations will provide insights into students' experiences, satisfaction levels, and to identify areas for improvement. We will also seek input from employers and industry professionals to ensure alignment of the curriculum with employer expectations and demands. We will use this input to inform curriculum design, career services, and student support services to better meet the needs of employers and to enhance the employability of our graduates. Overall, these supports and practices work together to create an encouraging environment to help students maximize their learning experience and achieve their academic and professional goals.

3. Please describe relevant, alliances and partnerships with PK-12, other institutions of higher education, and the employer community. If you have or plan to convene an advisory group for this proposed program, please explain. Describe how information from an advisory will be used to develop and refine the program.

Westfield State University's MBA Program will form partnerships and alliances with the employer community to develop sponsorships for the Applied Integrative Project course in terms of consulting projects. The consulting projects are intended to provide students with an opportunity to conduct fieldwork to develop strategic recommendations for a real company. Sponsoring companies will provide funding, access and support for a team of students to gather information about a current

strategic issue/problem and to formulate data-supported strategic recommendations. The team will present their recommendations (through presentations and written reports) to the company. Each consulting project will be supervised by a member of the WSU MBA faculty who will work with the company to define the project specifications prior to the team's work. The faculty member will also review the completed project to ensure that the recommendations are appropriate.

WSU will also develop an advisory board for the MBA program. The advisory board will be asked to develop and refine the program in the following ways:

- **Industry Insight and Trends:** Board members bring their experience and insight from business to keep the program updated on industry trends, emerging technologies and changing market demands.
- **Curriculum Review and Development:** Board members provide feedback on the program/s curriculum to ensure it remains current, relevant and aligned with industry standards. They can help identify new Certificates for inclusion in the program or new courses within existing Certificates.
- **Networking Opportunities:** Board members can generate guest lectures, workshops, internships and job placements for students.
- **Quality Assurance:** Board members help ensure the quality of the education by reviewing program outcomes and student performance data to identify areas for improvement. They can provide constructive feedback to improve the program's effectiveness.
- **Accreditation:** Should WSU pursue accreditation for its business programs, board members can ensure the MBA program follows best practices and accreditation standards



4. If the proposed program is designed for students to enter an employment area of demonstrated need in the regional and/or statewide labor market, provide evidence including references to workforce development plans (e.g. MassHire Regional Blueprints, <https://www.mass.gov/service-details/view-your-regions-blueprint>), showing market need and employer engagement. If it is not directly labor market aligned, identify the career options related to the proposed program and explain how students will be made aware of them. Do not rely on Bureau of Labor Statistics projections in this section.

The Westfield State University MBA program was designed to prepare students for employment in the regional labor market as identified in the *Pioneer Valley Labor Market Blueprint* as updated in 2020<sup>1</sup>. The report identifies Advanced Manufacturing Occupational Groups and Cross-Industry Occupations as priorities for the region WSU serves. In Advanced Manufacturing, regional firms are considering re-purposing their factories to better meet current product demand. Students earning the Business Analytics Certificate as part of the WSU MBA program would provide these firms with the analytical abilities to determine what types of products would be most successful going forward. Students earning the Global Sustainability Certificate could assist these businesses by recommending ways for firms to improve the efficiency and effectiveness of their manufacturing processes. Students earning the Business Leadership Certificate would be able to effectively manage the transformation of these firms.

Advanced Manufacturing employees with undergraduate degrees in engineering may choose to pursue an MBA so that they can move into project management and upper management positions in the industry. The focus of the WSU MBA on leadership, business analytics, and sustainability can assist engineers to move from supervising equipment upgrades to managing the manufacturing facility. Pairing an MBA with an engineering degree can result in significant salary increases. Regional manufacturing organizations employing WSU MBA graduates should experience enhancements in the managerial, analytical, and sustainability skills of their employees. These improvements should improve the survival and transformation of these businesses.

Sustainability in the form of Climate & Clean Energy is one of the Healy-Driscoll administration's priorities. In the Governor's inaugural address, she emphasized the goal of making Massachusetts "a world leader in combating the climate crisis and driving our clean energy economy."<sup>2</sup> WSU MBA graduates and Global Sustainability Certificate holders will be well equipped to assist Massachusetts businesses in improving their organization's sustainability practices.

<sup>1</sup> MassHire Workforce Boards of Hampden and Franklin Hampshire Counties (Region 2). (2020, September). *Pioneer Valley Labor Market Blueprint Update 2020* - [mass.gov](https://www.mass.gov). MassHire Hampden

<sup>2</sup> Healey, M., & Driscoll, K. (2024). *The Healey-Driscoll Administration's priorities*. [mass.gov](https://www.mass.gov/info-details/the-healey-driscoll-administrations-priorities#climate-&-clean-energy-).

The Pioneer Valley Blueprint also envisions finance and insurance as two other critical industries for the region. Big-data capabilities are becoming a critical need for insurance companies. The predictive analytics to understand consumer behavior, set prices, and save costs are key components in the study of business analytics.

Detecting insurance fraud is another important application of big-data sets in the insurance industry. The Business Analytics certificate provided by the WSU MBA would prepare students with the skills necessary for developing insights from big-data. By employing MBA graduates with the Business Analytics Certificate, regional manufacturing organizations could improve their data-informed decision-making.

Data-driven decision making is also becoming important in the financial services industry. Finance professionals are using analytics to improve services to customers, recognize fraudulent purchases, monitor upcoming market trends, and reduce production costs. The WSU MBA will prepare graduates well for positions in the finance industry.

In addition to alignment with regional labor market priorities, the WSU MBA program prepares students for in-demand career options identified in the 2024 market analysis study provided by Lightcast.

The market analysis study for the overall MBA program (including sustainability studies and business analytics) for the northeast region (including Connecticut, Maine, Massachusetts, New Hampshire, New York, Rhode Island and Vermont) showed that jobs for MBAs were expected to increase by 25% in the years between 2021-2033. Median earnings for those positions in the northeast were 18% higher than for the nation. Annual job openings for MBAs were expected to reach 48,057. (Lightcast report is attached as Appendix 2)

The top ten occupations as ranked by the number of jobs and annual openings for MBAs in the region are shown in the table below:

<b>Target Occupations for MBA Graduates in the Northeast Region</b>			
<b>Occupation</b>	<b>2021 Jobs</b>	<b>Annual Job Openings</b>	<b>Expected Growth (2021-2033)</b>
Accountants and Auditors	50,304	5,129	+19.73%
General and Operations Managers	44,897	5,110	+26.06%
Management Analysts	36,947	4,151	+24.89%
Market Research Analysts & Marketing Specialists	26,119	3,571	+34.48%
Project Management Specialists	23,395	2,493	+29.64%
Financial Managers	22,436	2,406	+33.13%
Computer & Information Systems Managers	18,202	1,903	+33.83%
Human Resource Specialists	16,379	2,072	+32.87%
Business Operations Specialists	15,158	1,845	+27.65%
Managers, All Other	14,519	1,379	+18.02%

A total of 41 occupations targeting MBA graduates with business analytics and sustainability studies coursework were shown in the Lightcast report. The diverse occupations listed demonstrate the versatility of the WSU MBA program and the high market demand for individuals with this preparation.

The market analysis for occupations targeting MBA graduates with a focus on business analytics is summarized in the table below:

<b>Target Occupations for MBA Graduates in the Northeast Region with Business Analytics</b>			
<b>Occupation</b>	<b>2021 Jobs</b>	<b>Annual Openings</b>	<b>Expected Growth (2021-2033)</b>
Management Analysts	39,350	4,084	+10.04%
Market Research Analysts & Marketing Specialists	29,004	3,448	+12.02%
Business Operations Specialists	16,119	3,803	+11.18%
Managers, All Other	15,126	1,349	+7.24%
Sales Representatives of Services except Advertising, Insurance, Financial Services, and Travel	12,123	1,373	+8.31%
Sales Representatives, Wholesale and Manufacturing Except Technical and Scientific Products	9,754	938	+2.85%
Data Scientists	8,437	929	+22.65%
Chief Executives	8,013	602	+2.98%
Sales Managers	7,904	692	+6.44%
Statisticians	1,899	203	+20.96%

Data from Lightcast Q1 2024 report

Only four of the target occupations from the previous table are repeated in the list of occupations with a business analytics focus. The other seven target occupations are unique to the business analytics area. Growth rates in the occupations of Data Scientists and Statisticians reflect the rapid growth in data/business analytics. Good job opportunities should be attractive to prospective students.

When studying labor market demand for a graduate degree and sustainability focus, the top states for jobs included New York, Massachusetts, and Connecticut. The top qualification for sustainability jobs in the northeast region was an MBA degree. The specialized skills in the job profiles evaluated by Lightcast included sustainability improvement, sustainability evaluation, leadership, analytics, and business skills. The design of the WSU MBA is highly consistent with employer stated needs for open positions. Students wishing to earn the MBA with the Sustainability Certificate will find employment opportunities within the northeast region.

MBA students will be made aware of career opportunities through Westfield State University's Career Center in the form of career development advising, job fairs, and professional networking events. Virtual professional development opportunities also be offered through webinars. MBA students will be encouraged to take advantage of professional networking opportunities through the WSU Alumni Association to learn more about career options.

5. Are there existing programs at other institutions (public and independent) in your region that offer a similar degree? If so, compare and contrast them with the proposed program.

In developing the Westfield State University MBA program, we began by studying the MBA offerings of other institutions within the region. The comparative analysis of regional MBA programs is summarized in **Appendix 1** of this report. We drew the following conclusions from our analysis:

- Although the number of credits required for MBA programs at regional universities varied from a high of 48 credits (Clark University, Framingham State University) to 30 credits (Bay Path, Bentley, Central Connecticut, Fitchburg, MCLA), the trend is for fewer credits. The proposed WSU MBA is 30 credits.
- MBA degrees have typically been generalist degrees in advanced business. The current trend seems to be to offer specialties or concentrations in the MBA. We noted that several programs had concentrations in Business Analytics while no programs offered a concentration in Sustainability. The proposed WSU MBA offers a Certificate in Business Analytics OR a Certificate in Global Sustainability for Business. The program also offers a Certificate in Business Leadership (required of all MBA students). The WSU MBA is on trend with the emphasis on Business Analytics but has no competitors in the Global Sustainability for Business space. Some programs offer individual courses in business sustainability, but no concentration. There is only one other program offering a concentration in Leadership (Western New England University). The design of the WSU MBA is distinctive and unique in the region.
- The delivery format for MBA programs has shifted to embrace online course delivery. Many of the programs studied offer both in-person and online programs. The WSU MBA has been developed as a 100% online program to provide students with the flexibility they need as working adults. Recent studies have shown strong student preferences for online courses in MBA programs.<sup>3</sup>
- Tuition and fees for the MBA differ widely, ranging from \$58,650 (Bentley University) to a low of \$13,080 (Fitchburg State University). At the current graduate tuition rates for Westfield State University, the full cost of the WSU MBA would be \$11,940, the lowest cost of the 17 regional universities we studied.

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<sup>3</sup> Stokes, K. (2023, April 13). *State of the Graduate Education Market: Trends & Insights in Key Graduate Markets 2023*. Wiley. <https://universityservices.wiley.com/state-of-the-graduate-education-market>

In short, we designed the WSU MBA to distinguish it from other MBA programs in the region. The WSU MBA program is differentiated by its unique curriculum emphasis, specialize concentrations, experiential learning opportunities, affordability, and flexibility and accessibility. These qualities will serve to attract students who wish to differentiate themselves in a competitive employment market.

The program is a stackable certificate program where students complete a Business Leadership Certificate and choose between a Business Analytics Certificate, or a Global Sustainability Certificate. The program is an online, 30-credit graduate program, offering the quick completion and flexible delivery students desire. The certificates in the program were chosen to align with skills employers say are important now and will continue to be in the next five years such as leadership, data analysis & interpretation, decision-making processes, strategy.

The WSU MBA was also designed to meet the need of today's MBA students in that it provides pathways for part-time education, quicker goal attainment, and flexibility via online asynchronous delivery.

6. Has the proposed program been planned to include any significant digital, experiential, competency-based or other innovative approaches? Please explain and provide examples.

WSU's MBA program has been designed to incorporate many high impact practices (HIPs) to improve the student learning experience. HIPs to be incorporated include:

- Capstone Courses and Projects: Students will have three options for completing the capstone project: 1) Consulting Project (described in the response to question 3 above), 2) a Strategic Analysis Project incorporating similar analysis to the Consulting Project but utilizing secondary sources rather than primary sources such as in-person interviews and company tours, and 3) Study Abroad Projects which involves combining academic learning with cultural immersion and practical exposure to global business environments. In all three options, students will develop a strong understanding of business environments including economic, political, legal, and socio-culture factors that impact business operations. Students will also develop strategic-thinking skills by examining how businesses formulate and execute business strategies, conducting market research, and evaluating the competitive landscape. These projects will allow students to apply theoretical knowledge to real-world business challenges in different contexts.
- Collaborative Assignments and Projects: Collaborative assignments and projects will prepare students for teamwork in the workplace by simulating real-world scenarios where students must work together to achieve common goals. Students will develop teamwork skills such as communication, conflict resolution, and collaboration.
- Diversity/Global Learning: MBA programs typically attract students from diverse backgrounds, different industries, cultures, and academic

disciplines. Collaborative assignments will provide opportunities for students to leverage this diversity and learn from each other's unique perspectives, experiences, and expertise. The Study Abroad Capstone option will help develop students' cultural awareness, sensitivity, and adaptability by immersing them in a different cultural context.

