



Board of Trustees

2:00 PM

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

AGENDA

- | | |
|--|--|
| 1. Call to Order | Board Chair Dr. Robert Martin |
| 2. Approval of Minutes
a. June 28, 2022 | Board Chair Dr. Robert Martin |
| 3. General Announcements
a. Minor Revisions to Policies sent Sept. 2, 2022:
i. Security Camera Authorization and Use (0640)
ii. Software and Hardware Acquisition and Usage (0602)
iii. Information Security (0580)
iv. WSU BOT Gift Acceptance (0340)
v. Non-Cash (In-Kind) Contributions (0330) | Board Chair Dr. Robert Martin |
| 4. President's Report | Dr. Linda Thompson |
| 5. Student Trustee Report | Trustee Chloe Sanfacon |
| 6. Sustainability Initiatives Recommendation | Student Daniel Currier |
| 7. Items for Discussion
a. Mission Statement
b. Dashboard of Performance Metrics | Dr. Rebecca Morris
Dr. Brian Jennings |
| <u>Governance and Nomination Committee</u> | Committee Chair Melissa Alvarado |
| 8. Items for Information | |
| 9. Items for Action
a. Motion – Bylaw Amendment to Create a Committee for Justice, Equity, Diversity, and Inclusion (JEDI) | |

Finance and Capital Assets Committee

Committee Chair Ali Salehi

10. Items for Information

11. Items for Action

- a. Motion – Vehicle Purchase (Ambulance)
- b. Motion – Student Travel Policy (4040)
- c. Motion – FY23 Operating Budget
- d. Motion – FEMA Reserves Request

Advancement and Enrollment Management Committee

Committee Chair Lydia Martinez-Alvarez

12. Items for Information

Academic and Student Affairs Committee

Committee Chair Dr. Gloria Williams

13. Items for Information

14. Items for Action

- a. Motion – Approval of Bachelor of Fine Arts, Graphic Design

Audit Committee

Committee Chair Theresa Jasmin

15. Items for Information

16. Items for Action

- a. Motion – FY22 Audit Report

Other Business

Board Chair Dr. Robert Martin

17. Items for Action

- a. Motion – Presidential Compensation Adjustment
- b. Motion – Dashboard of Performance Metrics
- a. Ratification of Motion Approved by Executive Committee – FY23 ARPA Capital Maintenance/Projects
- b. Ratification of Motion Approved by Executive Committee – FY23 Investment Income Allocation

Attachments:

- a. Draft Minutes of June 28, 2022
- b. Tracked Changes to Security Camera Authorization and Use (0640)
- c. Tracked Changes to Software and Hardware Acquisition and Usage (0602)
- d. Tracked Changes to Information Security (0580)
- e. Tracked Changes to WSU BOT Gift Acceptance (0340)
- f. Tracked Changes to Non-Cash (In-Kind) Contributions (0330)
- g. President’s Report
- h. Letter to Board of Trustees, Cabinet, and President on Sustainability
- i. Submission Report – Protecting the Global Nest – Going Green at Westfield State University
- j. AUC Proposed Charge for Special Committee on Sustainability
- k. Presentation – Protecting the Global Nest – Going Green at Westfield State University
- l. Mission Statement Review Report
- m. Mission Statement Presentation

- n. Performance Metric Dashboard
- o. Performance Metrics Dashboard (In Progress)

Governance and Nomination Committee:

- p. Motion – Bylaw Amendment to Create a Committee for Justice, Equity, Diversity, and Inclusion
- q. Proposed Bylaw Amendment to Create a committee for Justice, Equity, Diversity, and Inclusion

Finance and Capital Assets Committee:

- r. Motion – Vehicle Purchase (Ambulance)
- s. Vehicle Purchase (Memo)
- t. Vehicle Purchase (Invoice)
- u. Motion – Student Travel Policy (4040)
- v. Student Travel Policy (Track Changes)
- w. Student Travel Policy (No Track Changes)
- x. Motion – FY23 Operating Budget
- y. FY23 Operating Budget (Summary)
- z. FY23 Operating Budget (Final)
- aa. FY23 Operating Budget (Detailed Budget)
- ab. FY23 Operating Budget (June 2022 Provisional Material)
- ac. Motion – FEMA Reserves Request
- ad. FEMA Reserves Request

Academic and Student Affairs Committee:

- ae. Motion – Approval of Bachelor of Fine Arts, Graphic Design
- af. Massachusetts Dept. of Higher Education, Notice of Intent for BFA in Graphic Design

Audit Committee:

- ag. Motion – FY22 Audit Report
- ah. FY22 Audit Report (Required Communication)
- ai. FY22 Audit Report (Draft)

Full Board:

- a. Motion – Presidential Compensation Adjustment
- b. Presidential Compensation Letter August 31, 2022
- c. Motion – Dashboard of Performance Metrics
- d. Ratification of Motion Approved by Executive Committee – FY23 ARPA Capital Maintenance/Projects
- e. Ratification of Motion Approved by Executive Committee – FY23 Investment Income Allocation



BOARD OF TRUSTEES

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: Chair Dr. Robert Martin, Vice Chair Ali Salehi, and Trustees Melissa Alvarado, Paul Boudreau, Theresa Jasmin, Madeline Landrau, Chris Montemayor, William Reichelt, and Dr. Gloria Williams

MEMBERS PARTICIPATING REMOTELY: Trustee Chloe Sanfacon

MEMBERS EXCUSED: Secretary Lydia Martinez-Alvarez

Also present were Westfield State University President Dr. Linda Thompson; President of Westfield Chapter MSCA Dr. Claudia Ciano-Boyce, and Director of Athletics Richard Lenfest.

The meeting was called to order at 2:34 PM by Chair Martin who announced the meeting was being livestreamed and recorded. A roll call was taken of the Trustees participating as listed above.

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

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

Trustee Alvarado	Yes	Trustee Reichelt	Yes
Trustee Boudreau	Yes	Trustee Salehi	Yes
Trustee Jasmin	Yes	Trustee Sanfacon	Yes
Trustee Landrau	Yes	Trustee Williams	Yes
Trustee Montemayor	Yes	Trustee Martin	Yes

Motion passed unanimously.

Chair Martin said it has been a challenging year with enrollment, budget, student mental health, and changing demographics. Enrollment and other data shared at committee meetings should be shared with the entire campus and the University needs to continue to collaborate in the interest of the whole institution.

President’s Report. President Thompson stated that during her first year she tried to focus her attention on getting to know people on and off campus, in this region of the commonwealth, and in the northeast. She wanted the campus community to know their voices would be heard and she has been building her administration along the theme of *building our future by restoring our health*. She has worked toward pathways for healthy environments on and off campus and took advantage of opportunities to create

partnerships in the community. Students want more types of programming and want to be heard. Employees are feeling overworked, and we need to transform the work that we do to create an environment that everyone thrives in. The community wants more access to our facilities and events, and she would like to promote more town gown events. Since June 2021, she has participated in nearly 1,000 meetings and events on and off campus to show that Westfield State University can be the premier public university of higher education in the northeast. To do that, we need to update the Strategic Plan with a focus on Westfield 2030 and beyond by building bridges and promoting the wellbeing of everyone. She is focusing on three main goals:

1. Build teams on campus and collaborate with leaders in the Pioneer and Connecticut River Valley. Foster a spirit of educational innovation. Embrace ideals of Horace Mann to ensure democracy will flourish as principles guiding our work. Success for learners at every stage of life. Create solid communication with school districts and community colleges to create a pipeline for four-year degrees.
2. Transform campus culture with a commitment to transform our values. Promote health and wellbeing of everyone on and off campus. Review and integrate climate survey recommendations to improve culture on campus. Embrace cultural, social, economic, and physical environments for impact and purpose so all people can flourish.
3. Expand resources, which is critical to ensure Westfield State's fiscal health. Stabilize and secure resources, industry partnerships, diversification of programs, technology, and innovation, using the science of learning and entrepreneurial activities. Focus on our strengths and partner with others. We obtained grant writers to assist with state and federal funding and secured close to \$2 million in annual grant funds. We are working to develop a partnership with the University of Puerto Rico and developing a fundraising case for the campus and a community fundraising council.

Chair Martin stated he had asked the president to give updates on her goals throughout the year. She has been working on her self-evaluation, and at her encouragement, the Board will draft an evaluation with input from campus constituencies in the fall.

Student Trustee Report. Trustee Sanfacon shared that a Coordinator of Student Involvement had been hired to replace Barbara Hand in assisting the Student Government Association. There are student leadership sessions planned to prepare for the upcoming year and the new student orientation team is working hard to ensure smooth transitions for students.

Faculty Perspectives. Dr. Ciano-Boyce shared that mental health has been a concern and students' issues have increased the last two years. In class, professors are noticing students sleeping and distracted, increased absences, no responses, missing and late assignments, and requests for accommodations. The faculty love their students but have standards to hold them to. They have been compromising with themselves by being flexible, providing out-of-class help, loosening deadlines, and being more lenient in grading, but with the whisper of enrollment and retention at the back of their minds, it is putting them in a hard spot. Faculty are also facing fears and health issues but cannot bring those to the students. A big part of retention is in the classroom, but some faculty care about it more than some of the students. The faculty are saying "we are not okay; our jobs have changed," and some are fearful they will lose their jobs.

Trustees commented the same issues are in the high schools. There is a limit of faculty and institutional resources, but some students will thrive with more support. The level of commitment to education has dropped for students. The Board is very cognizant of what is going on and closing the University has never been a subject of discussion among anyone. Jobs will not be cut or cut back. That information needs to be taken back to the faculty so we can all work in unison to advance the same cause.

Smith Cup Presentation. Mr. Lenfest stated that from spring 2021 through now, his staff has focused solely on our student athletes. The athletes were laser focused on their sports and succeeded academically and are a

pride point for the University. A video was shown of Westfield State athletics as recipients of the 2021-2022 Howard C. Smith Cup. Our teams finished first and second in five sports, four of which were women's programs. Students Delaney Parker from the women's soccer team (who led the country in scoring), and Kiely Hafensteiner from the women's lacrosse team introduced themselves and were recognized.

Advancement and Enrollment Management Committee. Committee Vice Chair Melissa Alvarado shared that the committee received an update on institutional advancement metrics and that alumni participation rates have increased. The Summer of Fun events were discussed, and Homecoming will take place on October 22. The new class profile showed increased applications, but nearly a 10% drop in deposits. The financial aid timing and allocation needs additional work.

Academic and Student Affairs Committee. Committee Chair Dr. Gloria Williams shared that the committee received information on the student retention cycle from Tinto's Model of Student Retention. Retention planning and retaining students takes the entire institution to be vested in understanding institution goals for enrollment and financial planning. Continuing student attrition and summer melt figures were provided. Student targets, graduation and turnover percentages, and withdrawal data were presented.

MOTION made by Trustee Reichelt, seconded by Trustee Williams, to approve the name change of the Bachelor of Science in Regional Planning to the Bachelor of Science in Urban and Regional Planning.

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

Trustee Alvarado	Yes	Trustee Reichelt	Yes
Trustee Boudreau	Yes	Trustee Salehi	Yes
Trustee Jasmin	Yes	Trustee Sanfacon	Yes
Trustee Landrau	Yes	Trustee Williams	Yes
Trustee Montemayor	Yes	Trustee Martin	Yes

Motion passed unanimously.

