



**Board of Trustees**  
**Enrollment Management & Student Affairs Committee**

October 11, 2023  
8:30-10:00am

President's Boardroom  
Horace Mann Building

In accordance with Massachusetts 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 will also take place at the following link: <https://www.westfield.ma.edu/live>

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- |   |                          |
|---|--------------------------|
| <b>1. Call to Order</b>                                     | Trustee William Reichelt |
| <b>2. Approval of Minutes</b>                               | Trustee William Reichelt |
| a. June 6, 2023   |                          |
| <b>3. Items for Information</b>                             |                          |
| a. Introduction of VP for Enrollment Mgt. & Student Affairs | Dr. Kevin Hearn          |
| b. VP Report, Initial Transition/First 8 weeks              | Dr. Kevin Hearn          |
| c. Enrollment Management current efforts                    | Dr. Kevin Hearn          |
| 1) FA/23 census report                                      |                          |
| 2) Fall 2023 events/tactics                                 |                          |
| d. Student Affairs current efforts                          | Dr. Kevin Hearn          |
| <b>4. Items for Discussion</b>                              |                          |
| a. Development of a Strategic Enrollment Plan               | Dr. Kevin Hearn          |
| b. Student Affairs Engagement                               | Dr. Kevin Hearn          |
| c. Open agenda/Discussion items                             | Dr. Kevin Hearn          |

**Attachments:**

- a. Draft Minutes June 6, 2023
- b. PowerPoint Presentation



## Board of Trustees

Enrollment Management and Student Affairs Committee

June 6, 2023

Minutes

Via Zoom in accordance with Massachusetts 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.

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**MEMBERS PARTICIPATING REMOTELY:** Committee Chair William Reichelt, Secretary Paul Boudreau, Trustees Chloe Sanfacon, and Board Chair Dr. Robert Martin, ex-officio member

**MEMBERS EXCUSED:** Vice Chair Melissa Alvarado and Trustee Gilmer

**TRUSTEE GUESTS PARTICIPATING REMOTELY:** Trustee Ali Salehi [joined at 3:37 PM]

Also participating remotely were Westfield State University President Dr. Linda Thompson, Enrollment Management Vice President Daniel Forster, Dean of Students Maggie Balch, Director of Admissions Mike Mazeika, and Associate Registrar/Director of Graduate Program Admission Jessica Tansey, and Director of Financial Aid Simone Backstedt.

The meeting was called to order at 3:30 PM by Committee Chair William Reichelt. A roll call was taken of the committee members participating as listed above and it was announced that the meeting was being livestreamed and recorded.

**MOTION** made by Trustee Martin, seconded by Trustee Sanfacon, to approve the minutes of the April 25, 2023, meeting. **There being no discussion, ROLL CALL VOTE** passed motion unanimously with Trustees voting in the affirmative: Boudreau, Sanfacon, Reichelt and Board Chair Martin.

Enrollment Update. Mr. Forster stated the goal this year was to improve yield and we had the second highest application total ever, being the third highest in sister schools and second highest in accepts. Based on the yield, it has been a disappointing trend downward in the last few years with the number of students deposited versus the number accepted. We are doing well in collecting applications and maintaining visits, but students are not committing. Typical reasons they do not choose Westfield is that we were never their first choice and the location – most want to be closer to home.

Mr. Mazeika shared the funnels showing an increase in inquiries, but decreases in applications, accepts, and deposits. It is not expected to have a large incoming class this year. Eighty percent of students will be living on campus, which is in line with past years. A new CRM is being implemented. In-state, first-year students have dropped from 2022. There is a good number of international students and deposited student demographics were shared. Business has become the top major for the University.

Ms. Tansey shared the part-time undergraduate/second bachelors fall 2023 funnel, showing inquiries and applications up 22% from last year. For the graduate and post-baccalaureate fall 2023 funnel, inquiries were up 8% from last year.

Student Affairs – A Year in Review. Ms. Balch provided an update on events held through Student Affairs throughout the year, including health services, counseling center, and through the JED Foundation. They are working on a comprehensive approach to their strategic plan for an equitable implementation of policies and programs to support students’ emotional well-being and to help prevent suicide and substance abuse. Residential Life recorded 6,600 students in attendance at 243 programs, plus 540 student athletes. The Presence app will provide data to help focus on students who are not attending any activities.

Revisions to Policies. Ms. Balch brought forward revisions to the following policies. Legal counsel reviewed and provided redlined edits to all the policies as requested in the April meeting.

**MOTION** made by Trustee Martin, seconded by Trustee Sanfacon, to approve the changes to the Residence Hall Policy (0590) as presented and to approve the change of the policy’s name to Housing Policy (0590).