- Case Analysis: Case studies allow students to apply theoretical knowledge to real-world business situations, helping them to develop a deeper understanding of how theoretical concepts translate into practical decision-making. Students must critically analyze complex business problems, identify relevant information, and propose solutions or strategies. This process cultivates students' critical thinking and problem-solving skills which are critical components for business leaders.
- Experiential Learning Opportunities—Many MBA courses will virtually utilize software data provided by the WSU Finance/Data Analytics Lab so that students can have access to cutting-edge analytical tools (such as statistical and data visualization software) and live (and historical) financial data feeds. In finance courses, students will be able to develop stock portfolios and see how they perform when market conditions are simulated. Statistical software will permit identification of patterns in large data sets so that students can drive insights into business activities when developing strategic recommendations. The capstone project courses provide opportunities for students to gain insight into real-world business challenges.

Overall, the Westfield State University MBA program is innovative in its design as a stackable certificate program that leads to a graduate degree, and will use significant digital and experiential learning components to provide students with a learning experience that will prepare them for success in the complex and dynamic field of business.

## B. Alignment with Campus Strategic Plan and Mission

1. Describe why the proposed program is a priority, and how it supports the campus's approved strategic plan, in the context of the institution's mission.

The proposed MBA is a priority and supports Westfield State University's approved strategic plan in multiple ways, aligning with the institution's mission as a public University offering accessible quality graduate programs.

The MBA program contributes to WSU's commitment to providing accessible quality graduate programs. The design of the WSU MBA program prioritizes affordability, flexibility, diversity, inclusivity, student support, academic excellence, experiential learning, and career development so that students achieve their academic and professional goals.

The program enhances student engagement and success by creating an interactive learning environment, fostering peer learning and collaboration, providing access to industry experts and career development resources, offering personalized academic support, providing experiential learning opportunities, and focusing on leadership development. These elements will collectively contribute to the holistic growth and professional success of our students.

The MBA program contributes to the economic, social, and cultural growth of the northeast region. The WSU MBA program will cultivate business leaders, entrepreneurs, and managers with the skills and knowledge to drive economic growth. Graduates will contribute to innovation, productivity, and competitiveness in industries from finance and technology to healthcare and manufacturing. By fostering an inclusive learning environment, the WSU MBA will prepare students to lead diverse teams and organizations, promote equity and social justice, and contribute to a more inclusive society. As a hub for networking, collaboration, and knowledge exchange among students, alumni, faculty, and industry professionals, the MBA students and graduates will make connections that facilitate the exchange of ideas, experiences, and resources that foster a vibrant community within the region.

The program aligns with Westfield State University’s mission of developing responsible leaders and engaged citizens. The MBA Business Leadership Certificate (Required of all MBAs) focuses on the development of students’ leadership skills and prepares students to be ethical and socially responsible leaders. Students will use self-assessment tools, and feedback from peers and mentors, to identify their personal strengths, weaknesses, and leadership goals. They will then develop a personalized leadership development plan with action steps for ongoing growth and improvement. The courses in the Leadership Certificate provides students with opportunities to develop values of social responsibility, ethical practice, and community engagement, preparing graduates to be active contributors to society and engaged citizens in the northeast region.

In summary, the proposed MBA program at Westfield State University is a priority that supports the institution’s mission by providing accessible quality programs, promoting student engagement and success, contributing to economic and social growth, and developing responsible leaders and citizens. The program aligns with the University’s commitment to education, community engagement, and the overall well-being of the northeast region.

2. List the overall goals and learning objectives of the program and describe the strategy for achieving each goal. Use the **LOI Program Goals and Objectives** table in addition to any narrative comments.

The overall goals and learning objectives of the Westfield State University MBA program revolve around equipping students with the knowledge, skills and capabilities

needed to succeed as effective leaders in the dynamic business environment. Students completing the WSU MBA should be able to:

- Demonstrate advanced knowledge in areas such as business management, accounting, finance, marketing, and strategic planning.
- Develop critical thinking, decision-making, leadership and communication skills to drive organizational success and contribute to societal well-being.
- Thrive in a diverse and inclusive community where individuals from different backgrounds can exchange ideas and perspectives.
- Develop the ethical mindset needed to lead with integrity in today's dynamic global business landscape.
- Integrate knowledge and formulate strategies to contribute meaningfully to improving businesses and society.
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Details of the assessment of these goals are provided in Form B.

### **C. Alignment with Operational and Financial Objectives of the Institution**

1. Provide enrollment projections for the first five years of the program using the Program Enrollment form (Form C), Describe below any anticipated impact that the program may have on enrollment in other programs.

Form C provides conservative estimates for enrollment of full and part-time MBA enrollments for the first five years of the program and certificate enrollments for the same period. (We will file the necessary forms for approval of the three certificates (Business Leadership, Business Analytics, and Global Sustainability for Business after the MBA program is approved). We anticipate that most students will enroll in the MBA program as part-time students with few full-time students.

Enrollment growth was estimated to be only 3% per year. As will be shown in the proforma statements in Form D, the program is profitable from the first year even with modest enrollment growth.

Focus groups with senior business students at WSU indicated a strong interest in the design of the MBA program and its certificates. Several students expressed interest in the Business Analytics certificate since WSU currently offers few undergraduate courses in this area. Students interested in sustainability issues thought the Global Sustainability for Business Certificate would be beneficial for students receiving undergraduate degrees in Regional Planning or Environmental Science. We hope to attract many MBA and certificate students from the WSU undergraduate programs.

We anticipate modest impact on enrollment in other graduate programs offered by WSU. Students in other graduate programs such as the Master of Public Administration, the Master of Science in Accounting, or the Health Innovation and



Leadership degree (under development in Nursing) may wish to enroll in MBA courses that are complimentary to their degree programs.

2. Describe the resources that the program will require (additional faculty and/or staff, space and equipment, on-line infrastructure, startup and maintenance of the program). Please include a narrative or financial statement outlining the anticipated net impact of the program on the overall financial resources of the institution. Include five years of future projections of revenue and expense using the LOI Budget form (**Form D**).

The existing business faculty have expressed interest in teaching in the MBA program. Faculty are interested in working with advanced students and see the MBA courses as welcomed changes of pace in their teaching. We anticipate that many of these faculty will teach an MBA class as an addition to their traditional four/four workload. Few faculty will teach an MBA course as part of their day workload. This will permit WSU to offer the MBA program without adding additional faculty members. Additional adjuncts may be needed to teach specialized courses within the program. The proforma budget in Form D was built to reflect the teaching of many courses in the program by Day program faculty at the DCGE salary rate. Only two adjunct faculty were included in the budget. As the program becomes profitable, WSU may wish to use some of the profits to hire additional faculty to serve the MBA program.

As a 100% online program, no additional classroom or office space will be required for the MBA and Certificates. Faculty will utilize WSU's learning management system (LMS) to provide online content for students.

The budget includes a part-time staff member to serve as the program's administrative assistant. The administrative assistant will report to the Program Area Chair. The Program Area Chair (PAC) will serve as the director for the MBA program and associated Certificates. The PAC may appoint other faculty members to serve as Program Advisors. Both the PAC and Program Advisors will be compensated at the typical rate for all graduate programs at WSU.

The budget includes approximately \$10,000/year in funding for marketing and professional travel. These areas will be critical to the startup and maintenance of the program. These funds will be used to promote the program (online and in print), to host recruiting events (virtually and in person), and to recruit students through visits to businesses in the region.

We have also included a modest budget of \$500/yr to host professional development workshops, guest speakers, and webinars. These events will enhance the student experience in the program by providing opportunities for students to interact with experts and specialists.

The complete budget is provided as Form D. Even with the conservative enrollment projections and the inclusion of existing faculty as instructors (at a higher cost than adjuncts), the MBA program is profitable from the first year.

**ATTACHMENTS:**

<b>Form A</b>	<b>LOI Curriculum Outline</b>
<b>Form B</b>	<b>LOI Goals and Objectives</b>
<b>Form C</b>	<b>LOI Enrollment Projections</b>
<b>Form D</b>	<b>LOI Budget</b>
<b>Appendix 1</b>	<b>Comparative Analysis of MBA Programs in the Region</b>
<b>Appendix 2</b>	<b>Lightcast Market Analysis Report (separate document)</b>

**Form A2: LOI Graduate Program Curriculum Outline**  
(Insert additional rows as necessary.)

<i>Major Required (Core) Courses (Total # of courses required = 15)</i>		
<i>Course Number</i>	<i>Course Title</i>	<i>Credit Hours</i>
<b>Business Leadership Certificate (required for all MBA candidates)</b>		
MBA XXXX	Business Leadership Development	1.5
MBA XXXX	Emotional Intelligence for Leaders	1.5
MBA XXXX	Value Creation	1.5
MBA XXXX	Accounting for Business Decisions	1.5
MBA XXXX	Ethics & Corporate Social Responsibility	1.5
MBA XXXX MBA XXXX	Negotiations OR Special Topics for Leaders	1.5
MBA XXXX	Marketing Leadership	3.0
MBA XXXX	Strategic Management	1.5
MBA XXXX	Applied Integrative Project	1.5
<b>Business Analytics Certificate (Option #1 for MBA completion)</b>		
MBA XXXX	Data-Driven Decision Making	1.5
MBA XXXX	Statistics for Business Analytics	1.5
MBA XXXX	Marketing Analytics	3.0
MBA XXXX	Data Visualization for Business Decisions	3.0
MBA XXXX	Applied Business Analytics	3.0
<b>Global Sustainability for Business Certificate (Option #2 for MBA completion)</b>		
MBA XXXX	Organizational Change for Sustainability	1.5
MBA XXXX	Sustainability Reporting & Analysis	1.5
MBA XXXX	Responsible Global Leadership	3.0
MBA XXXX	Sustainable Business Practices	3.0
MBA XXXX	Special Topics in Sustainability	3.0
	Sub-total # Core Credits Required	27

<b>Form A2: LOI Graduate Program Curriculum Outline (continued)</b>		
<i>Elective Course Choices (Total courses required = 3 credits) (attach list of choices if needed)</i>		
Variable	Students may take any of the above courses not included in either the Business Leadership Certificate or the chosen certificate for completion of the degree.	3
MBA XXXX	Special Topics for Leaders (May be repeated for credit provided that the topic to be covered is different)	1.5
MBA XXXX	Negotiations (May be taken as an elective if not selected for completion of the Business Leadership Certificate)	1.5
<b>CHOOSE ONE OF THE FOLLOWING ELECTIVES</b>		
Students may choose as an elective any MBA course not required in their chosen Certificates		
ACCT 0628	Fraud Examination (Elective)	3
ACCT 0630	Foundations in Ethics: Applications in Business & the CPA Profession (Elective)	3
ACCT 0631	Municipal & Fund Accounting (Elective)	3
MGMT 0632	Business Law for Accountants (Elective)	3
ACCT 0642	Managing Professionals in Client Service Organizations (Elective)	3
PADM 0600	Foundations of Public Administration (Elective)	3
PADM 0638	Introduction to Healthcare Systems (Elective)	3
PADM 0640	The Regional Economy of New England (Elective)	3
	Sub-total # Elective Credits Required	3
<b>Curriculum Summary</b>		
Total number of courses required for the degree		15
Total credit hours required for degree		30
<b>Prerequisite, Concentration or Other Requirements:</b>		
A bachelor's degree in business or equivalent knowledge of basic financial accounting, financial management, and microeconomics. Students without this background will be required to complete MBA Boot Camp.		



Proposed MBA

Business, Mathematics,  
Computing, & Sustainability

<b>BUSINESS LEADERSHIP CERTIFICATE</b> (Required for all MBA Candidates)				<b>TOTAL CREDITS</b>
Business Leadership Development (1.5 credits)	Value Creation (1.5 credits)	Ethics & Corporate Social Responsibility (1.5 credits)	Marketing Leadership (3 credits)	<b>12</b>
Emotional Intelligence for Leaders (1.5 credits)	Accounting for Business Decisions (1.5 credits)	Choose one: <ul style="list-style-type: none"> <li>Negotiation</li> <li>Special Topics for Leaders</li> </ul>		

<b>BUSINESS ANALYTICS</b>				<b>TOTAL CREDITS</b>
Data-Driven Decision Making (1.5 credits)	Marketing Analytics (3 credits)	Data Visualization for Business Decisions (3 credits)	Applied Business Analytics (3 credits)	<b>12</b>
Statistics for Business Analytics (1.5 credits)				

<b>GLOBAL SUSTAINABILITY FOR BUSINESS</b>				<b>TOTAL CREDITS</b>
Organizational Change for Sustainability (1.5 credits)	Responsible Global Leadership (3 credits)	Sustainable Business Practices (3 Credits)	Special Topics in Sustainability (3 credits)	<b>12</b>
Sustainability Reporting & Analysis (1.5 credits)				

<b>ADDITIONAL REQUIRED FOR MBA</b>		<b>TOTAL CREDITS</b>	<b>PATHWAYS TO WSU MBA</b>
Elective (3 credits) Choose 3 credits from courses above or MSA courses or PADM courses	Capstone Course Strategic Management (1.5 credits)  Applied Integrative Project: (1.5 credits) <ul style="list-style-type: none"> <li>Consulting project</li> <li>Strategic analysis project</li> <li>Study Abroad</li> </ul>	<b>6</b>	<p><b>2 Certificates + 2 Courses = MBA</b>  <b>24 credits + 6 credits = 30 credits</b></p> <p><b>LEADERSHIP + BUSINESS ANALYTICS + ELECTIVE + CAPSTONE = MBA</b></p> <p><b>LEADERSHIP + GLOBAL SUSTAINABILITY + ELECTIVE + CAPSTONE = MBA</b></p>

**MBA Admission Requirements:** A bachelor’s degree in business or equivalent knowledge of basic financial accounting, financial management and microeconomics. Students without this background will be required to complete MBA Boot Camp.