Finance and Capital Assets Committee. Committee Chair Ali Salehi shared that the committee was presented with the provisional budget for FY23. Everything is connected -- enrollment, revenue, expenditures, and shortfalls. These are very difficult times, and we need to plan for the worst and hope for the best. We have more applications and interest, but the challenge is converting them to deposits. Reserves will be drawn upon to help balance the budget. The whole campus needs to commit to sacrifices, but that does not include job cuts. The Parenzo Hall project is still on time and on budget. There is currently a deficit of \$1.6 million. A multi-year budget will be presented soon. The newly purchased ambulance has been secured and prepped for use.

FY23 Provisional Operating Budget. **MOTION** made by Trustee Landrau, seconded by Trustee Reichelt, to approve the FY23 provisional operating budget as presented and to authorize the President to make budget adjustments to these funds.

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

Trustee Alvarado	Yes	Trustee Reichelt	Yes
Trustee Boudreau	Yes	Trustee Salehi	Yes
Trustee Jasmin	Yes	Trustee Sanfacon	Yes
Trustee Landrau	Yes	Trustee Williams	Yes
Trustee Montemayor	Yes	Trustee Martin	Yes

Motion passed unanimously.

Capital Budget. **MOTION** made by Trustee Landrau, seconded by Trustee Alvarado, to approve the FY23 proposed capital budget as presented in the FY23 Major Capital Projects

for Facilities Plan.

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

Trustee Alvarado	Yes	Trustee Reichelt	Yes
Trustee Boudreau	Yes	Trustee Salehi	Yes
Trustee Jasmin	Yes	Trustee Sanfacon	Yes
Trustee Landrau	Yes	Trustee Williams	Yes
Trustee Montemayor	Yes	Trustee Martin	Yes

Motion passed unanimously.

Motion – Vehicle Lease/Purchase Program. **MOTION** made by Trustee Landrau, seconded by Trustee Montemayor, to approve FY23 expenditures for the vehicle lease/purchase program , as presented.

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

Trustee Alvarado	Yes	Trustee Reichelt	Yes
Trustee Boudreau	Yes	Trustee Salehi	Yes
Trustee Jasmin	Yes	Trustee Sanfacon	Yes
Trustee Landrau	Yes	Trustee Williams	Yes
Trustee Montemayor	Yes	Trustee Martin	Yes

Motion passed unanimously.

Motion – FY23 Sponsorships. **MOTION** made by Trustee Landrau, seconded by Trustee Reichelt, to authorize the University to spend up to \$30,000 in FY23 on sponsorship and/or attendance at community events, consistent with University guidelines for the expenditure of such funds. The University will report all expenditures made under this umbrella approval no later than the June 2023 meeting of the Board of Trustees.

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

Trustee Alvarado	Yes	Trustee Reichelt	Yes
Trustee Boudreau	Yes	Trustee Salehi	Yes
Trustee Jasmin	Yes	Trustee Sanfacon	Yes
Trustee Landrau	Yes	Trustee Williams	Yes
Trustee Montemayor	Yes	Trustee Martin	Yes

Motion passed unanimously.

Audit Committee. Committee Chair Paul Boudreau shared that the committee received information that the internal control questionnaire had been submitted to Office of Comptroller. The annual review of the Audit Committee Charter presented no significant changes. The risk management/internal audit vacant position will not be filled at this time, but the Boston Consortium will be consulted to find out if we could contract some internal audit services through them. Revisions to the Whistleblower Policy were approved at committee. The policy in place would protect the University and it was discussed whether the executive committee should be notified of any complaints. Legal counsel will be consulted on that issue.

Motion – Reporting Violations of Laws, Rules or Regulations (Whistleblower) Policy.

MOTION was made by Trustee Landrau, seconded by Trustee Reichelt, to approve the changes and accept the newly revised Reporting Violations of Laws, Rules or Regulations (Whistleblower) Policy (0440), as presented.

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

Trustee Alvarado	Yes	Trustee Reichelt	Yes
Trustee Boudreau	Yes	Trustee Salehi	Yes
Trustee Jasmin	Yes	Trustee Sanfacon	Yes
Trustee Landrau	Yes	Trustee Williams	Yes
Trustee Montemayor	Yes	Trustee Martin	Yes

Motion passed unanimously.

Governance and Nomination Committee. Committee Chair Melissa Alvarado shared the committee agreed on the following proposed slate of officers.

MOTION was made by Trustee Reichelt, seconded by Trustee Montemayor, to elect the following slate of officers for the 2022-2023 academic year:

Dr. Robert Martin, Chair
Ali Salehi, Vice Chair
Dr. Gloria Williams, Secretary

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

Trustee Alvarado	Yes	Trustee Reichelt	Yes
Trustee Boudreau	Yes	Trustee Salehi	Yes
Trustee Jasmin	Yes	Trustee Sanfacon	Yes
Trustee Landrau	Yes	Trustee Williams	Yes
Trustee Montemayor	Yes	Trustee Martin	Yes

Motion passed unanimously.

Also discussed in the meeting were Board committee assignments and committee structures. Given the new position of Vice President of Justice, Equity, Diversity, and Inclusion (JEDI), it was agreed to create an additional committee to support JEDI efforts across the University. The format for meetings this coming year were discussed, and five full-day meetings will continue but the bi-monthly meetings will be eliminated. Bylaw revision feedback should be sent to the Board assistant over the summer.

Chair Martin stated that he and Trustee Salehi have been meeting regularly with President Thompson the last year. He asked Trustees to share their committee preferences as he considers the committee assignments for 2022-2023. He requested that committee chairs and staff liaisons to the Board committees discuss and identify those items the committee should pay attention to going into the next year – particularly those of a strategic level. Some material brought to the meetings is board education and business, but the Board needs to ask questions and pay attention to items that should be put before them. He thanked Trustee Martinez-Alvarez for serving as secretary the last three years . A new chair of the Audit Committee is required since Trustee Boudreau has served in that position for the last three years, and the following motion to confirm the chair is required per the Bylaws.

Motion – Confirm Appointment of Audit Committee Chair for 2022-2023. **MOTION** was made by Trustee Landrau, seconded by Trustee Reichelt, to confirm the appointment of Trustee Theresa Jasmin as the Chair of the Audit Committee for 2022-2023.

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

Trustee Alvarado	Yes	Trustee Reichelt	Yes
Trustee Boudreau	Yes	Trustee Salehi	Yes
Trustee Jasmin	Yes	Trustee Sanfacon	Yes
Trustee Landrau	Yes	Trustee Williams	Yes
Trustee Montemayor	Yes	Trustee Martin	Yes

Motion passed unanimously.

Recognition of former Board Chair Kevin Queenin. Chair Martin acknowledged with gratitude the work of former Board Chair Kevin Queenin, who cycled off the Board in January and Trustee Alvarado moved into that Board seat. Chair Martin worked with Trustee Queenin over the last three years and has benefitted from his

role as a Trustee and a person to be at his shoulder. His unquestioned loyalty and commitment to the institution started with his days as a student, then business leader, and many years as trustee, navigating some difficult situations. Trustee Queenin gave of his time and energy and was generous to the University in putting his money where his loyalty and affection were. Trustee Queenin was thanked for his service to the institution and a resolution was read in his honor. Trustee Queenin provided reflections on his years as a Trustee.

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

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

Trustee Alvarado	Yes	Trustee Reichelt	Yes
Trustee Boudreau	Yes	Trustee Salehi	Yes
Trustee Jasmin	Yes	Trustee Sanfacon	Yes
Trustee Landrau	Yes	Trustee Williams	Yes
Trustee Montemayor	Yes	Trustee Martin	Yes

Motion passed unanimously.

Meeting adjourned at 4:39 PM.

Attachments presented at this meeting:

- a. Draft Minutes of April 27, 2022

Academic and Student Affairs Committee:

- b. Motion – Approval of Degree Name Change: Bachelor of Science in Regional Planning to Bachelor of Science in Urban and Regional Planning
- c. Memo on Degree Name Change
- d. BHE Name Change Request

Finance and Capital Assets Committee:

- e. Motion – FY23 Provisional Operating Budget
- f. FY23 Provisional Operating Budget (Narrative)
- g. FY23 Provisional Operating Budget
- h. FY23 Provisional Operating Budget (Revised Enrollment Projection)
- i. FY23 Provisional Operating Budget (Approved Fees)
- j. Motion – Capital Budget
- k. Capital Budget
- l. Motion – Vehicle Lease/Purchase Program
- m. Vehicle Lease/Purchase (Memo)
- n. Vehicle Lease/Purchase Program
- o. Motion – FY23 Sponsorships

Audit Committee:

- p. Motion – Reporting Violations of Laws, Rules or Regulations (Whistleblower) Policy (0440)
- q. Policy – Whistleblower (Track Changes)
- r. Policy – Whistleblower (No Track Changes)
- s. Policy – Whistleblower (Campus Email)

Governance and Nomination Committee:

- t. Motion – Election of Board of Trustees Officers for 2022-2023

Full Board:

- u. Motion – Confirm Appointment of Audit Committee Chair for 2022-2023
- v. Proclamation for Kevin Queenin

Secretary's Certificate

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

Lydia Martinez-Alvarez, Secretary

Date

DRAFT

Westfield State University

Policy concerning:

Section Public Safety

Number 0640

Page 1 of 5

APPROVED: December 2017

REVIEWED: December 2018/June 2022

SECURITY CAMERA AUTHORIZATION AND USE

PURPOSE

Westfield State University is committed to enhancing the quality of life of the campus community by integrating technology into its safety and security practices. A critical component of a comprehensive security plan is the utilization of a security camera system. The surveillance of public areas is intended to deter crime and assist in protecting the safety and property of the University and its community members. It is an extension of the University's law enforcement function.

This Policy addresses the University's safety and security needs while respecting the individual privacy of those attending, working at or visiting Westfield State University. This Policy authorizes the process of installing security cameras on University property while ensuring the protection of individual privacy rights and adhering to state and federal law. Additionally, this Policy pertains to the viewing, retention, dissemination, and destruction of recordings.

The following classes of camera are exempt from this Policy:

- Security cameras installed by authorized financial institutions to monitor bank branches and ATM machines.
- Department of Public Safety's audio/video recording equipment in the department and patrol vehicles.

POLICY

A. Definitions

"Public areas" are areas made available for use by the public including, but not limited to, campus grounds, parking areas, building exteriors, lobbies, hallways, entrances and exits. Areas of the University in which persons would not have a reasonable expectation of privacy, and to which access is restricted to certain people, such as storage areas and residence hall hallways, shall be considered public areas for the purposes of this Policy.

"Private areas" are areas in which a person has a reasonable expectation of privacy, including, but not limited to, residence hall rooms, bathrooms, shower areas, locker rooms, changing rooms, spaces which serve primarily as classrooms and private offices. Areas dedicated to medical, physical or mental therapy or treatment shall also be considered private areas for the

Westfield State University

Policy concerning:

Section Public Safety

Number 0640

Page 2 of 5

APPROVED: December 2017

REVIEWED: December 2018/June 2022

purpose of this Policy.

B. General Principles

The primary use of security cameras will be to record images for future identification of individuals in the event of the investigation of legal matters, criminal violation, or University policy violations. The University will not be monitoring the cameras at all times.

