



Board of Trustees

Advancement and Enrollment Management Committee

10:30 AM
October 12, 2022

Arno Maris Gallery, Room 201, Ely Hall

A live stream of the meeting for public viewing will also take place on YouTube at the following link: <https://www.westfield.ma.edu/live>

For information about Westfield State's COVID-19 procedures, visit: www.westfield.ma.edu/covid

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|---|---|
| 1. Call to Order | Trustee Martinez-Alvarez |
| 2. Approval of Minutes | Trustee Martinez-Alvarez |
| a) June 28, 2022 | |
| 3. Items for Information | |
| a) Tuition Discount Modeling | Mr. Daniel Forster/Ms. Simone Backstedt |
| b) Class Profile | Mr. Daniel Forster/Mr. Mike Mazeika |
| c) CGCE Update | Ms. Jessica Tansey |
| d) Recruitment Plan for 2022-23 | Mr. Daniel Forster/Mr. Mike Mazeika |
| e) Marketing and Communication Investment | Mr. Daniel Forster/Dr. Leslie Rice |
| f) Institutional Advancement Update/Quarterly Dashboard | Ms. Lisa McMahon |
| g) Student Philanthropy | Ms. Courtney Blajda |
| h) Planned Giving Website | Mr. William Hynes |
| i) Alumni Update/Homecoming | Mr. Ryan Meersman |

Attachment(s):

- a) 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



Board of Trustees

Advancement and Enrollment Management Committee

June 28, 2022

Minutes

Loughman Living Room, Scanlon Hall

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

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

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

MEMBERS PARTICIPATING REMOTELY: Trustee Chloe Sanfacon

MEMBERS EXCUSED: Committee Chair Lydia Martinez-Alvarez

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

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

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

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

There being no further discussion, ROLL CALL VOTE taken:

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

Motion passed unanimously.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Motion passed unanimously.

Meeting adjourned at 9:46 AM.

Attachments presented at this meeting:

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

Secretary's Certificate

I hereby certify that the foregoing is true and correct copy of the approved minutes of the Westfield State University Board of Trustees Advancement and Enrollment Management Committee meeting held on June 28, 2022.

Melissa Alvarado, Secretary

Date

Discount Rate Model to project Financial Aid Budget

Description	Projections				Calculations
	FY23 Budgeted / Est.	FY24	FY25	FY26	
Avg Billed Students	2,991	3,000	3,000	3,000	Input
Revenue					
Tuition and Fees	11,500	11,845	12,200	12,566	a.
Avg Billed Students	2,991	3,000	3,000	3,000	b.
Tuition and Fee Revenue	34,396,500	35,535,000	36,601,050	37,699,082	c. = a.* b.
Financial Aid					
Tuition and Fee Revenue	34,396,500	35,535,000	36,601,050	37,699,082	
Discount Rate	12.2%	13.0%	14.0%	15.0%	d.
<i>Disc Rate Increase</i>	1.9%	0.8%	1.0%	1.0%	
Financial Aid Budget	4,196,373	4,619,550	5,124,147	5,654,862	e. = c. * d.
<i>YoY Increase to Fin. Aid Budget</i>	463,111	423,177	504,597	530,715	cy - py
<i>Financial Aid per Student</i>	1,403	1,540	1,708	1,885	e. / b.
Net Revenue	30,200,127	30,915,450	31,476,903	32,044,219	= c. - e.
<i>YoY Increase Net Affect</i>	(2,457,417)	715,323	561,453	567,316	cy - py

Notes:

- 1) Enrollment numbers correspond to MRF Multi-Year Projection Model based on funnel reports
- 2) Previous models increased Financial Aid Discount Rate by 1% each year, this model escalated to a 15% Max
- 3) This model calculates FinAid Budget by using a defined Discount Rate
- 4) Discount Rate X Tuition and Fee Revenue = Financial Aid Budget
- 5) In this model, while enrollment declines in continual years, Financial Aid budget continues to increase as a result of the increase in tuition and fee revenue.

Discount Rate Model to project Financial Aid Budget

Description	Projections				Calculations
	FY23 Budgeted / Est.	FY24	FY25	FY26	
Avg Billed Students	3,248	3,079	3,019	2,964	Input
Revenue					
Tuition and Fees	11,500	11,845	12,200	12,566	a.
Avg Billed Students	3,248	3,079	3,019	2,964	b.
Tuition and Fee Revenue	37,352,000	36,470,755	36,832,857	37,246,693	c. = a.* b.
Financial Aid					
Tuition and Fee Revenue	37,352,000	36,470,755	36,832,857	37,246,693	
Discount Rate	12.2%	13.0%	13.0%	13.0%	d.
<i>Disc Rate Increase</i>	1.9%	0.8%	0.0%	0.0%	
Financial Aid Budget	4,556,944	4,741,198	4,788,271	4,842,070	e. = c. * d.
<i>YoY Increase to Fin. Aid Budget</i>	823,682	184,254	47,073	53,799	cy - py
<i>Financial Aid per Student</i>	1,403	1,540	1,586	1,634	e. / b.
Net Revenue	32,795,056	31,729,557	32,044,585	32,404,622	= c. - e.
<i>YoY Increase Net Affect</i>	137,512	(1,065,499)	315,028	360,037	cy - py

Notes:

- 1) Enrollment numbers correspond to MRF Multi-Year Projection Model based on funnel reports
- 2) Previous models increased Financial Aid Discount Rate by 1% each year, this model freezes it at 13% Max
- 3) This model calculates FinAid Budget by using a defined Discount Rate
- 4) Discount Rate X Tuition and Fee Revenue = Financial Aid Budget
- 5) In this model, while enrollment declines in continual years, Financial Aid budget continues to increase as a result of the increase in tuition and fee revenue.

Discount Rate Model to project Financial Aid Budget

Model 5/9/22 vs. 9/7/22 Incr/(Decr)

Description	Projections				Calculations
	FY23 Budgeted / Est.	FY24	FY25	FY26	
Avg Billed Students	(257)	(79)	(19)	36	Input
Revenue	-	-	-	-	
Tuition and Fees	-	-	-	-	a.
Avg Billed Students	(257)	(79)	(19)	36	b.
Tuition and Fee Revenue	(2,955,500)	(935,755)	(231,807)	452,389	c. = a.* b.
Financial Aid					
Tuition and Fee Revenue	(2,955,500)	(935,755)	(231,807)	452,389	
Discount Rate	0.0%	0.0%	1.0%	2.0%	d.
<i>Disc Rate Increase</i>	0.0%	0.0%	1.0%	1.0%	
Financial Aid Budget	(360,571)	(121,648)	335,876	812,792	e. = c. * d.
<i>YoY Increase to Fin. Aid Budget</i>	<i>(360,571)</i>	<i>238,923</i>	<i>457,524</i>	<i>476,917</i>	<i>cy - py</i>
<i>Financial Aid per Student</i>	-	-	122	251	<i>e. / b.</i>
Net Revenue	(2,594,929)	(814,107)	(567,682)	(360,403)	= c. - e.
<i>YoY Increase Net Affect</i>	<i>(2,594,929)</i>	<i>1,780,822</i>	<i>246,425</i>	<i>207,279</i>	<i>cy - py</i>

Notes:

- 1) Enrollment numbers correspond to MRF Multi-Year Projection Model based on funnel reports
- 2) Previous models increased Financial Aid Discount Rate by 1% each year, this model freezes it at 13% Max
- 3) This model calculates FinAid Budget by using a defined Discount Rate
- 4) Discount Rate X Tuition and Fee Revenue = Financial Aid Budget
- 5) In this model, while enrollment declines in continual years, Financial Aid budget continues to increase as a result of the increase in tuition and fee revenue.

2021-2022 Projection

Current Deposit Total			
FYFT	TR	Total	
825	150	975	

Projection			
FYFT	TR	Total	
850	190	1040	

Fall Enrollment			
Registered	New	Total	
2449	1040	3489	

Spring Enrollment

Fall Total 90% persistence from Fall to Spring

3140.1

New FTFY and TR for Spring

75

Total

3,215 << FY22 Budget

Average Yearly Enrollment Billed

Fall	Spring	Avg.	
3,489	3,140	3,315	
Less XRG		100	
Total		3,215	

Budgeted Enrollment FY22

3352

Net Difference

137

Enrollment Projection	Assumptions	BUDGETED ENROLLMENT		Projected Enrollment (Based on Funnel Reports)			
		FY22	FY23	FY23	FY24	FY25	FY26
New		1,040	1,075	965	897	835	776
Registered		2,449	2,449	2,449	2,449	2,449	2,449
Total Fall Enrollment		3,489	3,524	3,414	3,346	3,284	3,225
Spring Enrollment	10% Melt Rate	3,140	3,172	3,073	3,012	2,955	2,903
Avg Fall & Spring		3,315	3,348	3,243	3,179	3,119	3,064
Less: XRG Students	100 Students Avg/yr	(100)	(100)	(100)	(100)	(100)	(100)
Average Billable		3,215	3,248	3,143	3,079	3,019	2,964
				(105)	(64)	(60)	(56)
Revenue Projection							
General Fee	3% Overall increase	\$ 11,139	\$ 11,500	\$ 11,500	\$ 11,845	\$ 12,200	\$ 12,566
General Fee Revenue		\$ 35,806,872	\$ 37,349,700	\$ 36,147,950	\$ 36,472,265	\$ 36,838,311	\$ 37,245,992
General Fee Increase			3.24%	0.00%	3.00%	3.00%	3.00%
Meal Plan Rates		\$ 4,500	\$ 4,724	\$ 4,724	\$ 4,866	\$ 5,012	\$ 5,162
Meal Plan Revenue	Factored on 55% of enrollment	\$ 7,956,011	\$ 8,438,434	\$ 8,166,922	\$ 8,240,195	\$ 8,322,896	\$ 8,415,003
MP Rate Increase			4.98%	0.00%	3.00%	3.00%	3.00%
Housing Rates		\$ 8,068	\$ 8,300	\$ 8,300	\$ 8,549	\$ 8,805	\$ 9,070
Housing Revenue	Factored on 55% of enrollment	\$ 14,264,244	\$ 14,826,207	\$ 14,349,165	\$ 14,477,904	\$ 14,623,208	\$ 14,785,040
Housing Rate Increase			2.88%	0.00%	3.00%	3.00%	3.00%
Housing Students		1769	1788	1,729	1,694	1,661	1,630
Total Revenue		\$ 58,027,128	\$ 60,614,341	\$ 58,664,037	\$ 59,190,364	\$ 59,784,415	\$ 60,446,035
Total Cost of Attendance		\$ 23,707	\$ 24,524	\$ 24,524	\$ 25,260	\$ 26,018	\$ 26,798

Revenue Loss Projection

	FY23	FY24	FY25	FY26
General Fees	\$ (1,201,750)	\$ (760,123)	\$ (728,122)	\$ (697,468)
Cumulative Losses		\$ (1,961,873)	\$ (2,689,995)	\$ (3,387,463)
Dining	\$ (493,658)	\$ (312,245)	\$ (299,100)	\$ (286,508)
Cumulative Losses		\$ (805,903)	\$ (1,105,003)	\$ (1,391,511)
Housing	\$ (867,350)	\$ (548,611)	\$ (525,514)	\$ (503,390)
Cumulative Losses		\$ (1,415,961)	\$ (1,941,475)	\$ (2,444,865)
Total Revenue Losses due to enrollment	\$ (2,562,758)	\$ (1,620,979)	\$ (1,552,736)	\$ (1,487,366)
Cumulative Total		\$ (4,183,737)	\$ (5,736,474)	\$ (7,223,839)

File Resource:

S:\Budgets\FY23 Budget\FY23 Enrollment\Enrollment_Threeyearpro 4.25.22 - Updated by MRF Projection.xlsx

Description	Projections			Historical Actuals				
	FY25	FY24	FY23 Scenario B - Flat Aid	FY23 Scenario B - Increased Aid	FY23 Proposed	FY22	FY21	FY20
Enrollment --> Flat projection @ 1200 FY and 210 Transfers						Enrollment Data from 10.13.21 E		
Avg Billed Students	3,686	3,215	3,215	3,215	3,416	3,214	3,190	3,643
Revenue --> Uses Avg Billed # of students calculated above -- Excludes Auxillary Revenues --> Fee Increases @ 3%/Yr								
Tuition and Fees	12,200	11,845	11,500	11,500	11,500	11,324	11,139	10,849
Avg Billed Students	3,686	3,215	3,215	3,215	3,416	3,214	3,190	3,643
Tuition and Fee Revenue	44,967,440	38,081,675	36,972,500	36,972,500	39,283,425	36,390,806	35,531,739	39,522,907
Financial Aid --> Historical Fin.Aid. Budget provided by Enrollment, projections calculated using Discount Rate + 1%								
Tuition and Fee Revenue	44,967,440	38,081,675	36,972,500	36,972,500	39,283,425	36,390,806	35,531,739	39,522,907
Fin Aid Budget	6,393,873	5,033,976	3,733,262	4,800,000	4,800,000	3,733,262	3,064,722	3,000,369
YoY Increase to Budget	1,359,896	233,976	-	1,066,738	1,066,738	668,540	64,353	155,229
Net Revenue	38,573,567	33,047,699	33,239,238	32,172,500	34,483,425	32,657,544	32,467,017	36,522,538
YoY Increase Net Affect	5,525,869	875,199	581,694	(485,044)	1,825,881	190,527	(4,055,521)	(1,607,342)
Discount Rate --> Projection applies 1% increase YoY						Discount Rate --> Calculated us		
Discount Rate	14.2%	13.2%	10.1%	13.0%	12.2%	10.26%	8.6%	7.6%
Disc Rate increase	1.0%	1.0%	-0.2%	2.7%	2.0%	1.6%	1.0%	0.6%

Additional Information:

- * This information below shown to recreate original model, revenue numbers don't tie out to calculations above.
- * These revenue numbers apply Tuition and Fees to "entering Fall" enrollment as opposed to Avg. Billable students
- * Used for the purposes of determining First Year Financial Aid Allocation in previous model