**Form B: LOI Goals and Objectives**

Goal	Measurable Objective	Strategy for Achievement	Timetable
Demonstrate advanced knowledge in areas such as business management, accounting, finance, marketing, and strategic planning.	Successful completion (B+ or better) of the courses in the Business Leadership Certificate	Faculty will ensure that key topics, models and tools for each functional business area are included in the relevant courses along with appropriate assignments and activities.	Data to be collected and analyzed annually
Develop critical thinking, decision-making, leadership and communication skills to drive organizational success and contribute to societal and environmental well-being.	Successful completion (B+ or better) of the Business Leadership Certificate  Successful completion (B+ or better) of Applied Business Analytics or Sustainable Business Practices courses	Faculty will ensure that course topics, assignments, and activities introduce and reinforce skills in critical thinking, decision-making, leadership and communication.	Data to be collected and analyzed annually
Thrive in a diverse and inclusive community where individuals from different backgrounds can exchange ideas and perspectives.	Successful completion (B+ or better) of Business Leadership Development and Emotional Intelligence	Faculty will ensure that key topics, models and tools for diversity, inclusion, equity and social justice are addressed in the Business Leadership Development and Emotional Intelligence courses.	Data to be collected and analyzed annually
Develop the ethical mindset needed to lead with integrity in today’s dynamic global business landscape.	Successful completion (B+ or better) of the Ethics and Corporate Social Responsibility course	Faculty will ensure that key topics, models and tools for ethical decision making and corporate social responsibility are incorporated in the relevant courses.	Data to be collected and analyzed annually
Integrate knowledge and formulate strategies contribute meaningfully to	Successful completion (B+ or better) of Strategic Management	Faculty will ensure that key topics, models and tools for strategy formulation are	Data to be collected and analyzed annually

Goal	Measurable Objective	Strategy for Achievement	Timetable
improving businesses and society.	course and Applied Integrative Project course Responsible Global Leadership or Applied Business Analytics courses	incorporated in relevant courses and are applied in integrative course projects.	

**Form C: LOI Program Enrollment**

**MBA Program Proposal**  
**Form C: LOI Program Enrollment**

	<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>
New Full-Time	3	3	3	3	3
Continuing Full-Time		1	1	1	1
New Part-Time	25	26	27	28	29
Continuing Part-Time		19	20	20	21
MBA Full-Time Totals	3	4	4	4	4
MBA Part-Time Totals	25	45	47	48	50
Certificate Totals	4	5	6	7	8
<b>MBA Totals</b>	<b>28</b>	<b>49</b>	<b>51</b>	<b>52</b>	<b>54</b>

Enrollment Assumptions

Full-Time students should complete the program in one year (30 credits)  
 Certificate students should complete the certificate in one year (12 credits)

Enrollment is projected to grow at 3% per year  
 Part-time student retention is 75% of the previous year's enrollment  
 Full-time student retention is 33% of the previous year's enrollment

**Form D: LOI Program Budget**



**Proposed MBA Program**

One Time Start Up Costs		2025	2026	2027	2028	2029
Cost Categories						
	Full Time Faculty (Salary & Fringe & Payroll Tax)	\$ -	\$ -	\$ -	\$ -	\$ -
	Day Faculty Teaching in DCGE (Salary & Payroll Tax)	\$ 73,759	\$ 76,341	\$ 79,013	\$ 81,778	\$ 84,641
	Part Time/Adjunct (Salary & Payroll Tax)	\$ 12,190	\$ 12,616	\$ 13,058	\$ 13,515	\$ 13,988
	<b>TOTAL SALARY COSTS</b>	<b>\$ 85,949</b>	<b>\$ 88,957</b>	<b>\$ 92,071</b>	<b>\$ 95,293</b>	<b>\$ 98,629</b>
Other Instructional & Administrative Costs						
	Overhead to DGCE @20% of Total Revenue	\$ 45,710	\$ 79,158	\$ 85,457	\$ 90,443	\$ 97,326
	Program Area Chair	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500
	Program Advisor	\$ 3,200	\$ 5,400	\$ 5,700	\$ 5,900	\$ 6,200
	Staff (half-time) (Admin II)	\$ 43,515	\$ 45,038	\$ 46,614	\$ 48,246	\$ 49,934
	Professional Development Webinars	\$ 500	\$ 500	\$ 500	\$ 500	\$ 500
	Instructional Supplies	\$ 300	\$ 300	\$ 300	\$ 300	\$ 300
	Office Supplies	\$ 200	\$ 200	\$ 200	\$ 200	\$ 200
	Professional Travel	\$ 500	\$ 500	\$ 500	\$ 500	\$ 500
\$ 5,000	Marketing	\$ 6,000	\$ 9,500	\$ 9,500	\$ 9,500	\$ 9,500
	<b>TOTAL EXPENSES</b>	<b>\$ 188,374</b>	<b>\$ 232,053</b>	<b>\$ 243,342</b>	<b>\$ 253,382</b>	<b>\$ 265,589</b>

**Institution:** Westfield State University

**Proposed Degree:** MBA

<b>Revenue</b>					
Full-time MBA Tuition @ 21 credits/yr	\$ 26,334	\$ 36,204	\$ 37,296	\$ 38,388	\$ 39,564
Full-Time MBA Program Fees	\$ 2,400	\$ 3,200	\$ 3,200	\$ 3,200	\$ 3,200
Full-time MBA Revenue	\$ 28,734	\$ 39,404	\$ 40,496	\$ 41,588	\$ 42,764
Part-Time MBA Tuition @ 15 credits/yr	\$ 156,750	\$ 290,925	\$ 313,020	\$ 329,040	\$ 353,250
Part-Time MBA Program Fees	\$ 20,000	\$ 36,000	\$ 37,600	\$ 38,400	\$ 40,000
Part-time MBA Revenue	\$ 176,750	\$ 326,925	\$ 350,620	\$ 367,440	\$ 393,250
Certificate Tuition	\$ 20,664	\$ 26,460	\$ 32,568	\$ 38,988	\$ 45,816
Certificate Program Fees	\$ 2,400	\$ 3,000	\$ 3,600	\$ 4,200	\$ 4,800
Certificate Revenue	\$ 23,064	\$ 29,460	\$ 36,168	\$ 43,188	\$ 50,616
<b>TOTAL REVENUE</b>	<b>\$ 228,548</b>	<b>\$ 395,789</b>	<b>\$ 427,284</b>	<b>\$ 452,216</b>	<b>\$ 486,630</b>
<b>NET INCOME</b>	<b><u>\$ 35,174</u></b>	<b><u>\$ 163,736</u></b>	<b><u>\$ 183,942</u></b>	<b><u>\$ 198,834</u></b>	<b><u>\$ 221,041</u></b>

**Institution:** Westfield State University

**Proposed Degree:** MBA

<b>ASSUMPTIONS</b>	
Annual Salary, Fringe & Taxes	3.50%
Fringe + Tax Rate	45.05%
Advising Pay/Student	\$ 100
Program Area Chair	\$ 2,500
Staff Salary	\$ 30,000
Program Fee/Term	\$ 200
Terms/MBA Student/Yr	4
Terms/Certificate Student/yr	3
Credit Hours/YR Full-time Student	21
Credit Hours/Yr Part-time Student	15

<b>Tuition Rates</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>	<b>Average Credits /year</b>
MBA per credit	\$ 418	\$ 431	\$ 444	\$ 457	\$ 471	21
Certificate per Credit	\$ 418	\$ 431	\$ 444	\$ 457	\$ 471	15



Institution: Westfield State University

Proposed Degree: MBA

<b>SALARY CALCULATIONS</b>		<b>Salary per Credit</b>	<b>3 Credit Grad Course</b>	<b>Salary + Tax</b>	<b>Number of Faculty</b>	<b>First Year Cost</b>
	Instructor	\$ 1,608	\$ 5,161	\$ 5,997	0	\$ -
	Sr Instructor	\$ 1,634	\$ 5,245	\$ 6,095	2	\$ 12,190
	Asst Prof	\$ 1,691	\$ 5,428	\$ 6,308	1.5	\$ 9,461
	Assoc Prof	\$ 1,778	\$ 5,707	\$ 6,631	5	\$ 33,156
	Prof	\$ 1,855	\$ 5,956	\$ 6,921	4.5	\$ 31,142
	<b>TOTAL SALARY 2025</b>					

## Appendix 1 COMPARATIVE ANALYSIS OF MBA PROGRAMS IN REGION

Institution & Location Program Name	Total Credits	Delivery Format	Cost to Attend	Sample Curriculum
<b>Westfield State University</b> Westfield, MA  Master of Business Administration	30	Online	\$11,940	Stackable Certificate Program with Certificates in Business Leadership, Business Analytics, Sustainability
<b>Adelphi University</b> Garden City, NY  Master of Business Administration	36	Online	\$53,640	General MBA, Healthcare Management
<b>American International College (AIC)</b> Springfield, MA  Master of Business Administration	36	Online	\$24,450	Traditional MBA curriculum
<b>Assumption University</b> Worcester, MA  MBA Full-Time Management MBA in Healthcare Management MA in Organizational Leadership	36	In-Person for Full-Time Online for Part-Time	\$29,412	Concentrations: Business Analytics, Entrepreneurial Studies, Finance, Healthcare Management,
<b>Bay Path University</b> Longmeadow, MA  Master of Business Administration	30	Online	\$25,650	Management, Cybersecurity, Data Analytics, Finance, Healthcare Management
<b>Bentley University</b> Waltham, MA  Master in Business Analytics	30	In-Person	\$58,650	Managerial Statistics, Data Management & System Modeling, Time Series Analysis, Data Mining

**Institution:** Westfield State University

**Proposed Degree:** MBA

Institution & Location Program Name	Total Credits	Delivery Format	Cost to Attend	Sample Curriculum
<b>Bridgewater State University</b> Bridgewater, MA  Master of Business Administration	30	In-Person & Online	\$15,067	Business Intelligence/ Analytics, Global Management Managing People and Organizations
<b>Central Connecticut State University</b> New Britain, CT  Master of Business Administration	30	In-Person	\$25,140	Tracks in Business Analytics, Accounting, Finance, General Management, Supply Chain Management, Management, Marketing
<b>Clark University</b> Worcester, MA  Master of Business Administration MBA in Accounting MBA in Finance	48	Online	\$42,900	Information Systems for Analytics, Responsible Management in a Global Economy, Data Driven Decision Making
<b>College of Our Lady of the Elms</b> Chicopee, MA  Master of Business Administration	36	In-Person and Online	\$35,676	Accounting MBA, Financial Planning MBA, Healthcare Leadership MBA, Management MBA
<b>Fitchburg State University</b> Fitchburg, MA  Master of Business Administration	30	Online	\$13,080	Accounting, Business Analytics Management, Healthcare Management, Human Resources Management
<b>Framingham State University</b> Framingham, MA  Master of Business Administration	48	In-Person & Online	\$18,300	Concentration in Management or Biotechnology Operations
<b>Massachusetts College of Liberal Arts (MCLA)</b> North Adams, MA  Master in Business Administration	30	Hybrid & Online	\$15,510	Competing in Global Economies and Markets, Managing and Leading, Sustainability and Social Responsibility

**Institution:** Westfield State University

**Proposed Degree:** MBA

Institution & Location Program Name	Total Credits	Delivery Format	Cost to Attend	Sample Curriculum
<b>Salem State University</b> Salem, MA  Master of Business Administration	36	In-Person & Online	\$20,326	Accounting Analysis for Decision Making, Legal and Ethical Environment, Financial Decision Making and Value Creation
<b>University of Connecticut</b> Hartford and Stamford, CT  Master of Business Administration	42	In-Person & Online	\$46,200	Business Analytics, Business Ethics & Compliance, Finance, General Business, Management, Marketing, Supply Chain Management
<b>University of Hartford</b> Hartford, CT  Master of Business Administration	36	Online	\$30,096	Business Analytics, Entrepreneurial Studies, Finance, Healthcare Management
<b>University of Massachusetts Amherst</b> Amherst, MA  Master of Business Administration MS in Accounting MS in Business Analytics MS in Sports Management Master of Finance	45	In-Person & Online	\$42,132	Business Analytics, Healthcare Administration, Marketing, Entrepreneurship, Finance, Sports Management
<b>Western New England University</b> Springfield, MA  Master of Business Administration	38	Online asynchronous & remote synchronous	\$36,000	Leadership, Accounting for Decision Makers, Organizational Behavior, Decision Modeling for Analytics



## Board of Trustees

June 20, 2024

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### MOTION

To approve the Master of Psychiatric Mental Health Nurse Practitioner.