**Discussion:** The title changed because when students live on campus, it is more of a housing policy. **There being no further discussion, ROLL CALL VOTE** passed motion unanimously with Trustees voting in the affirmative: Boudreau, Sanfacon, Reichelt and Board Chair Martin.

**MOTION** made by Trustee Sanfacon, seconded by Trustee Martin, to approve the changes and accept the newly revised Free Speech, Demonstration and Picketing Policy (3020), as presented.

**Discussion:** This policy applies to students, faculty, and staff. Policies are uploaded to the University’s policy webpage and an email is sent to the campus community notifying of policy changes. On the rights and responsibilities page, it explains what free speech really means and is an example of how it can be used in a constructive way. Since this policy may involve faculty as well as students, Academic Affairs will be asked to inform faculty of the policy and discuss academic freedom with them. **There being no further discussion, ROLL CALL VOTE** passed motion unanimously with Trustees voting in the affirmative: Boudreau, Sanfacon, Reichelt and Board Chair Martin.

**MOTION** made by Trustee Martin, seconded by Trustee Sanfacon, to approve the changes and accept the newly revised Alcohol and Other Drug Policy (4010), as presented.

**Discussion:** This policy applies to students, not faculty or staff. The amnesty clause at the end of the policy creates an opportunity for students to report a concern if they see someone in a health crisis due to substance abuse. **There being no discussion, ROLL CALL VOTE** passed motion unanimously with Trustees voting in the affirmative: Boudreau, Sanfacon, Reichelt and Board Chair Martin.

**MOTION** made by Trustee Sanfacon, seconded by Trustee Martin, to approve the changes to the Involuntary Medical Withdrawal of Student for Physical or Mental Health Reasons Policy (4060), as presented and to approve the change of the policy’s name to Administrative Medical Leave of Absence (4060). **There being no discussion, ROLL CALL VOTE** passed motion unanimously with Trustees voting in the affirmative: Boudreau, Sanfacon, Reichelt and Board Chair Martin.

Enrollment Management and Student Affairs Committee Charter. Committee Chair Reichelt shared the revisions to the committee charter.

**MOTION** made by Trustee Boudreau, seconded by Trustee Sanfacon, to approve and adopt the Westfield State University Board of Trustees Enrollment Management and Student Affairs Committee Charter, as presented. **There being no discussion, ROLL CALL VOTE** passed motion unanimously with Trustees voting in the affirmative: Boudreau, Sanfacon, Reichelt and Board Chair Martin.

There being no further business,

**MOTION** made by Trustee Sanfacon, seconded by Trustee Martin, to adjourn. **There being no discussion, ROLL CALL VOTE** passed motion unanimously with Trustees voting in the affirmative: Boudreau, Sanfacon, Reichelt and Board Chair Martin.

Meeting adjourned at 4:43 PM.

Attachments presented at this meeting:

- a. Draft Minutes of 4/25/23
- b. Enrollment Update-PowerPoint
- c. Student Affairs – Year in Review PowerPoint
- d. Motion – 0590 Residence Hall-Housing Policy
- e. 0590 Residence Hall-Housing Policy Redline with Legal Edits
- f. 0590 Residence Hall-Housing Policy Clean
- g. Motion – 3020 Free Speech/Demonstration/Picketing Policy
- h. 3020 Free Speech/Demonstration/Picketing Policy Redline with Legal Edits
- i. 3020 Free Speech/Demonstration/Picketing Policy Clean
- j. Motion – 4010 Alcohol & Other Drug Policy
- k. 4010 Alcohol & Other Drug Policy with Legal Edits
- l. 4010 Alcohol & Other Drug Policy Clean
- m. Motion – 4060 Involuntary Medical Withdrawal of Students for Physical or Mental Health Reasons-Administrative Medical Leave of Absence
- n. 4060 Involuntary Medical Withdrawal of Students for Physical or Mental Health Reasons Redlined
- o. 4060 Proposed New Administrative Medical Leave of Absence Policy Redline with Legal Edits
- p. 4060 Proposed New Administrative Medical Leave of Absence Policy-Clean
- q. Motion – Enrollment Management & Student Affairs Committee Charter Approval
- r. Draft Enrollment Management & Student Affairs Committee Charter

#### 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 Enrollment Management and Student Affairs Committee meeting held on June 6, 2023.