Description	Projections			Historical Actuals				
	FY25	FY24	FY23	FY22	FY21	FY20	FY19	FY18
Revenue by Class --> Uses Entering Fall enrollment data vs Avg Billable Students								
FY	14,640,420	14,214,000	13,800,000	10,814,420	-	-	-	-
SO	10,687,507	10,376,220	7,889,000	8,549,620	-	-	-	-
JR	9,613,876	7,308,365	7,302,500	10,033,064	-	-	-	-
SR	7,076,203	7,071,465	11,155,000	10,101,008	-	-	-	-
TR	6,600,389	4,607,705	2,415,000	-	-	-	-	-
Total NEW	17,202,494	16,701,450	16,215,000	10,814,420	-	-	-	-
Total	48,618,395	43,577,755	42,561,500	39,498,112	-	-	-	-
Financial Aid First Year Student Allocation --> Gross Revenue for FY students * 16%						FY Rate		
First Year Financial Aid	\$ 2,342,467	\$ 2,274,240	\$ 2,208,000	\$ 1,730,307	\$ -	\$ -	\$ -	\$ -

Description	Projections			Historical Actuals				
	FY25	FY24	FY23	FY22	FY21	FY20	FY19	FY18
Enrollment --> Flat projection @ 1200 FY and 210 Transfers				Enrollment Data from 10.13.21 Enrollment BOT Slide				
FY	1,200	1,200	1,200	955	-	-	-	-
SO	876	876	686	755	-	-	-	-
JR	788	617	635	886	-	-	-	-
SR	580	597	970	892	-	-	-	-
TR	541	389	210	-	-	-	-	-
Total	3,985	3,679	3,701	3,488	-	-	-	-
Total NEW	1,410	1,410	1,410	955	-	-	-	-
Entering Fall Enrollment	3,985	3,679	3,701	3,488	3,463	3,940	4,241	4,526
Average Billed Students --> Applies Fall -> Spring Retention Rate of 90%				Fall->Spring 90%				
Spring Enrollment	3,587	3,311	3,331	3,139	3,117	3,546	3,817	4,073
Avg Enrollment	3,786	3,495	3,516	3,314	3,290	3,743	4,029	4,300
XRG	(100)	(100)	(100)	(100)	(100)	(100)	(100)	(100)
Avg Billed Students	3,686	3,395	3,416	3,214	3,190	3,643	3,929	4,200
Revenue --> Uses Avg Billed # of students calculated above -- Excludes Auxillary Revenues --> Fee Increases @ 3%/Yr								
Tuition and Fees	12,200	11,845	11,500	11,324	11,139	10,849	10,429	9,867
Avg Billed Students	3,686	3,395	3,416	3,214	3,190	3,643	3,929	4,200
Tuition and Fee Revenue	44,967,440	40,214,367	39,283,425	36,390,806	35,531,739	39,522,907	40,975,020	41,438,440
Financial Aid --> Historical Fin.Aid. Budget provided by Enrollment, projections calculated using Discount Rate + 1%								
Tuition and Fee Revenue	44,967,440	40,214,367	39,283,425	36,390,806	35,531,739	39,522,907	40,975,020	41,438,440
Fin Aid Budget	6,393,873	5,315,895	4,800,000	3,733,262	3,064,722	3,000,369	2,845,140	2,583,719
YoY Increase to Budget	1,077,978	515,895	1,066,738	668,540	64,353	155,229	261,421	
Net Revenue	38,573,567	34,898,473	34,483,425	32,657,544	32,467,017	36,522,538	38,129,880	38,854,721
Discount Rate --> Projection applies 1% increase YoY				Discount Rate --> Calculated using historical data				
Discount Rate	14.2%	13.2%	12.2%	10.26%	8.6%	7.6%	6.9%	6.2%
Disc Rate increase	1.0%	1.0%	2.0%	1.6%	1.0%	0.6%	0.7%	

Additional Information:

- * This information below shown to recreate original model, revenue numbers don't tie out to calculations above.
- * These revenue numbers apply Tuition and Fees to "entering Fall" enrollment as opposed to Avg. Billable students
- * Used for the purposes of determining First Year Financial Aid Allocation in previous model

Description	Projections			Historical Actuals				
	FY25	FY24	FY23	FY22	FY21	FY20	FY19	FY18
Revenue by Class --> Uses Entering Fall enrollment data vs Avg Billable Students								
FY	14,640,420	14,214,000	13,800,000	10,814,420	-	-	-	-
SO	10,687,507	10,376,220	7,889,000	8,549,620	-	-	-	-
JR	9,613,876	7,308,365	7,302,500	10,033,064	-	-	-	-
SR	7,076,203	7,071,465	11,155,000	10,101,008	-	-	-	-
TR	6,600,389	4,607,705	2,415,000	-	-	-	-	-
Total NEW	17,202,494	16,701,450	16,215,000	10,814,420	-	-	-	-
Total	48,618,395	43,577,755	42,561,500	39,498,112	-	-	-	-
Financial Aid First Year Student Allocation --> Gross Revenue for FY students * 16%							FY Rate	16%
First Year Financial Aid	\$ 2,342,467	\$ 2,274,240	\$ 2,208,000	\$ 1,730,307	\$ -	\$ -	\$ -	\$ -

Model/Analysis Assumptions

Enrollment Assumptions

		Notes
New Students Each year	1,410	1200 FY and 210 Transfers, Provided by EM
Persistence/Retention Rate	73%/90%/94%	Provided by IR for Enrollment Model
Transfer Retention	85%	No Data from IR, used an Average rate of 85%
Historical Enrollment Data		Collected from 10.13.21 Enrollment BOT Slide deck

Average Billed Students Assumptions

		Notes
Fall to Spring Retention	90%	Provided by EM via original document
XRG Students	100	Provided by EM via original document
Avg Enrollment Calculation		Fall*90% = Spring. Average of Fall and calc. Spring
Avg Billed Calculation		Average Enrollment-100 XRG students

Revenue Assumption

		Notes
FY23 Tuition and Fees	11,500	BOT Approved Fees 2.17.22 - Tuition and Fees
Fee increase FY23 forward	3.00%	Applies 3% increase each year
Tuition and Fee Revenue Calc		Fee * Avg Billed Students
Revenue by Class		Only for illustration - Doesn't apply Avg Billed Calculations

Financial Aid Assumptions

		Notes
Financial Aid Budget	<i>Historical</i>	Provided by EM
Financial Aid Budget	<i>Projection</i>	Uses projected Discount Rate * Projected Tuition and Fee Revenue
Discount Rate Calculation	<i>Historical</i>	Fin.Aid Budget / Tuition and Fee Revenue
Discount Rate Calculation	<i>Projection</i>	Applies 1% increase to previous year's rate
Discount Rate Increase		Shows increase over previous year's rate
FY Financial Aid Allocation	16%	Provided by EM via original document
FY Financial Aid Allocation \$		Tuition and Fee Revenue * FY FinAid Rate - For illustration Only

Other Notes:

- * Does not include melt rate calculations seen in other Average billable student calculations
- * Will need to cross reference final numbers with Scenario Model should we go down this path
- * Haven't applied any other enrollment figures to this model to date, used what was provided for FY23 and beyond

	FY23	FY24	FY25
Enrollment	3416	3395	3686
Rate	11,500	11,500	11,500
Total T&F Rev	\$ 39,284,000	\$ 39,042,500	\$ 42,389,000
Financial Impact of Enrollment		\$ (241,500)	\$ 3,346,500
Rate Change		345	355
New Rate		11,845	12,200
Financial Impact of Rate Change		\$ 1,171,275	\$ 2,580,200
Total T&F Rev	\$ 39,284,000	\$ 40,213,775	\$ 44,969,200
Financial Aid	4,800,000	5,315,895	6,393,873
Discount Rate	12.2%	13.2%	14.2%
Change in Discount Rate		1.0%	1.0%

	FY23	FY24	FY25
Enrollment	3416	3395	3686
Rate	11,500	11,500	11,500
Total T&F Rev	\$ 39,284,000	\$ 39,042,500	\$ 42,389,000
Financial Impact of Enrollment		\$ (241,500)	\$ 3,346,500
Rate Change		-	-
New Rate		11,500	11,500
Assumes no rate change		\$ -	\$ -
Total T&F Rev	\$ 39,284,000	\$ 39,042,500	\$ 42,389,000
Financial Aid	4,800,000	5,315,895	6,393,873
Discount Rate	12.2%	13.6%	15.1%
Change in Discount Rate		1.4%	1.5%

Exclusion: Rate Change	\$ -	\$ (1,171,275)	\$ (2,580,200)
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Anytime the T&F rate increases, the discount rate is offset and reflects a lower % basis.

Projected Discount Rate for FY'23

Tuition and Fees				Financial Aid Spend (Merit and Need Based)			Avg. Billed	Discount Rate (Institutional Aid/Tuition and Fees)					
Total Students FY'22		Revenue per student Fall		Spring	Reserve	Total		Revenue Spring	Total Revenue				
Total Students	3,488	\$ 5,662	0.9	\$ 19,749,056	3139.2	\$ 3,633,262.00	\$ 200,000.00	\$ 3,425,000.00	3213.6	10%	\$ 17,774,150.40	\$ 37,523,206.40	\$ 1,155,000.00
FY	955	\$ 5,662	0.9	\$ 5,407,210								\$ 36,368,206.40	Billed
SO	755	\$ 5,662	0.9	\$ 4,274,810									
JR	886	\$ 5,662	0.9	\$ 5,016,532									\$ 36,390,806.40
SR	892	\$ 5,662	0.9	\$ 5,050,504									
	3,488			19,749,056									

Projected Tuition and Fees Best Case

Total Students FY'23	2%	Revenue	Financial Aid Spend	Total	Discount Rate
Total Students	3500	\$ 11,550	\$ 4,500,000.00	\$ 4,500,000.00	11%
FY	1200	11550	\$ 13,860,000		
SO	768	11550	\$ 8,870,400		Current Rate
JR	712	11550	\$ 8,223,600		10%
SR	720	11550	\$ 8,316,000		
	3,400		39,270,000		

Source:
Z:\Budgets\FY23 Budget\FY23 Scenario
"-Discount Rate FY23 DanF113021

Projected Tuition and Fees Good Case

Total Students FY'23	2%	Revenue	Financial Aid Spend	Total	Discount Rate
Total Students	3400	\$ 11,781	\$ 4,000,000.00	\$ 4,000,000.00	10%
FY	1100	11550	\$ 12,705,000		
SO	868	11550	\$ 10,025,400		
JR	712	11550	\$ 8,223,600		
SR	720	11550	\$ 8,316,000		
	3,400		39,270,000		

This is a variation of the original pdf we

Projected Tuition and Fees Same Case

Total Students FY'23	2%	Revenue	Financial Aid Spend	Total	Discount Rate
Total Students	3200	\$ 11,550	\$ 3,500,000.00	\$ 3,500,000.00	9%
FY	1200	11550	\$ 13,860,000		
SO	768	11550	\$ 8,870,400		
JR	712	11550	\$ 8,223,600		
SR	720	11550	\$ 8,316,000		
	3,400		39,270,000		

Projected Tuition and Fees Worst Case

Total Students FY'23	2%	Revenue	Financial Aid Spend	Total	Discount Rate
Total Students	3100	\$ 11,550	\$ 3,000,000.00	\$ 3,000,000.00	8%
FY	1200	11550	\$ 13,860,000		
SO	768	11550	\$ 8,870,400		
JR	712	11550	\$ 8,223,600		
SR	720	11550	\$ 8,316,000		
	3,400		39,270,000		

	FY25	FY24	FY23 Projection	FY22	FY21	FY20	FY19	FY18
FY	1,200	1,200	1,200	955				
SO	876	876	876	755				
JR	788	617	635	886				
SR	580	597	970	892				
TR	541	389	210					
Total	3,985	3,679	3,701	3,488	-	-	-	-
Total NEW	1,410	1,589	1,410	955	-	-	-	-

Avg Billed Calculation		
	Spring	Fall
Inputs	3,331	3,701
Avg		3,516
Melt %		11%
Melt #		(366)
Net		3,150
XRG		(100)
Avg Billable Students		3,050

Enrollment Projection Using Provided FY23 Enrollment					
		Year 1FY23	Year 2FY24	Year 3FY25	Year 4 FY26
Inputs					
First Year Students	1200	1,200	1,200	1,200	1,200
Sophomores		686	876.00	876	876
Juniors		635	617.00	788.00	788.00
Seniors		970	597.00	580.00	741.00
Transfers	210	210	389	541	670
		3,701	3,679	3,985	4,275

* This calculation found in EM Folder, Disc Rate projections don't use Melt Rate in the projections
 * Avg billed in Disc Rate projections uses FY->So persistence rate of 90%
 * Also, FY23 projections don't use the XRG student deduction for Avg Billed Students

Persistence rate per enrollment model (73%,90%,94%)
 ** Assumes 1200 new FY and 210 new transfers each year. FY students 73% retention, Transfers @ 85%
 --> no data on transfer retention, applied an average rate of 85%

FY23 Scenario Model uses 3215 Billable Students for a revenue projection
 FY23 FinAid budget in model appears to be about \$4.5MM, it's a bit unclear with all the Strategic plan pieces from previous years.