\_\_\_\_\_  
Ali Salehi, Chair

\_\_\_\_\_  
Date

Institution:

Proposed Degree:

**PHASE I: LETTER OF INTENT TEMPLATE  
FOR BOARD VOTE ON APPROVAL PROCESS**

Review Guidelines Prior to Submitting Materials  
<https://www.mass.edu/foradmin/academic/publicnewdegrees.asp>

Information should be typed directly into the boxes below, which will expand. Letter of Intent (LOI) document should be about five to six pages in addition to appendices. After the local approval process for the LOI has been completed, the President of the institution should submit this template and all required forms addressed to the Commissioner of Higher Education, and to the Academic Affairs Committee (AAC) of the Board of Higher Education (BHE).

*Submissions are required to be in MS Word format. Please direct the completed to:*  
[PublicProgramReview@dhe.mass.edu](mailto:PublicProgramReview@dhe.mass.edu)

**Proposed Degree Title and Intent and Mission of the Program (200 words):**  
Psychiatric Mental Health Nurse Practitioner

**Proposed CIP Code:**

**Chief Academic Officer (CAO) Name and Title:** Linda Thompson DrPH, MPH, DNP (hc), RN, FAAN, President

**CAO Phone Number:** (413) 572-5201

**CAO Email:** [president@westfield.ma.edu](mailto:president@westfield.ma.edu)

**Has the Chief Academic Officer reviewed this LOI?** yes

**Date LOI was approved by governing authority:**

**A. Alignment with Massachusetts Goals for Public Higher Education**

The FY19 BHE Equity Statement (<https://www.mass.edu/strategic/equity.asp>) provides campuses with insight into the next iteration of the system-level plans.

1. How does the program address institutional gaps in opportunity and achievement? How does the program align with campus goals?



**Institution:**

**Proposed Degree:**

The launch of a thoughtfully designed Psychiatric Mental Health Nurse Practitioner (PMHNP) program at Westfield State University can effectively address institutional gaps in opportunity and achievement while also aligning with campus goals in several ways. First, the program's structure includes 22 credits of required core curriculum for Nurse Practitioners followed by a required 26 credit specialty track in PMHNP. This fully online curriculum will allow for accessibility for working adult learners, and the flexibility to add additional specialty tracks to meet the institutional goals related to program growth and responding to area workforce needs.

a. Addressing Institutional Gaps:

This program actively promotes diversity and inclusion by recruiting and admitting a diverse cohort of students. It can aim to increase representation of underrepresented minority groups in the healthcare field, addressing gaps in opportunity and achievement for these populations. By offering this specialized PMHNP program, Westfield State can provide an accessible and affordable education option to students who aspire to become Psychiatric Mental Health Nurse Practitioners. This broadens opportunities for students who might otherwise face barriers to advanced education due to geographical or financial constraints.

Additionally, the proposed program is a launching point for a flexibly accessible advanced nursing programming as it can be further tailored to meet the specific healthcare needs of the local community, especially in underserved areas. Graduates can fill gaps in healthcare services, improving access to care for marginalized and underserved populations. The initial NP track of Psychiatric Mental Health can specifically address gaps in mental healthcare services, which have been recognized at both the federal and state level as a health professional shortage within our geographical location. The addition of the proposed program will meet a significant need, particularly in addressing issues related to mental health disparities and achievement gaps.

b. Aligning with Campus Goals:

The addition of the Psychiatric Mental Health Nurse Practitioner program can enhance the overall academic excellence of Westfield State University. It aligns with the goal to offer high-quality, relevant, and competitive educational programs. The program encourages engagement with the local community through clinical placements and outreach efforts. This aligns with the campus goal of fostering community partnerships and contributing to the region's well-being. Launching the proposed PMHNP program aligns with broader campus and state goals related to healthcare workforce development. It can support state initiatives to address healthcare workforce shortages, enhance the quality of care, and improve health outcomes. The introduction of a PMHNP program encourages innovation and interprofessional collaboration. It aligns with goals related to expanding research, promoting cross-disciplinary cooperation, and preparing students to work in evolving healthcare environments. The PMHNP program can contribute to student success by offering future growth opportunities in specialty tracks to fulfill the need for in-demand career pathways. By helping students become highly skilled the PMHNP program at Westfield State can promote successful outcomes for its graduates.

**Institution:**

**Proposed Degree:**

2. What program or department supports and practices are in place to ensure that students persist and complete the certifications and degrees offered by the program?

The Psychiatric Mental Health Nurse Practitioner program will reside in the Nursing Department which has demonstrated highly effective programs with the BSN and the RN to BSN bachelor completion program offered through DGCE. In addition, Westfield State University has various supports and practices in place to ensure that students persist and complete the Psychiatric Mental Health Nurse Practitioner program, including academic advising, student support services, clinical placement assistance, faculty mentorship, professional development opportunities, and collaboration and peer support.

The program will have dedicated academic advisors who work closely with students to develop personalized academic plans, track their progress, and provide guidance throughout their program. Academic advisors can help students navigate the curriculum, understand degree requirements, and make informed course selection and sequencing decisions.

The University has a range of student support services available to assist Psychiatric Mental Health Nurse Practitioner students. These services include financial aid, writing assistance, career assistance, and technology. These resources can help students strengthen their academic skills and overcome challenges they may encounter during their program.

The program will have a dedicated team that assists students in securing clinical placements. They can help students identify suitable clinical sites, connect with preceptors, and navigate the logistics of arranging clinical rotations. This support is crucial for students to gain hands-on experience and meet the clinical requirements of their program.

Faculty members in the program will provide mentorship and guidance to students. They can offer academic and professional advice, support students in their research or capstone projects, and serve as role models in psychiatric mental health nursing. Faculty mentorship can contribute to students' academic and personal development, fostering a supportive learning environment.

The program will offer opportunities to help students build their skills and knowledge beyond the classroom. These may include workshops, conferences, seminars, or networking events where students can engage with experts in the field and stay up to date with advancements in psychiatric mental health nursing.

The program will foster collaboration among students and support a sense of community within the program to enhance student engagement and persistence. Group projects, study groups, and peer mentoring initiatives will provide opportunities for students to support and learn from one another, creating a supportive network that promotes academic success.

Finally, the nursing program engages in ongoing evaluation to assess the effectiveness of all programming, including curriculum, teaching methods, and support structures. This evaluation

**Institution:**

**Proposed Degree:**

process involves seeking feedback from students, alumni, and clinical partners to identify areas for improvement and make necessary adjustments to ensure the program meets the needs of students and aligns with industry standards. The program evaluation uses known standards such as the Commission on Collegiate Nursing Education to guide its evaluation.

These supports and practices work together to create a nurturing and inclusive environment for students, and will continue in the Psychiatric Mental Health Nurse Practitioner program at Westfield State University. By providing comprehensive support, the University aims to increase student persistence and completion rates, ultimately preparing students for successful psychiatric mental health nursing careers.

3. Please describe relevant alliances and partnerships with PK-12, other institutions of higher education, and the employer community. If you have or plan to convene an advisory group for this proposed program, please explain. Describe how information from an advisory will be used to develop and refine the program.

Establishing solid alliances and partnerships is crucial for the success of the Psychiatric Mental Health Nurse Practitioner Program at Westfield State University. Through the Nursing Program we have built a solid foundation of supports and will continue to build on this with the proposed program. We plan to engage with various stakeholders, including partnerships with middle and high schools, other higher education institutions, and employers. Additionally, we plan to engage an advisory board that reflects the community of interest to develop and revise the program.

We will collaborate with local primary and secondary schools to identify students interested in healthcare careers early on. Leveraging our existing healthcare career navigation program, we will offer resources, mentorship, and guidance to help students navigate their educational pathways toward becoming psychiatric mental health nurse practitioners.

Partnerships with institutions like Holyoke and Springfield Technical Community College will allow seamless transfer pathways for students interested in pursuing advanced degrees in nursing. We'll work together to align the curriculum, streamline admissions processes, and facilitate credit transfers to ensure a smooth transition for students building off of current collaborations such as our concurrent enrollment program with Holyoke Community College that allows students to begin taking courses toward Westfield's baccalaureate degree in nursing while in their associate degree nursing program. This existing program also includes a joint admission whereby students complete one application to be admitted to both programs, hence further streamlining the process and lifting the burden from the student.

We have strong partnerships with major medical facilities and other regional healthcare organizations. Through practice placement collaborations, our students access diverse clinical experiences that enrich their education and prepare them for real-world practice. By engaging with employers, we can tailor our program to meet the evolving needs of the healthcare industry and ensure that our graduates are well-prepared for employment opportunities. Our practice partners are searching for qualified

**Institution:**

**Proposed Degree:**

practitioners to fill vacancies and are imploring Westfield State to offer academic preparation pathways to help build the pipeline.

We will convene an advisory group of key stakeholders, including faculty members, healthcare professionals, representatives from partnering institutions, employers, and alumni. This group will provide valuable insights, feedback, and guidance throughout the development and refinement of the program. Information gathered from the advisory group will be instrumental in shaping the program curriculum, clinical experiences, and overall program structure. We'll use feedback from the advisory group to identify industry trends, emerging best practices, and areas for improvement. This iterative process will ensure that our program remains relevant, responsive to the community's needs, and aligned with industry standards.

By fostering strong partnerships and leveraging the expertise of our advisory group, we aim to develop a psychiatric mental health nurse practitioner program that not only meets accreditation standards but also prepares highly competent and compassionate professionals to address the mental health needs of our communities.

4. If the proposed program is designed for students to enter an employment area of demonstrated need in the regional and/or statewide labor market, provide evidence including references to workforce development plans (e.g. MassHire Regional Blueprints, <https://www.mass.gov/service-details/view-your-regions-blueprint>), showing market need and employer engagement. If it is not directly labor market aligned, identify the career options related to the proposed program and explain how students will be made aware of them. Do not rely on Bureau of Labor Statistics projections in this section.

Launching the Psychiatric Mental Health Nurse Practitioner program at Westfield State University will play a crucial role in addressing the demonstrated workforce need expressed by MassHire, the Pioneer Valley Labor Market Blueprint, and the Massachusetts Health Policy Commission's goals and initiatives. An explanation for how these programs would support the need for additional Psychiatric Mental Health Nurse Practitioners is as follows.

The Psychiatric Mental Health Nurse Practitioner programs offered by Westfield provide a solution to addressing workforce shortages (MassHire, 2020). MassHire and regional labor market data have identified a shortage of Psychiatric Mental Health Nurse Practitioners (MassHire, 2020). Psychiatric Mental Health Nurse Practitioners are prepared to address today's healthcare challenges (MassHire, 2020). On January 1, 2021, Massachusetts became the 23rd state to enact full practice authority for Nurse Practitioners (Massachusetts Legislature, 2021), keenly positioning them to take the lead in providing a complete and integrative approach to caring for the population. The Pioneer Valley Labor Market Blueprint highlights healthcare as a growth sector with specific demands for nurses (Pioneer Valley Planning Commission, 2024). Launching these programs aligns with the region's economic development goals such as expanding access to care (Pioneer Valley Planning Commission, 2024).

The Massachusetts Health Policy Commission aims to improve access to healthcare services, especially in underserved areas (Massachusetts Health Policy Commission, 2020). PMHNPs can

**Institution:**

**Proposed Degree:**

address the growing mental health needs of the population, contributing to the commission's goals of enhancing mental health services statewide (Massachusetts Health Policy Commission, 2020). The Massachusetts Health Policy Commission has identified that in contrast to a slow growth in the supply of primary care physicians in recent years, the number of PMHNPs has increased rapidly and is expected to continue to increase nationally and in Massachusetts (Massachusetts Health Policy Commission, 2020). Further, the Commission also states that PMHNPs have the potential to fill gaps in access to care, often working in underserved areas and with lower income populations (Massachusetts Health Policy Commission, 2020). By educating PMHNPs, Westfield State can help meet these objectives, supporting statewide policy goals (Massachusetts Health Policy Commission, 2020).

Nurse Practitioners, as a general discipline, enter specialty areas and receive specialized training that directly aligns with the unique healthcare needs of their respective fields (American Association of Nurse Practitioners, 2021). This targeted education ensures that graduates are well-prepared to address specific healthcare challenges and provide high-quality care in their areas of expertise (American Association of Nurse Practitioners, 2021). This proposal is specializing in Psychiatric Mental Health. As stated above, the creation of this inaugural PMHNP program will set the foundation for building additional tracks to meet the healthcare needs outlined in the Pioneer Valley Labor Market Blueprint (2024).