\_\_\_\_\_  
Paul Boudreau, Secretary

\_\_\_\_\_  
Date

# Enrollment Management & Student Affairs Committee

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Board of Trustees  
October 2023

- 1) Call to Order - Trustee William Reichelt
- 2) Approval of Minutes from June 6, 2023 - Trustee Reichelt
- 3) Items for Information
  - A. Introduction of Vice President – Trustee Reichelt
  - B. VP Report, Initial Transition/ First 8 Weeks –Dr. Kevin Hearn
  - C. Enrollment Management Update – Dr. Hearn
    1. Fall 2023 Admissions Report
    2. Fall 2023 Admissions Events
    3. Student Affairs Current Efforts
- 4) Items for Discussion
  - A. Development of a Strategic Enrollment Plan – Dr. Hearn
  - B. Engagement in Student Affairs – Dr. Hearn
- 5) Open Agenda / Discussion

# VP Report: First 8 weeks (or so...)

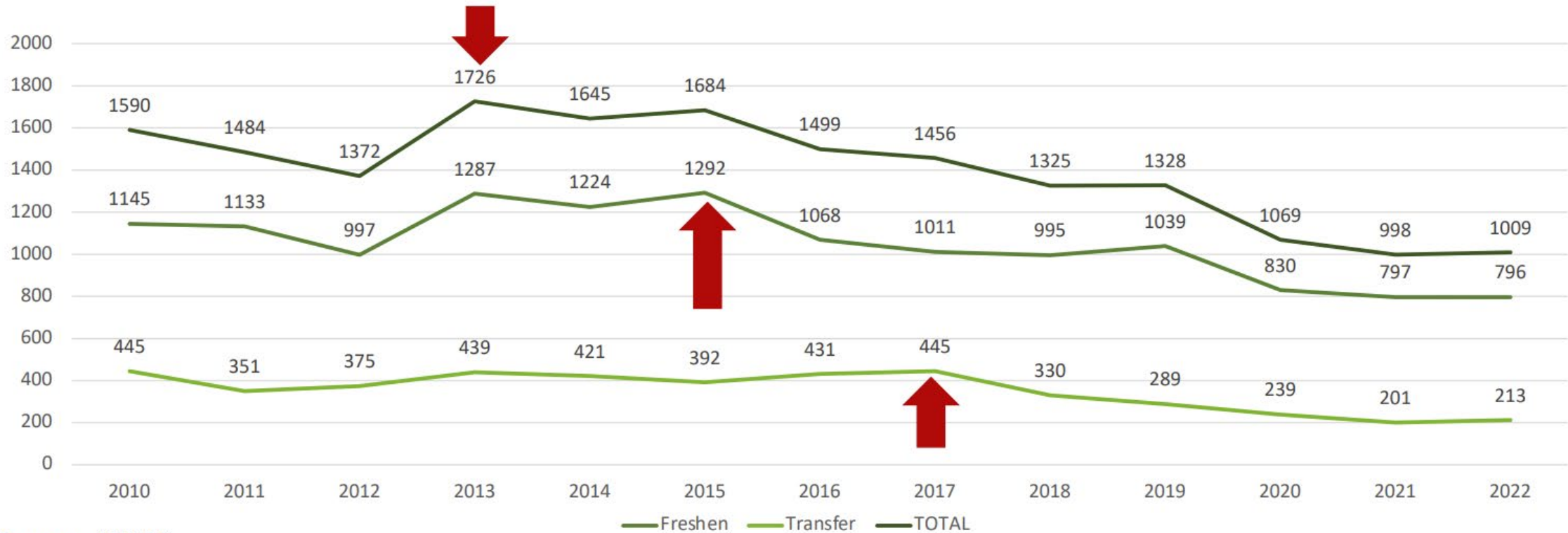
## 1) Goals

- 1) Stabilize enrollments\*
- 2) Assess and complete merger of Enrollment Management & Student Affairs (EMSA) division
- 3) Assess and address issues related to institutional/divisional culture
- 4) Assess and support staff
- 5) Address immediate issues in EMSA

## 2) Lessons

- 1) Additional training is necessary, in and outside the division
- 2) Speak (briefly) to the past, invite personnel to move through/beyond
- 3) Staff is ready, waiting to be led
- 4) We need to learn to act quickly, take risks, and advocate for resources

Traditional new student numbers, as a whole, have declined 41% since the high in 2013 (717 students). First-year students have declined 38% since the high mark in 2015, with transfers declining 52% since the high mark in 2017



Source: IPEDS



# VP Report: Fall 2023

- 1) Re-organize the division and build a culture of collaboration
- 2) Address immediate issues in enrollment (Retention & Recruitment)
  - A. Lack of strategy / poor use of data\*
  - B. Lack of communication and coordination (internal and external)
  - C. Poor management of contracts/partners
  - D. Lack of progressive, strategic marketing
- 3) Build a culture of planning and execution
- 4) Create the Strategic Enrollment Committee
  - Disband enrollment committee
  - Begin draft of Strategic Enrollment Plan (SEP) - first draft due at December board meeting
- 5) Work with SGA to expand membership
- 6) Assess student activities programming given perception/concerns
- 7) Rebuild residence life

DATA



SORTED



ARRANGED



PRESENTED VISUALLY



EXPLAINED WITH A STORY



## Data doesn't tell a story by itself

- Most leaders can sort and arrange data.
- Fewer are good at presenting it visually.
- And, still fewer are good at using it to tell a story.

