



Board of Trustees

Advancement and Enrollment Management Committee

October 12, 2022

Minutes

Arno Maris Gallery, Room 201, Ely Campus Center

And via Zoom, in accordance with Massachusetts Gov. Charlie Baker's Executive Order Suspending Certain Provisions of the Open Meeting Law, G.L. c. 30A, § 20 dated March 12, 2020.

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

MEMBERS PRESENT: Committee Chair Lydia Martinez-Alvarez, Vice Chair William Reichelt, Secretary Melissa Alvarado, and Trustee Chloe Sanfacon

MEMBERS EXCUSED: Trustee Paul Boudreau

TRUSTEE GUESTS PRESENT: Trustees Theresa Jasmin, Dr. Robert Martin, Chris Montemayor, Ali Salehi, and Dr. Gloria Williams

TRUSTEE GUESTS PARTICIPATING REMOTELY: Trustee Madeline Landrau

Also present/participating remotely were Westfield State University President Dr. Linda Thompson, Enrollment Management Vice President Daniel Forster; Director of Financial Aid Simone Backstedt; Director of Admissions Mike Mazeika; Associate Registrar/Director of Graduate Program Admission Jessica Tansey; Executive Director of Communication, Marketing and Branding Dr. Leslie Rice; Institutional Advancement Vice President Lisa McMahan; Senior Annual Giving Coordinator Courtney Blajda; Interim Director of Advancement and Major Gifts William Hynes; and Associate Director of Alumni Relations Ryan Meersman.

The meeting was called to order at 10:50 AM by Committee Chair Martinez-Alvarez. A roll call was taken of the committee members participating as listed above and it was announced that the meeting is being livestreamed and recorded.

MOTION made by Trustee Reichelt, seconded by Trustee Sanfacon, to approve the minutes of the June 28, 2022, meeting. There being no discussion, **Motion passed unanimously.**

Tuition Discount Modeling. Mr. Forster stated the Financial Aid office is working toward a new structure for budgeting for financial aid. In the past, they were able to increase aid approximately \$200,000 per year, but were still losing ground, especially for the neediest students. In the last two fiscal years, reserves were used to increase financial aid awards. Most universities use the tuition discount rate model where they determine what percentage of money coming in will go back out to help students. It is much more effective. Ms. Backstedt presented a sample of student aid given over the last fiscal year when we were still on a fixed model. Mr. Forster stated we are over budget in financial aid as we typically over award and then

recoup funds not used due to attrition or students leaving. This line item will be brought back into budget. There were over 100 appeals last year and the majority of the additional \$500,000 in aid was given to those students, bringing in approximately 50 additional students. Most appeals are \$2,000 or more, which can tip the family in our favor. It was requested to track how many students enrolled due to receiving part of the \$500,000 through an appeal. Chair Martin requested that at some point in the future the balance between merit and need based aid be discussed.

CGCE Update. Ms. Tansey presented an update on graduate and continuing education:

- For fall, numbers have been consistent with graduate and matriculated students. The Master of Social Work enrolled the first cohort of an online class.
- For Spring 23, graduate enrollment is on target with last year, undergraduates are down in applications and acceptances.
- Each contact with students makes a difference by removing barriers, especially for these non-traditional students who are making a huge effort to get back to school.
- Some academic departments are responding to interest in online classes.
- We need to be flexible with what we offer to students. They want to know how quickly they can get their degrees. It was requested to report back at a future meeting what students want for classes.

Class Profile. Mr. Mazeika stated he is hoping for an increase in out-of-state students as a result of the extra efforts to recruit them this year. Approximately 33% of the class is local and the remainder mostly from all across the state. There is a slight increase in transfer students. There were 143 students lost between depositing and enrolling. Because of collaboration between the admission, billing, and registrar's offices, the enrollment numbers were finalized earlier this year. Less than 50% of transfer students came from the four local community colleges, but 55% of transfer students came from a Massachusetts community college. Admissions sampled 4,400 students who chose not to enroll and received a 3.7% response rate. Significant data points included:

- More than 60% said we were not in their top two choices
- For 36% we were their first or second choice
- The number one reason was cost and/or financial aid
- The second reason was "other" which included acceptance to other schools or a better feeling
- The third reason was location
- For 50% of respondents, they did not visit campus due to distance, cost, time
- Financial aid: 36% said we cost more, 28% said the same, and 36% said we cost less than those they chose to attend.