Westfield State has established partnerships with local healthcare facilities, where a demand for PMHNP services exists. These partnerships provide students with practical experience and enhance their readiness for employment in the local workforce (Westfield State University, 2023). In addition, these partners have asked Westfield State University to expand its capacity to develop the nursing pipeline and produce practitioners ready to fill workforce gaps (Westfield State University, 2023). Westfield has a long-standing reputation for working as an interprofessional partner and fostering this value in our students (Westfield State University, 2023). The PMHNP program will emphasize interprofessional collaboration, addressing the need for healthcare providers who can work effectively in team-based care models, which is a priority in modern healthcare delivery (Westfield State University, 2023). As Westfield State currently does so for students in our pre-licensed and baccalaureate degree completion programs, we can commit to tracking the outcomes of PMHNP graduates, demonstrating their contributions to the healthcare workforce and patient outcomes (Westfield State University, 2023). This data can further support the value of these programs in meeting regional and state needs.

In conclusion, launching a PMHNP program at Westfield State University is not only a strategic response to the workforce needs identified by MassHire, the Pioneer Valley Labor Market Blueprint, and the Massachusetts Health Policy Commission but also a way to fulfill the University's role in supporting the health and well-being of its community and the broader region. These programs can produce highly skilled Psychiatric Mental Health Nurse Practitioners who can bridge gaps in primary care and mental health services, improving healthcare access and outcomes in line with regional and state goals.



**Institution:**

**Proposed Degree:**

American Association of Nurse Practitioners. (2021). Nurse practitioner facts.  
<https://www.aapmhnp.org/about/all-about-PMHNPs/PMHNP-fact-sheet>

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Explain all relevant content that has been sourced using the internet. Use the full APA citation including retrieval date and the exact url where the content was obtained [e.g. Last, First, M. (Year, Month Date Published). Article title. Retrieved from URL ...]. Do not rely on a hyperlink reference to information and data used in this section. The application serves as a permanent record. If the institution has commissioned market research regarding the proposed program, please attach a digital copy of the report(s) on which you relied to draw your conclusions and design your program. DHE utilizes Burning Glass to validate data.

5. Are there existing programs at other institutions (public and independent) in your region that offer a similar degree? If so, compare and contrast them with the proposed program.

The following table provides a comparison of other programs that offer the psychiatric mental health nurse practitioner degree pathway.

School	Program Type	Tuition per Credit	Program Length (years)
University of Massachusetts Amherst	Online	\$750	2.5
MGH Institute of Health Professions	On-ground	\$1414	2
Boston College	On-ground	\$1496	2.5
Regis College	Online/On-ground	\$1310	3
Northeastern University	Online/On-ground	\$1716	2.5
Simmons University	Online	\$1110	2.5

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**Institution:**

**Proposed Degree:**

University of Massachusetts Boston	Online/On-ground	\$750	3
Westfield State University	Online	\$600	2-3

Westfield State University's program is necessary to address the specific workforce needs in the Pioneer Valley and western Massachusetts. Training Psychiatric Mental Health Nurse Practitioners, the program helps fulfill the regional demand for mental health care professionals, particularly in light of the identified gaps in mental health care highlighted by the Massachusetts Health Policy Commission. Westfield State University's program is in Western Massachusetts, allowing students to gain local perspectives and experiences relevant to the region's healthcare landscape. Many, but not all, PMHNP programs offer an online option. With the knowledge that online programs offer flexibility for working professionals and having experience in offering distance education currently with WSUs RN to BSN completion program, we are confident that this delivery method would offer a flexible alternative for students.

Westfield State University's program is designed to align with the University's mission, goals, and resources, including offering high quality education at a reasonable price. Tuition costs range among Massachusetts PMHNP programs from \$750 to over \$1700 per credit. WSU's cost per credit will be \$600, which will provide an affordable option for students.

The program will leverage the institution's existing academic and clinical partnerships, faculty expertise, and support services to provide a comprehensive and high-quality educational experience for students pursuing a Psychiatric Mental Health Nurse Practitioner degree. Being a part of Westfield State University allows students in the program to access interprofessional collaboration opportunities with other healthcare programs and disciplines. Collaboration with faculty and students from related fields, such as social work, counseling, and psychology, will enhance students' understanding of integrated care models and prepare them to work effectively in interprofessional teams.

Westfield State University's PMHNP program is necessary to address the workforce needs, local community focus, and alignment with the University's resources and mission. The duration of the PMHNP programs in Massachusetts ranges from 2 to 3 years. This timeframe is optimal for balancing the rigorous and comprehensive curriculum with the demands faced by most working adults. Thus, in a program designed for adult learners with competing priorities, Westfield State University will add to the current workforce by producing well-equipped graduates to meet the specific challenges and provide quality care in the region.

6. Has the proposed program been planned to include any significant digital, experiential, competency-based or other innovative approaches? Please explain and provide examples.

The PMHNP program at Westfield State University has been meticulously designed to incorporate innovative approaches that align with the updated 2021 AACN Competency-Based Education (CBE) model. Recognizing the evolving landscape of healthcare and the increasing demand for competent psychiatric nursing professionals, our program integrates digital, experiential, and competency-based

**Institution:**

**Proposed Degree:**

learning methods to ensure that graduates are well-prepared to meet the challenges of modern psychiatric healthcare delivery.

A cornerstone of our program lies in the seamless integration of cutting-edge digital technologies to elevate the learning journey. At Westfield State, we take pride in our state-of-the-art simulation center, methodically designed to provide students with unparalleled educational experiences. This facility harnesses a myriad of innovative technologies, many of which offer remote accessibility, ensuring flexibility and accessibility for all learners. To ensure the highest standards of simulation-based education, we are fortunate to have a dedicated full-time Director of Simulation, who, with her team, is responsible for overseeing all aspects of learning within this dynamic environment. Leveraging this expertise, we extend comprehensive support to faculty and students enrolled in the PMHNP program.

Through the strategic utilization of online learning platforms, immersive virtual simulations, and advanced telehealth technologies, our students are empowered to actively engage in interactive learning experiences. These dynamic digital resources not only complement traditional classroom instruction but also immerse students in lifelike clinical scenarios, mirroring the challenges and complexities they will encounter in their future roles as PMHNPs. By seamlessly blending theoretical knowledge with hands-on practical skills in a simulated clinical setting, we equip our students with the confidence and competence necessary to excel in the ever-evolving field of psychiatric nursing.

As a competency-based program, experiential learning is at the core of the PMHNP program's curriculum, providing students with hands-on clinical experiences that are essential for competency development and skill refinement. From practicum placements in diverse psychiatric settings to immersive case studies and interdisciplinary collaborations, students gain practical exposure to a wide range of mental health conditions and treatment modalities. Additionally, the program offers experiential opportunities for interprofessional education and collaborative practice, fostering a holistic understanding of patient care within a multidisciplinary context.

In alignment with the AACN CBE model, our program is focused on competency attainment, including the acquisition and demonstration of essential knowledge, skills, and abilities required for psychiatric nursing practice. Competency-based assessments will be used to evaluate student performance and progress throughout the program, ensuring that graduates are proficient in conducting comprehensive psychiatric assessments, formulating evidence-based treatment plans, and establishing therapeutic relationships with clients and interdisciplinary teams.

Westfield State University is committed to providing a dynamic and innovative learning environment that prepares PMHNP graduates to excel as psychiatric nursing leaders in an ever-changing healthcare landscape. By incorporating digital technologies, experiential learning opportunities, and competency-based approaches, our program equips students with the skills and competencies needed to deliver high-quality psychiatric care and improve outcomes for individuals with mental health needs.

## **B. Alignment with Campus Strategic Plan and Mission**

**Institution:**

**Proposed Degree:**

1. Describe why the proposed program is a priority, and how it supports the campus's approved strategic plan, in the context of the institution's mission.

The proposed Psychiatric Mental Health Nurse Practitioner program is a priority and supports Westfield State University's approved strategic plan in multiple ways, aligning with the institution's mission as a public University offering accessible quality undergraduate and graduate programs in the liberal arts, sciences, and professional studies.

The PMHNP program contributes to Westfield State University's commitment to providing accessible quality programs. By offering the PMHNP program, the University expands its offerings to address the growing demand for mental health professionals. This program enables students to gain the necessary knowledge, skills, and character to serve as responsible leaders in the nursing field. Furthermore, with the launch of the PMHNP program, the opportunity for expansion to additional specialty tracks exists to further meet the demand for responsive educational programs.

The program enhances student engagement and success by offering a focused and relevant academic pathway. It provides students with opportunities for hands-on clinical experiences, research projects, and interprofessional collaboration, fostering active learning and engagement. By preparing students to address the health needs of the community, the program supports their success and helps them develop as competent and compassionate professionals.

The PMHNP program contributes to the economic, social, and cultural growth of the northeast region. Mental and general health care is an essential component of overall well-being and community development. By producing highly skilled practitioners, the program addresses the region's mental health workforce needs, improves access to care, and positively impacts the economic and social fabric of the community.

The program aligns with Westfield State University's mission of developing responsible leaders and engaged citizens. As PMHNPs graduates assume leadership roles in the delivery of health care, advocating for equitable access to services, and promoting holistic approaches to well-being. By instilling values of social responsibility, ethical practice, and community engagement, the program prepares graduates to be active contributors to society and engaged citizens in the northeast region.

In summary, the proposed PMHNP program at Westfield State University is a priority that supports the institution's mission by providing accessible quality programs, promoting student engagement and success, contributing to economic and social growth, and developing responsible leaders and engaged citizens. The program aligns with the University's commitment to education, community service, and the overall well-being of the northeast region.

2. List the overall goals and learning objectives of the program and describe the strategy for achieving each goal. Use the **LOI Program Goals and Objectives** table in addition to any narrative comments.

**Institution:**

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The PMHNP program at Westfield State University has been meticulously crafted to align with the competencies outlined by the American Association of Colleges of Nursing (AACN), the National Organization of Nurse Practitioner Faculties (NONPF), and the Nurse of the Future (NOF). Each program goal, measurable objective, and strategy for achievement has been intentionally designed to ensure alignment with these competencies. Further, each course objective is directly linked to these competencies ensuring that all required competencies are addressed. Through a curriculum emphasizing comprehensive psychiatric assessments, evidence-based treatment planning, and cultural humility, students develop the skills and attributes necessary to excel as advanced practice psychiatric mental health nurses. Strategies such as simulation-based learning, clinical rotations in diverse settings, and advocacy initiatives support the development of clinical competence, therapeutic communication, and leadership skills, thus preparing graduates to meet the evolving demands of healthcare while advancing the mental health needs of individuals, families, and communities.

### **C. Alignment with Operational and Financial Objectives of the Institution**

1. Provide enrollment projections for the first five years of the program using the Program Enrollment form (Form C), Describe below any anticipated impact that the program may have on enrollment in other programs.

As outlined in Form C, enrollment projections show an additional 58 students by year 5. As the healthcare industry works toward building integrated healthcare teams to reduce overall health costs while increasing health outcomes, the graduates from the WSU PMHNP program will serve this workforce gap and bring an area of expertise that is lacking among healthcare teams.

With respect to the impact the program may have on other areas of enrollment, the required degree to enter the PMHNP program is a BSN. As we attract students interested in specialized mental health training, the program is expected to raise the overall visibility and appeal of WSU's healthcare and nursing programs. This heightened interest may lead to increased enrollment in related fields, such as the undergraduate nursing and RN to BSN degree completion programs, thus enhancing the university's reputation as a leader in comprehensive nursing and behavioral healthcare education. Additionally, the interdisciplinary nature of the PMHNP program will encourage collaboration and enrollment in complementary programs, such as psychology, social work, physician assistant, and public health.

2. Describe the resources that the program will require (additional faculty and/or staff, space and equipment, on-line infrastructure, startup and maintenance of the program). Please include a narrative or financial statement outlining the anticipated net impact of the program on the overall financial resources of the institution. Include five years of future projections of revenue and expense using the LOI Budget form (**Form D**).

As noted in Form D, the accreditation standards for the new PMHNP program at WSU will require specific resources to ensure its success. This includes the recruitment of a program director, a full-



**Institution:**

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time faculty member, clinical coordinator, and part-time faculty with expertise in psychiatric mental health, as well as administrative staff to support program operations. A robust online infrastructure will be crucial for delivering remote instruction and virtual simulations, necessitating reliable IT support and resources for faculty to develop high-quality online content. Initial funding will be needed for curriculum development, marketing, and recruitment, along with ongoing maintenance to support continuous faculty development, course material updates, and regular program assessments to meet accreditation standards and industry needs. Finally, funds need to be allocated to adequately market the PMHNP program to online adult learners. Westfield State University is dedicated to securing these resources to ensure the successful implementation and sustainability of the PMHNP program.

3. Complete the LOI Curriculum Outline form (Form A) with course titles and credits.

Form A describes the 48 credit program and delineates the 22 credits of core curriculum, and the 26 credits of the specialty track of PMHNP. Through the thoughtful design, additional specialty tracks can be added, i.e., family nurse practitioner, etc.

4. Complete the LOI Program Goals and Objective form (Form B).

Form B outlines the program goals and objectives that align with the accreditation standards set forth by the Commission on Collegiate Nursing Education.