As you consider developing a SEP, the use of data will be a critical factor in building a viable plan.

# Fall Admissions Report – 704 (796) first year students

## SUMMARY

- Increase in inquiries
- 376 fewer applications (all apps – incomplete included)
- 272 fewer completed applications
- 325 fewer acceptances
- 92 fewer deposits
- 25 more withdrawals
- 10 more 'melts'

# Fall Admissions Report – 200 (213) Transfer students

## SUMMARY

- Decrease in inquiries
- 48 fewer applications (all apps – incomplete included)
- 57 fewer completed applications
- 50 fewer acceptances
- 13 fewer deposits
- 8 more withdrawals
- Same number of 'melts'

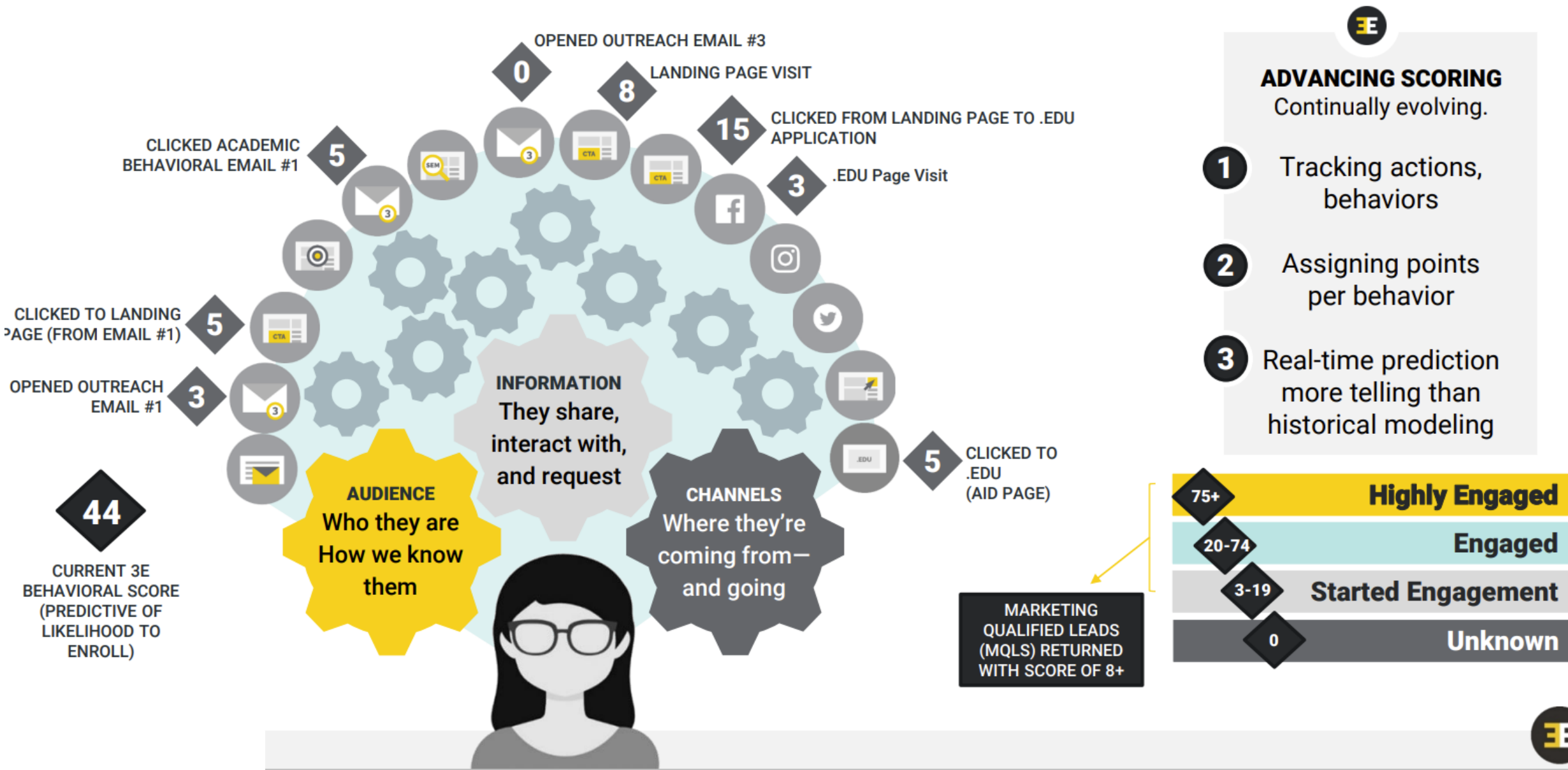
# Fall 2023 Admission Events

- 1) Daily Tour - moved from Horace Mann Center to Parenzo Hall
- 2) Saturday visits (once a month)
- 3) Re-designed Open Houses (once a month)
  - 1) October 21
  - 2) November 18
  - 3) December 9
- 4) Re-introduce regional events (Hartford, Worcester, Boston, etc.)
- 5) New Bus Tour Program
  - 1) Reach to Teach
  - 2) SOAR (Student Outreach and Recruitment)
- 6) Special school & program visit events
- 7) Engage alumni in virtual events