FY20	
New Frosh	1060
Frosh	73
Soph	847
Juniors	835
Seniors	1117
New Transf	288
Totals	4220

Undergraduadergraduate		
	Enrollment	Enrollment
	(Budgeted)	(Actual)
	Budget	Actual
FY 2013	4,475	4,391
FY 2014	4,675	4,612
FY 2015	4,675	4,540
FY 2016	4,500	4,643
FY 2017	4,372	4,645
FY 2018	4,350	4,526
FY 2019	4,350	4,241
FY 2020	4,223	3,940
FY 2021	3,550	3,463
FY2022	3,214	

Total	3,985	3,679	3,701	3,488	3,463	3,940	4,241	4,526	
FY Retntn	0.9	3,586.50	3,311.10	3,330.90	3,139.20	3116.7	3546	3816.9	4073.4
		3,785.75	3,495.05	3,515.95	3,313.60	3,289.85	3,743.00	4,028.95	4,299.70
XRG		(100)	(100)	(100)	(100)	(100)	(100)	(100)	(100)
Avg Billed		3,685.75	3,395.05	3,415.95	3,213.60	3,189.85	3,643.00	3,928.95	4,199.70
Revenue									
Fees	\$	12,397.68	12,036.58	11,686	11,324	11,139	10,849	10,429	9,867
FY	\$	14,877,213	14,443,896	14,023,200	10,814,420	-	-	-	-
SO	\$	10,860,365	10,544,044	8,016,596	8,549,620	-	-	-	-
JR	\$	9,769,370	7,426,570	7,420,610	10,033,064	-	-	-	-
SR	\$	7,190,653	7,185,838	11,335,420	10,101,008	-	-	-	-
TR	\$	6,707,143	4,682,230	2,454,060	-	-	-	-	-
Total NEW		17,480,725	19,126,126	16,477,260	10,814,420	-	-	-	-
Total	\$	49,404,744	44,282,578	43,249,886	39,498,112	-	-	-	-

Fin Aid Budget									
Avg Billed		3,685.75	3,395.05	3,415.95	3,213.60	3,189.85	3,643.00	3,928.95	4,199.70
Net Rev	Gross Revenue	\$ 45,694,739	\$ 40,864,791	\$ 39,918,792	\$ 36,390,806	\$ 35,531,739	\$ 39,522,907	\$ 40,975,020	\$ 41,438,440
Aid	Fin Aid	\$ 6,408,418.55	\$ 5,322,398.75	\$ 4,800,000	\$ 3,733,262	\$ 3,064,722	\$ 3,000,369	\$ 2,845,140	\$ 2,583,719
Net	Net Rev	\$ 39,286,321	\$ 35,542,392	\$ 35,118,792	\$ 32,657,544	\$ 32,467,017	\$ 36,522,538	\$ 38,129,880	\$ 38,854,721

Disc. Rate	Disc Rate	14.0%	13.0%	12.0%	10.26%	8.6%	7.6%	6.9%	6.2%
FY Rate	FY Rate	0.16							
		\$ 2,380,354	\$ 2,311,023	\$ 2,243,712	\$ 1,730,307	\$ -	\$ -	\$ -	\$ -
	Disc Rate increase	1.0%	1.0%	1.8%	1.6%	1.0%	0.6%	0.7%	

* Fee increase at 3%
 Increased in Fin Aid Amt projection is Previous Year calc Rate + 1%

*This doesn't include the Strat. Invest \$
 ** Revenue #'s don't match the spreadsheet given in FY23, Math doesn't work for all years except TR, it's about \$1500 off. Spot on in FY22
 *FY23 Projection also doesn't account for XRG students in the Avg billed number
 ** Data collected from 10Year Enrollment Cohort Model 6.22.21 v2

simone #'s round 1
 - Includes: Merit and Need combined, no FWS match, No CGCE Grant, but yes CGCE student Aid
 CGCE grant #'s given in email if needed

	Orig. FinAid from Simone	From WebFocus BudvsAct		
		Fund 2311 0 #s	Budg Act	
FY21	\$ 3,244,133	FY22	\$ 3,710,770	
FY20	\$ 3,095,424	FY21	\$ 3,162,995	\$ 3,161,698
FY19	\$ 2,918,873	FY20	\$ 3,235,424	\$ 3,247,491
FY18	\$ 2,660,710	FY19	\$ 2,853,874	\$ 2,854,873
		FY18	\$ 2,595,774	\$ 2,593,674

FY18 \$2,583,719
 FY19 \$2,845,140
 FY20 \$3,000,369
 FY21 \$3,064,722

Spring		Fall	
	3,300		3,400
Avg			3,350
	11%		(363) Melt rate - applies to total enrollment (one academic year)
Net			2,987
	Students - XRG		(100) Junior / Senior - CGCE Students
Enrollment			2,887 Avg Billable Students

S:\Budgets\FY23 Budget\FY23 Enrollment\Simple_BillableEnrollment_Calc.xlsx

2021-2022 Institutional Grant Funds \$3,633,262 (August 12, 2021)							FY		SO		JR		SR	
Fund Name	FA Fund Code	AR Detail Code	Type of aid	2021 Award Amt	Projected Award Amt	Current Award Amt	Awarded		Awarded		Awarded		Awarded	
Tsongas Schol	TSON/TSONTW	TSON / 8061	Merit	164,737	172,873	172,873	2	20338	2	20338	5	50845	8	81352
Presidential Merit	PRES	PRES	Merit	134,000	56,000	56,000			2	8,000	10	40,000	2	8,000
	PRESM	PREM	Merit	0	564,500	564,500	139	548500	4	16000	0	0	0	0
Leadership Schol	LEADSH	LDSH	Merit	769,000	1,141,376	1,141,376	225	441518	175	346179	88	171491	97	182188
Dean Scholarship	DEAN	DEAN	Merit	310,500	520,134	520,134	320	317634	197	195000	8	7500	0	0
Out of State Schol	OSCH	OSCH	Merit	395,788	605,448	605,448	51	250448	30	150000	25	125000	16	80000
International Schol	INSTSC	INST	Merit	10,000	15,000	15,000	2	10000	0	0	0	5000		
UE Summer Bridge Sch	WSCIGR	WIGR	Merit	39,500	115,144	115,144	35	69144	23	46000				
UE Housing Sch	UEHOUS	UEHS	Merit/(Need)	0	42,000	42,000	14	42000						
Honors Book Award	HNRS	HNRS	Merit	91,125	164,719	164,719	112	82,969	34	25500	63	46875	13	9375
Westfield Promise Sch	WPROM	WEXP	Merit	14,000	12,000	12,000	3	6,000	2	4,000	1	2,000		
Alumni Legacy Sch	ALUMNI	ALUM	Merit	3,500	76,500	76,500	55	54500	12	9500	12	11500	1	1000
CAHSS Creative Act Sch	CREATE	CRSH	Merit	0	1,000	1,000	1	1,000						
CAHSS Social Justice Sch	SOCJUS	SJSH	Merit	0	2,000	2,000	2	2,000						
Nettie Stevens STEM Sch	STEM	STEM	Merit	0	1,000	1,000	1	1,000						
2122 Housing Schol	HO2122	HSCH	Incentive	0	176,750	176,750								
Nest Incentive	NEST	NEST	Incentive	30,000	0	0								
Spring 2021 Hous Sch	HOUS21	HSSH	Incentive	52,200	0	0								
University Hous Grnt	COLHSG	HSSH	Need	0	398,423	398,423	64	253,977	20	47,070	23	61,980	9	35396
University Grnt	COLSCH	CSCH	Need	876,128	87,686	87,686	26	27,395	3	3,135	8	17,005	13	40,151
WSU Appeal Schol	WSCSCH	WSCH	Appeal	33,000	21,000	21,000	3	3,000	1	4,000	4	7,000	4	7,000
WSU Housing Schol	WSUMTS	MTSS	Appeal	7,250	152,423	152,423	70	136,423	7	10,000	2	4,000	1	2,000
OWL Scholarship	WSCGRA	WGRA	Appeal	238,285	195,500	195,500	7	10000	32	47500	34	67000	36	71000
Total				3,169,013	4,521,476	4,521,476	FY	2277846	SO	932222	JR	617196	SR	517462
total funds remaining						0								
Overbudget						-711,464								
Overbudget (no reserve)						-888,214								

**Westfield State University
Financial Aid Analysis**

	FY20	FY21	FY22	Diff Incr/(Decr)
Base	2,807,325	3,048,875	3,711,713	
50% of Res Life Fee Increase	116,550			
Strategic Investment	125,000	250,000		
Strategic Plan Proposed Incr.	60,000	60,000		
Financial Aid increase		94,120		
October 2020 Budget Adjustment		(27,224)		
2020-2021 Budget Decrease		(250,000)		
Subtotal	\$ 3,108,875	\$ 3,175,771	\$ 3,711,713	\$ 535,942
Work Study 25% Match	(78,451)		(78,451)	
Net-Available for Institutional Aid	\$ 3,030,424	\$ 3,175,771	\$ 3,633,262	\$ 457,491

Notes:

1. Work Study reduction represents geography in the general ledger and not an actual reduction to
2. Work Study in FY20 is yet to be determined
3. Residential Life Fee Increase is cumulatively added to the base each year

Financial Aid Sample Students



Direct Billed Cost & Gap for “Loan Only” Students...

2022-2023

Calculate Your Cost

MA Resident, On Campus

University Direct Costs

Tuition		\$970.00
Fees		\$10,530.00
Housing*		\$8,300.00
Meal Plan**		\$4,724.00
Total		\$24,524.00

*housing is flat rate except for premium private rooms

**meal plan cost is based on unlimited meal plan

Financial Aid

Federal Direct Loan(s)		\$5,500.00
Total “Aid”		\$5,500.00
Total Gap		\$19,024.00

Sample Student: EFC, 25,517, family size 4 with 1 in college

Adjusted Gross Income: \$109,845; \$132,000 “assets”



Direct Billed Cost & Gap for Students Just Above Pell...

2022-2023		
Calculate Your Cost		
MA Resident, On Campus		
<u>University Direct Costs</u>		
Tuition		\$970.00
Fees		\$10,530.00
Housing*		\$8,300.00
Meal Plan**		\$4,724.00
Total		\$24,524.00
<small>*housing cost is flat rate except premium private</small>		
<small>**meal plan cost is based on unlimited meal plan</small>		
<u>Financial Aid</u>		
WSU Univeristy Funds		\$3,170.00
State Grants & Tuition Waiver		\$4,970.00
Loans		\$5,500.00
Total		\$13,640.00
Total Gap		\$10,884.00
Sample Student: EFC 6964		Adjusted Gross Income
Family Size 4 with 1 in college		68,977; \$32,000 "assets"



Direct Billed Cost & Gap for students with a “0” EFC...

2022-2023		
Calculate Your Cost		
MA Resident, On Campus		
<u>University Direct Costs</u>		
Tuition		\$970.00
Fees		\$10,530.00
Housing*		\$8,300.00
Meal Plan**		\$4,724.00
Total		\$24,524.00
<small>*housing cost is flat rate except premium private</small>		
<small>**meal plan cost is based on unlimited meal plan</small>		
<u>Financial Aid (Initial Award)</u>		
Pell & Mass Grant		\$9,695.00
State Aid & WSU Funds		\$4,470.00
Loans		\$5,500.00
Total		\$19,665.00
Total Gap		\$4,859.00
Sample Student: EFC 0	Parent Not Tax Filer	
Family Size 4 with 1 in college	Reported Wages: \$785.00	



Deposit Profile Report

FIRST YEAR STUDENTS

10/3/2022

Fall 2022			Fall 2021			Fall 2020			Fall 2019		
Total Deposits											
Total Deposits	797		Total Deposits	798		Total Deposits	830		Total Deposits	1039	
In-state	713	89.5%	In-state	722	90.5%	In-state	752	90.6%	In-state	945	91.0%
Out-of-state	84	10.5%	Out-of-state	76	9.5%	Out-of-state	78	9.4%	Out-of-state	94	9.0%
Race/Ethnicity											
AALANA	29.2%		AALANA	22.1%		AALANA	28.7%		AALANA	23.7%	
Housing											
Housing	641	80.4%	Housing	625	78.3%	Housing	566	68.2%	Housing	903	86.9%
Commuter	156	19.6%	Commuter	173	21.7%	Commuter	264	31.8%	Commuter	136	13.1%
Top 5 Majors											
Undeclared/Exploratory	126	15.8%	Criminal Justice	118	14.8%	Criminal Justice	150	18.1%	Criminal Justice	193	18.6%
Criminal Justice	111	13.9%	Undeclared/Exploratory	115	14.4%	Undeclared/Exploratory	149	18.0%	Undeclared/Exploratory	174	16.7%
Business*	93	11.7%	Education	83	10.4%	Business	85	10.2%	Business	113	10.9%
Psychology	71	8.9%	Business	81	10.2%	Education	81	9.8%	Education	99	9.5%
Education**	60	7.5%	Psychology	65	8.1%	Psychology	62	7.5%	Psychology	73	7.0%
Top MA Counties											
Hampden	252	31.6%	Hampden	249	31.2%	Hampden	206	24.8%	Hampden	253	24.4%
Worcester	103	12.9%	Worcester	118	14.8%	Worcester	133	16.0%	Middlesex	141	13.6%
Middlesex	69	8.7%	Middlesex	82	10.3%	Norfolk	91	11.0%	Worcester	132	12.7%
Norfolk	67	8.4%	Norfolk	68	8.5%	Middlesex	84	10.1%	Norfolk	94	9.0%
Hampshire	46	5.8%	Hampshire	40	5.0%	Hampshire	56	6.7%	Plymouth	80	7.7%
Plymouth	46	5.8%	Plymouth	40	5.0%	Plymouth	45	5.4%	Essex	60	5.8%
Essex	43	5.4%	Essex	34	4.3%	Bristol	40	4.8%	Berkshire	52	5.0%
Berkshire	31	3.9%	Bristol	33	4.1%	Essex	31	3.7%	Hampshire	45	4.3%
Bristol	28	3.5%	Berkshire	30	3.8%	Berkshire	26	3.1%	Bristol	37	3.6%
Franklin	11	1.4%	Franklin	12	1.5%	Barnstable	16	1.9%	Barnstable	22	2.1%
Barnstable	8	1.0%	Barnstable	11	1.4%	Franklin	15	1.8%	Suffolk	19	1.8%
Suffolk	7	0.9%	Suffolk	5	0.6%	Suffolk	13	1.6%	Franklin	13	1.3%
Dukes	1	0.1%	Dukes	0	0.0%	Dukes	1	0.1%	Dukes	0	0.0%
Nantucket	1	0.1%	Nantucket	0	0.0%	Nantucket	0	0.0%	Nantucket	0	0.0%
Top Out-of-state Counties											
Hartford (CT)	30	3.8%	Hartford (CT)	23	2.9%	Hartford (CT)	33	4.0%	Hartford (CT)	41	3.9%
Tolland (CT)	5	0.6%	Tolland (CT)	12	1.5%	Litchfield (CT)	4	0.5%	Tolland (CT)	10	1.0%
Suffolk (NY)	4	0.5%	New London (CT)	4	0.5%	Tolland (CT)	3	0.4%	Rockingham (NH)	5	0.5%
New Haven (CT)	3	0.4%	Hillsborough (NH)	4	0.5%	Fairfield (CT)	3	0.4%	New Haven (CT)	4	0.4%