### ***Comments and Response***

*The submitted LOI will be reviewed for completeness by staff. This process typically occurs within 15 business days from when it is received. Once deemed complete, the LOI is circulated by the Deputy Commissioner of Academic Affairs and Student Success (the Deputy), to the AAC and SPC members of the BHE, public campus CAO's, and to the Association of Independent Colleges and Universities of Massachusetts (AICUM) representatives for relevant comments.*

*Formal commentary to an LOI must come from an institution's President, be addressed to the Commissioner of Higher Education, with a cc to the Deputy, and received within 20 business days from the date the LOI is circulated.*

*All commentary is sent to the community colleges and state University institution, where the proposed program LOI originated. University of Massachusetts commentary is sent to the Senior Vice President for Academic Affairs, and International Relations, who is responsible to forward the information to the specific campus*

*Responses to any commentary are required. Responses must come from the LOI institution President and be addressed to the Commissioner of Higher Education, with a cc to the Deputy*

**Institution:**

**Proposed Degree:**

*and submitted to [awilliams@dhe.mass.edu](mailto:awilliams@dhe.mass.edu). This written response to commentary must be received within 20 business days from the date it is sent to the President.*

**Institution:**

**Proposed Degree:**

*A Note About Timelines*

Program review is a serve-and-return process, which means that there are several communications back and forth between the institution and DHE staff as the submission is being reviewed.

A campus should expect that an LOI (or proposal application) template submitted for staff validation and review for completion will be subject to a **15-business-day period of review**. Following this time frame the campus can expect staff to provide information regarding any further data that are needed for the LOI to be deemed complete. This communication **resets the 15-business-day time frame**. Responsibility rests with the campus to provide data in a timely manner, this may be important to a campus working within a targeted timeline for program development and launch. Once the campus has responded to staff by submitting the additional data, **the 15-business-day** clock begins anew.

After an LOI is validated and deemed complete it is circulated by the Deputy to the AAC and SPC, public campus CAO's and to AICUM representatives for commentary (as described above). The **comment period is open for 20 business days**. At the end of this time frame, all comments are reviewed by staff and sent to the LOI institution's CAO, who then has **20 business days** to submit a written response to the Deputy. Comments and responses are included in the motion brought forward for BHE action.

An LOI is brought forward either within **20 business days** of receiving the institution's response or at the next scheduled AAC meeting.

Following AAC action, the next step of the process is submission of the application proposal, which must be submitted **within two years** of the BHE action on the LOI for either a Fast Track or Standard process review.

A proposed program application template is validated and reviewed for completion **within 20 business days** of receipt. As noted above, the campus can expect staff to provide information regarding any further data that are needed for the proposal to be deemed complete. As previously noted, this communication **resets the time frame**. Once the campus has responded by submitting the additional data, **the 15-business-day** clock begins anew. Once validated and deemed complete, Fast Track proposals are forwarded to the Commissioner with a recommendation for action **within 30 business days**. The 30-business day timetable begins on the date DHE staff notify the campus that the proposal is deemed complete. BHE follows the guidelines on all proposal applications in accordance with either the Fast Track or the Standard Process.

**Institution:** Westfield State University

**Proposed Degree:** Master of Science in Nursing

**ATTACHMENTS:**

<b>Form A</b>	<b>LOI Curriculum Outline</b>
<b>Form B</b>	<b>LOI Goals and Objectives</b>
<b>Form C</b>	<b>LOI Enrollment Projections</b>
<b>Form D</b>	<b>LOI Budget</b>

**Institution:** Westfield State University

**Proposed Degree:** Master of Science in Nursing

**Form A1: LOI Undergraduate Program Curriculum Outline**

(Insert additional rows as necessary)

<i>Major Required (Core) Course</i>		
<i>Course Number</i>	<i>Course Title</i>	<i>Credit Hours</i>
NURSXXXX	Advanced Pathophysiology	3
NURSXXXX	Advances Health Assessment Skills Across the Lifespan	4
NURSXXXX	Theoretical Basis for Advanced Nursing Practice	3
NURSXXXX	Advanced Pharmacology	3
NURSXXXX	Evidence Based Strategies to Improve Health	3
NURSXXXX	The NP role in Healthcare Policy	3
NURSXXXX	The NP Role in Healthcare Leadership and Innovation	3
	Sub-total # Core Credits Required	22
<i>PMHNP Track Required Courses</i>		
NURSXXXX	PMHNP: Psych Assessment & Differential Diagnosis	3
NURSXXXX	PMHNP: Neuro-Psychopharmacology	3
NURSXXXX	PMHNP: Integrated Treatment for Adults/Older Adults	3
NURSXXXX	PMHNP: Practicum I	3
NURSXXXX	PMHNP: Integrated Treatment for Child/Adol/Family	2
NURSXXXX	PMHNP: Practicum II	6
NURSXXXX	PMHNP: Practicum III	6
	Sub-total # Elective Credits Required	26
<i>Curriculum Summary</i>		
Total number of courses required for the degree		14
Total credit hours required for degree		48
<b>Prerequisite, Concentration or Other Requirements:</b> BSN degree, RN license, minimum GPA 3.0, Resume, Personal statement, Two letters of recommendation		



**Institution:** Westfield State University

**Proposed Degree:** Master of Science in Nursing

**Form B: LOI Goals and Objectives**

<b>Program Goals</b>	<b>Measurable Objectives</b>	<b>Strategy for Achievement</b>	<b>Timetable</b>
1. Participants will be proficient in conducting comprehensive psychiatric assessments, formulating differential diagnoses, and developing evidence-based treatment plans, including pharmacological and non-pharmacological interventions.	- Demonstrate competency in conducting psychiatric assessments, formulating differential diagnoses, and developing treatment plans.	1. Offer simulation and standardized patient encounters to practice assessment and diagnostic skills in controlled environments.	Throughout program
	- Achieve proficiency in selecting and implementing evidence-based pharmacological and non-pharmacological interventions.	2. Provide access to case studies, clinical guidelines, and practice expert-led workshops on treatment planning and intervention selection.	Throughout program
2. Participants will demonstrate skill in integrating current research evidence, best practices, and clinical expertise to provide high-quality, evidence-based care to diverse populations with psychiatric and mental health needs.	- Incorporate current research evidence and best practices into clinical decision-making and patient care.	1. Offer courses that integrate evidence-based practice, research methodologies, and critical appraisal of literature.	Program year 1
	- Demonstrate proficiency in applying evidence-based interventions to address the unique needs of diverse patient populations.	2. Facilitate clinical rotations in diverse settings to provide exposure to various patient populations and their specific needs.	Program year 2/3
3. Participants will be adept at establishing and maintaining therapeutic relationships with clients, families, and interdisciplinary teams to promote collaborative care and positive treatment outcomes.	- Develop skills in building rapport, active listening, and empathetic communication with clients and their families.	1. Provide role-playing exercises, communication workshops, and interpersonal skills training to enhance therapeutic relationship-building.	Program year 1
	- Collaborate effectively with interdisciplinary teams to	2. Encourage participation in interdisciplinary case conferences, team-based	Throughout program

**Institution:** Westfield State University

**Proposed Degree:** Master of Science in Nursing

	coordinate care and optimize treatment outcomes.	projects, and collaborative care planning activities.	
4. Participants will demonstrate cultural humility in providing culturally sensitive care to individuals from diverse backgrounds, recognizing the impact of culture, ethnicity, and socio-economic factors on mental health.	- Acquire knowledge and understanding of diverse cultural backgrounds, beliefs, and practices related to mental health.	1. Integrate cultural competence training and experiential learning activities into the curriculum.	Program year 1
	- Demonstrate cultural humility through respectful engagement, active listening, and sensitivity to cultural nuances in clinical practice.	2. Provide opportunities for immersive experiences in culturally diverse communities and reflective exercises on personal biases and assumptions.	Program year 2/3
5. Participants will adhere to ethical principles and legal standards governing psychiatric and mental health practice, including confidentiality, informed consent, and professional boundaries.	- Demonstrate understanding of ethical principles, legal standards, and regulatory requirements in psychiatric nursing practice.	1. Offer courses, workshops, and case studies focusing on ethical decision-making, legal issues, and professional standards.	Throughout the program
	- Practice within the scope of legal and ethical guidelines, ensuring confidentiality, informed consent, and maintenance of professional boundaries.	2. Provide opportunities for ethical dilemma discussions, role-playing exercises, and shadowing experiences with experienced practitioners.	Program year 2/3
6. Participants will demonstrate advocacy for the mental health needs of individuals, families, and communities, and demonstrate leadership in promoting mental health awareness, reducing stigma, and advancing mental health policy.	- Engage in advocacy efforts to raise awareness of mental health issues, reduce stigma, and promote access to mental health services.	1. Facilitate participation in community outreach programs, mental health awareness campaigns, and advocacy initiatives.	Program year 1
	- Demonstrate leadership in advocating for policy changes that address systemic barriers to mental health care and support	2. Encourage involvement in professional organizations, policy forums, and legislative advocacy efforts.	Throughout the program

**Institution:** Westfield State University

**Proposed Degree:** Master of Science in Nursing

	mental health initiatives at local and national levels.		
7. Engage in continuous professional development, lifelong learning, and scholarly activities to stay abreast of advances in psychiatric and mental health nursing practice, research, and education.	- Participate in ongoing professional development activities, including conferences, workshops, and continuing education courses.	1. Provide access to resources such as journals, online databases, and professional development opportunities.	Throughout the program
	- Contribute to scholarly activities such as research projects, publications, presentations, and participation in academic conferences.	2. Encourage mentorship relationships with faculty members, collaboration on research projects, and scholarly dissemination of findings.	Program year 2/3

**Institution:** Westfield State University

**Proposed Degree:** Master of Science in Nursing

**Form C: LOI Program Enrollment**

	<b>Year 1 2025</b>	<b>Year 2 2026</b>	<b>Year 3 2027</b>	<b>Year 4 2028</b>	<b>Year 5 2029</b>
New Full-Time	10	11	12	13	13
Continuing Full-Time		9	10	11	11
New Part-Time	10	11	12	13	13
Continuing Part-Time Yr. 2		9	10	11	11
Continuing Part-Time Yr. 3			9	10	10
PHMHNP Full-Time Totals	10	20	22	24	24
PHMHNP Part-Time Totals	10	20	31	34	34
<b>Totals</b>	<b>20</b>	<b>40</b>	<b>53</b>	<b>58</b>	<b>58</b>

**Enrollment Assumptions**

- Full-Time students can complete the program in two years (48 credits; Year 1 = 22. Yr. 2 = 26)
- Part-Time students can complete the program in three years (48 credits; Year 1 = 16, Yr. 2 = 14, Yr. 3 = 18)
- Enrollment is projected to grow between 1-2% per year to account for any melt and to stabilize growth.
- Student retention is projected at a 1-2% loss per year based on retention rates in the nursing and RN to BSN program and offset by growth projections.

Institution: Westfield State University

Proposed Degree: Master of Science in Nursing

**Form D: LOI Program Budget**

<i>One Time/ Start Up Costs</i>		<b>Annual Enrollment</b>				
		<b>Year 1 (Start Up)</b>	<b>Year 2 2025</b>	<b>Year 3 2026</b>	<b>Year 4 2027</b>	<b>Year 5 2028</b>
	<i>Cost Categories</i>					
	Full Time Faculty (Salary & Fringe)	174,000	323,350	333,500	343,505	368,310
	Part Time/Adjunct Faculty (Salary & Fringe) 18cr/yr		33,600	35,280	37,044	38,896
	Clinical Coordinator (Salary & Fringe)		108,825	112,090	115,452	118,916
	Admin Support (PT) (Salary & Fringe)		57,200	58,916	60,683	63,503
	General Administrative Costs	1,500				
	Instructional Materials, Library Acquisitions					
	Facilities/Space/Equipmen t					
	Field & Clinical Resources					
	Marketing		17,103	18,522	20,060	21,725
	Other (Specify) Accreditation Fees	4,000	10,985	3,710	3,770	3,820
	National Assoc of NP	4,000	4,000	4,000	4,000	4,000
<b>TOTAL</b>		<b>(183,500)</b>	<b>(555,063)</b>	<b>(566,018)</b>	<b>(584,514)</b>	<b>(619,170)</b>
<i>One Time/Start-Up Support</i>			<i>Annual Income</i>			
	<i>Revenue Sources</i>	<b>Year 1 (Start Up)</b>	<b>Year 2 2025</b>	<b>Year 3 2026</b>	<b>Year 4 2027</b>	<b>Year 5 2028</b>
	Grants					
	Tuition	0	228,000	936,000	1,526,400	1,670,400
	Fees					
	Departmental					



**Institution:** Westfield State University

**Proposed Degree:** Master of Science in Nursing

	Reallocated Funds					
	Other (specify)					
	<b>TOTALS</b>	(183,500)	(327,063)	369,982	941,886	1,051,230
Less 20% Overhead		36,700	65,412	73,996	188,377	210,246
Net Revenue/Loss		(220,200)	(392,475)	295,986	753,509	840,984



## Board of Trustees

June 20, 2024

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### MOTION

To approve the revised Outstanding Debts Policy (0150), as presented. The policy was revised due to a U.S. Department of Education regulation prohibiting withholding of transcripts in specific situations.

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Ali Salehi, Chair

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Date

# Westfield State University

Policy concerning:

APPROVED: September 1985

Section Administrative

number 0150

page 1 of 1

REVIEWED June 2024

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## OUTSTANDING DEBTS

### PURPOSE

To define the consequences of having an unpaid debt to the University.