# Changes to Date

- 1) Move from Horace Mann
- 2) Change in inquiry and funnel strategy\*
- 3) Coordination with MarCom and the admissions marketing firm (3E)\*
  - A. Aggressive, competitive efforts
  - B. Coordinate messaging (Explore, Experience, Excel)
  - C. Automated messaging (drip-campaigns through Slate/CRM)
- 4) Evaluate and launch new Financial Aid leveraging model
- 5) Being accepting unofficial transcripts
- 6) Investigate Direct Admissions practices
- 7) Build communications strategy for parents/families
- 8) Investigate relationships with NICHE and Naviance
- 9) Explore homeschool market
- 10) Say no! Take risks.\*

# ENGAGEMENT TRACKING & BEHAVIORAL SCORING



# The solutions to most enrollment challenges are not difficult, execution is where most struggle

Most campuses don't have a plan and are focusing on everything vs. the right things – what would it mean to Westfield if you could just focus on what moves the needle towards your goal?

It will be important for the campus to consider Pareto's Principle: 80% of our results come from 20% of our actions and identifying those critical functions that move the needle in meaningful ways as you undergo a strategic enrollment planning process.

## Trying To Do Everything



## Consistently Doing The 20% That Matters



Graphic Credit: Pejman Milani



# Student Affairs Current Efforts

- 1) Focus on synergy and support of SGA
- 2) Training, planning, and execution of comprehensive residence life program (programs, operations, retention)
- 3) Improved campus-wide communication regarding campus events (NestWorks)
- 4) Better integration of SA office with other campus offices and officers, including faculty and academic administration
- 5) Increased programming and operational support
  - A. Student activities
  - B. Career Center
  - C. Campus Safety
  - D. Residence Life

# Development of a Strategic Enrollment Plan (SEP)

- 1) Disband the existing committee
- 2) Complete an admissions audit (August 16-18)\*
- 3) Address audit findings
- 4) Draft new admissions strategy\*
- 5) Create and convene Strategic Enrollment Committee\*
  - 1) Undergraduate admission
  - 2) CGCE admissions
  - 3) Retention
- 6) Committee evaluation of the strategy
- 7) Committee draft of the SEP (to BoT in December)
- 8) Refinement
- 9) Plan the Work ~ Work the Plan!

# Massachusetts



† In-state institutions receiving the largest number of in-state freshmen.

†† Competition factor equals college continuation rate less number of students migrating and the three in-state institutions receiving the largest number of in-state freshmen.

Source: National Center for Education Statistics. Freshman Migration Data for 2018-19

72,534 high school seniors / 2019-20\*

120 institutions of higher education\*\*

73.2% college continuation rate (53,095)\*\*\*  
(ranks 3rd among states)

33.3% leave the state to go to college (17,702)\*\*\*\*  
(ranks 12th among states)

Three Largest Institutions <sup>†††††</sup>	Number of In-state Freshmen <sup>†††††</sup>
University of Massachusetts – Amherst	3,299
Middlesex Community College	1,500
University of Massachusetts – Dartmouth	1,392

**29,202 students ÷ 117 institutions = 250 students per institution<sup>††</sup>**

**Westfield needs to quickly identify its in-state market share to understand what it is and to protect it. In a declining market if you maintain market share you will still see declines in your enrollment.**

Sources: Slide from Ruffalo Noel Levitz

\*Western Interstate Commission for Higher Education, *Knocking at the College Door*, 2016

\*\*The Chronicle of Higher Education, 2018

\*\*\*Postsecondary Education Opportunity, *Chance for College by Age 19 by State 1986-2010*, 2013

\*\*\*\*Postsecondary Education Opportunity, *Interstate Migration of College Freshmen 1986-2012*, 2014

\*\*\*\*\*National Center for Education Statistics, IPEDS Fall Enrollment Survey (2014)