Recruitment Plan for 2022-23. Mr. Mazeika stated that people buy into why we do what we do. Students want to feel connected, valued, and wanted at their university. The goals for this year are to increase the number of first-year students by 850, which is ambitious. It will take a total community effort to reach that goal by collaborating with departments, increasing diversity, recruiting students from outside Massachusetts, and increasing outreach to local school students. The new Customer Relationship Manager (CRM) software is slated to be in operation before the current CRM ends on June 30.

- To help with the recruitment plan, everyone on campus needs to know what the plan is and the role they can play in it.
- Visits are down compared to last year but those attending have provided very positive feedback. The online presence needs to be improved because half of students do not come for a visit. To improve yield and retention, Admissions is creating incentives to encourage student visits to campus, such as waiving a portion of the deposit.
- The Reach to Teach program recently hosted 51 students on campus which received positive feedback. The goal is to get more local students onto campus.

Marketing and Communication Investment. The investment in Marketing will have an effect in the community by packaging the University and getting it in front of people and on their minds.

Institutional Advancement Update/Quarterly Dashboard. Ms. McMahon shared that last year was a year of engagement resulting in increased donors and alumni connections. Just over \$1.5 million has been raised, which does not count grants. The Foundation had a clean audit in September with no findings. Three reunions have taken place and the Sweet Success for Scholarship Reception was back in person this year.

Student Philanthropy. Ms. Blajda spoke about TAG days (talk about giving). She hosted a table on campus that included President Thompson, a musician, coffee with a cop, and a raffle for students who wrote a note to thank a donor, receiving 48 thank you notes to first-time donors. A senior gift campaign will be launched asking for a \$20.23 gift to the University. Upcoming events are the 100 Days till Graduation and Give a Hoot, and there is excitement to get students educated about philanthropy. Alumni participation increased from .90% last year to the current figure of 1.87%.

Planned Giving Website. Mr. Hynes stated strategic funds were used to launch a planned giving website of <https://westfieldma.planmygift.org>. Planned giving newsletters were sent to 1,000 donors aged 55 and above who have given a gift in the last five years. In November, a second mailing focusing on IRAs and required distributions will be sent to those age 70 and above. Analytics from the website will be brought to the next meeting. It is actually through a planned gift received in 2021, the Foundation is able to give \$300,000 to the University for recruitment and retention initiatives in this current fiscal year.

Alumni Update/Homecoming. Mr. Meersman shared the homecoming theme of “Come Home to the Nest” which has campus-wide engagement from Thursday, October 20 through Sunday, October 23. There will be a Homecoming Scholarship Dinner honoring Dr. Liz Preston and the distinguished alumni of Dr. Robert Enright '73 (Distinguished Alumnus), Dr. Terrell Hill '92 (Excellence in Education), Alison Rheaume '09 (Alumna of the Year), and Ashley Weisse '19 (Excellence in Healthcare).

There being no further business, **MOTION** made by Trustee Alvarado, seconded by Trustee Sanfacon, to adjourn. There being no discussion, **Motion passed unanimously.**

Meeting adjourned at 11:50 AM.

Attachments presented at this meeting:

- a) Draft June 28, 2022, Minutes
- b) Tuition Discount Modeling
- c) Tuition Discount Modeling – Student Sample
- d) Class Profile
- e) CGCE Update
- f) Recruitment Plan
- g) Marketing and Communication-Our Story
- h) Marketing and Communications Investment-Goals-Budget
- i) Quarterly Dashboard
- j) Student Philanthropy Table Flyer
- k) Planned Giving Web Site <https://westfieldma.planmygift.org>
- l) WSAA Dinner & Awards
- m) Homecoming Poster