*Business includes students coming through Accounting, Finance, Marketing, & Management programs

**Education includes students enrolling in Early Childhood Education, Elementary Education, & Special Education

Deposit Profile Report

TRANSFER STUDENTS

10/3/2022

Fall 2022			Fall 2021			Fall 2020			Fall 2019		
Total Deposits											
Total Deposits	213		Total Deposits	201		Total Deposits	239		Total Deposits	289	
In-state	190	89.2%	In-state	178	88.6%	In-state	212	88.7%	In-state	262	90.7%
Out-of-state	23	10.8%	Out-of-state	23	11.4%	Out-of-state	27	11.3%	Out-of-state	27	9.3%
Race/Ethnicity											
AALANA	32.1%		AALANA	28.3%		AALANA	33.8%		AALANA	33.3%	
Housing											
Housing	100	46.9%	Housing	78	38.8%	Housing	60	25.1%	Housing	104	36.0%
Commuter	113	53.1%	Commuter	123	61.2%	Commuter	179	74.9%	Commuter	185	64.0%
Top 5 Majors											
Business	53	24.9%	Business	31	15.4%	Criminal Justice	37	15.5%	Criminal Justice	49	17.0%
Criminal Justice	26	12.2%	Criminal Justice	29	14.4%	Business	26	10.9%	Business	38	13.1%
Psychology	20	9.4%	Education	18	9.0%	Psychology	23	9.6%	Biology	22	7.6%
Social Work	15	7.0%	Psychology	14	7.0%	Social Work	20	8.4%	Psychology	21	7.3%
Biology	9	4.2%	Health Science	10	5.0%	Education	15	6.3%	Movement Science	20	6.9%
Top MA Counties											
Hampden	110	51.6%	Hampden	111	55.2%	Hampden	128	53.6%	Hampden	158	54.7%
Hampshire	19	8.9%	Hampshire	22	10.9%	Hampshire	31	13.0%	Hampshire	27	9.3%
Berkshire	18	8.5%	Worcester	10	5.0%	Berkshire	12	5.0%	Berkshire	26	9.0%
Worcester	16	7.5%	Middlesex	7	3.5%	Worcester	11	4.6%	Worcester	21	7.3%
Middlesex	7	3.3%	Norfolk	6	3.0%	Middlesex	9	3.8%	Plymouth	8	2.8%
Bristol	5	2.3%	Plymouth	5	2.5%	Plymouth	6	2.5%	Middlesex	7	2.4%
Suffolk	4	1.9%	Barnstable	5	2.5%	Norfolk	5	2.1%	Norfolk	7	2.4%
Franklin	3	1.4%	Bristol	4	2.0%	Barnstable	4	1.7%	Barnstable	5	1.7%
Norfolk	3	1.4%	Berkshire	3	1.5%	Franklin	4	1.7%	Bristol	2	0.7%
Essex	2	0.9%	Franklin	3	1.5%	Essex	2	0.8%	Franklin	1	0.3%
Barnstable	2	0.9%	Essex	1	0.5%	Bristol	0	0.0%	Essex	0	0.0%
Plymouth	1	0.5%	Suffolk	1	0.5%	Suffolk	0	0.0%	Suffolk	0	0.0%
Dukes	0	0.0%	Dukes	0	0.0%	Dukes	0	0.0%	Dukes	0	0.0%
Nantucket	0	0.0%	Nantucket	0	0.0%	Nantucket	0	0.0%	Nantucket	0	0.0%
Top Out-of-state Counties											
Hartford (CT)	7	3.3%	Hartford (CT)	9	4.5%	Hartford (CT)	12	5.0%	Hartford (CT)	13	4.5%
Tolland (CT)	3	1.4%	Tolland (CT)	5	2.5%	Windham (CT)	2	0.8%			
All Others	1		Suffolk (NY)	2	1.0%	Albany (NY)	2	0.8%			

Deposit Profile Report

Ethnicity Breakdown

10/3/2022

FIRST YEAR STUDENTS				TRANSFER STUDENTS			
Ethnicity	Race	Total Students	% of Total	Ethnicity	Race	Total Students	% of Total
Hispanic or Latino	American Indian/Alaskan Native	2	0.25%	Hispanic or Latino	American Indian/Alaskan Native	1	0.47%
	Asian	1	0.13%		Asian	0	0.00%
	Black/African American	18	2.26%		Black/African American	7	3.30%
	Cape Verdean	0	0.00%		Cape Verdean	0	0.00%
	Multiple Races	9	1.13%		Multiple Races	6	2.83%
	Native Hawaiian/ Pacific Islander	0	0.00%		Native Hawaiian/ Pacific Islander	2	0.94%
	No Race	42	5.27%		No Race	5	2.36%
	White	52	6.52%		White	12	5.66%
Not Hispanic/Latino	American Indian/Alaskan Native	5	0.63%	Not Hispanic/Latino	American Indian/Alaskan Native	0	0.00%
	Asian	12	1.51%		Asian	2	0.94%
	Black/African American	60	7.53%		Black/African American	0	0.00%
	Cape Verdean	0	0.00%		Cape Verdean	0	0.00%
	Multiple Races	30	3.76%		Multiple Races	0	0.00%
	Native Hawaiian/ Pacific Islander	0	0.00%		Native Hawaiian/ Pacific Islander	0	0.00%
	No Race	8	1.00%		No Race	2	0.94%
	White	535	67.13%		White	8	3.77%
None	American Indian/Alaskan Native	0	0.00%	None	American Indian/Alaskan Native	0	0.00%
	Asian	1	0.13%		Asian	5	2.36%
	Black/African American	0	0.00%		Black/African American	20	9.43%
	Cape Verdean	0	0.00%		Cape Verdean	0	0.00%
	Multiple Races	1	0.13%		Multiple Races	6	2.83%
	Native Hawaiian/ Pacific Islander	0	0.00%		Native Hawaiian/ Pacific Islander	0	0.00%
	No Race	12	1.51%		No Race	0	0.00%
	White	9	1.13%		White	136	64.15%
Total		797		Total		212	

CGCE Fall 2019-2022 -FINAL		DISTINCT STUDENT COUNT					SEAT COUNT					CREDITS				
COLLEGE	STUDENT_TYPE	Fall 2019	Fall 2020	Fall 2021	Fall 2022	Variance	Fall 2019	Fall 2020	Fall 2021	Fall 2022	Variance	Fall 2019	Fall 2020	Fall 2021	Fall 2022	Variance
Evening Undergraduate (UCE)*	MATRIC	611	571	485	489	0.82%	1,655	1,508	1,312	1,373	4.44%	5,064.5	4,665.0	4,027.0	4,208.5	4.31%
	NON-MATRIC	37	48	24	21	-14.29%	71	79	41	46	10.87%	220.0	246.0	125.0	142.0	11.97%
TOTAL- Evening Undergraduate (UCE)		648	619	509	510	0.20%	1,726	1,587	1,353	1,419	4.65%	5,284.5	4,911.0	4,152.0	4,350.5	4.56%
Graduate (GCE)	MATRIC	616	656	649	631	-2.85%	1,503	1,700	1,672	1,641	-1.89%	4,894.0	5,343.5	5,330.5	5,366.0	0.66%
	NON-MATRIC	42	36	17	20	15.00%	46	41	25	29	13.79%	136.0	135.0	64.5	90.0	28.33%
TOTAL - Graduate (GCE)		658	692	666	651	-2.30%	1,549	1,741	1,697	1,670	-1.62%	5,030.0	5,478.5	5,395.0	5,456.0	1.12%
TOTAL - CGCE		1,306	1,311	1,175	1,161	-1.21%	3,275	3,328	3,050	3,089	1.26%	10,314.5	10,389.5	9,547.0	9,806.5	2.65%
Undergraduate Day School	MATRIC (XRG)	54	52	114	36	-216.67%	105	113	280	73	-283.56%	307.0	325.5	805.5	211.0	-281.75%
	MATRIC (non-XRG)	270	240	254	167	-52.10%	305	279	289	211	-36.97%	929.0	847.0	887.0	649.0	-36.67%
Total Date to Date Comparison		1,360	1,551	1,429	1,328	-7.61%	3,380	3,607	3,339	3,300	-1.18%	10,621.5	10,715.0	10,352.5	10,017.5	-3.34%

*Does not include Westfield Promise or Dual Enrollment

Fall 2022 Physician Assistant Studies

COLLEGE	STUDENT_TYPE	DISTINCT STUDENT COUNT	SEAT COUNT	CREDITS	AVG SEATS TAKEN
Graduate (GCE)	MATRIC	57	398	1,181.0	6.9825
*TOTAL COLLEGE Graduate (GCE)		57	398	1,181.0	6.9825
*TOTAL COLL_TYPE CGCE		57	398	1,181.0	6.9825
*TOTAL TERM 202285		57	398	1,181.0	6.9825

Graduate and Continuing Ed - Fall Funnel Report

Data for Fall 2022 pulled on September 13, 2022

		Fall 2017		Fall 2018		Fall 2019		Fall 2020		Fall 2021		Fall 2022	
LEVL	SOURCE	COUNT	RATIO	COUNT	RATIO	COUNT	RATIO	COUNT	RATIO	COUNT	RATIO	COUNT	RATIO
GR	RECRUITED	544	.00%	862	.00%	1042	.00%	985	.00%	888	.00%	868	.00%
	APPLIED	352	64.71%	342	37.66%	436	41.84%	410	41.62%	398	44.82%	378	43.55%
	ACCEPTED	244	69.32%	250	87.11%	251	57.57%	256	62.44%	262	65.83%	261	69.05%
	ENROLLED	197	80.74%	204	81.60%	192	76.49%	219	85.55%	215	82.06%	219	83.91%
PB	RECRUITED	30	.00%	56	.00%	48	.00%	36	.00%	31	.00%	57	.00%
	APPLIED	29	96.67%	37	66.07%	29	60.42%	27	75.00%	10	32.26%	21	36.84%
	ACCEPTED	19	65.52%	26	70.27%	24	82.76%	26	96.30%	6	60.00%	19	90.48%
	ENROLLED	16	84.21%	22	84.62%	16	66.67%	18	69.23%	2	33.33%	17	89.47%
SB	RECRUITED	25	.00%	48	.00%	49	.00%	27	.00%	34	.00%	36	.00%
	APPLIED	23	92.00%	24	50.00%	26	53.06%	9	33.33%	13	38.24%	13	36.11%
	ACCEPTED	22	95.65%	19	79.17%	22	84.62%	8	88.89%	10	76.92%	11	84.62%
	ENROLLED	10	33.33%	13	68.42%	16	72.73%	5	62.50%	7	70.00%	7	63.64%
UG	RECRUITED	294	.00%	405	.00%	498	.00%	407	.00%	382	.00%	377	.00%
	APPLIED	221	75.17%	207	51.11%	216	43.37%	153	37.59%	166	43.46%	184	48.81%
	ACCEPTED	155	70.14%	148	71.50%	160	74.07%	127	83.01%	122	73.49%	142	77.17%
	ENROLLED	104	67.10%	103	69.59%	137	85.63%	118	92.91%	97	79.51%	104	73.24%
TOTAL RECRUITS		893		1371		1637		1455		1335		1338	
TOTAL APPS		625		610		707		599		587		596	
TOTAL ACCEPTS		440		443		457		417		400		433	
TOTAL ENROLL		327		342		361		360		321		347	

**Graduate and Continuing Ed - Recruit Funnel for Spring Terms
Data Pulled for Spring 2023 on October 4, 2022**

		Spring 2018		Spring 2019		Spring 2020		Spring 2021		Spring 2022		Spring 2023		D2D Compare Spring 2022 as of 10/26/2021	
LEVL	SOURCE	COUNT	RATIO	COUNT	RATIO	COUNT	RATIO	COUNT	RATIO	COUNT	RATIO	COUNT	RATIO	COUNT	RATIO
GR	RECRUITED	102	.00%	120	.00%	145	.00%	128	.00%	109	.00%	110	.00%	100	.00%
	APPLIED	56	54.90%	55	45.83%	59	40.69%	70	54.69%	44	40.37%	29	26.36%	39	39.00%
	ACCEPTED	28	50.00%	44	80.00%	37	62.71%	59	84.29%	34	77.27%	12	41.38%	11	28.21%
	ENROLLED	20	71.43%	41	93.18%	36	97.30%	52	88.14%	29	85.29%	0	.00%	1	9.09%
PB	RECRUITED	23	.00%	21	.00%	22	.00%	12	.00%	27	.00%	17	.00%	28	.00%
	APPLIED	15	65.22%	15	71.43%	14	63.64%	8	66.67%	14	51.85%	5	29.41%	19	67.86%
	ACCEPTED	10	66.67%	13	86.67%	10	71.43%	8	100.00%	11	78.57%	4	80.00%	11	57.89%
	ENROLLED	9	90.00%	6	46.15%	6	60.00%	7	87.50%	7	63.64%	0	.00%	0	.00%
SB	RECRUITED	20	.00%	29	.00%	18	.00%	14	.00%	20	.00%	14	.00%	13	.00%
	APPLIED	11	55.00%	14	48.28%	12	66.67%	7	50.00%	10	50.00%	4	28.57%	7	53.85%
	ACCEPTED	10	90.91%	10	71.43%	5	41.67%	7	100.00%	9	90.00%	1	25.00%	4	57.14%
	ENROLLED	5	50.00%	7	70.00%	5	100.00%	6	85.71%	6	66.67%	0	.00%	0	.00%
UG	RECRUITED	175	.00%	200	.00%	194	.00%	174	.00%	145	.00%	93	.00%	122	.00%
	APPLIED	106	60.57%	132	66.00%	106	54.64%	77	44.25%	80	55.17%	44	47.31%	70	57.38%
	ACCEPTED	65	61.32%	87	65.91%	72	67.92%	55	71.43%	55	68.75%	13	29.55%	24	34.29%
	ENROLLED	46	70.77%	65	74.71%	63	87.50%	42	76.36%	30	54.55%	0	.00%	0	.00%
TOTAL RECRUITS		320		370		379		328		301		234		263	
TOTAL APPS		188		216		191		162		148		82		135	
TOTAL ACCEPTS		113		154		124		129		109		30		50	
TOTAL ENROLL		80		119		110		107		72		0		1	