### POLICY

It is the policy of the Board of Trustees that students who are listed by the Director of Student Accounts of Westfield State University as having unpaid debts for tuition, fees, room, board, medical, or other University related charges where said debts have not been discharged by operation of law or where deferred payment of said debts has not been agreed to by said University, the students will not **(1)** be issued a diploma to which said students might otherwise be entitled; and **(2)** be permitted to register for future terms.

### REVIEW

This policy will be reviewed annually by the Associate Vice President for Finance.

# Westfield State University

Policy concerning:

section Administrative

number 0150

page 1 of 1

APPROVED: September 1985

REVIEWED: ~~June 2024~~April 2007

## OUTSTANDING DEBTS

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### REVIEW

This policy will be reviewed annually by the Associate Vice President for ~~Administration and~~ Finance.



## Board of Trustees

June 20, 2024

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### MOTION

To transfer management of the University's investment funds, held by Charles Schwab, in-kind to Fund Evaluation Group LLC before June 30, 2024. Westfield State University's new investment advisors.

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Ali Salehi, Chair

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Date



## Board of Trustees

June 20, 2024

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### MOTION

To approve the FY25 provisional campus budget, as presented, including, but not limited to the following elements: operating budget, capital budget, vehicle lease/purchase program and sponsorships. Further, to authorize the President and/or the Vice President for Administration and Finance to make budget adjustments to these funds as allowed in the Trust Fund Management Policy (0604).

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Ali Salehi, Chair

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Date



**Westfield State University**  
Financial Affairs Committee  
**FY25 Provisional Operating Budget**  
June 20, 2024

**OVERVIEW**

Westfield State University is working diligently to make strategic investments toward the Presidential Goals of Economic Health, Enrollment Stabilization, and Campus Culture through the FY24 established Reinvestment Fund and Economic Progress Funds (\$2M Strategic Investment Allocations) which are expected to be spent across both FY24 and FY25. Through the \$2M Reinvestment Fund, significant efforts are being made to improve academic and student facing interior spaces, provide better signage on campus, expand marketing and branding efforts, and improve access to campus data relative to Institutional Research. The \$2.1M Economic Progress Fund was established to invest in outreach through social media, marketing and advertising, enrollment retention and yield strategies, conference revenue generation, and campus culture events such as Parliament Day and the 185<sup>th</sup> Anniversary.

The campus is also making significant efforts to reposition its price point in the market by lowering the cost of attendance through a financial aid leveraging model. The University increased financial aid by \$2M with the goal of increasing the first year entering class. Leading indicators are showing early signs of success. Admissions is also seeing a significant increase in attendance at events; and deposits for first year freshman students is currently 8% over the target of 750. Furthermore, the full-time undergraduate enrollment decline reflects signs of slowing, with a year over year decline of 1.4% versus the FY24 decline of approximately 5%. While early enrollment indications are positive, enrollment will continue to be monitored closely as the final October Budget is developed.

**PROVISIONAL BUDGET PLAN FY25**

- The FY25 Provisional Budget reflects a revenue gap of \$7.2M, mainly driven by \$6M in losses in Residential Life due to lower occupancy and MSCBA debt as well as a necessary deferred maintenance capital projects of \$1M.
- Total use of cash reserves in FY25 is expected to be \$5.2M as follows: 1) \$3.4M to solve the funding gap through a combination of \$1.7M of Residential Life reserves and \$1.7M of Operating Fund reserves, with \$1M dedicated toward progress on deferred maintenance, and 2) \$1.7M for Ely pool repair and switch gear testing and repairs, both previously approved FY24 capital projects.
- The budget also assumes a temporary pause in hiring which will result in projected temporary savings of \$3.8M. Once the FY24 year-end closes, an analysis will be done to reassess this current strategy as some hiring in FY25 will be needed. This is a temporary measure which will establish an operating budget for July 1, 2024. Changes over the summer with the budget balancing strategy will be integrated into the final October budget.
- The campus is planning for enrollment of 2,821 billable students on a full year average basis, which is a reduction of 39 students (or 1.4% fewer) from the FY24 Budget of 2,860.
- Grant revenue is projected to increase by approximately \$2.5M, which almost doubled over last year mainly due to expansion of Mass Grant Plus and Pell Grants.

- Financial challenges are significant in Residential Life, as expected, due to the overall enrollment impact. Occupancy is projected to decline from the FY24 Budget of 1,700 to 1,634 students expected to live on campus, which represents 68% occupancy. Given that most expenses in Residential Life are fixed in the form of MSCBA debt obligations, cost containment strategies are challenging for housing operations, as other expenses are also increasing. Residential Life is currently projecting a total deficit of \$6M and will require the use of \$2.4M in reserve funding and \$3.7M from operations to fully fund the projected loss and MSCBA required reserve balance, which is 5% of prior year expenses. Breakeven occupancy targets are estimated between 90% - 95%. If the campus cannot recover occupancy to its breakeven targets, strategies will be required to ensure financial sustainability and the campus will have to continue financially supporting the residential program.
- Dining Services participation rates follow enrollment and occupancy levels. Currently, it is expected to contribute \$1.1M to the campus to support their overhead costs. Unlike residential life, dining expenses are more variable and based on staffing and food costs.
- DGCE revenue is expected to increase by \$1M over the prior year at \$13.4M primarily due to increases in per credit rates for FY25. DGCE will contribute \$2.75M to the campus, in support of overhead costs which are not allocated directly.

### **FY25 BUDGET BALANCING STRATEGY**

The Glide Path Strategy is in its final year. The campus is requesting the use of \$5.2M of reserves and implementing a hiring pause to temporarily close the funding gap. The funding gap projection will be updated once more accurate enrollment information is available and more defined cost containment strategies are determined. The President's Cabinet anticipates focusing on economic health during the summer planning sessions with a significant emphasis on multi-year strategies to overcome the deficit in residential life, cost containment, and revenue growth. This will result in significant changes from the provisional budget to a balanced October budget.

### **SUMMARY**

The FY25 Provisional Budget was developed to support critical operations and opportunities, as several critical planning elements remain uncertain. Key revenue indicators such as enrollment and state appropriation will be better known as we approach the fall, at which time the campus will develop a final budget in October. The campus continues to carefully evaluate the balance between affordability, enrollment, and strategic investments while striving to balance the budget.

Westfield State University  
FY25 Provisional Budget

6/11/24

	a			b	b - a	
	FY24 Final October Budget	FY25 Provisional Budget (Excl. Rollovers/Timing)	FY25 Rollovers (Timing, Prior Year Unspent)	FY25 Provisional Budget	Variance B/(W)	% Change
<b>Revenue:</b>						
State Appropriation	36,610,982	40,430,285		40,430,285	3,819,303	10%
Total Tuition/Fee Revenue	33,731,605	34,135,815	8,000	34,143,815	412,209	1%
Foundation	1,195,500	1,213,500		1,213,500	18,000	2%
Grant Revenue	2,632,937	5,103,333		5,103,333	2,470,396	94%
Other Revenue	5,347,103	3,501,084	1,067,167	4,568,251	(778,852)	-15%
DGCE	12,140,783	13,410,276		13,410,276	1,269,493	10%
Residential Life	14,541,806	14,701,663		14,701,663	159,857	1%
Dining Services	9,618,608	10,373,146		10,373,146	754,538	8%
Grants: HEERF/ARPA	2,193,719	-		-	(2,193,719)	-100%
<b>Total Revenue</b>	<b>\$ 118,013,042</b>	<b>\$ 122,869,101</b>	<b>\$ 1,075,167</b>	<b>\$ 123,944,268</b>	<b>\$ 5,931,225</b>	<b>5%</b>
<b>Reserve Funding - Rollovers &amp; Timing</b>						
Planned Use of Reserves	3,031,451			6,845,327	3,813,876	126%
Capital Rollover	1,819,618			2,313,661	494,043	27%
FEMA Rollover for Capital Projects	377,637				(377,637)	-100%
<b>Total Reserve Funding - Rollovers &amp; Timing</b>	<b>\$ 5,228,705</b>		<b>\$ -</b>	<b>\$ 9,158,987</b>	<b>\$ 3,930,282</b>	<b>75%</b>
<b>Total Resources</b>	<b>\$ 123,241,748</b>	<b>\$ 122,869,101</b>	<b>\$ 1,075,167</b>	<b>\$ 133,103,255</b>	<b>\$ 9,861,507</b>	<b>8%</b>
<b>Expense:</b>						
Compensation & Fringe	48,658,439	47,917,348	78,754	47,996,103	662,336	1%
Department Operations	14,862,763	15,404,332	3,625,721	19,030,053	(4,167,290)	-28%
Utilities	3,403,383	3,403,383		3,403,383	-	0%
Financial Aid	4,443,151	6,536,203		6,536,203	(2,093,052)	-47%
Debt Service	1,488,098	1,513,984		1,513,984	(25,886)	-2%
Contingency	650,000	650,000		650,000	-	0%
Capital Investments	4,985,965	5,108,022	2,313,661	7,421,683	(2,435,718)	-49%
DGCE	9,590,305	10,659,798	200,000	10,859,798	(1,269,493)	-13%
Residential Life	20,133,499	21,515,842	966,497	22,482,339	(2,348,840)	-12%
Dining Services	9,170,507	9,258,844	300,000	9,558,844	(388,337)	-4%
Strategic Investments	351,581	734,581		734,581	(383,000)	-109%
All Other	6,362,444	4,544,550	1,665,211	6,209,761	152,683	2%
Innovation Fund	1,359,976	800,000	654,117	1,454,117	(94,141)	-7%
FEMA Reimbursement Funds	1,459,972	-	430,193	430,193	1,029,779	71%
Covid Related Expenses	-	-		-	-	
UEAAC Savings	-	-		-	-	
<b>Total Expense</b>	<b>\$ 126,920,081</b>	<b>\$ 128,046,886</b>	<b>\$ 10,234,154</b>	<b>\$ 138,281,040</b>	<b>\$ (11,360,959)</b>	<b>-9%</b>
<b>Net Profit/(Loss)</b>	<b>\$ (3,678,333)</b>	<b>\$ (5,177,785)</b>	<b>\$ (9,158,987)</b>	<b>\$ (5,177,785)</b>	<b>\$ (1,499,452)</b>	<b>41%</b>
<b>Use of Reserves - Cash</b>						
Capital Projects		\$ 2,789,928		\$ 2,789,928	\$ 2,789,928	
Residential Life - Reserves		\$ 1,662,160		\$ 1,662,160	\$ 1,662,160	
Glide Path Use of Reserves	\$ 3,678,333	\$ 725,697		\$ 725,697	\$ (2,952,636)	-80%
<b>Total Use of Reserves - Cash</b>	<b>3,678,333</b>	<b>5,177,785</b>	<b>-</b>	<b>5,177,785</b>	<b>1,499,453</b>	<b>41%</b>
<b>Adjusted Surplus/(Deficit)</b>	<b>-</b>	<b>-</b>	<b>(9,158,987)</b>	<b>-</b>	<b>-</b>	

Planning Assumptions:	a		FY25 Rollovers (Timing, Prior Year Unspent)	b		b - a
	FY24 Final October Budget	FY25 Provisional Budget (Excl. Rollovers/Timing)		FY25 Provisional Budget	Variance B/(W)	
<b>Revenue Assumptions</b>						
Billable Students	2,860	2,821		2,821	(39)	
% Change YoY	-4.6%	-1.4%		-1.4%	3.2%	
Housing Students	1,700	1,634		1,634	(66)	
% Change YoY	-5%	-4%		-4%	1%	
Occupancy Rate	71%	68%		68%	-3%	
In-State Tuition and Fees Incr.	3.5%	3.2%		3.2%	-0.4%	
General Fee Increase	382	298		298	(84)	
Residential COA Incr. (weighted avg.)	4%	3%		3%	0%	
State Appropriation as % of Revenue	31%	33%		33%	2%	
Investment Earnings	\$ 1,915,000	\$ 1,915,000		\$ 1,915,000	\$ -	
Operating Reserve / Contingency	\$ 650,000	\$ 650,000		\$ 650,000	\$ -	
<b>Expense Assumptions</b>						
Strategic Plan Funding YoY Increase	\$ 351,581	\$ 383,000		\$ 383,000	\$ 31,419	
Financial Aid Incr/(Decr)	\$ (715,470)	\$ 2,093,052		\$ 2,093,052	\$ 2,808,522	
<b>Overhead Contributions</b>						
Dining Contribution	\$ 1,060,654	\$ 1,114,302		\$ 1,114,302	\$ 53,649	
CGCE Contribution	\$ 2,750,478	\$ 2,750,478		\$ 2,750,478	\$ -	
<b>Net Results</b>						
CGCE Surplus		-			-	
Residential Housing Deficit (unadjusted)	(5,591,693)	(6,057,273)		(6,057,273)	(465,579)	
Campus Transfer to Offset the Res Life Deficit	1,494,723	-		-	(1,494,723)	
Dining Deficit	(312,552)	-		-	312,552	