# First-year admissions funnel – fall YOY

<u>Stage/Year</u>	<u>2018</u>	<u>2019</u>	<u>2020</u>	<u>2021</u>	<u>2022</u>
prospects/suspects	67,075	64,671	60,038	63,237	102,290
Inquiries	11,528	14,892	16,224	19,176	43,957
<i>Take rate (prospect/suspect to inq)</i>	<i>17.19%</i>	<i>23.03%</i>	<i>27.02%</i>	<i>30.32%</i>	<i>42.97%</i>
Applications	4,880	5,060	4,733	4,214	6,621
<i>Application rate</i>	<i>42%</i>	<i>34%</i>	<i>29%</i>	<i>22%</i>	<i>15%</i>
Completed Apps	4,308	4,527	4,049	3,612	5,703
<i>Comp rate</i>	<i>88%</i>	<i>89%</i>	<i>86%</i>	<i>86%</i>	<i>86%</i>
Admitted	3,700	3,879	3,733	3,411	5,394
<i>Admit rate (app to admit)</i>	<i>76%</i>	<i>77%</i>	<i>79%</i>	<i>81%</i>	<i>81%</i>
<i>Admit rate (comp app to admit)</i>	<i>86%</i>	<i>86%</i>	<i>92%</i>	<i>94%</i>	<i>95%</i>
Confirmed/Deposited	1,096	1,136	966	905	921
<i>Deposit rate</i>	<i>30%</i>	<i>29%</i>	<i>26%</i>	<i>27%</i>	<i>17%</i>
Enrolled	995	1,039	830	797	796
<i>Yield - Admit to Enroll</i>	<i>27%</i>	<i>27%</i>	<i>22%</i>	<i>23%</i>	<i>15%</i>
<i>Melt rate</i>	<i>9%</i>	<i>9%</i>	<i>14%</i>	<i>12%</i>	<i>14%</i>
Goal	1,100	1,100	1,100	1,100	1,200



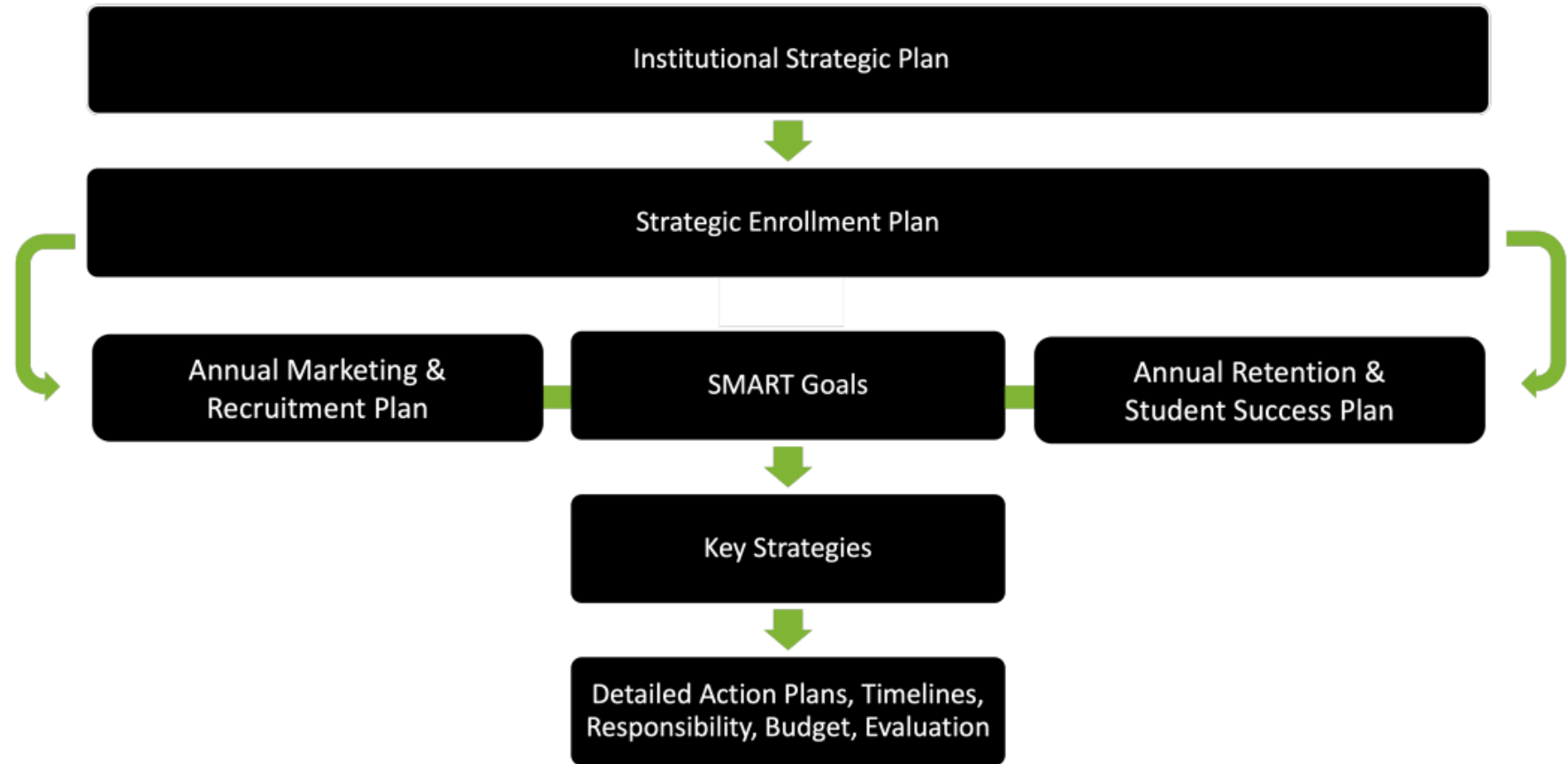
# **SIMPLE** conversion analysis exercise example using incoming first-time freshmen admissions funnel before we jump into recommendations