M.S. in Physician Assistant Studies - Spring 2023

Funnel Stage	Physician Assistant	Goal	% to Goal
Prospect	667	350	190.6%
Applications Submitted	365	200	182.5%
Admits	30	30	100.0%
Confirmed	16	30	53.3%
Enrolled	0	30	0.0%



**OFFICE OF ADMISSION
RECRUITMENT PLAN
2022-2023**

People don't buy WHAT you do, they buy WHY you do it.
Simon Sinek

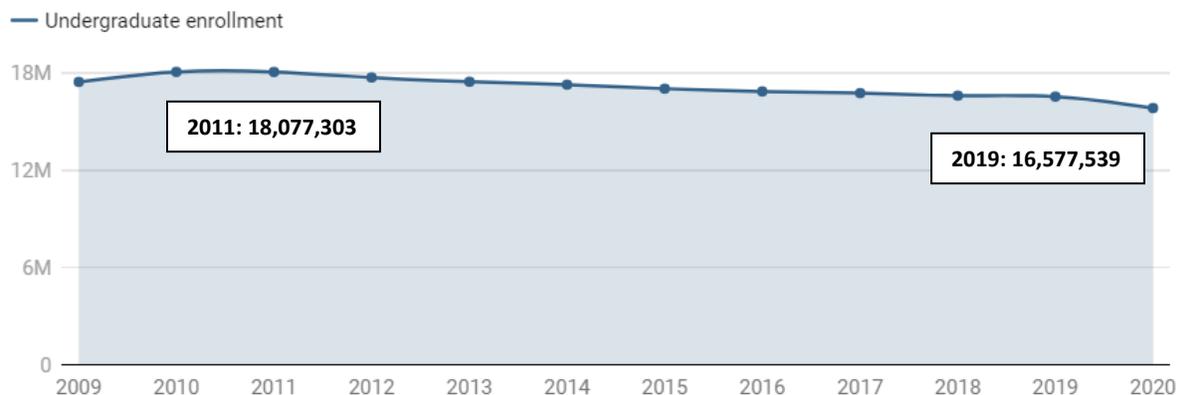
ENROLLMENT LANDSCAPE

The college admission landscape has become more volatile over the past decade and forecasts predict seismic shifts to come. This is especially noteworthy considering that it comes on the heels of an extended 40-year period of stable college enrollments. While the COVID-19 pandemic has exacerbated the decline in enrollment, the true genesis of this decline can be traced back to the early 2010's.

Data from the "Report on the Condition of Education 2022" produced by the National Center for Education Statistics show the slide in undergraduate enrollment began in 2011. By Fall 2019, the number of undergraduates had shrunk by more than 1.5 million students (June, 2022).

A Multi-Year Decline

Between the fall of 2011, when undergraduate enrollment began to dip, and the fall of 2020, undergraduate enrollment fell 12.3 percent.



Note: Data are for institutions that grant associate degrees or higher in the 50 states and the District of Columbia that participate in Title IV federal financial-aid programs.

Chart: Audrey Williams June • Source: [Source: National Center for Education Statistics](#) • [Get the data](#) • Created with [Datawrapper](#)

Additionally, higher education is seeing a decline in the number of male students attending college. While the decline in females and males had been relatively even across years, the Fall 2020 semester saw the number of males decline by 7 percent from the year prior (June, 2022).

Steady Decline, Sharp Drop

The decline in college enrollment for men and women was similar for several years – until the fall of 2020, when the share of men dropped more steeply.

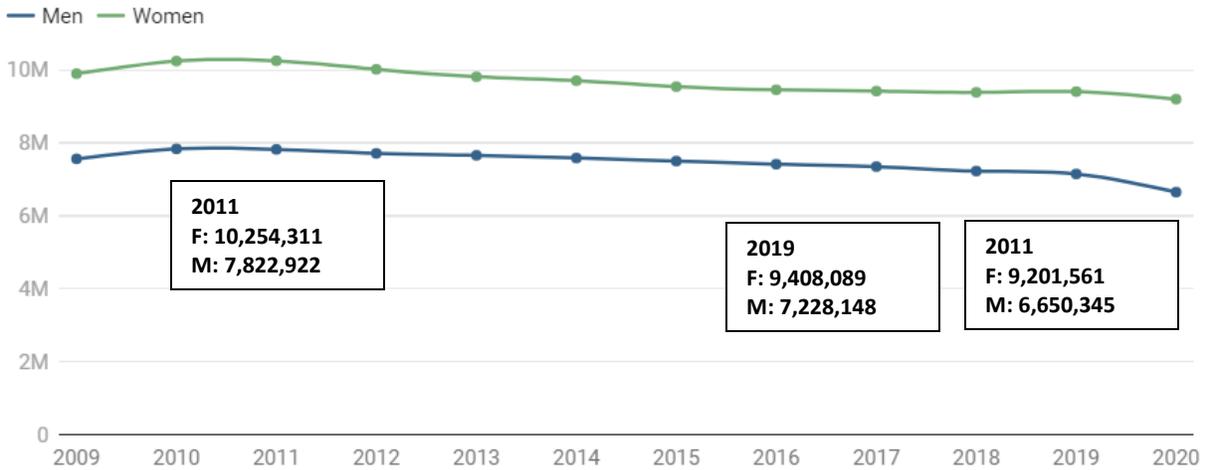


Chart: Audrey Williams June • Source: [Source: National Center for Education Statistics](#) • [Get the data](#) • Created with [Datawrapper](#)

Looking at the most recent Spring data available, the National Student Clearinghouse reports that total undergraduate enrollment for Spring 2022 fell by 4.7 percent nationally. This would mark the 5th straight semester of declining enrollment, and a loss of 1.4 million students since the beginning of the pandemic (Moody, 2022).

With rising costs for higher education becoming a barrier, as well as the push by the Biden Administration to encourage schools to prepare students by teaching workforce skills, the growing question seems to be “is college worth it?” A student from Georgetown University’s Center on Education and the Workforce showed that that at one third of colleges and universities, more than 50 percent of students who enrolled were earning less than a high school graduate 10 years later (Camera, 2022). For reference, it was reported for Westfield State University that 76% of our graduates were making more than a high school graduate 10 years after graduation (Georgetown University Center on Education and the Workforce, 2022).

Regional public institutions have been experiencing declines since the start of the pandemic. In comparing Fall 2019 to Fall 2020, regional public school enrollments dropped 2 percent nationwide (more than 65,000 students). Each state in New England saw a decline, with Vermont faring the worst with a drop of 17 percent; Massachusetts saw 4.2 percent decline in enrollment. The declines were also felt more by regional public universities in suburbs and towns (drops of 2 percent and 3.3 percent respectively); of note, rural regional public universities only saw a decline of .07 percent (Elias, 2021).

In Massachusetts, the number of high school graduates for 2021 was approximately 68,947. This year represented the highest graduation rate in the state going back to 2006, resulting in more high school graduates in 2021 than previous years (Massachusetts Department of

Elementary & Secondary Education, 2022). However, the college going rate for Massachusetts graduates dropped from 72.2 percent in 2018-19 to 62.7 percent in 2020-21. Additionally, the rate of those choosing to attend a Massachusetts State University dropped from 11.7 percent for 2018-19 to 10.6 percent in 2020-21 (Massachusetts Department of Elementary & Secondary Education, 2022). Finally, Massachusetts ranked 9th in the nation for students leaving the state to attend school, with 33.4% of graduates choosing to study outside Massachusetts (Hanson, 2022).

Gen Z Goes to College

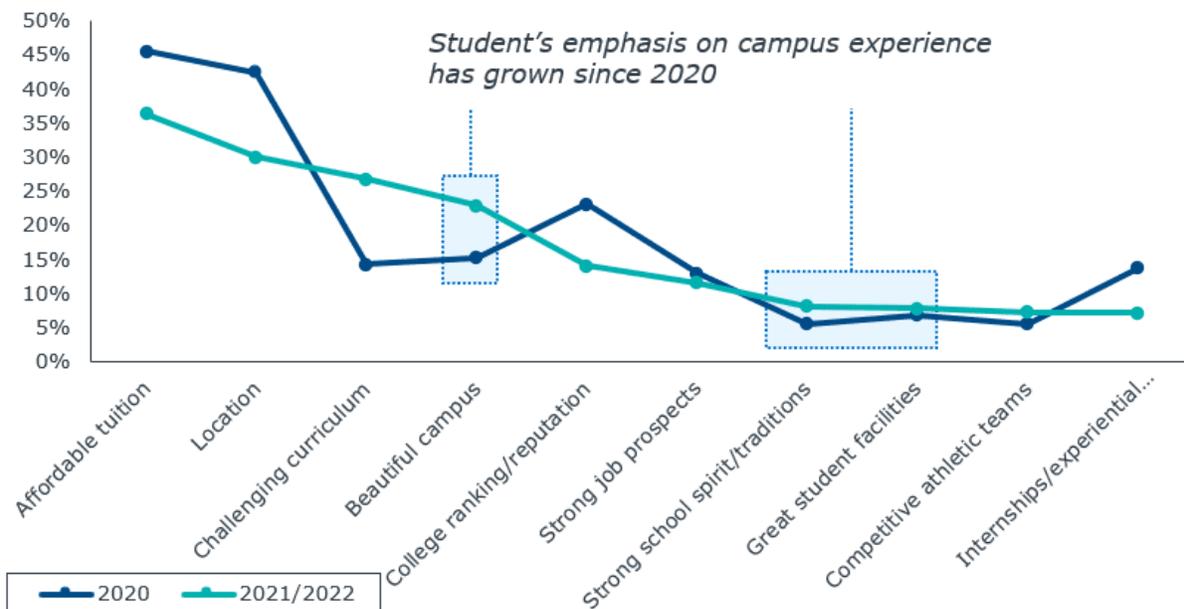
Generation Z has had a unique entry into the world (the first generation to grow up in a post-9/11 world), and their entry into the college landscape has been disrupted time and time again (most notably, by the COVID-19 pandemic). This has led to a shift in the way Gen Z searches, applies, and selects their college.

While Gen Z is much different in how they have grown up and consumed content, the COVID-19 pandemic has dramatically shifted the way Gen Z is now looking at college. To begin with, parents are becoming a larger influence in the search process, with 48% of college going students in 2021/2022 reporting that parents were among their top 5 influencers, compared to 34% in 2019 (Donaldson, 2022). Additionally, 75% of Gen Z students reported to have used at least one virtual tour, compared to only 49% of students in 2020 (Donaldson, 2022).

More importantly, Gen Z are seeking a vibrant campus, which should be no surprise as we are coming out of a pandemic. Consider the following survey of Gen Z students:

“Why did you select the school where you are enrolled?”

Top 10 Responses, Participants Could Pick Up to 3



The key takeaway being that as we look to recruit and retain more students in a post-pandemic world, students are looking for a more active experience. What's more, they are looking for engaging curriculum and a chance to work toward their future goals (Donaldson, 2022).

Additionally, parents still play a large role in how Gen Z will look at, apply to, and ultimately enroll in college. The information parents are looking for changes at each stage of the process; beginning in the Junior year, parents want more information on cost and academics, but shift to areas of support and campus safety in their student's Senior year (EAB, 2022). Ultimately, parents want to be engaged alongside their students, with direct communication in multiple different mediums (including print, email, and social media). As part of the communication, parents need to be engaged directly on costs, but also the value of an education. And of course, ensuring academics are prominently discussed and information is easy to find will continue to be a winning strategy (EAB, 2022).

WESTFIELD STATE UNIVERSITY MISSION, VISION, & VALUES

Mission

Westfield State University is a public institution offering accessible quality undergraduate and graduate programs in the liberal arts, sciences, and professional studies. Our welcoming community focuses on student engagement and success. We contribute to the economic, social, and cultural growth of the northeast region by developing the knowledge, skills, and character essential for students to become responsible leaders and engaged citizens.

Vision

Westfield State University strives to be the premier public comprehensive institution in the Northeast region through its commitment of student engagement and success.

Values

Westfield State University commits to values that strengthen a common bond among all members of our community. These values represent a commitment to others, a commitment to ourselves, and a commitment to a diverse learning environment where everyone is respected.

Our Values:

- **Embrace Diversity:** We treat all members of our community with dignity and respect.
- **Build a Strong Community:** We are inclusive and ensure equity, supporting the personal development of all community members, and embracing multiple perspectives.
- **Maintain Excellence and Integrity:** We maintain excellence and integrity in all that we do.
- **Engage in the Outside Community:** We support civic engagement in local, regional, and global initiatives.
- **Collaborate with Each Other:** We make decisions in a transparent and collaborative means.

- **Provide Accessible Education:** We commit to providing an accessible, affordable public higher education for all.