The University's intended uses of security cameras are limited to uses that do not violate a person's reasonable expectation of privacy.

Cameras will not be used to monitor individuals based on characteristics of race, gender, ethnicity, sexual orientation, disability, or other classifications protected by the University's Non-Discrimination Policy.

The University shall undertake all appropriate measures to protect an individual's right to privacy and to maintain security camera information securely through its creation, storage, transmission, use, and deletion.

All camera installations are subject to federal and state regulations as verified by the Chief Information Officer and Director of Facilities and Operations.

C. Procedures

1. Placement of Permanent Equipment

- a) Except as otherwise authorized under this Policy, permanent cameras may be installed only in public areas, including circulation spaces, common areas, hallways, building entrances and exits and areas dedicated to University operations. Cameras shall not be installed in, nor positioned to view through the windows of or entryways into, private areas where privacy interests are paramount, such spaces which serve primarily as classrooms, private offices, areas dedicated to health and counseling services, residence hall rooms, locker rooms and bathrooms .
- b) The Westfield State University Chief of Police shall maintain a current listing of all camera locations and shall make such listing available to Cabinet.
- c) The University shall install appropriate signage to provide notice of the permanent security cameras and to enhance the crime prevention value

Westfield State University

Policy concerning:

Section Public Safety

Number 0640

Page 3 of 5

APPROVED: December 2017

REVIEWED: December 2018/June 2022

of the cameras.

2. Special Investigatory Equipment

- a) In response to specific safety concerns occasioned by recurring criminal behavior or other credible threats being monitored by the Westfield State University Police, the Chief of Police may install cameras on a temporary basis, after consultation with Cabinet, or, in the event of an emergency or exigent circumstances, the President and the University Counsel. Temporary installations shall be removed by the date specified by the Chief of Police in any such consultation, unless extended upon further consultation.

3. Monitoring

- a) University security cameras are not monitored continuously under normal operating conditions, but may be monitored for legitimate safety, security, and compliance purposes that include, but are not limited to, the following: high risk areas, including but not limited to information technology data centers, intermediate and main distribution facilities (IDF and MDF), restricted access areas/locations, in response to an alarm, special events, criminal law and University policy violations, and specific investigations authorized by the Chief of Police or designee.
- b) Information obtained through video monitoring will be used exclusively for safety, security, compliance with University policy and for law enforcement purposes. Should monitoring reveal activity that violates laws or policy, an investigation will be initiated and the University is authorized to refer for criminal prosecution or University disciplinary proceedings.
- c) Cameras shall not be installed for the purpose of monitoring workplace behavior of University employees, except as part of an ongoing investigation of criminal activity by the Westfield State University Police or other law enforcement agency, or as part of an investigation of conduct posing a threat of harm to members of the University community, in either case, only when approved by the President and University Counsel.

4. Training

Westfield State University

Policy concerning:

Section Public Safety

Number 0640

Page 4 of 5

APPROVED: December 2017

REVIEWED: December 2018/June 2022

- a) Westfield State University Department of Public Safety personnel shall be trained in the technical, legal, and ethical parameters of appropriate camera use. Department of Public Safety Personnel shall receive a

copy of this Policy and provide written or **electronic** acknowledgement that they have read and understood its contents.

5. Storage, Disposition and Release of Recorded Images

- a) Recorded video images will be retained and destroyed in accordance with the Massachusetts Statewide Records Retention Schedule or otherwise as required by law.
- b) For recorded images that may be destroyed after the University's administrative use ceases, the administrative use period will generally not exceed 45 days, and thereafter the images may be erased or "overwritten," unless retained as part of a police investigation, or subject to a valid court or agency preservation order, a University litigation hold, or needed for legitimate training purposes.
- c) Recorded video images will be stored on a secure server accessible to authorized personnel only.
- d) Recorded video images will only be released to parties outside the University in accordance with the paragraph below, the Massachusetts Public Records Law, or as otherwise required by law.

Relevant video recordings may be released by the Chief of Police as follows:

- to the Office of the Dean of Students in connection with an adjudication of an alleged violation of the Student Code of Conduct for which disciplinary charges have been issued;
- to the Assistant Vice President for Human Resources in connection with the investigation of workplace misconduct of a threatening or criminal nature;
- to senior University administrators to assist in the assessment of and response to actual or threatened criminal activity or other

Westfield State University

Policy concerning:

Section Public Safety

Number 0640

Page 5 of 5

APPROVED: December 2017

REVIEWED: December 2018 June 2022

campus emergencies;

- to senior University administrators who are charged with responsibility in the investigation to assist in the investigation of University policy violations; to federal, state or municipal law enforcement agencies for purposes of investigation or prosecution of criminal activity;

 - to third parties for purposes related to legitimate safety concerns, e.g. to aid in locating missing persons; and/or

 - pursuant to subpoenas or court orders requiring production, but in conformity with requirements of relevant laws and regulations, and after consideration of the advisability of an opposing motion to prevent or limit release.
6. A record log will be kept of all instances of access to, and use of, recorded material by authorized users not employed by the Department of Public Safety. Nothing in this section is intended to limit the authority of the Westfield State University Campus Police in law enforcement activities.
7. Any person who tampers with or destroys video security equipment and/or footage will be subject to criminal prosecution and/or disciplinary action.
8. Nothing in the above shall be deemed to restrict the use of video recordings by the University in the defense of legal actions or other proceedings brought against it.

REVIEW

Review and maintenance of equipment will be coordinated through Information Technology Services.

The Policy shall be reviewed by the Vice President of Student Affairs and affected University administrators every three years.

SOFTWARE AND HARDWARE ACQUISITION AND USAGE

PURPOSE

The purpose of this policy is to provide compatibility and control of software and hardware utilized at the University. This policy shall be enforced in conformity with all applicable local, state, and federal regulations and laws.

SCOPE

This policy applies to all students, faculty, staff, volunteers, vendors, consultants, contractors, or others (herein afterwards referred to as “constituents”) who use or have authorized access to University Information Technology Resources. This policy is supplemented by the policies of those networks to which the University is interconnected, including, but not limited to, the University of Massachusetts Information Technology Systems group, the Commonwealth of Massachusetts’ Information Technology Division, UMass Online, etc. It covers all University information whether in hardcopy or electronic form and any systems which access, process, or have custody of business data. This policy also applies to ~~any and all~~ information, in any form and in any medium, network, internet, intranet, computing environments, as well as the creation, communication, distribution, storage and disposal of information.

For the purposes of this policy, “Information Technology Resources” means all computer and communication facilities, services, data, and equipment that are owned, managed, maintained, leased or otherwise provided by the University. Information Technology Services (ITS) refers to authorized personnel currently assigned to Infrastructure Services and Administrative Systems. Academic Information Services Support Desk (AISSD) refers to authorized personnel currently assigned to the Technology Support Desk under Academic Information Services. Area Security Officials shall be the supervisor of each department or program with the authority to grant access to Information Technology Resources. The Information Technology Resource Hardware and Software Review Committee refers to members of the Security Policy Committee that will ensure compatibility, functionality, and feasibility in order that the request meets the needs of the business operation it is intended to support. This includes, but is not limited to, ensuring that hardware and software does not currently exist to meet the need of the business operation.

The use of the University’s Information Technology Resources constitutes an understanding of, and agreement to abide by, this policy. Additionally, all constituents must protect and if necessary, intervene to assure that others protect the confidentiality, integrity and security of all Information Technology Resources.

USER OWNERSHIP AND RESPONSIBILITIES

It is the responsibility of any person using the University’s Information Technology Resources to read, understand and follow this policy. In addition, all users are expected to exercise

APPROVED: June 2015

REVIEWED: June 2022~~0~~

reasonable judgment in interpreting this policy and in making decisions about the use of Information Technology Resources. Any person with questions regarding the application or meaning of this policy should seek clarification from their ASO or from the Information Security Officer. The University owns and maintains the information stored in its Information Technology Resources and it limits access to its Information Technology Resources to authorized users. Users of Information Technology Resources have a responsibility to properly use and protect these resources, respect the rights of other ~~users~~users, and behave in a manner consistent with any local, state and federal laws and regulations, as well as all University policies. Information Technology Resources, including Internet bandwidth, are shared among the community and users must utilize these resources with this understanding.

Users must respect all intellectual property rights, including any licensing agreements, applicable to information and resources made available by the University to its community.

Information Technology Resources are provided to support the mission of teaching and learning and to conduct official University business. Therefore, the University bears no responsibility for the loss of any personal data or files stored or located on any system.

The University does not systematically monitor communications or files. Users must be aware of, and responsible for, material which community members may post, ~~send~~send, or publish using its network, servers and other resources including the internet.

PROCEDURES

A list of currently approved software and hardware is available by contacting AISSD or the Chief Information Security Officer.

1. Software ~~and Hardware~~and Hardware Acquisition

- a) Requests for software and hardware must have the approval of the Information Technology Resource Hardware and Software Review Committee, including, but not limited to, the future support of the software and/or hardware.
- b) Software and hardware, including those that are externally hosted, are required to follow this acquisition and usage process, even if it is at no cost.
- c) Purchase or installation of any software or hardware that has not been approved by the Information Technology Resource Hardware and Software Review Committee is strictly prohibited.
- d) After approval, it is the responsibility of the requestor to:
 1. Have the funds available in their appropriate budget including a future financial plan.

Westfield State University

Policy concerning:

Section Administrative

number 0602

page 3 of 4

APPROVED: June 2015

REVIEWED: June 2022~~9~~

-
2. Coordinate with the Information Technology Resource Hardware and Software Review Committee to ensure dependencies for the future operations of the software and/or hardware.
 - e) All requests for software and hardware acquisition must follow the approved University Procurement Process policy (Administrative Policy #320) and be in compliance with all local, ~~state~~state, and federal laws and regulations, as well as any other applicable University policies.
 - f) The University shall honor and respect all software copyright(s) and adhere to the terms of all software licenses to which the University is a part of:
 1. Software, ~~hardware~~hardware, and its associated documentation may not be duplicated for use on University Information Technology Resources or elsewhere unless expressly authorized by fair use or agreement.
 2. Software and/or hardware may be utilized on local area networks or multiple machines in accordance with applicable licensing agreements.
 - g) This policy is also inclusive of software as a service (SaaS).
2. Software and Hardware Installation and Maintenance:
- a) All hardware and software assets, regardless of the funding source, remain the property of the University and must be in compliance with The Fixed Assets, Capitalization, and Inventory Control Policy (Administrative Policy # 601).
 - b) University Information Technology Resources must be kept both virus and malware free and in compliance with licensing agreements.
 - c) All installations of approved software and/or hardware must be coordinated through the appropriate Information Technology Department.
 - d) Generally, the purchase of a single copy of any software entitles the owner to use the software on one (1) device.
 - e) Before installing any approved University software on any home or personal machines, please check with ~~AISSD~~the Technology Support Services department (TSS).
 - f) Installation of any software or hardware not approved is strictly prohibited. Any unapproved software and/or hardware found to be installed on University Information Technology Resources shall be considered a security incident and shall be reported and acted upon in accordance with the Information Security Incident Response Policy.
 - g) Software and hardware may be purchased with maintenance and upgrade options. Unless otherwise agreed upon by the appropriate Information

Westfield State University

Policy concerning:

Section Administrative

number 0602

page 4 of 4

APPROVED: June 2015

REVIEWED: June 2022~~0~~

Technology Department, the requestor is responsible for budgeting for any and all future maintenance and upgrade costs.