**Westfield State University**  
**FY25 Detailed Budget by Trust Fund**  
**FY25 Provisional Budget**

	Operating Budget	FEMA Fund	Innovation Fund	Grants	Capital Project Fund	DGCE	Residential Life	Dining Services	Other Trust Funds	FY25 Provisional Budget
<b>Revenue</b>										
Scholarship Allowance				(14,660,448)						(14,660,448)
Tuition and Fees	34,143,815					13,410,276			8,000	47,562,091
Federal Grants and Contracts				10,803,781						10,803,781
State Grants and Contracts				8,565,000						8,565,000
Private Grants and Contracts				395,000					-	395,000
Residence Fees							14,429,937			14,429,937
Dining Fees								10,373,146		10,373,146
Other Operating Revenues	572,151						249,726		1,067,167	1,889,044
Commissions	205,933						22,000			227,933
State General Appropriations	40,430,285									40,430,285
Foundation Support	1,213,500									1,213,500
Innovation Fund			800,000							800,000
Investment Income	1,915,000									1,915,000
<b>Total Revenue</b>	<b>78,480,683</b>		<b>800,000</b>	<b>5,103,333</b>	<b>-</b>	<b>13,410,276</b>	<b>14,701,663</b>	<b>10,373,146</b>	<b>1,075,167</b>	<b>123,944,268</b>
Planned Use of Reserves	3,625,721	430,193	654,117	48,950		200,000	966,497	300,000	619,849	6,845,327
Capital - Rollover / Timing					1,556,755		756,906			2,313,661
<b>Total Rollovers / Timing</b>	<b>3,625,721</b>	<b>430,193</b>	<b>654,117</b>	<b>48,950</b>	<b>1,556,755</b>	<b>200,000</b>	<b>1,723,403</b>	<b>300,000</b>	<b>619,849</b>	<b>9,158,987</b>
<b>Total Resources</b>	<b>82,106,404</b>	<b>430,193</b>	<b>1,454,117</b>	<b>5,152,283</b>	<b>1,556,755</b>	<b>13,610,276</b>	<b>16,425,066</b>	<b>10,673,146</b>	<b>1,695,016</b>	<b>133,103,255</b>
<b>Expenses</b>										
Personnel	45,295,237			336,000		4,496,028	2,674,720	2,530,243	53,466	55,385,693
Fringe Benefits	2,700,865			152,587		1,981,390	1,249,897	1,159,533	25,289	7,269,561
Operations	18,599,860			3,889,746		4,307,379	3,486,204	5,282,392	1,616,261	37,181,843
Strategic Investments	734,581									734,581
Utilities	3,403,383						2,320,729			5,724,112
Debt Payments	1,513,984							540,685		2,054,669
FEMA Reimb. Spending Plan		430,193								430,193
Operating Contingency	650,000							45,991	-	695,991
Capital Projects					7,263,288					7,263,288
Scholarships	6,536,203			725,000		75,000	447,170			7,783,373
Transfers	2,876			48,950	(3,916,605)	2,750,478	-	1,114,302		-
MSCBA Assessment							12,303,619			12,303,619
Innovation Fund Expenditures			1,454,117							1,454,117
<b>Total Expense and Transfers</b>	<b>79,436,989</b>	<b>430,193</b>	<b>1,454,117</b>	<b>5,152,283</b>	<b>3,346,683</b>	<b>13,610,276</b>	<b>22,482,339</b>	<b>10,673,146</b>	<b>1,695,016</b>	<b>138,281,040</b>
<b>Net Revenue over Expense</b>	<b>2,669,416</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(1,789,928)</b>	<b>-</b>	<b>(6,057,273)</b>	<b>-</b>	<b>-</b>	<b>(5,177,785)</b>
Capital - Use of Cash Reserves	1,000,000					1,789,928				2,789,928
Residential Life Reserves							1,662,160			1,662,160
Glide Path - Cash Reserves							725,697			725,697
<b>Total Use of Reserves</b>	<b>1,000,000</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>1,789,928</b>	<b>-</b>	<b>2,387,857</b>	<b>-</b>	<b>-</b>	<b>5,177,785</b>
<b>Net Surplus/(Loss)</b>	<b>3,669,416</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(3,669,415)</b>	<b>-</b>	<b>-</b>	<b>-</b>

**Notes:**

1. Other Operating Revenues consist of parking, application fees, phone fee, non-credit program revenue and other miscellaneous fees
2. Transfers represent the movement of cash from one trust fund to another

		Funding Source						
Deferred Maintenance		Campus	Rollover Incomplete FY24 Projects	Campus Funded from Use of Reserves	DCAMM	MSCBA Debt Release Funds	MSCBA	Total
<b>Physical Plant Projects</b>								
1	Deferred Maintenance & Project Mgmt	Y	685,019			4,016,334	T.B.D.	4,701,353
2	Water Main Repairs/Replacement	Y	400,000					400,000
3	Scanlon Hall 3rd Floor Partial Renovation	Y	300,000					300,000
4	Replacement Fire Reporting System / City of Westfield	Y	250,000					250,000
5	Critical Repair Contingency	Y	140,000					140,000
6	Critical Equipment Repair		93,981					93,981
7	Facilities Planned Equipment Replacement	Y	150,000					150,000
8	CODE- Sprinkler Heads & Escutcheon	Y	125,000					125,000
9	Facilities Master Plan	Y	100,000					100,000
10	Emergency Equipment Failure	Y	100,000					100,000
11	Emergency Infrastructure Failure	Y	100,000					100,000
12	CODE- Fire Damper Study & Testing	Y	100,000					100,000
13	Steam Lime Emergency repairs	Y	100,000					100,000
14	Central Feed Water Pump Replacement	Y	100,000					100,000
15	CODE -Storm Water Mgt Plan, Testing & Repair	Y	50,000					50,000
16	Ely Library Certified Study	Y	50,000					50,000
17	Facilities Studies		50,000					50,000
<b>Sub-total</b>			<b>2,894,000</b>	-	-	<b>4,016,334</b>	-	<b>6,910,334</b>
<b>Information Technology</b>								
18	ODA Hardware Replacement		350,000					350,000
19	LMS Upgrade		225,000					225,000
20	Faculty Staff Lifecycle		200,000					200,000
21	Classroom Technology Lifecycle		150,000					150,000
22	Campus Computer Labs Lifecycle		125,000					125,000
23	Science Wing Network Upgrades		76,000					76,000
24	Banner Upgrades		55,000					55,000
<b>Sub-total</b>		-	<b>1,181,000</b>	-	-	-	-	<b>1,181,000</b>
<b>Total</b>			<b>4,075,000</b>	-	-	<b>4,016,334</b>	-	<b>8,091,334</b>
<b>Projects Funded via Rollover</b>								
25	Rollover Facility Projects	Y		942,126				942,126
26	Rollover for DCAMM Projects	Y		535,050				535,050
27	Rollover for IT Projects			79,579				79,579
28	Rollover for Dining Services							-
29	Rollover - Lammers (Hot water, Dryer, IT Network)					756,906		756,906
<b>Subtotal - Rollovers for FY24 Projects</b>		-	<b>1,556,755</b>	-	-	<b>756,906</b>	-	<b>2,313,661</b>
<b>Other - Use of Cash Reserves</b>								
30	Ely Pool Restoration				1,000,000			1,000,000
31	Switchgear Testing & Repairs				789,928			789,928
<b>Sub-total</b>		-	-	<b>1,789,928</b>	-	-	-	<b>1,789,928</b>
<b>Grand Total</b>			<b>4,075,000</b>	<b>1,556,755</b>	<b>1,789,928</b>	<b>4,016,334</b>	<b>756,906</b>	<b>12,194,923</b>

**Notes:**

1) MSCBA Projects are not yet known at the time of planning and may change as final decisions are made

Westfield State University  
 FY25 Provisional Capital Budget - Institutional Projects; Facilities & Non-Facilities

6/12/2024

Item	Type	Project	Estimated Construction Cost / Match	Description
1	F&O	Ely Pool Restoration (DCAMM)	3,701,097	General pool renovations, safety & code upgrades and HVAC replacement
2	F&O	Facility Emergencies (DCAMM)	250,000	Match placeholder for emergency projects added to the DCAMM plan
3	F&O	R22 Replacement (DCAMM)	1,421,609	Replacement of equipment and coolant
4	F&O	Match Relief (DCAMM)	158,395	Match relief allowed by DCAMM. Funds the Project manager
5	F&O	Parenzo Paving & Banacos Offset (DCAMM)	350,000	Paving done as change order to project that WSU reimburses for
6	F&O	Water Main Repairs/Replacement	400,000	Water main is failing, funds to repair and replace. Multi year plan
7	F&O	Scanlon Hall 3rd Floor Partial Renovation	300,000	Refresh for the occupants of Mod Hall closure
8	F&O	Replacement Fire Reporting System / City of Westfield	250,000	City is no longer supporting the existing fire monitoring on campus
9	F&O	Critical Repair Contingency	140,000	
10	F&O	Critical Equipment Repair	93,981	
11	F&O	Facilities Planned Equipment Replacement	150,000	Planned replacement of failing/obsolete equipment
12	F&O	CODE- Sprinkler Heads & Escutcheon	125,000	Code - replacement of the fire system sprinkler heads and escutcheons
13	F&O	Facilities Master Plan	100,000	Additional funds needed to complete the Facilities Master Plan
14	F&O	Emergency Equipment Failure	100,000	Emergency repairs to equipment interior and exterior
15	F&O	Emergency Infrastructure Failure	100,000	Emergency Infrastructure repair
16	F&O	CODE- Fire Damper Study & Testing	100,000	Code required testing on the Fire system
17	F&O	Steam Lime Emergency repairs	100,000	Continued Steam line repairs (multi year)
18	F&O	Central Feed Water Pump Replacement	100,000	Feed Water pump for the boiler room needs to be replaced
19	F&O	CODE-Storm Water Mgt Plan, Testing & Repair	50,000	Code required testing and repair
20	F&O	Ely Library Certified Study	50,000	Study to look at dehumidification in the Library
21	F&O	Facilities Studies	50,000	House Doctor studies
22	F&O	Switchgear Testing & Repairs	789,928	Study of Electrical Systems and Testing
<b>Total Facilities Projects</b>			<b>\$ 8,880,009</b>	

1	Non F&O	ODA Hardware Replacement	350,000	Hardware Banner Suite resides on is end of life/end of support (EOL/EOS)
2	Non F&O	LMS Upgrade	225,000	Migrating to a new LMS as the current version is EOL/EOS before end of FY25
3	Non F&O	Faculty Staff Lifecycle	200,000	Lifecycle Computers for Faculty and Staff
4	Non F&O	Classroom Technology Lifecycle	150,000	Lifecycle for Class Technology Replacements
5	Non F&O	Campus Computer Labs Lifecycle	125,000	Lifecycle for Computer Lab Replacements
6	Non F&O	Science Wing Network Upgrades	76,000	Wired/Wireless network gear is EOL/EOS
7	Non F&O	Banner Upgrades	55,000	Degree Works Upgrade, Oracle Patching (security updates for Banner database), Argos Prof Services (report development and migration)
<b>Total Non-Facilities Projects</b>			<b>\$ 1,181,000</b>	

<b>Total FY25 Project Cost</b>		10,061,009
Less: DCAMM Funding		-4,016,334
Less: FY24 Rollover for DCAMM Funding		-179,747
<b>Total Campus Funding</b>	<b>\$</b>	<b>5,864,928</b>
<b>Less: FY24 Approved Reserve Funding</b>	<b>\$</b>	<b>(1,789,928)</b>
<i>Ely Pool &amp; SwitchGear</i>		
<b>FY25 Net Campus Funding</b>	<b>\$</b>	<b>4,075,000</b>

Note:

1. Funding may be from multiple sources; DCAMM, rollover funding from prior year, FY25 Campus Capital Budget
2. Amounts represented above are estimates
3. FY24 Reserve Funding of \$1.78M was approved for Ely Pool Repair and Switch Gear Upgrades



**Westfield State University**  
**FY25 Lease and Motor Vehicle Schedule**

6/11/2024

<b>Existing Vehicle Summary</b>	<b>Quantity</b>	<b>Cost/ Month</b>	<b>Annual Cost</b>
<b>Existing Lease Commitments:</b>			
Facilities, Public Safety, Media Services, Mail Services, Catering, Information Technology	25	\$ 14,200	\$ 170,400
5% Escalation			\$ 8,520
Program Service fee			\$ 8,082
Vehicle Lease Contingency			\$ 27,621
<b>FY25 Lease Schedule</b>			<b>\$ 214,623</b>

FY24 Vehicle Lease Schedule	\$ 214,623
FY25 Vehicle Lease Schedule	\$ 214,623
<b>Difference</b>	<b>\$ -</b>

**Notes:**

1. The annual budget amount for leased vehicles is \$225k.
2. The Reduction in leased vehicle costs is a result of a 1-time offer from Ford to replace 15 of the vehicles that we lease at a lower cost. As of June 2024, we have received 12 of the 15 vehicles that we ordered through this program.



## Board of Trustees

June 20, 2024

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### MOTION

To recommend the University continue with an agreement with the Boston Consortium for internal audit services. All University procurement procedures and policies will be followed in executing said agreement.

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Ali Salehi, Chair

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Date