WESTFIELD STATE UNIVERSITY CHALLENGES

Competition

For the Fall 2021 cohort, 2,605 First Year students and 168 Transfer who chose not to enroll at Westfield State University. Below represent the top 15 institutions students chose to enroll instead of attending Westfield State:

RANK	COLLEGE/UNIVERSITY	TOTAL STUDENTS	PERCENTAGE
1	UNIVERSITY OF MASSACHUSETTS AT AMHERST	143	5%
2	BRIDGEWATER STATE UNIVERSITY	138	5%
3	WORCESTER STATE UNIVERSITY	106	4%
4	SALEM STATE UNIVERSITY	75	3%
5	UNIVERSITY OF MASSACHUSETTS BOSTON	74	3%
6	UNIVERSITY OF NEW HAMPSHIRE- DURHAM	74	3%
7	UNIVERSITY OF MASSACHUSETTS LOWELL	68	2%
8	WESTERN NEW ENGLAND UNIVERSITY	63	2%
9	PLYMOUTH STATE UNIVERSITY	58	2%
10	SPRINGFIELD COLLEGE	55	2%
11	UNIVERSITY OF RHODE ISLAND	54	2%
12	FITCHBURG STATE UNIVERSITY	54	2%
13	UNIVERSITY OF MASSACHUSETTS-DARTMOUTH	53	2%
14	COLLEGE OF OUR LADY OF THE ELMS	50	2%
15	FRAMINGHAM STATE UNIVERSITY	46	2%

Source: National Student Clearinghouse Student Tracker

Of the students who did not enroll, 407 (14 percent) did not have a fall enrollment record. Our top 3 competitors remained the same from Fall 2020, with UMass Amherst overtaking Bridgewater State University at the top spot. Additionally, Elms College and University of New Hampshire replaced our two local community colleges (Springfield Technical Community College and Holyoke Community College) in the top 15 schools.

Institutional & Position Challenges

Westfield State's position in the market is not as strong as it was prior to the COVID-19 pandemic. Enrollment has dropped from a high point of 4,645 full-time undergraduate students in FY17 to 3,215 in FY22, resulting in a 31% decrease in students. New first year students have dropped from 1039 for Fall 2019 to 851 for Fall 2022 (as of July 24, 2022); New transfer students have dropped from 289 for Fall 2019 to 214 for Fall 2022 (as of July 24, 2022).

Westfield State University is in a unique position for a regional public institution in Massachusetts in that we are a more residential heavy population than other institutions. This

leaves the University more dependent on filling residence halls to help cover the cost of auxiliary services. Westfield State University has 2,396 beds on campus, with only 75.7 percent being occupied. Additionally, public transit in Western Massachusetts is not as robust as it is elsewhere in the commonwealth. While Westfield State University is on the PVTA bus lines, there are currently limited routes for students to take, meaning more students need to have their own transportation if they choose to commute to campus.

Pricing and Financial Aid Challenges

The total cost of an undergraduate, residential education at Westfield State University now exceeds \$24,000. Not surprisingly, the total cost elicits sticker shock even for families with the ability to pay. Westfield State has, for the past several years, worked to increase the amount of financial aid offered to students, moving from \$2,932,325 in FY19 to \$3,951,713 FY23. However, Tuition & Fees for resident students have increased from approximately \$21,377 to \$24,394 in that same period.

In the 2022-23 academic year, the Financial Aid Office will be moving to a discount model for financial aid awards, modeling the same method private schools have used for years. Westfield State's raw discount rate for the incoming class was approximately 13% (\$3,171), bringing the true cost closer to \$21,223. In reviewing our external competitors, the latest NACUBO study cites the average discount rate for first-year students climbed to a record high of 54.5 percent in 2021-22, a two-point increase over 2020-21, and a more than three-point increase over 2018-19 (National Association of College and University Business Officers, 2022). This means that many private universities are closer in cost to Westfield State University, negating what had been a major selling-point for regional public universities. Families recognize this, leading to more "negotiations", where families believe they can squeeze a better deal from the University than initially offered.

WESTFIELD STATE UNIVERSITY OPPORTUNITIES

Dual Enrollment Programs

Westfield State hosts the Westfield Promise Dual Enrollment Program. This program engages with students in their Junior year of high school, and provides a lead-up to college for students by allowing them to earn up to 15 credits prior to enrolling. The program works directly with the Holyoke, Springfield, and Westfield Public School Districts, which are areas of growth for the University. Currently, about 25 percent of students in the Westfield Promise program go on to enroll at the University; however, this program provides a dedicated pipeline that the University can work to enhance and strengthen future classes.

International Admissions

Westfield State University recently hired an International Admission Counselor to assist with recruiting and enrolling international students. As the pandemic restrictions begin to lift for international students, this represents an area of potential growth for the University. We have already begun to make changes to the Admission Process and simplify forms for International Students applying to Westfield State. And with dedicated staff who have a better

understanding of the enrollment process to help nurture this population, Westfield State is in a better position to begin recruiting more students from abroad to the University.

New Programs

Opportunity exists for growth at Westfield State University with the introduction of new programs. Starting in Fall 2021, Westfield State introduced a new degree in Music Therapy, blending musicianship with health sciences and clinical field work. At a time when other music programs are closing, this provides us the opportunity to capture this audience. Additionally, Westfield State has added a new program in Data Science for Fall 2023, a high demand field that is only growing in popularity across the United States. The U.S. Bureau of Labor Statistics predicts this field will grow more than any other field, with the degree paying incredibly well (Davenport & Patil, 2022). With the potential for an in demand field, the University will hopefully see a boost in enrollment for students interested in the program.

Fall 2022 represented the last opportunity to enroll students in the Athletic Training major, as the industry standard has moved to a Master's Degree. While this is a loss, the potential now exists to create 3+2 program for Athletic Training. With combination programs becoming more desired for shorter time span to attain multiple credentials, this potential program represents additional opportunities for incoming students.

Moving forward, additional programmatic opportunities in fields such as Cannabis Studies and mediums such as Online Degree Completion would help bring new opportunities for enrollment growth. Additional certificate programs will also help to generate additional enrollment at Westfield State

OFFICE OF ADMISSION

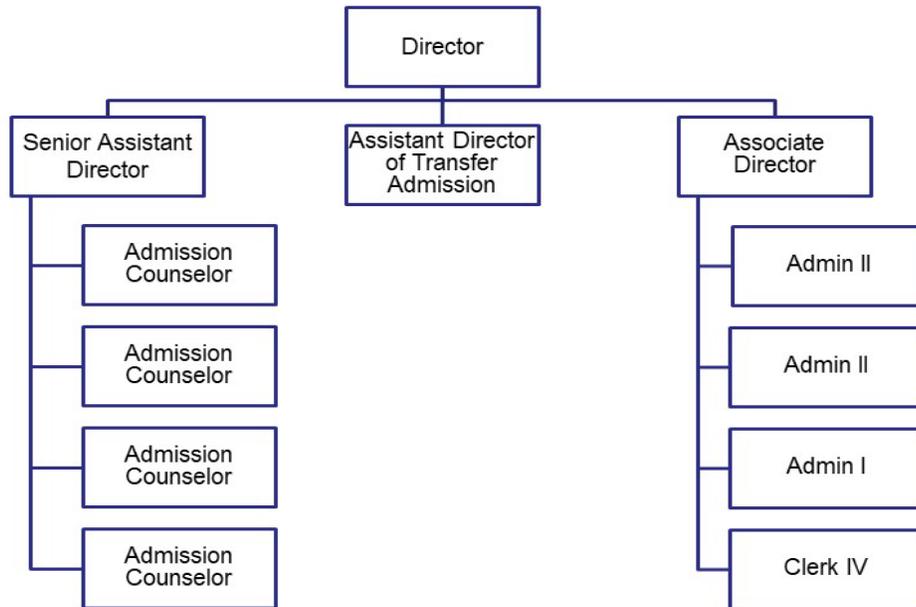
Mission Statement

The Westfield State University Office of Admission leads and coordinates the recruitment efforts for the full-time undergraduate day division at the University. Working collaboratively with the campus and local communities, we strive to identify, recruit, admit, and enroll an academically strong and culturally diverse student body.

Office of Admission Staff

Below is the current organizational chart for the Office of Admission

Undergraduate Admission Office Organizational Chart



OFFICE OF ADMISSION PHILOSOPHY

Start with “Why”

Author Simon Sinek shared in his book “Start With Why” that most organizations communicate what they do and how they do it, but very few share why they do it. In fact, very few companies can articulate why they do what they do. As he writes, “by WHY, I mean what is your purpose, cause or belief? WHY does your company exist? WHY do you get out of bed every morning? And WHY should anyone care?” (Sinek, 2009, p.39).

The Office of Admission has adopted this philosophy as a pragmatic approach to our recruitment efforts. As quoted above, Sinek shares that “people don’t buy WHAT you do, they buy WHY you do it” (2009, p.58). From our perspective, students today do not want to know what makes Westfield State great; they want to know why they should choose Westfield State.

For students looking to attend college, it is an intensely personal choice. In many ways, it is often difficult to articulate why a student chooses their college of choice. They may say it was cost, but there are numerous schools that offer scholarships or financial aid; they may say it is a major, but more often than not, you will find the same major at hundreds of other schools. From our perspective, these are reasons students LOOK at colleges, but they are not the sole reasons students choose them.

So why do they choose their college? We believe that with most students, it was a piece of the campus that spoke to them on a deeper level. It may have been a conversation with a faculty

member, a view of the campus green from the right angle, or perhaps it was a quick comment from a tour guide. Whatever the reason, students CHOOSE a college because they feel it is the right “fit”. Other factors will come in to play, as programs, cost, and location are all important elements. However, the most important element in our minds is that students need to feel that Westfield State is the right fit.

Sharing the Right Fit

The Office of Admission wants students to know why Westfield State University is the right fit, but acknowledge that sharing the right fit is not a universal approach. Each student is unique in their own right, and they want their college search to focus on their passions and aspirations. We know that students want to be engaged – the key is engaging on the right level.

As part of our philosophy, we have been striving to change our conversations, presentations, and campus visits to match what prospective students are looking for. Through conversations with students, we are looking for openings to make stronger connections to Westfield State. This includes taking families on extended tours to visit the Nettie Stevens Science Building, the Nettie Stevens Nursing Labs or the Dower Center for the Performing Arts, or sharing contact information with folks on campus to encourage additional communication.

The right fit is never going to be the same for each student, nor is sharing the information going to be the same for each student. However, we believe that high impact practices that focus on the student’s needs will invariably lead to a more favorable view of the University, and (hopefully), more students viewing Westfield State as the right fit.

RECRUITMENT GOALS, STRATEGIES, AND DELIVERABLES

GOAL #1: Enroll the following classes for the full-time day division

Spring 2023: First-Year Students – 15
Transfer Students – 75
Total Students – 90

Fall 2023: First-Year Students – 850
Transfer Students – 215
Total Students – 1065

Strategies

1. Engage with Enrollment Marketing to promote Westfield State University and nurture our inquiry pool.
 - a. Purchase names through CollegeBoard and Encoura to promote Westfield State University to a wider audience.
 - b. Ensure that students with high engagement scores are contacted directly by Admission Staff to encourage them to attend events, apply, and enroll.
2. Increase Admission Travel to local high schools and community colleges during Fall 2022
 - a. Assign each Admission Counselor 2 local school districts to work directly with during the recruitment cycle.

- b. Visit the 2 local community colleges (Springfield Technical Community College and Holyoke Community College) at least once per month during the Fall and Spring semesters.
 - c. Visit 4 other feeder community colleges (Greenfield Community College, Berkshire Community College, Quinsigamond Community College, and Asnuntuck Community College) at least 1-2 times per semester.
- 3. Improve data entry of inquiry cards that are received by the office and follow up with students accordingly.
 - a. Admission Counselors will work to ensure that any inquiry card received is entered into the CRM within 48 hours of receipt.
 - b. Admission Counselors will follow up directly with students met at high school visits and college fairs with personalized communication and notes on their visits.
- 4. Increase percentage of students applying from high school visits to 60%.
 - a. After high school visits, Admission Counselors will follow up with personalized communication from the visit and encourage application submission and campus visitation.
 - b. Admission Counselors will follow up with students throughout the cycle to ensure students have submitted an application.
- 5. Continue to engage with our transfer applicant pool and improve our outreach to non-enrolled students.
 - a. Continue successful practices of calling incomplete students, short application turnaround times, and initial articulation of courses.
 - b. Collaborate with the Registrar's Office to ensure that students who wish to be part-time are shared quickly and followed up with in a timely manner.
 - c. Develop a communication flow to reach out to students who chose not to attend Westfield State to inform them of transfer options available.
- 6. Improve follow up on accepted students to create a more personalized approach
 - a. Identify applicants who have engaged with the University prior to applying and ensure these students are prioritized in terms of follow up.
 - b. Admission Counselors will follow up with personalized emails, cards, and letters, with specific references to items from their applications or essays.
 - c. Utilize Academic Departments to send personalized communications to students, with larger departments receiving priority lists in addition to all accepted students.
 - d. Work with the Marketing & Communications Department to improve the Admitted Student packet (as allowed by budget).
- 7. Develop a financial aid model to better support populations of students we are looking to recruit
 - a. Use limited scholarship funds on students from areas where there is potential for growth within the University
 - b. Ensure financial aid packages are more attractive to our targeted populations.
- 8. Increase recruitment of students of color to the University
 - a. See Goal #2 for specific initiatives

9. Enroll a greater percentage of out of state applicants
 - a. See Goal #3 for specific initiatives
10. Increase the percentage of students who deposit following the Accepted Student Day programs to 75%
 - a. Create a more dynamic & personalized experience at Accepted Student Days
 - b. Offer special incentives to deposit at each event, such as a waiver of tuition deposit or Westfield State swag item
11. Continue with already successful social media initiatives to drive engagement with prospective students
 - a. Utilize tour guides to share posts to social media more frequently and capture everyday elements of campus.
 - b. Create engaging “day of” content for events to share what prospective students will see if they attend larger events.
 - c. Collaborate with Marketing to ensure our posts are re-shared by the University.
12. Create a specified Parent/Champion communication plan for the recruitment cycle
 - a. Engage with parents/champions via email throughout the cycle, including important dates, reminders, and special opportunities throughout the cycle
 - b. Create a mailer for parents/champions to send after acceptance, highlighting events, opportunities at Westfield, and information on financial aid.
 - c. Enhance communication around cost and value, with direct emails explaining how costs will work at Westfield State.
13. Improve communication with students who have deferred admission to the following semester or year.
 - a. Reach out earlier in the semester to confirm attendance in the upcoming semester.
 - b. Ensure that Financial Aid has re-awarded any financial aid the student is receiving, including scholarships and grant funding similar to previous financial aid.
 - c. Connect students to Advising and Academic Departments to ensure they feel part of campus and welcomed to the University.