3. Server related software and hardware shall follow the same procedures and be approved by the Director of Administrative Systems and/or the Director of Infrastructure Services and be in compliance with ~~the all~~ University policies and its procedures and guidelines.
4. Computer Lab software and/or hardware shall follow the same procedures and is managed by the ~~AISSD-TSS~~ and utilizes Deep Freeze to restore the image to original configuration on log off or restart.
5. Any exceptions to this policy must be approved in writing by the ~~Dean of Academic Information Systems and~~ the Chief Information Security Officer.
6. Failure to comply with these guidelines and its supporting policies may be subject to disciplinary action.

REVIEW

This policy shall be reviewed annually by the Chief Information Security Officer and the ~~Associate~~ Director of ~~the Academic Information Services Support Desk~~ Technology Support Services.

INFORMATION SECURITY

PURPOSE

The purpose of this policy is to establish a standardized, system-wide approach to managing the protection of information and Information Technology Resources to support core business needs and the provision of continuity and privacy at Westfield State University ("University") and establish sanctions for violations of this policy. This policy is intended to protect the users of the University's Information Technology Resources by ensuring a reliable and secure technology environment that supports the educational mission of the University. These resources are provided as a privilege to all Westfield State University employees, students, and authorized guests. The University seeks to ensure the integrity of Information Technology Resources made available to the user community, as such, to ensure these resources are secure from unauthorized access for those that utilize them. This policy is not intended to inhibit the culture of intellectual inquiry, discourse, academic freedom, or pedagogy. In general, the same ethical conduct that applies to the use of all University resources and facilities applies to the use of the University's Information Technology Resources.

SCOPE

This policy applies to all students, faculty, staff, volunteers, vendors, consultants, contractors, or others (herein afterwards referred to as "constituents") who use or have authorized access to University Information Technology Resources. This policy is supplemented by the policies of those networks to which the University is interconnected, including, but not limited to, the University of Massachusetts Information Technology Systems group, the Commonwealth of Massachusetts' Information Technology Division, UMass Online, etc. It covers all University information whether in hardcopy or electronic form and any systems which access, process, or have custody of business data. This policy also applies to any and all information, in any form and in any medium, network, internet, intranet, computing environments, as well as the creation, communication, distribution, storage and disposal of information.

For the purposes of this policy, "Information Technology Resources" means all computer, applications and communication facilities, services, data, and equipment that are owned, managed, maintained, leased, or otherwise provided by the University. ~~Information Technology Services (ITS) refers to authorized personnel currently assigned to Infrastructure Services and Administrative Systems. Academic Information Systems Support Desk (AISSD) refers to authorized personnel currently assigned to Support Desk under Academic Information Services.~~ Area Security Officials shall be the supervisor of each department or program with the authority to grant access to Information Technology Resources.

The use of the University's Information Technology Resources constitutes an understanding of, and agreement to abide by this policy. Additionally, all constituents must protect, and if necessary, intervene to assure that others protect the confidentiality, integrity, and security of all Information Technology Resources.

Westfield State University

Policy concerning

Section Administrative

number 0580

page 2 of 3

APPROVED: October 2014

~~2024~~August 2022

REVIEWED: ~~September~~

USER OWNERSHIP AND RESPONSIBILITIES

It is the responsibility of any person using the University's Information Technology Resources to read, understand, and follow this policy. In addition, all users are expected to exercise reasonable judgment in interpreting this policy, and in making decisions about the use of Information Technology Resources. Any person with questions regarding the application or meaning of this policy should seek clarification from his or her supervisor, or from the Information Security Officer. The University owns and maintains the information stored in its Information Technology Resources and limits access to its Information Technology Resources to authorized users. Users of Information Technology Resources have a responsibility to properly use and protect these resources, respect the rights of other users, and behave in a manner consistent with any local, state, and federal laws and regulations, as well as all University policies, procedures, and guidelines. Information technology resources, including Internet bandwidth, are shared among the community, and users must utilize these resources with this understanding.

Users must respect all intellectual property rights, including any licensing agreements, applicable to information and resources made available by the University to its community.

Information Technology Resources are provided to support the mission of teaching and learning and to conduct official University business. Therefore, the University bears no responsibility for the loss of any personal data or files stored or located on any system.

POLICY

Westfield State University's Information Security Officer will establish security program that will be based upon the best practices recommended in the SANS Critical Security Controls for Effective Cyber Defense - Version 5. The components defined by these System Administration Networking and Security Institutes (SANS) Critical Security Controls are a subset of the National Institute of Standards and Technology (NIST) SP 800-53, prioritizing the controls that will provide a measurable security program, appropriately adopted to meet the specific needs of Westfield State University. This program will also incorporate applicable regulations and laws, such as, but not limited to, the Gramm-Leach-Bliley Act (GLBA), the Health Insurance Portability and Accountability Act (HIPPA), Family Educational Rights and Privacy Act (FERPA), and the Commonwealth of Massachusetts Information Technology Department (ITD) and Office of Consumer Affairs and Business Regulations. Additional organizations, such as EDUCAUSE and the International Organization for Standardization and the International Electrotechnical Commission (ISO/IEC 27005:2011) will be utilized as resources for additional security practices.

Westfield State University

Policy concerning

Section Administrative

number 0580

page 3 of 3

APPROVED: October 2014

~~2024~~August 2022

REVIEWED: ~~September~~

PROCEDURES

The SANS Critical Controls for Effective Cyber Defense – Version 5 and other noted sources in the above policy statement will be utilized to guide, develop and enhance any additional Information Technology policies, procedures and guidelines as needed to address the security needs of Westfield State University.

REVIEW

This policy shall be reviewed annually by the Chief Information Security Officer.

Westfield State University

Policy concerning:

Section Administrative

Number 0340

Page 1 of 5

APPROVED: March 2000

REVIEWED: ~~June 2018~~ May 2022

Formatted: Indent: First line: 0"

WESTFIELD STATE UNIVERSITY BOARD OF TRUSTEES GIFT ACCEPTANCE POLICY

PURPOSE

The goal of this policy is to encourage the advancement of Westfield State University without encumbering the organization with gifts which are not in keeping with the mission of Westfield State University or which may generate more costs than benefits.

RATIONALE

Westfield State University and the Westfield State Foundation value the voluntary support of all donors. Their generosity assists the University's pursuit of excellence. In accepting gifts in support of its mission, the University and the Foundation seek to assure that the interests of its donors and both organizations are protected, with maximum benefit afforded to all parties.

POLICY

The Office of Institutional Advancement (IA) responds to all donors concerning prospective gifts. The following policies are intended as guidelines. Complex gift situations require flexibility after careful consideration of several factors. The IA Office understands, therefore, that action of either the Trustees Advancement and Enrollment Management Committee or the Westfield State Foundation may be required at times to consider the merits of particular gifts and to make a final decision.

1. TYPES OF GIFTS

A. Outright Gifts

- i. Gifts in the form of cash and checks shall be accepted regardless of amount unless, as in the case of all gifts, there is a question as to whether the donor has sufficient title to the assets or is mentally competent to legally transfer the funds as a gift to Westfield State University or the Westfield State Foundation.
- ~~ii.~~
- ~~iii.~~ The University and Foundation shall make every effort to respect the intentions of donors. Gifts that have been solicited for a
— specified purpose shall be applied to that purpose. The Advancement and Enrollment Management Committee will decide on the use of gifts greater than \$10,000 if the donor has not

Formatted: Numbered + Level: 3 + Numbering Style: i, ii, iii, ... + Start at: 1 + Alignment: Right + Aligned at: 1.38" + Tab after: 1.5" + Indent at: 1.5", Tab stops: 0.5", Left

Westfield State University

Policy concerning:

Section Administrative

Number 0340

Page 2 of 5

APPROVED: March 2000

REVIEWED: ~~June 2018~~ May 2022

Formatted: Indent: First line: 0"

indicated any preference. Gifts of less than \$10,000 donated without preference will be placed in the Westfield Fund.

- iii. All bequests will be applied to the Foundation's endowment. If the decedent requests that the bequest be restricted to a purpose that falls within the University's mission, the income from the bequest shall be restricted to that purpose.
 - iv. Solicitations will specify whether checks should be made payable to Westfield State University or the Westfield State Foundation, Inc. In no event shall checks be made payable to an employee, agent or volunteer to the credit of the University or Foundation.
- B. Publicly Traded Securities
- i. Readily marketable securities, which are traded on the New York Stock Exchange, the American Stock Exchange and NASDAQ as well as shares of publicly traded mutual funds, shall be accepted by the Foundation.
 - ii. Should a donor wish to place any restrictions on the use of a stock gift, instructions to this effect must be put in writing and sent to the Office of Institutional Advancement before the stock is accepted or sold.
 - iii. In accordance with IRS regulations, securities are valued at the mean of the highest and lowest quoted selling prices on the date the securities are officially delivered.
 - iv. Gifts of securities will be sold by the Foundation upon receipt through its agent or representative. In no event shall an employee or volunteer working on behalf of either the University or Foundation commit to a donor that a particular security will be held by the Foundation.
- C. Closely Held Securities
- i. The approval of the Foundation Board of Directors will be required to accept gifts of restricted, illiquid, and private securities. Other hard-to-value property that might be proposed, such as limited partnership interests, will be subject to the same review.
- D. Real Property
- i. The Foundation's charter enables it to hold property on behalf of the University. The Office of Institutional Advancement recognizes that gifts of real estate are specialized investments subject to risks, particularly those associated with environmental liability. Thus no gift of real estate shall be accepted without prior approval of the Foundation Board. Gifts of real estate to be turned over ultimately for University purposes will be accepted only after a survey is made

to ascertain the integrity of the physical structure, the cost of repair and annual operations, and the usefulness of the property to the University.

Westfield State University

Policy concerning:

Section Administrative

Number 0340

Page 3 of 5

APPROVED: March 2000

REVIEWED: ~~June 2018~~ May 2022

Formatted: Indent: First line: 0"

- ii. No gift of real estate shall be accepted without first being appraised in a manner conforming to the guidelines of the Internal Revenue Service by a qualified appraiser who meets the IRS definition. For complex properties, it may be desirable to obtain two separate qualified appraisals, one the responsibility of the donor and the other the responsibility of the Foundation.
 - iii. Unless specifically exempted by the Foundation, all proposed gift properties would require the completion of an Environmental Assessment by a qualified assessor.
 - iv. In general, residential real estate located in New England, with a net realizable value estimated by prospective donor or others at \$50,000 or greater, will be considered, unless the Foundation shall determine that the property is not suitable as a gift.
 - v. In general, residential real estate located outside the New England area will not be considered as a gift unless its net realizable value appears to be in excess of \$150,000 and there is reason to believe that it is highly marketable. The Foundation may make exceptions to this policy if conditions warrant.
 - vi. No commercial real estate shall be accepted without thorough Foundation review.
 - vii. Special attention shall be given to the consideration and acceptance of real estate encumbered by a mortgage, as the ownership of such property may give rise to unrelated business income for the Foundation.
 - viii. In general, gifts of real estate to the Foundation will be liquidated on the public market as soon as possible, rather than held and managed for investment purposes. The Foundation may make exceptions on a case-by-case basis.
- E. Tangible Personal Property
- i. Tangible personal property (art works, antiques, jewelry, rare books, etc.) shall be accepted after approval of the Foundation Board provided such property has a value in excess of \$1,000 and is related to the Foundation's tax exempt status. All gifts of personal property shall be unrestricted; unless any restriction instructions are provided by the donor and said instructions are accepted by the Foundation Board. The Foundation cannot put a dollar value on a gift of personal property under IRS regulations.
 - ii. No tangible personal property shall be accepted by the Foundation unless there is reason to believe that the property can be liquidated, if necessary. No property shall be accepted that obligates the Foundation to ownership of it in perpetuity.
- F. In-Kind Gifts
- i. The terms for accepting gifts-in-kind that can be immediately used

Westfield State University

Policy concerning:

Section Administrative

Number 0340

Page 4 of 5

APPROVED: March 2000

REVIEWED: ~~June 2018~~ May 2022

Formatted: Indent: First line: 0"

by the University are spelled out in the University's *NON-CASH (IN-KIND) CONTRIBUTIONS* Policy.