Simple Conversion Analysis Scenario Using Westfield's Fall 2022 FTIC Data				
Funnel Stage	Fall 2022	Inc Inq	Inc Conv	Inc Both
Inquiries	43,957	45,000	43,957	45,000
Applications	6,621	6,777	7,033	7,200
Applications (Comp)	5,703	5,838	6,058	6,202
Admits	5,394	5,521	5,730	5,866
Enrolled	796	815	903	924
Inquiry to App Rate	15.06%	15.06%	16.00%	16.00%
Completion Rate	86.14%	86.14%	86.14%	86.14%
Admit Rate	94.58%	94.58%	94.58%	94.58%
Yield Rate	14.76%	14.76%	15.76%	15.76%
<b>Enroll Result</b>		<b>19</b>	<b>107</b>	<b>128</b>

fall 2022 actual

potential scenarios

# A simple model for a strong strategic enrollment planning structure



# Engagement in Student Affairs

- 1) Direct, continuous collaboration with admissions to leverage student life
- 2) Work with Institutional Research on engagement survey in the spring
- 3) Improved collaborate with JEDI to improve institutional culture and drive targeted admissions efforts
- 4) Create and celebrate Westfield traditions
- 5) Integration with curricular and co-curricular activities and programs
- 6) Review of programs and policies meant to support student(s) development
- 7) Partnerships with 'student life' services outside the division
  - A. Dining
  - B. Information Technology
  - C. MarCom
  - D. Facilities

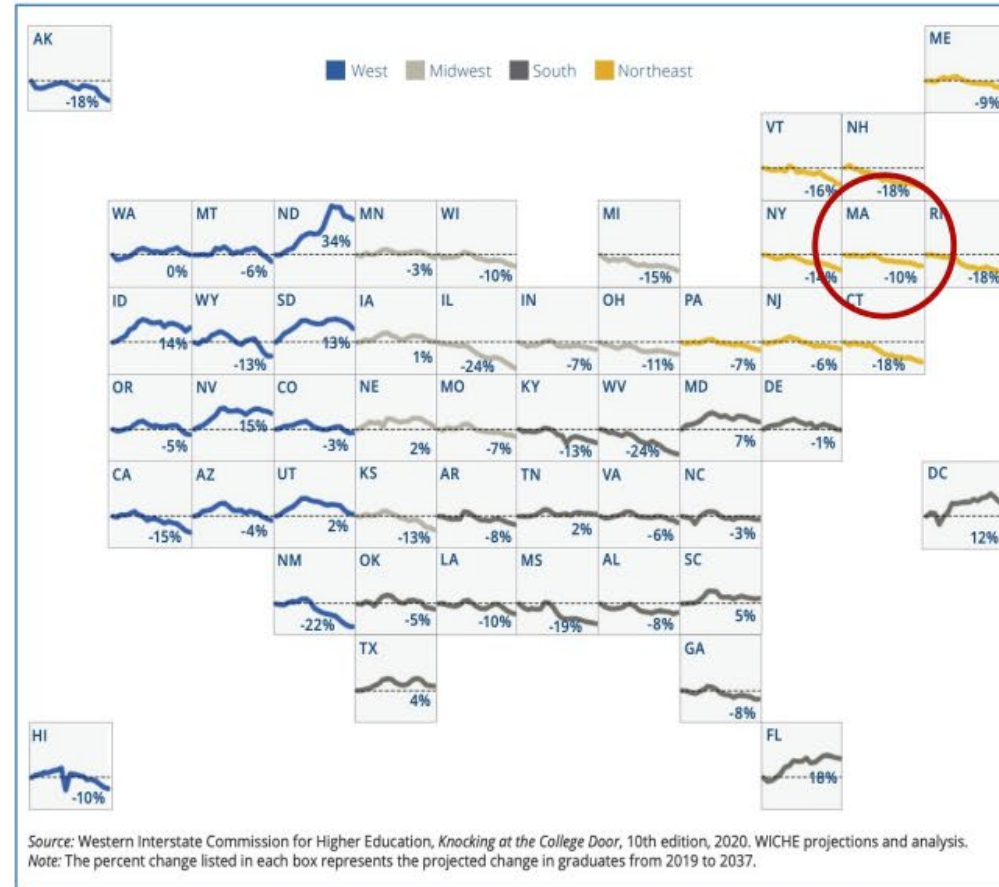




# Appendix

# Total projected percent change in U.S. high school graduates (public & private) from 2019–2037

Figure 2b. State-by-State Projected Percent Change from Class of 2019 to 2037, Grand Total of Public & Private Schools