Deliverables

1. Enrollment goals presented are met for the upcoming semesters.
2. Enroll a larger class through increased budget and collaboration with Departments across campus.

GOAL #2: Increase the percentage of students of color entering the University to 33 percent of the incoming Fall 2023 first-year and transfer class.

Strategies

1. Increase recruitment travel to local schools
 - a. Admission Counselors will visit schools Chicopee, Holyoke, Springfield, and West Springfield schools twice to recruit students.

- b. Separate visits as needed will be made by the Vice President for Enrollment Management and Director of Admission to address any needs of local school districts.
- 2. Reengage with Springfield Public Schools on the Reach to Teach program
 - a. Vice President of Enrollment Management and Director of Admission will continue to meet with senior leadership from Springfield Public Schools.
 - b. Host special Reach to Teach event in the Fall, in collaboration with the Education Department, in an effort to encourage students to attending Westfield State.
- 3. Bring students to Westfield State to expose them to campus
 - a. Host 2 SOAR Westfield events in the Fall 2022 semester in conjunction with local high schools (with at least 4 schools at each event).
 - b. Host 4 Junior Discover programs in Spring 2023.
 - c. Accommodate special tour requests and prioritize local school districts with diverse populations.
- 4. Work with Westfield Promise to increase number of students enrolling at Westfield State University
 - a. Host special workshops to ensure application completion and FAFSA completion.
- 5. Engage in community outreach to improve visibility of Westfield State University
 - a. Work with local non-profit organizations to host information sessions.
 - b. Offer more assistance with FAFSA preparation and provide additional financial aid information to families.

Deliverables

- 1. Percentage of students who do not identify as non-Hispanic/Latino, White will represent 33% of the incoming students for Fall 2023.

GOAL #3: Increase the percentage of students from outside Massachusetts to 14 percent of the incoming Fall 2023 first-year and 12 percent of the incoming Fall 2023 transfer class.

Strategies

- 1. Expand the New England Regional Rate to all of New England for the class entering Fall 2023.
 - a. Market the new rates to students in our secondary markets to increase the number of students from New England.
 - b. Expand recruitment travel to include more high schools in Connecticut.
 - c. Engage with Athletics to promote the rates to prospective student athletes across New England.
- 2. Continue recruitment travel in New York & New Jersey
 - a. Depending on budget, look to increase name buy for students in Eastern NY (Hudson Valley), Long Island, and northern New Jersey.
 - b. Identify specific schools in northern New Jersey and the New York Capitol Region to visit during the Fall 2023 travel season.

3. Increase the number of completed international applications and work to enroll a larger international class.
 - a. Work collaboratively to improve the communication with international students after the application is submitted.
 - b. With the assistance of the International Programs Office, revamp the International Student Forms to be more streamlined and efficient.
 - c. Exhibit flexibility with applicants, including waiving document when not necessary.
 - d. Work with the Marketing Department to develop publications and informational sheets in multiple languages.
 - e. Update the International Admission website to better reflect requirements and steps to enrolling at Westfield State.
4. Utilizing the Presidential Innovation funds, recruit students in Washington, D.C. and Florida.
 - a. See addendum for specific recruitment plan for these regions.

Deliverables

1. Percentage of students from outside Massachusetts will increase to 14 percent of the incoming first-year class and 12 percent of the incoming transfer class.
2. Established presence in Connecticut, allowing for an increased market share.
3. Blueprint for further recruitment activities in Washington, D.C. and Florida.

GOAL #4: Implement the new CRM (Slate) by April 2023

Strategies

1. Establish Slate Captains to manage the implementation and help bring the system online.
 - a. Slate Captains will be from both the Full-Time Day Division and Part-Time/Graduate Division.
 - b. Slate Captains will provide regular updates to their respective divisions and participate in regular meetings.
2. Engage with consulting firm to help Slate Captains implement the system and assist the University with strategy for implementation.
3. Work collaboratively with departments across campus to rethink processes and revisit workflows stemming from the admission of a student.

Deliverables

1. Slate is fully functioning and in use by both divisions by April, 2023.
2. A comprehensive training plan will be created by the Slate Captains to assist users in understanding the system.
3. Plan to integrate other members of the campus community into Slate over the course of the Summer, 2023.

GOAL #5: Work to improve all campus visit programs

Strategies

1. Collaborate with Academic Affairs to revamp Open House and Accepted Student Day programs.
 - a. Hold meetings with the Associate Deans and the Executive Director of the Center for Student Success & Engagement on a new format for Open Houses and Accepted Student Days.
 - b. Ensure department participation in all events by engaging the Associate Deans to assist with confirming attendance of each department in their school.
2. Enhance the training for the Tour Guides.
 - a. Ensure the Tour Guides are aware of the new strategies, including sharing personal anecdotes and sharing their “why”.
 - b. Update the Tour Guide manual to include more comprehensive information about buildings and locations, as well as interesting facts about majors and programs.
 - c. Re-train Tour Guides to ensure that we are sharing the same facts about campus, but allowing their personalities to bring those forward.
3. Refresh campus visitation surveys to better glean information from each program.
 - a. Improve collection of surveys by providing incentives to complete them and QR codes for easy access to online surveys.
 - b. Adjust campus events based on feedback from surveys, including expanding or eliminating portions of events.
4. Collaborate with Academic Departments to enhance the Daily Tour Program.
 - a. Offer special sessions with select academic departments to improve attendance and offer a more customized experience for guests.
5. Continue to host smaller Academic Department Accepted Student programs based around the successful programs hosted in Spring 2022.
 - a. Allow for students to better immerse themselves in an engaging aspect of each Department and learn directly from the Departments themselves why their program is the best fit.
6. Offer enhanced presentation options to all Departments, modeled after the Admission philosophy of sharing our “why”.
 - a. Work with Marketing to present ready-made formats for Departments to utilize for any presentation they give.
 - b. Encourage Departments who are currently offering custom programs to share their strategies with the Admission Office to help us better recruit students to their programs.
 - c. Create and share custom presentations for Departments to utilize when meeting with groups of students (including preset backgrounds and stock image slides for their departments).

Deliverables

1. 100 percent academic department participation in Open House and Accepted Student Day programs.

2. Open House and Accepted Student Day agendas to be posted online with links to registration.
3. Improved collection of survey results and improved survey results in general.
4. Department specific tours offered throughout the Fall semester.
5. Accepted Student events for each department scheduled prior to February 1, 2023 to allow for better promotion of events and encourage students to visit.

GOAL #6: Collaborate with academic departments to promote new and existing programs

Strategies

1. Meet with Academic Department Chairs during the Fall and Spring semesters
 - a. Building off the meetings from last year, the Admission Staff will continue to meet with chairs to learn more about their programs and any new initiatives the department is involved in.
 - b. Engage with departments to develop unique notes about each program for Admission Staff and Tour Guides to share when meeting with prospective students and families.
2. Invite the Associate Deans to meet with the Tour Guides to discuss their Schools and unique features
 - a. During Tour Guide Training Sessions, each Associate Dean will be invited to share information on their school and special features.
3. Invite Faculty to participate in Open House & Accepted Student meet and greets with incoming students
 - a. Ask for Faculty volunteers to mingle at the beginning of Admission events and speak to prospective students and families.
 - b. Identify under-enrolled majors to participate as a means to engage with Undeclared/Exploratory students.
 - c. Utilize Faculty to engage in more creative ways in order to best showcase their talents and scholarship.

Deliverables

1. Complete meetings with all Department Chairs by December 2022.
2. Compile department facts into a comprehensive spreadsheet to be used by Admission Staff and Tour Guides.

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An Investment in Our Story

Dr. Leslie Rice

Executive Director of Communication, Marketing, and Branding



5 ESSENTIAL GOALS

1. Develop a cohesive Marketing and Communication unit that functions strategically to promote Westfield State University
2. Maximize efficiency within the Marketing and Communication unit



5 ESSENTIAL GOALS

3. Implement a digital-first integrated marketing and communication plan for the University as a whole
4. Develop a strong brand identity that is supported by the University community and meets stakeholder needs for marketing projects and communications
5. Measure and increase earned media and public relations efforts



STRATEGIC INVESTMENTS

- ✓ **Improved Name Recognition in Target Areas to Increase Top of Mind Placement**
 - Out of Home Campaigns, Radio and TV, Increased Digital Advertising
- ✓ **Focused Effort on Enrollment Yield Strategy (Post-Acceptance, Push to Deposit)**
 - In partnership with Enrollment Management's investment in admissions experience
 - Improved and enhanced visit experience, social media focused public art

STRATEGIC INVESTMENTS

✓ **Strategic Reputation Investment**

- US News focus
- Thematic publications for areas of academic success and fundraising opportunities

✓ **Success Stories and Additional Promotions**

- Broad support for cross-channel content development



STRATEGIC INVESTMENTS

✓ **Website Continuous Improvement**

- Key initiatives such as Focus Magazine, NewsWise, and other areas

✓ **Branding Refresh**

- Agile development, limited scope



STRATEGIC INVESTMENTS

FY 23 MARCOMM SUPPLEMENTAL BUDGET PROPOSAL	
Improved Name Recognition	\$205,000
Enrollment Yield Strategy	\$50,000
Strategic Reputation Investment	\$65,000
Success Stories and Promotions	\$50,000
Website Continuous Improvement	\$100,000
Branding Refresh	\$130,000
TOTAL INVESTMENT	\$600,000

Funding categories are estimated and may be adjusted with the total investment not to exceed \$600,000.



EVALUATING EFFECTIVENESS

- ✓ TRACKING TOOLS FOR OUT OF HOME, PRINT, AND DIGITAL ADVERTISING
- ✓ PROMOTION OF LANDING PAGES TO TRACK VISITORS
- ✓ CAMPUS VISIT SURVEYS
- ✓ SOCIAL MEDIA ENGAGEMENT METRICS
- ✓ WEBSITE EVALUATION TOOLS



EVALUATING EFFECTIVENESS: ULTIMATE GOAL

FALL '23
YIELD RATE



Marketing and Communications Annual Report

Top Five Goals

1. DEVELOP A COHESIVE MARKETING AND COMMUNICATION UNIT THAT FUNCTIONS STRATEGICALLY TO PROMOTE WESTFIELD STATE UNIVERSITY.

- a. Clarify and improve workflows to help the campus community work with us.
- b. Create professional development goals for each team member aligned with job descriptions and assignments.
- c. Develop toolkits for repetitious tasks to move away from always operating in a reactive manner and move towards operating in a proactive and strategic manner (e.g. crisis comms, general press releases, new hire announcements).

2. MAXIMIZE EFFICIENCY WITHIN THE MARKETING AND COMMUNICATION UNIT.

- a. Consolidate project organization and work requests to better manage requests and implement daily team stand-ups to keep priorities aligned.
- b. Practice “strategic abandonment” by identifying areas where tools such as templates or training can be used to allow the campus community to operate in a self-service manner.
- c. Create staff management dashboards and evaluate staff capacity regularly to identify areas where we need freelance support and/or future additional staffing.

3. IMPLEMENT A DIGITAL-FIRST INTEGRATED MARKETING AND COMMUNICATION PLAN FOR THE UNIVERSITY AS A WHOLE.

- a. Prioritize web-based marketing and communications, including social media, email communications, the University website and supporting sites, and digital advertising.
- b. Evaluate and assess current digital assets and methodologies and strategically realign to ensure we are focusing on the most critical, impactful tactics. Implement data tracking with monitored QR codes, create Google Analytics dashboards to understand website performance, evaluate email and newsletter open and click thru rates, and establish social media engagement metrics and goals.
- c. Partner with units across campus to bring about greater consistency and coverage with monthly Social Media Symposia and Web Development Brown Bags to share insight, best practices, and highlight areas across campus who are finding success.

4. DEVELOP A STRONG BRAND IDENTITY THAT IS SUPPORTED BY THE UNIVERSITY COMMUNITY AND MEETS STAKEHOLDER NEEDS FOR MARKETING PROJECTS AND COMMUNICATIONS.

- a. Develop and promote tools that people need for current business: updated PowerPoint templates, event poster templates, social media filters and frames, etc.
- b. Update key components of brand message: Focus magazine (print and digital); NewsWise online newsletter and site; all graduate program promotional material; establish template for print brochures for academic programs; website templating for key pages – program pages with Collegis, personal bio pages, etc.
- c. Begin the conversation around an updated brand, identify stakeholders and needs for target launch in FY24.

5. MEASURE AND INCREASE EARNED MEDIA AND PUBLIC RELATIONS EFFORTS.

- a. Establish accurate benchmark for earned media as an organization.
- b. Refine policies regarding media relations to ensure consistency of messaging.
- c. Expand our reach with targeted media outlets and publications for key messages.

Marketing and Communications

FY23 Supplemental Budget Needs

These supplemental budget needs are based on the following strategic needs and align with the 2023 FY Marketing and Communication Annual Goals.

IMPROVED NAME RECOGNITION IN TARGET AREAS AND TOP OF MIND PLACEMENT

This category of spend is about consistent, repetitious brand placements in the physical and digital spaces our prospective students inhabit. Tactics may include out-of-home advertising, radio and tv campaigns, and an increased budget for digital advertising.

FOCUSED EFFORT ON ENROLLMENT YIELD STRATEGY (POST-ACCEPTANCE; PUSH TO DEPOSIT)

In collaboration with Enrollment Management initiatives, this investment should help us improve our yield rate by raising the quality of the acceptance and visit experiences. Tactics may include improved acceptance materials, campus signage and décor for special event days, and a student-driven public art investment fund to create social media friendly destination locations around campus to drive organic traffic to campus.