G. Other Property

- i. Other non-cash property of any description, including mortgages, notes, copyrights, royalties, easements, etc., shall only be accepted by action of the Foundation Board or an officer duly acting on its behalf.
- ii. Special consideration shall be given to the nature of any gift property and whether it is in keeping with the tax-exempt mission of the Foundation prior to the acceptance of such property.

2. PAYMENT OF FEES RELATED TO GIFTS TO WESTFIELD STATE UNIVERSITY

A. Finder's Fees or Commissions

- i. Westfield State University and the Westfield State Foundation will pay no fee to any person as consideration for direction a gift to either organization.
- ii. Neither the University nor Foundation will pay a commission or finder's fee of any type to any party in connection with the completion of a gift to either organization.

B. Professional Fees

- i. As needed, the University or Foundation shall seek the advice of qualified legal counsel in matters pertaining to gift transfers, including any agreements, contracts, trusts, and other legal documents.
- ii. The University or Foundation will pay reasonable fees for professional services rendered to it in connection with the completion of a gift to the University or Foundation.

3. GENERAL

A. Confidentiality

- i. All information received from prospects and donors regarding their assets, heirs, gifts, advisors, and other personal information shall remain strictly confidential, with only those staff members and volunteers with a "need to know" having access to such information.
- ii. However, the University or Foundation may on occasion request permission from a donor to use his/her name or personal information in order to promote ongoing development efforts.

B. Role of Employees

Westfield State University

Policy concerning:

Section Administrative
Number 0340
Page 5 of 5

APPROVED: March 2000

REVIEWED: ~~June 2018~~ May 2022

Formatted: Indent: First line: 0"

- i. The primary development role of employees shall be to inform, serve, guide, and assist prospects and donors in reaching their philanthropic goals.
- ii. University employees/volunteers are not in a position to render legal or tax advice. Employees shall routinely advise donors to seek advice from their personal financial advisors and counsel on taxes, all aspects of their gifts, and the terms being considered.
- iii. All personnel employed by the University or Foundation to promote or administer charitable gifts, including consultants and advisors, shall be paid a salary, wage, or fee by the University or Foundation and shall never be compensated with a commission on such gifts.

REVIEW

This policy shall be reviewed ~~annually every three years~~ by the ~~Chief Development Officer~~ Vice President of Institutional Advancement.

NON-CASH (IN-KIND) CONTRIBUTIONS

PURPOSE

To establish guidelines for the receipts and acknowledgements of non-cash, in-kind gifts to any office or department of Westfield State University. Claims of such gifts are closely scrutinized by the Internal Revenue Service.

DEFINITIONS

1. **Non-cash or in-kind gifts** may be donations of new or used instructional or scientific equipment; computers; classroom or office supplies; furniture; books; musical instruments; recordings; collections of stamps, coins, jewelry, and the like; and works of art.
2. A **donor** can be an individual, partnership, or corporation. Westfield State University is a **donee** organization.
3. Tax deductions for non-cash donations are based upon **Fair Market Value** (FMV), the price a willing buyer would pay a willing seller when neither has to buy or sell, and both are aware of the sale conditions
4. A **qualified appraiser** is an individual who holds himself or herself out to the public as an expert appraiser of the type of property being evaluated and performs such appraisals on a regular basis. A qualified appraiser cannot be an employee of the donor or donee.
5. Gifts of real estate and securities are not covered by this policy.

POLICY: For Donors Wishing to Claim a Tax Deduction

1. It is incumbent upon Westfield State University to treat non-cash donations in a manner which does not jeopardize a donor's standing with the Internal Revenue Service.
2. Once a department or office is about to enter into discussions or negotiations for a non-cash donation with a donor, the Office of Institutional Advancement must be notified immediately. Acceptance decisions will follow existing

Westfield State University

Policy concerning:

Section Administrative

Number 0330

Page 2 of 3

APPROVED: December 1997

REVIEWED: ~~October, 2017~~ May 2022

Westfield State University policies. The Office of Institutional Advancement's role is to assist in encouraging any such gifts and to implement proper acknowledgement procedures once the gift is finalized. In the latter regard:

- a. Evaluations by donee employees are not acceptable by the IRS. Appraisals and the resulting deduction claims are entirely the responsibility of the donor.
- b. The Office of Institutional Advancement will work with the donor and donor's advisors to complete necessary IRS documentation in a timely manner.

POLICY: For Donors Not Claiming Deductions

1. Even though there are no IRS consequences for unreported non-cash donations, once a department or office is about to enter into discussions or negotiations for such donations with a donor, the Office of Institutional Advancement should be notified. The services of the Office of Institutional Advancement are available to help "close" gifts and encourage future donations.
2. Acceptance decisions will follow existing Westfield State University policies.

PROCEDURES

1. In order to request approval to receive a non-cash/in-kind gift, the department or office in question will request a Non-Cash/In-Kind Gift Acceptance Form from the Office of Institutional Advancement. Upon the completion of this form to the satisfaction of the approving authorities:
 - a. Physical arrangements will be made to transport and receive the gift.
 - b. The University's Vice President for Administration and Finance will receive a copy of the form.
 - c. Facilities & Operations will receive a copy of the form in order to add the gift to the University's physical assets inventory when it arrives.

Westfield State University

Policy concerning:

Section Administrative

Number 0330

Page 3 of 3

APPROVED: December 1997

REVIEWED: ~~October, 2017~~ [May 2022](#)

- d. The Office of Institutional Advancement will initiate the acknowledgment process.
2. Westfield State University is not obligated to accept non-cash contributions.
 - a. Items accepted must be considered as having some value to the campus or a campus program.
 - b. The University must acknowledge its ability to maintain, use or store the gift upon receipt.

REVIEW

This policy will be reviewed every three years by the Vice President of ~~the Office of~~ Institutional Advancement and the Vice President of Administration and Finance.



UNIVERSITY NON-CASH/IN-KIND GIFT ACCEPTANCE FORM

Date: _____

Donor Information:

Donor Individual/Organization Name: _____

Organization/Business Contact: _____

Address _____

City _____ State _____ Zip _____

Phone _____ Email _____

Corporate ID _____ ~~OR~~ Social Security Number _____

Gift Description and Potential Use: _____

Will acceptance of this gift generate a financial impact to the institution? Such as increased staffing or facility needs, storage, maintenance, etc. How will additional costs be funded?

Receipt and/or Appraisal by Independent Appraiser __ Yes __ No Attach receipt or appraisal to this form.

Estimated fair market value by donor: \$ _____

What is final destination on campus (if known)? _____

Special instructions e.g., item delivery or pick up, who is handling, restrictions, etc.:

Department Chair _____

Vice President of Administration and Finance _____

Executive Director, Westfield State Foundation, Inc. _____

Please return this form to: Westfield State Foundation, Inc. Attn: Erica Broman Lisa McMahon, Executive Director PO Box 1630 Westfield, MA 01086-1630 (413) 572-8644 or email ebromanlmcMahon@westfield.ma.edu

Field Code Changed

The IDEA of Our University

Dr. Linda Thompson
President

Board of Trustees Meeting – October 12, 2022



IDEA

AT Westfield State University



IDEA

AT Westfield State University



IDEA

AT Westfield State University



IDEA

AT Westfield State University



IDEA

AT Westfield State University



IDEA

AT Westfield State University

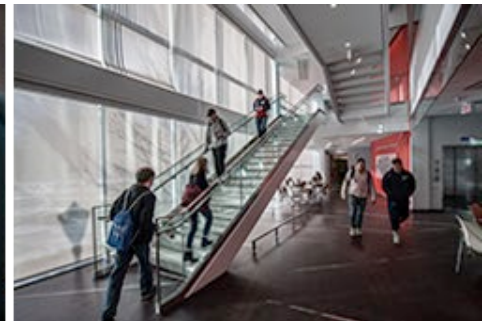


President's report: **The Student Experience**

Access to a fully integrated and exceptional student experience.

Supporting Strategic Priorities:

- On September 18, Students marched in the LGBTQIA Parade in Longmeadow and Westfield State students rallied to march in the Puerto Rican Parade in Springfield.
- For the month of September, we have had 848 students attend programs in the Residence Halls
- Counseling center logged 143 appointments.



President's report: The Student Experience

Access to a fully integrated and exceptional student experience.

Homecoming events:

- On October 20-23, the Homecoming committee is putting on a 4-day homecoming event featuring a day for the arts with poetry readings and art gallery shows. Spirit day events, including a bonfire, movie and pep rally. Also, tail gating at the football, soccer and field hockey games.
- Premiere event: Scholarship Dinner to celebrate the 40th Anniversary of Communication Department, and to honor several distinguished alumni from across campus, and launch the Dr. Liz Preston Scholarship.



President's report: Enrollment

Access to a fully integrated and exceptional student experience.

- Admission will be attending 400 different recruitment events for the fall semester. These events will take place throughout the northeast and also include Washington D.C. and Florida.
- Enrollment hosted our first Open House on October 2nd here on campus with over 212 guests which included 80 students.
- On October 6th we held a Reach to Teach event that had 51 students from 7 different Springfield high schools.
- The FAFSA filing date opened on October 1st and our Financial Aid staff have been communicating with prospective students on our willingness to assist in filling out the form.



President's report: Resources

Access to a fully integrated and exceptional student experience.

- We continue to advocate for a leadership role to form a coalition of area stakeholders to invest in solving the commonwealth's nurse shortage crisis.
- The state has also made mental health a priority and we intend to follow the legislature's lead that offers any funding related to mental health reform. Close to \$100 million has been earmarked for this initiative.
- FEMA covid reimbursement funds of \$1.3M were received in FY23.
- Implemented a new paperless student billing system which automated and streamlined processes and reduced costs to the University.



President's report: Facilities and Operations

Access to a fully integrated and exceptional student experience.