# Fall 2023 Admissions Report (First-time, full-time)

Fall 2023		Fall 2022		Fall 2021		Fall 2020		Fall 2019		Fall 2018	
<b>Inquiries</b>											
Total	50,206	Total	43,957	Total	19,176	Total	16,224	Total	14,892	Total	11,528
<b>Applications</b>											
Total	6,245	Total	6,621	Total	4,214	Total	4,733	Total	5,060	Total	4,880
Inquiry to App	12.4%	Inquiry to App	15.1%	Inquiry to App	22.0%	Inquiry to App	29.2%	Inquiry to App	34.0%	Inquiry to App	42.3%
<b>Complete Applications</b>											
Total	5,429	Total	5,703	Total	3,612	Total	4,049	Total	4,527	Total	4,308
Complete App	86.9%	Complete App	86.1%	Complete App	85.7%	Complete App	85.5%	Complete App	89.5%	Complete App	88.3%
<b>Acceptances</b>											
Total	5,069	Total	5,394	Total	3,411	Total	3,733	Total	3,879	Total	3,700
Accept Rate	93.4%	Accept Rate	94.6%	Accept Rate	94.4%	Accept Rate	92.2%	Accept Rate	85.7%	Accept Rate	85.9%
<b>Deposits</b>											
Total	704	Total	796	Total	797	Total	830	Total	1,039	Total	995
Deposit Rate	13.9%	Deposit Rate	14.8%	Deposit Rate	23.4%	Deposit Rate	22.2%	Deposit Rate	26.8%	Deposit Rate	26.9%
Inquiry to Deposit	1.40%	Inquiry to Deposit	1.81%	Inquiry to Deposit	4.16%	Inquiry to Deposit	5.12%	Inquiry to Deposit	6.98%	Inquiry to Deposit	8.63%
<b>Deposits (Total)</b>											
Total Deposits	839	Total Deposits	921	Total Deposits	905	Total Deposits	966	Total Deposits	1,136	Total Deposits	1,096
Paid Withdrawals	114	Paid Withdrawals	89	Paid Withdrawals	61	Paid Withdrawals	88	Paid Withdrawals	67	Paid Withdrawals	66
No Shows	0	No Shows	0	No Shows	22	No Shows	5	No Shows	18	No Shows	14
Deferred Admission	21	Deferred Admission	36	Deferred Admission	25	Deferred Admission	43	Deferred Admission	12	Deferred Admission	21
Total Melt	135	Total Melt	125	Total Melt	108	Total Melt	136	Total Melt	97	Total Melt	101
Melt Percentage	16.1%	Melt Percentage	13.6%	Melt Percentage	11.9%	Melt Percentage	14.1%	Melt Percentage	8.5%	Melt Percentage	9.2%

# Fall 2023 Admissions Event Schedule (ex. November)

November 2023						
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Oct 29	30	31	Nov 1	2	3	4
			9:30am Chicopee High School Special Tour 9:30am TOR 12:00pm TIN	9:30am Dean Tech Gear Up Special Tour 9:30am TOR 11:15am TOR 2:00pm TOR	9:30am Hampden Charter School Special Tour 9:30am TOR 12:00pm TIN	
5	6	7	8	9	10	11
	12:00pm TIN	9:30am TOR 11:15am TOR 2:00pm TOR	9:30am Baystate Academy Charter School Special Tour 9:30am TOR 12:00pm TIN	9:30am TOR 11:15am TOR 2:00pm TOR		Veteran's Day (United States)
12	13	14	15	16	17	18
	12:00pm TIN	SOAR	SOAR	9:30am TOR 11:15am TOR 2:00pm TOR	9:30am TOR 12:00pm TIN	Open House
19	20	21	22	23	24	25
	12:00pm TIN	9:30am TOR 11:15am TOR 2:00pm TOR	THANKSGIVING			
26	27	28	29	30	Dec 1	2
	12:00pm TIN	9:30am TOR 11:15am TOR 2:00pm TOR	9:30am TOR 12:00pm TIN	9:30am TOR 11:15am TOR 2:00pm TOR		