STRATEGIC REPUTATION INVESTMENT (US NEWS RANKING CAMPAIGN)

We know that rankings matter to prospective students and families, prospective employees, and even philanthropic donors and government grantors. Thematic promotion materials for areas of academic success can improve our rankings over time while driving fundraising engagements and creating a sense of campus pride and community spirit.

SUCCESS STORIES AND ADDITIONAL PROMOTIONS

We have many great things happening on campus but don't do enough to capture and promote the stories. Similarly, we have graphic design needs that we cannot meet at our current staffing levels. Funding here would allow us to expand our base of cross-channel content development.

WEBSITE CONTINUOUS IMPROVEMENT

While we were able to launch a new website in FY22, we still have areas that are operating on an older WordPress platform. We have made progress in bringing these into the Drupal site but some of the more complex areas such as Focus Magazine and our NewsWise platform require additional design and development. Ideally, this fund will allow for four critical developments aimed at improving the user experience.

BRANDING REFRESH

Internal stakeholders want to promote the University, but our current assets do not always meet our needs or feel representative of a strategic branding message we are sharing with the world. An investment in a community-wide research and design branding project will energize our marketing efforts, better tell our story with a consistent voice and visual look, and give all stakeholders the assets they need to reach our external audiences.

Improved Name Recognition	205,000
Enrollment Yield Strategy	50,000
Strategic Reputation Investment	65,000
Success Stories and Promotions	50,000
Website Continuous Improvement	100,000
Branding Refresh	130,000
TOTAL INVESTMENT	\$600,000

Institutional Advancement DASHBOARD

June 30, 2022 – 4th Quarter

Executive Summary

1,429 Total Donors

- 305 New Donors
- 486 Reactivated Donors
- 638 Retained Donors

879 Alum Donors

(1.87% participation rate based on 47,119 alumni of record*)

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

Highlights

- **15%** increase of donors (1,429 in FY22 vs. 1,239 in FY21)
- **35%** increase of alum donors (879 in FY22 vs. 652 in FY21)
- Over **70 Class Years** of alumni giving, ranging from donors in Class of 1949 through Class of 2022

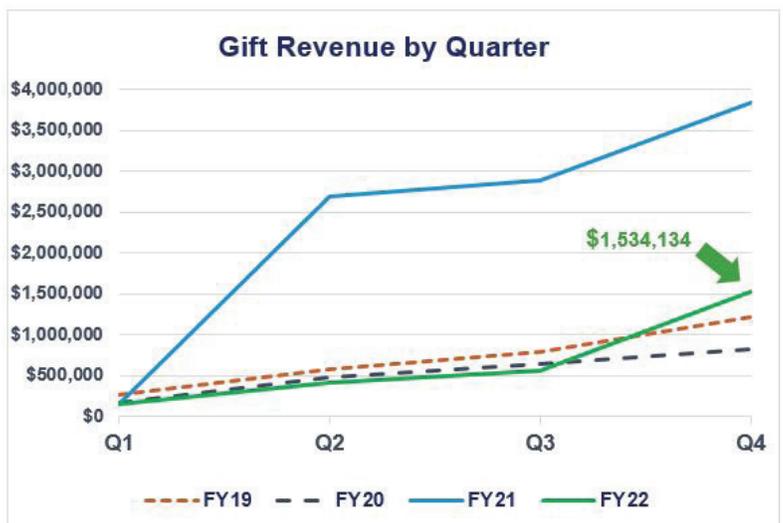
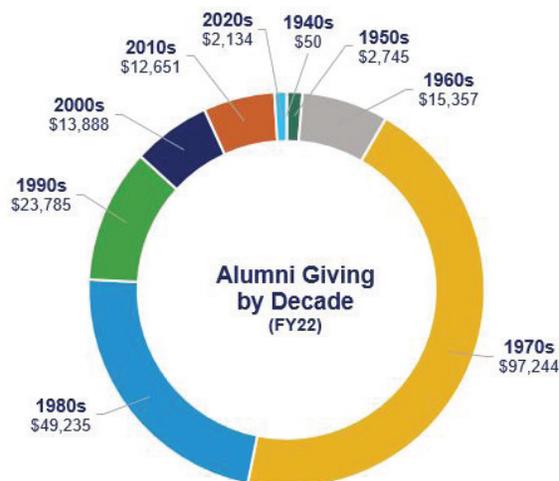
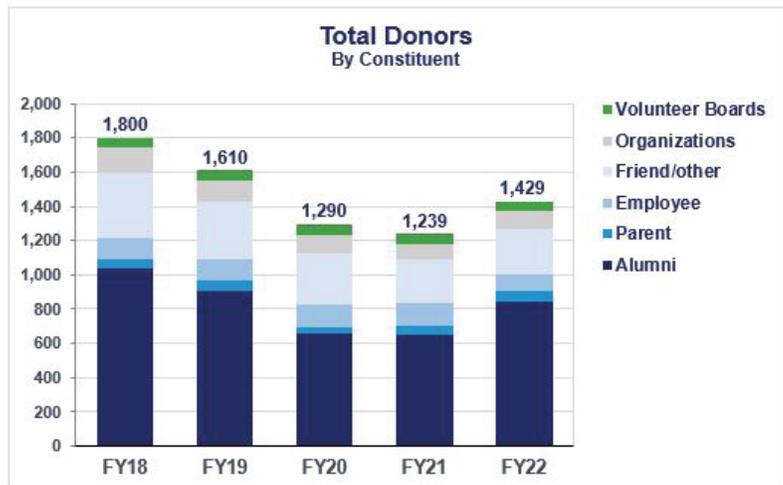
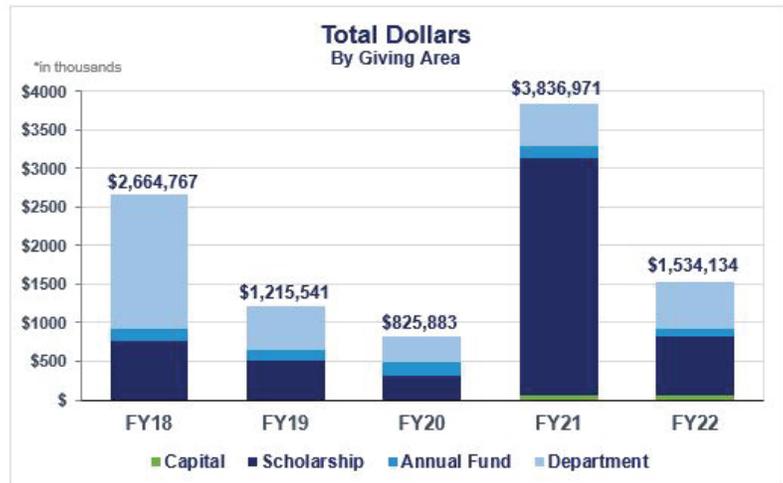
\$1,534,134
Dollars

1,429
Donors

\$251.80
Average Gift*

1.87%
Alum Part.

*Minus three Paul W. Dower Gifts, otherwise average gifts are \$449.23



Institutional Advancement DASHBOARD

June 30, 2022 – 4th Quarter

Fundraising Priorities



DEVER STAGE SEATS
DONORS: 80
DOLLARS: \$49,068



THE WESTFIELD FUND
DONORS: 843
DOLLARS: \$88,608



PRESIDENTIAL INITIATIVE
DONORS: 30
DOLLARS: \$32,645



GIVE A HOOT ANNUAL DAYS OF GIVING
468 Gifts totaling
\$83,387 from 416 donors



ATHLETICS OWL CLUB
373 Gifts totaling
\$65,453 from 252 donors

New this year!

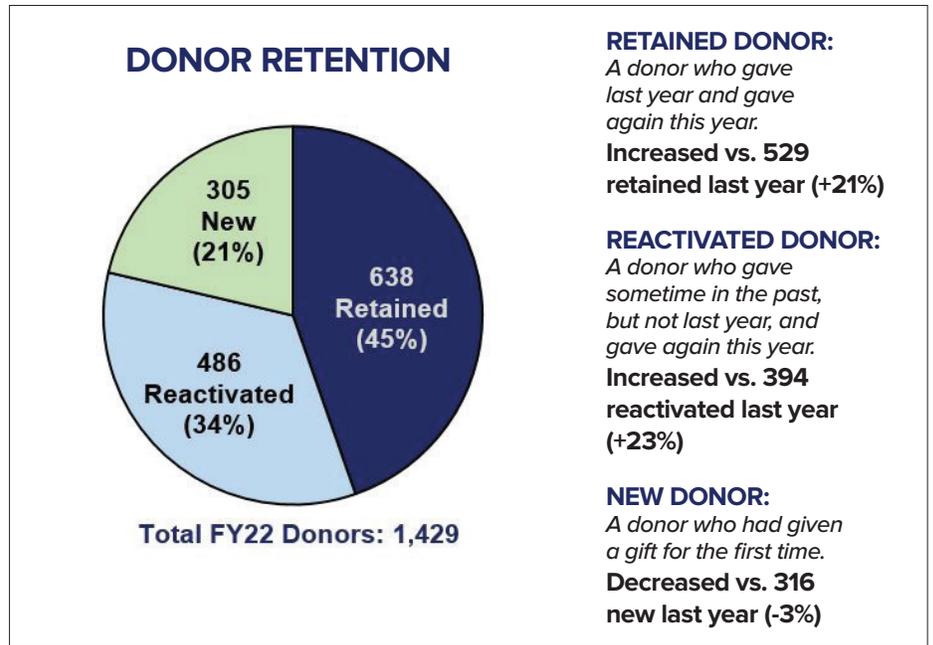
- **152 donors** made their gift through PayPal, Venmo, Apple Pay and Google Pay
- **23,795 engagement and solicitation texts** sent to alumni

Grant Activity

\$59,500 Grants Received in FY22

- \$45,000 As Schools Match Wits Grant
- \$1,000 Interfaith Youth Core Campus Initiative Grant
- \$1,000 Scientific Research Grant
- \$12,500 Nursing Completion Pilot

Gift Pyramid	Donors	Dollars
\$25,000 or higher	10	\$987,881
\$10,000-\$24,999	11	\$153,955
\$2,500 - \$9,999	29	\$131,670
\$500 - \$2,499	162	\$149,735
\$1 - \$499	1,217	\$110,892
Total	1,429	\$1,534,134



Volunteer Boards	Population	Donors	Participation	Ave. Gift	Dollars
Board of Trustees					
FY22 as of 6.30.2022	11	10	91%	\$ 1,501	\$ 15,008
FY21	11	11	100%	\$ 2,282	\$ 25,106
Foundation Board of Directors					
FY22 as of 6.30.2022	23	19	83%	\$ 3,489	\$ 66,282
FY21	25	25	100%	\$ 3,449	\$ 86,225
Alumni Association Executive Council					
FY22 as of 6.30.2022	15	15	100%	\$ 218	\$ 3,270
FY21	17	17	100%	\$ 213	\$ 3,615
Cabinet					
FY22 as of 6.30.2022	9	9	100%	\$ 3,513	\$ 31,615
FY21	7	7	100%	\$ 3,714	\$ 25,996

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

Westfield State Foundation, Inc.

2021-2022 School Year

316 student scholarships awarded

Over \$500,000 raised to support student scholarship and internship opportunities

Give a Hoot (day of giving),
416 donors gave to the areas they love!



Academic Departments

Athletics - Owl Club

Dever Stage

Owls Helping Owls
Student Emergency Fund

Student Scholarships

The Westfield State Foundation, Inc.

supports students and the University through advocacy, fundraising, engagement and stewardship.

Apply for Scholarships 2023-2024 School Year

Application opens in
February 2023!

Create an account at

<https://westfield.academicworks.com>



Open every:

Tuesday 12-4pm

Wednesday 12-4pm

A short walk from campus!

Second Congregational Church

487 Western Avenue,
Westfield, M.A.

Use the far right entrance.



**COMMON
GOODS**
at Westfield State

Common Goods

is a food pantry and resource center serving Westfield State University students, faculty and staff who may be experiencing hunger and are struggling to make ends meet.

Homecoming

SCHOLARSHIP DINNER

HONORING DR. LIZ PRESTON

&

DISTINGUISHED ALUMNI



FRIDAY, OCTOBER 21, 2022

Honoring

**DISTINGUISHED
ALUMNUS**

Dr. Robert Enright '73

**EXCELLENCE
IN EDUCATION**

Dr. Terrell Hill '92

ALUMNA OF THE YEAR

Alison Rheaume '09

**EXCELLENCE IN
HEALTHCARE**

Ashley Weisse '19



Westfield State University

HOMECOMING

A BRIDGE TO THE NEST

2022

★ THURSDAY, OCTOBER 20 ★

A Day for the Arts

English Department
Poetry Reading

Art Gallery
Shows

Student
Showcases

Contests &
Competitions

Pancakes with the President10:30 p.m.

★ FRIDAY, OCTOBER 21 ★

Spirit Day Events

Bonfire, Movie, and Pep Rally 7 p.m.

Homecoming Scholarship Dinner Honoring Dr. Liz Preston..... 6–9 p.m.

★ SATURDAY, OCTOBER 22 ★

Trivia & Games

Nestor's 21st Birthday

Live Music

Entertainment
for all ages

Admissions Open House..... 9 a.m.

Owl Fun Run..... 1 p.m.

Tailgating..... 12–5 p.m.

Football 2 p.m.

Athletics Swag Sale 11 a.m.

Field Hockey..... 7 p.m.

Women's Soccer 11 a.m.

After Party at 7–10 p.m.
Great Awakening Brewery

★ SUNDAY, OCTOBER 23 ★

Farewell Jazz Brunch..... 10 a.m.–2 p.m.

HONORARY CHAIRS Mayor Michael McCabe & Senator John Velis



Make plans for the **BIGGEST**
Westfield State Homecoming **EVER!**

Register today! westfield.ma.edu/homecoming



Scan me