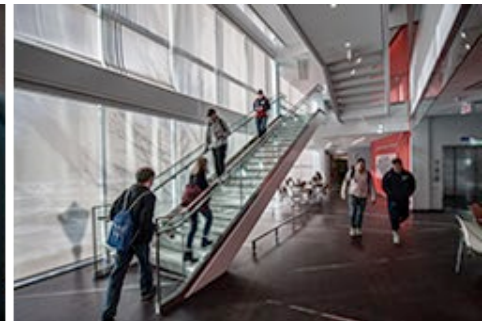
- Parenzo project is moving along on schedule. We project fall of 2023 will have substantial completion.
- The Wilson Hall Sprinkler Project has reached substantial completion.
- Asbestos Abatement in the Scanlon/Trades Tunnel has been completed using ARPA funding as planned.
- Phase 1 of the Campus Facilities Master plan is nearly completed which will guide the future deferred maintenance spending plan for the next several years. Phase 2 on space utilization will begin in FY23.



President's report: Recent grants include over \$900,000 in awards:

Access to a fully integrated and exceptional student experience.

- We have a new Director of Grants and Sponsored programs. We've also extended our relationship with grant consulting firm McAllister and Quinn.
- Public Higher Education Student Behavioral and Mental Health Needs Grant: \$132,000
- Baystate Health – Better Together Grant – Pathways for New Healthcare professionals: \$250,000
- Department of Elementary & Secondary Education – new Early Literacy Initiative: \$10,000
- National Endowment of the Arts - Visual and Performing artist lecture series and related workshops: \$20,000
- MA Education, Labor and Workforce Development, and Housing and Economic Development – Skills Capital Grant Fund: \$500,000



President's report: Innovation Fund has seen a flurry of awards

Access to a fully integrated and exceptional student experience.

- Professor Lisa Barao, Professor Joseph Camilleri, Professor Kim Tobin: Graduate Certificate/Program in Law Enforcement Mental Health Response Services -- \$10,000
- Professor Andy Bonacci: Sound Recording Studio/Audio maker's space -- \$10,000
- Dr. Megan Kennedy and members of Teacher Education, Assessment and Accreditation Committee TEAAC): MTEL Support -- \$11,639
- Professor Beverly St. Pierre: Purchase of simulation equipment for Health Science -- \$10,000
- Professor Imo Imeh: Art Aviary: Visual Artist in Residence Program -- \$5,000
- Professor Kim Sherma: Expanded Human Resource Program (including curricular and non-credit HR programs) \$4,212



President's report: Culture

Access to a fully integrated and exceptional student experience.

- We will continue our conversations and meetings with the City of Westfield on creating a stronger city/university partnership.
- In January, our nursing students will travel to Puerto Rico to provide culturally responsive care to community centers in the southern and western regions of the island.
- First Institutional Climate Survey key findings were presented at the Town Hall on 10/4/22.
- Human Resources launched a Values-based Working Group to advance institutional values to focus on campus culture.
- We will pilot a theme-based approach to peer-based training (e.g., organizational culture, conflict resolution) is being developed for fall semester.



President's report: Sports

Access to a fully integrated and exceptional student experience.

- Westfield State hosted their 16th annual Owl Golf Club Tournament for alumni on August 1, 2022. The tournament raised more than \$22,000 to support Westfield State University varsity athletics program and is the **largest single-day fundraising event for Westfield State Athletics.**
- Six different Owls have been named Conference Player of the Week, totaling seven weekly honors as a group.
- Strong incoming first-year class with eight conference Rookie of the Week awards over the first four weeks of the season.
- Women's soccer graduate student Jenn Rennich is tied for the school record in career points (119 points – 40 goals, 39 assists in 70 games played).



Daniel Currier
SGA Vice President for Finance-Elect
135 Carrier Avenue
Attleboro, MA 02703

Tarin Weiss, Ed.D.
Professor, Department of Chemical and Physical Sciences
Westfield State University
577 Western Avenue, Wilson Hall 318
Westfield, MA 01085

Tuesday, May 3, 2022

Honorable Members of the Westfield State University Board of Trustees
Westfield State University
577 Western Avenue
Westfield, MA 01085

Honorable Members of the President's Cabinet
Westfield State University
577 Western Avenue
Westfield, MA 01085

Linda Thompson, DrPH, MPH, RN, FAAN
President
Westfield State University
577 Western Avenue
Westfield, MA 01085

To the Honorable Members of the Westfield State University Board of Trustees, Honorable Members of the President's Cabinet, and University President:

Westfield State University is symbolized at the center of our campus by the Globe, which presents us with a constant reminder that the learning conducted on our campus is meant to better society here in the United States and across our world. But the Globe at the center of our campus also reminds us of the fragility of our planet and how us humans should do everything in our power to protect it now and into the future.

Students in Environmental Geology, beginning with Jack Duncan in Fall 2021 as part of an Honors Course By Contract and concluding with all students in the honors section of Environmental Geology in Spring 2022, have worked tirelessly to determine how Westfield State University can be more sustainable in its practices moving forward.

Enclosed with this letter is a report that has been developed by the Spring 2022 Honors Environmental Geology students entitled *Protecting the Global Nest – Going Green at Westfield State University*. The report provides a

comprehensive analysis of key issues in our quest to become more sustainable on our campus, including, but not limited to the:

- Establishment of an Office of Sustainability and Environmental Protection with a full-time Coordinator and part-time student interns and funded annually through the budget process.
- Formation of an Advisory Committee on Conceptualizing Environmental and Sustainability Schemes (ACCESS) (with equitable union and constituent representation) that would be tasked with crafting a strategic plan for the University with regard to our sustainability goals.
- Development of a new Common Core requirement that focuses on sustainable practices and environmental protection concepts, with the hope that this requirement would be interdisciplinary in nature.
- Consideration of new academic programs, including in Atmospheric Science and Meteorology/Weather Broadcasting, that will allow the University to innovate and increase our revenue.
- Construction of renewable energy technology on-campus, including solar panel arrays, to decrease reliance on fossil fuels and have greater control over utility costs.
- Implementation of new initiatives that increase the use of recycling on-campus and institute composting campuswide.
- Publication of sustainability goals and initiatives for the institution and consideration for accreditation in environmental protection and sustainability.

It is our hope that you can consider the recommendations contained in this report and help the University become more sustainable in the years ahead.

Please feel free to contact us with questions regarding the substance of the report.

Sincerely,

Dr. Tarin Weiss & Daniel Currier

Dr. Tarin Weiss & Daniel Currier

CC:

Jean Beal, Assistant to the Westfield State University Board of Trustees

Ted Welsh, Chair, All University Committee

Claudia Ciano-Boyce, Chair, MSCA Chapter at Westfield State University

Brian Cahillane, Chair, APA Chapter at Westfield State University

Linda Hogan-Shea, Vice President, AFSCME Chapter at Westfield State University

Maureen Socha, Executive Director for Capital Planning & Facilities

Joshua Hettrick, Interim Director for Residential Life

William Connor, Director of Dining Services

Hillary Sackett-Taylor, Chair, Honors Program

/Enclosures/

PROTECTING THE GLOBAL NEST — GOING GREEN AT WESTFIELD STATE UNIVERSITY



Professor Tarin Weiss & GEOL 0205 – Honors Environmental Geology Spring 2022 Students

Report Filed Tuesday, May 3, 2022

Table of Contents

Introduction	2
Methods of Evidence Collection & Analysis	4
Meetings with Campus Administration	5
Summary of Recommendations	7
Focus Area 1 – Centralizing Sustainability Efforts	10
Recommendation 1: Establish an Office of Sustainability and Environmental Protection	11
Recommendation 2: Convene an Advisory Committee on Conceptualizing Environmental and Sustainability Schemes (ACCESS)	18
Focus Area 2 – Enhancing the Academic Focus on Sustainable Practices	22
Recommendation 3: Develop a Sustainability Requirement for the Common Core	23
Recommendation 4: Addition of Sustainability-Aligned Majors/Minors for Revenue Generation	26
Recommendation 5: Increase Opportunities for Student Engagement in Sustainability	34
Focus Area 3 – Publicizing Sustainability Efforts and Metrics	38
Recommendation 6: Create a Sustainability Webpage on the Westfield State University Website	39
Focus Area 4 – Transitioning to Renewable Energy On Campus	42
Recommendation 7: Install Solar Panels on Campus Rooftops	43
Recommendation 8: Provide Electric Vehicle Charging Stations Across Campus	47
Recommendation 9: Consider Other Renewable Energy Sources	50
Focus Area 5 – Making Small-Scale Shifts That Lead to Impactful Change	53
Recommendation 10: Reimagine the Visibility and Communication of Recycling	54
Recommendation 11: Expand Existing Composting Program to Include Residence Halls	58
Recommendation 12: Decrease Reliance on Plastic Products	61
Recommendation 13: Institute a Bike-Sharing Program to Promote Eco-Friendly Mobility	65
Conclusion	68
Appendixes	69

INTRODUCTION

In 2008, a group of nine Westfield State University community members filed a report entitled *Sustainability in Higher Education at Westfield State College: A Report from the Ad Hoc Committee on Sustainability* in response to Westfield State University (then Westfield State College) signing on to the American College and University Presidents Climate Commitment (ACUPCC). The report would recommend that the University “conduct ... a comprehensive and systematic review to learn from the experiences and successes of other colleges and universities” in developing a strategic framework necessary to be a sustainable leader in higher education (Ad Hoc Committee on Sustainability, 2008, p. 17).

Jack Duncan, a student in the Class of 2022, realized the vision of the Ad Hoc Committee on Sustainability nearly fourteen years later and filed a report to fulfill the requirements of the Westfield State University Honors Program.¹ His report, entitled *A Comparative Study of the Ways MA State Universities are Combatting Climate Change and Promoting Sustainability*, provided a comprehensive overview of how our sister institutions are responding to the threat posed by climate change and demonstrated that Westfield State University – despite initially investing heavily in environmental protection and sustainability efforts – has since fallen behind. His findings were presented to the Westfield State University Board of Trustees at its meeting on February 17, 2022.²

To complement the work by Jack Duncan, the Honors Environmental Geology class of the Spring 2022 semester came together to file this report – *Protecting the Global Nest: Going Green at Westfield State University* – detailing what Westfield State University can do *specifically* to align itself with its sister institutions and become a leader in higher education on this issue.

We appreciate the opportunity, as students, to share our sustainability recommendations with campus leadership as these ideas are important to the student body, faculty, staff, alumni, and our global community.

Honors Environmental Geology Spring 2022 Class

Jordan Aguiar
Katherine Canty
Nathan Crane
Daniel Currier
Zachary Dickinson
Cierraa Guinen
Lexus Mastromatteo
Caitlyn Murphy

¹ Jack Duncan utilized a initiative within the Honors Program known as the “Honors Course By Contract” whereby he was able to take a non-honors section of Environmental Geology and conduct an additional project (the filed report) to enhance his experience and receive Honors credit.

² Westfield State University, *Board of Trustees Agenda – February 17, 2022*

Protecting the Global Nest – Going Green at Westfield State University

Daniel Survell
Maxwell Thomson
Tarin Weiss, *Professor*

CONTACT

Dr. Tarin Weiss
Professor, Department of Chemical and Physical Sciences
tweiss@westfield.ma.edu
(413) 572-8269

METHODS OF EVIDENCE COLLECTION & ANALYSIS

The students in Honors Environmental Geology and Professor Tarin Weiss have diligently conducted a search for evidence that can be utilized in this report. Given the lack of a sophisticated archival system at Westfield State University with regard to student and consultant reports, strategic plans, and meeting minutes, many of the documents were difficult to acquire, with some requiring individual faculty to go through their files from ten to fifteen years ago to locate some of the reports noted in our recommendations.

Other documents pertinent to the completion of this report were derived from public records requests with state agencies, including Westfield State University, fellow state universities, and campuses of the University of Massachusetts system. Further documents were also acquired through the collection of documents developed as part of the New England Commission of Higher Education (NECHE) 2023 Self-Study.

Evidence was deposited on the course PLATO site and independently organized in individual student OneDrives for analysis by students. Copies of the evidence gathered as part of this report can be found here:

https://westfieldstateuniversity-my.sharepoint.com/:f:/g/personal/dcurrier7293_westfield_ma_edu/Et94dRCuvutEtzjTqUI170msBX7vpyu1EvqvyAA-M2xsMWhQ?e=ehthcq

MEETINGS WITH CAMPUS ADMINISTRATION

The Spring 2022 Honors Environmental Geology class and Professor Tarin Weiss have held meetings with campus administration to gather information necessary to construct this report and garner support from administrators in working to make the campus of Westfield State University more sustainable in the long-term. The class has met with Director of Dining Services William Connor, Vice President for Administration and Finance Steve Taksar, Executive Director for Capital Planning & Facilities Maureen Socha, Director of Facilities & Operations Jason Florek, Director of Environmental Services Antonio Santos, and Director of Environmental Health & Safety Shawn Robbins in an effort to learn more about past and current initiatives along with future goals. Professor Tarin Weiss and Daniel Currier also held a meeting with President Linda Thompson (accompanied by Interim Director of Communications Robert Genest) regarding the initial proposal for the establishment of an Office of Sustainability & Environmental Protection and to learn more about the process of starting an ad hoc committee.

The following are notes on the meetings held with the aforementioned administrators:



Figure 1. Meeting Between GEOL 0205 – Honors Environmental Geology students and Director of Dining Services William Connor on Tuesday, April 5, 2022 to discuss sustainability initiatives currently taking place in Westfield State University's dining operations (Daniel Currier)

- **Meeting with Director of Dining Services William Connor (4/5/2022)**
 - Dining Services utilizes compostable products as much as possible (i.e. while the dishwasher was not being used, students were utilizing compostable plates and utensils).
 - Reusable To-Go Containers are now a fixture of the operations at the Dining Commons.
 - Straws have been cut throughout Dining Services to reduce unnecessary plastic waste.

Protecting the Global Nest – Going Green at Westfield State University

- LED Lights have been installed in the Dining Commons and new energy-efficient equipment will be installed over the next fiscal year that will save the University money in the long-run.
- The Dining Commons utilizes a mini version of the campus' Steam Plant for its needs to ensure that the Steam Plant does not run year-round.
- More products are being purchased locally, thereby reducing our carbon footprint.
- Director William Connor would like to see the University install a Sustainability Manager to centralize sustainability initiatives at the institution and assist in acquiring grants for the purchase of energy-efficient equipment.
- Composting at residence halls should be a top priority for the institution according to Director William Connor.
- **Meeting with Vice President for Administration Steve Taksar & Facilities Administration (4/13/2022)**
 - Jack Duncan provided an overview of his report from Fall 2021.
 - Vice President Steve Taksar noted that a capital request for a specific sustainability proposal can be made.
 - Director Antonio Santos detailed that Waste Management includes helpful information on how our recycling is processed.
 - Facilities administrators agreed to do a better job differentiating between trash and recycling through revised signage.
 - Administration noted that a bike sharing proposal has been made to the City of Westfield and documents are available through the City.
 - All administrators present unanimously agreed that an Office of Sustainability and Environmental Protection is necessary and that funding should be allocated with each fiscal year.

SUMMARY OF RECOMMENDATIONS

RECOMMENDATION #1: Establish an Office of Sustainability and Environmental Protection – By creating a central hub for campus sustainability efforts at Westfield State University, the institution will be able to better achieve its climate action goals through centralized action and decision-making.

RECOMMENDATION #2: Convene an Advisory Committee on Environmental and Sustainability Schemes (ACCESS) – This committee would be responsible for developing a comprehensive strategic plan that will guide the Coordinator for Sustainability and Environmental Protection and the budget process over the next decade.

RECOMMENDATION #3: Develop a Sustainability Requirement for the Common Core – With major changes being planned for Westfield State University’s set of general education requirements, consider adding a thematic requirement entitled “Environmental Protection and Sustainable Practices” whereby students must take two courses, one of which must be taken in a pre-approved STEM-based academic department.

RECOMMENDATION #4: Addition of Sustainability-Aligned Majors/Minors for Revenue Generation – Westfield State University must work on developing additional majors and minors using predominantly existing courses to generate additional revenue for the University through increased enrollment. Developing partnerships with area community colleges based upon our existing and proposed programs must also be a priority in order to increase further revenue.

RECOMMENDATION #5: Increase Opportunities for Student Engagement in Sustainability - In order to provide proper education to students at Westfield State University on being sustainable in their everyday lives, an Eco-Representatives program shall be established under the Office of Sustainability and Environmental Protection. The University should better advertise research opportunities and internships in sustainability and environmental protection to students regardless of major in an effort to graduate well-rounded, sustainably-conscious students.

RECOMMENDATION #6: Create a Sustainability Webpage on the Westfield State

University Website - A webpage should be created on the Westfield State University website in order to publicly advertise sustainability efforts on-campus, educational initiatives, and relevant accreditation files and reports. This webpage shall be updated regularly in consultation with the Office of Sustainability and Environmental Protection to ensure that the information provided is up-to-date and relevant to their present goals.

RECOMMENDATION #7: Install Solar Panels on Campus Rooftops – In order to be less reliant on Westfield Gas & Electric and ensure that our energy is coming from renewable sources in line with government policy and the American College and University President Climate Commitment (ACUPCC), it is recommended that the University invest in solar panels on the rooftops of buildings across campus, pending any necessary roof repair work. The University should further investigate the potential for solar panels over campus parking lots and open space to increase power generation.

RECOMMENDATION #8: Provide Electric Vehicle Charging Stations Across Campus –

With electric cars growing in popularity, the University should install a number of electric vehicle charging stations across campus over a period of a few fiscal years.

RECOMMENDATION #9: Consider Other Renewable Energy Sources – Beyond the addition of solar panels across campus, the University should carefully review previous research on wind and geothermal energy for the institution and consider the viability of such proposals.

RECOMMENDATION #10: Reimagine the Visibility and Communication of Recycling –

To ensure that all members of the campus community have equitable access to recycling, the University should invest in providing more recycling bins across campus (academic buildings, residence halls, office suites, athletic facilities, etc.). Recycling bins utilized on campus should be altered to be more visible to students and indicate that they are indeed recycling bins with infographics and poster affixed with the recycling bin to encourage the recycling of materials by faculty, staff, students, and guests.

RECOMMENDATION #11: Expand Existing Composting Program to Include Residence

Halls – Westfield State University’s Dining Services program presently offers a composting program through a third-party. It is recommended that the institution consider expanding the composting program to include residence halls in order to allow students to properly dispose of food waste.

RECOMMENDATION #12: Decrease Reliance on Plastic Products –

In an effort to alleviate plastic use on-campus, the University should better advertise hydrations stations across campus and encourage the use of reusable water bottles by members of the campus community. Policies

Protecting the Global Nest – Going Green at Westfield State University

to prevent the purchase of unnecessary amounts of plastic products by University departments should also be explored.

RECOMMENDATION #13: Institute a Bike-Sharing Program to Promote Eco-Friendly Mobility – To provide an environmentally-conscious mechanism to travel to restaurants, pharmacies, and grocery stores in downtown Westfield, the University should explore a bike-sharing program in concert with the City of Westfield and Valley Bike Share.

FOCUS AREA #1
**Centralizing Sustainability
Efforts**

RECOMMENDATION #1: ESTABLISH AN OFFICE OF SUSTAINABILITY AND ENVIRONMENTAL PROTECTION

Recommendation Overview

- **1.1** – Inaugurate an Office of Sustainability and Environmental Protection within the Facilities Division led by a full-time Coordinator for Sustainability and Environmental Protection in Fiscal Year 2024.
- **1.2** – Determine sources of funding for continual compensation of the Coordinator for Sustainability and Environmental Protection and student interns along with special projects overseen by the Office of Sustainability and Environmental Protection.

Timeline for Recommendation 1		
Action	Responsible Authority	Date
Develop report on potential costs of an Office of Sustainability and Environmental Protection (payroll, supplies, etc.) at Westfield State University.	Vice President for Administration and Finance	August 2022
Determine FY 2024 or FY 2025 Viability for Office of Sustainability and Environmental Protection	Vice President for Administration and Finance	January 2023
<i>If Installed in FY 2024 ...</i>		
Formalize Office of Sustainability and Environmental Protection Framework	ACCESS / Human Resources / Vice President for Administration and Finance / Executive Director for Facilities & Capital Planning	April 2023
Formalize Job Description for Coordinator for Sustainability and Environmental Protection	Human Resources	May 2023
Post Position Opening Coordinator for Sustainability and Environmental Protection	Human Resources	June 2023
Select & Onboard Candidate	Human Resources / Executive Director for Facilities & Capital Planning	August 2023
Meetings Between ACCESS & Coordinator for Sustainability and Environmental Protection	ACCESS / Coordinator for Sustainability and Environmental Protection	September 2023
Begin Planning Sustainability Initiatives & Programming	Coordinator for Sustainability and Environmental Protection	September 2023
Hire First Round of Interns	Coordinator for Sustainability and Environmental Protection	January 2024

Background

Westfield State University (then known as Westfield State College) established a new ‘Campus Sustainability Coordinator’ position in December 2007 in order to comply with the American College and University President Climate Commitment (ACUPCC).³ The responsibilities of the Campus Sustainability Coordinator were as follows:

- *Assist in defining goals, performance metrics, and a long-range plan for sustainability.*
 - Research and maintain working knowledge of best practices at peer institutions.
 - Represent the college’s sustainability programs to the public.
 - Attend meetings, workshops, seminars as appropriate.
- *Serve as bridge between administrators, faculty, and students as we further our sustainability efforts campus-wide.*
 - Encourage and facilitate sustainability programs initiated by student, faculty, and staff community members.
 - Foster and coordinate new ideas and concepts for sustainability programming themes.
 - Encourage habit-transformation from all segments of the college community.
 - Identify materials and resources to supplement, expand, or replace existing sustainability programming.
- *Establish and coordinate funding for sustainable initiatives.*
 - Participate in the preparation of grant and external funding proposals.
 - Oversee, where appropriate the implementation of grant-funded programs.
 - Assist in the preparation of budgets and grants; monitor, verify, and reconcile expenditure of budgeted funds as appropriate.

Figure 2. Key Responsibilities of the WSU Campus Sustainability Coordinator (Ad Hoc Committee on Sustainability)

According to archives of the Westfield State University website, the Campus Sustainability Coordinator worked in tandem with the Ad Hoc Committee on Sustainability to hold educational events focusing on issues relating to sustainability and environmental protection:

³ Ad Hoc Committee on Sustainability, *Sustainability in Higher Education at Westfield State College: A Report from the Ad Hoc Committee on Sustainability* (2008)

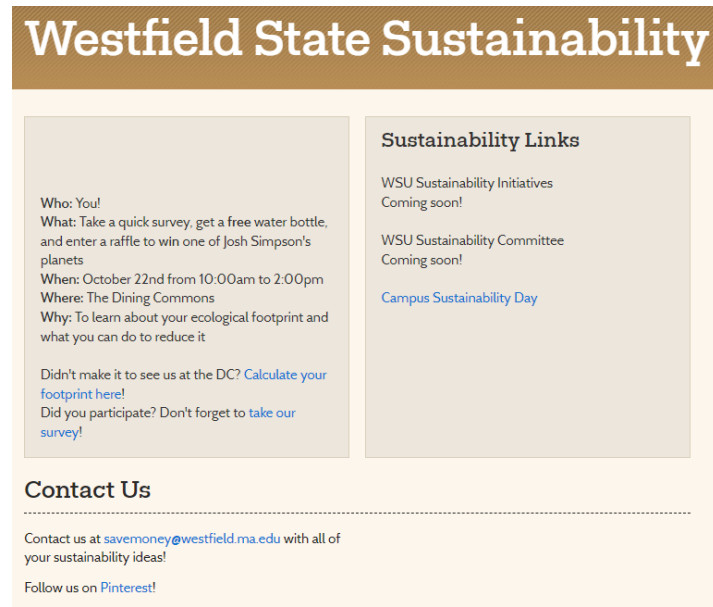


Figure 3. Westfield State sustainability webpage promoting fun events designed to foster educational knowledge surrounding climate change (Internet Archive, Approx. 2008)

The Campus Sustainability Coordinator was responsible for ensuring that the institution adhered to the stated mission of the Westfield State University President to implement changes on-campus and educate the student body as prescribed in the American College and University President Climate Commitment (ACUPCC). Due to the centralized efforts of the Campus Sustainability Coordinator in meeting the institution’s climate goals, Westfield State University was recognized the Environmental Protection Agency (EPA) and the Massachusetts Department of Environmental Protection.⁴

Westfield State University hired William Bickley, a member of the Association of Professional Administrators (APA) union, from the inception of the position in December 2007 until mid-2014.⁵ Bickley was paid the following between 2010 and 2014 – the years available through the state Comptroller’s Office:

⁴ New England Association of Schools and Colleges, *Report to the Faculty, Administration, Trustees, and Students of Westfield State University by an Evaluation Team representing the Commission on Institutions of Higher Education of the New England Association of Schools and Colleges* (2012)

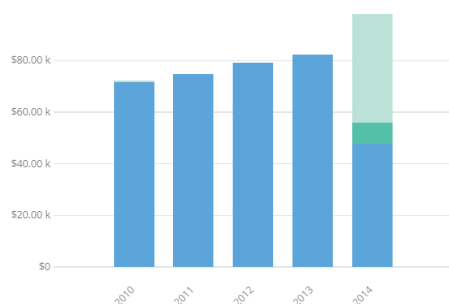
⁵ [William Bickley - WSC - Staff Associate | Statewide Payroll Home Open Payroll \(mass.gov\)](#)

Protecting the Global Nest – Going Green at Westfield State University

Payroll History

Total Payroll by Year

■ Base Pay ■ Overtime Pay ■ Buyout ■ Other Pay



Year	Base Pay	Overtime Pay	Buyout	Other Pay
2014	\$47,743.98	\$0.00	\$8,194.62	\$42,202.38
2013	\$82,125.48	\$0.00	\$0.00	\$0.00
2012	\$79,229.44	\$0.00	\$0.00	\$0.00
2011	\$74,659.88	\$0.00	\$0.00	\$0.00
2010	\$71,565.26	\$0.00	\$0.00	\$551.14

[View Raw Data for this Record](#)

Figure 4. Compensation given to William Bickley – Westfield State University Campus Sustainability Coordinator (2007-2014) (Comptroller of the Commonwealth)

Following William Bickley’s departure from the University in mid-2014, the position of Campus Sustainability Coordinator remained vacant despite a modest increase in enrollment through Fiscal Year 2017. The position likely remained vacant due to a focus on the part of the University to maintain a sufficient administrative structure following the resignation of former Westfield State University President Evan Dobbelle in 2013. Furthermore, President Dobbelle had overseen the implementation of the Campus Sustainability Coordinator position and related work under his administration, thus the lack of administrative support in his wake likely led to the eventual demise of this office.

Westfield State University continues to offer opportunities for students to engage in sustainability curricula⁶ and extracurricular activities⁷, and has continued to adhere to governmental building regulations and aspired for LEED certification⁸. The challenge for Westfield State University has been the lack of centralized planning and coordination of sustainability initiatives on-campus, as expressed through multiple administrators, including Dining Services Director William Connor.⁹

Supporting Evidence

Offices devoted to promoting sustainable practices on-campus continue to be found across the state institutions of the Commonwealth of Massachusetts and are publicized for their campus community and the general public to learn more about their efforts.

⁶ The Department of Geography and Regional Planning (GARP) changed its name to the Department of Geography, Planning, and Sustainability (GPS) in 2018. The department now offers a Sustainability Studies Minor and is sending proposals through Governance to expand its emphasis on sustainability through different concentrations in the planning major (see Curriculog).

⁷ One such example from the 2021-2022 academic year is the Thrift Store sponsored by the Westfield State University Sustainability Club. The group of students raised over \$600 for an organization committed to ameliorating sustainability in the clothing supply chain (@sustainabilityclub.wsu on Instagram).

⁸ The Renovation of Parenzo Hall, slated for completion in Fall 2023, will see the structure (originally built in the 1950s) achieve LEED Silver Certification.

⁹ Meeting with William Connor, Director of Dining Services (4/5/2022)

Protecting the Global Nest – Going Green at Westfield State University

One such example can be found at our chief state university rival – Worcester State University. The institution presently employs one full-time staff associate (Steven Bandarra – APA Union)¹⁰ to coordinate the University’s sustainability initiatives and work with other offices to meet the University’s climate goals. Some of the initiatives overseen by this staff associate include an Annual Sustainability & Food Day Fair¹¹ and lectures by top climate scientists.

The staff associate reports to the Director of Environmental Health & Safety within the Division of Facilities, Operations & Planning. The Executive Director for Division of Facilities, Operations & Planning reports to the Vice President for Administration and Finance – an identical model when compared with Westfield State University and their facilities organization chart.¹²¹³

Worcester State University is operating its Office of Sustainability in the same manner of Westfield State University between December 2007 and mid-2014 with impressive results that have been able to save money for the University in the long-term, including through reduced utility costs, both for water (through the installation of roof rainwater collection basins for irrigation) and electricity (through the installation of solar panels on campus buildings).

From a financial perspective, the Worcester State University Office of Sustainability spends less than \$100,000 per annum¹⁴ in the following manner:

Sustainability Budget Line 343, FY 2022		
<u>Code</u>	<u>Description</u>	<u>Budget Allocation</u>
AAA01	Payroll – Steven Bandarra	\$72,162
BBB05	Training	\$499
EEE00	Charge Point Electric Vehicle Stations, Service Fee, Promotional and Educational Goods, Signage	\$7,360
FFF18	Promotional Materials	\$7,759
NNN00	Supplies and Composting Services	\$8,101
		\$95,881

Figure 5. Worcester State University Office of Sustainability Budget, Fiscal Year 2022 (Worcester State University)

It is important to note that some campus improvements with regard to sustainability (including LEED certification for new or updated buildings) are not included in this overall budget for the Office of Sustainability at Worcester State University.

Despite the financial pressures created by the COVID-19 pandemic and declining enrollment, the institution has maintained the position over the past decade with Steven Bandarra at the helm through annual line-item allocations.

¹⁰ Worcester State University, *Public Records Request 2022-03-09*

¹¹ [Sustainability | Worcester State University](#)

¹² See Appendix I

¹³ See Appendix II

¹⁴ Worcester State University, *Public Records Request 2022-03-09*

Implementation

To ensure that Westfield State University has an individual devoted to overseeing the institution’s sustainability initiatives, it is recommended that the University install a Coordinator for Sustainability and Environmental Protection in Fall 2023 with the passage of the Fiscal Year 2024 Budget, which will allow the Westfield State University Division of Administration and Finance to determine how to fund the position and related expenses in a fiscally responsible manner given our present financial state. The Division should determine by Fall 2022 what the projected payroll and relevant expense costs would be for the establishment of this office at our institution, with the hope that the Office is funded annually not just for payroll, but for additional initiatives, projects, and small-scale sustainable upgrades to campus facilities.

The Coordinator for Sustainability and Environmental Protection position should be located as follows (in line with our sister institutions):



Figure 6. Proposed Structure for the Office of Sustainability and Environmental Protection (in green). Supervision shall be exercised by the Director for Environmental Health and Safety in line with Worcester State University’s model.

In line with President Thompson’s vision to enhance high-impact practices through on-campus apprenticeships¹⁵, it is recommended that the Office of Sustainability and Environmental Protection hire a group of interns each semester (size to be determined by Coordinator for Sustainability and Environmental Protection and Vice President for Administration and Finance) that will work to develop educational programming for faculty, staff, and students; plan key sustainability initiatives in consultation with relevant administrators; and draft grant proposals for review by the Coordinator for Sustainability and Environmental Protection and the Director of Grants and Sponsored Programs.

The University should look at our sister institutions (such as Worcester State University) for information regarding best practices in re-establishing our sustainability position and providing centralized initiatives in sustainability and environmental protection on-campus. Meetings between relevant administrators across these institutions and continued communication are key in order to move forward in a fiscally prudent and efficient manner.

In line with Recommendation #2, the Coordinator for Sustainability and Environmental Protection (once in place) shall work in consultation with the Advisory Committee on Conceptualizing Environmental and Sustainability Schemes (ACCESS) to implement that committee’s strategic plan, which will be filed with the Board of Trustees,

¹⁵ Westfield State University Student Government Association, *Meeting Minutes 4/19/2022*

Protecting the Global Nest – Going Green at Westfield State University

President, and Cabinet prior to the conclusion of the 2022-2023 academic year. The strategic plan will help guide the Coordinator in their work to make the campus more sustainable in a fiscally responsible yet robust fashion.

RECOMMENDATION #2: CONVENE AN ADVISORY COMMITTEE ON CONCEPTUALIZING ENVIRONMENTAL AND SUSTAINABILITY SCHEMES (ACCESS)

Recommendation Overview

- **2.1** – Charge an Advisory Committee on Conceptualizing Environmental and Sustainability Schemes (ACCESS) with representation from faculty and staff unions, non-unit professionals, and students.
- **2.2** – The Advisory Committee on Conceptualizing Environmental and Sustainability Schemes (ACCESS) shall file a *Sustainability Strategic Plan for Westfield State University* with the Board of Trustees, President, and Cabinet no later than April 2023.
- **2.3** – The Advisory Committee on Conceptualizing Environmental and Sustainability Schemes (ACCESS) (in a subsequently constructed permanent committee capacity) shall work with the Coordinator for Sustainability and Environmental Protection on an ongoing basis once installed to ensure that the initiatives are being implemented from the strategic plan and that support is available from the campus community.

Timeline for Recommendation 2		
Action	Responsible Authority	Date
Submit Proposal to the All-University Committee (AUC) to Form Ad Hoc Advisory Committee	Dr. Tarin Weiss / AUC	April 22, 2022 (COMPLETE)
Officially Charge ACCESS Committee	AUC / President	October/November 2022
Install Representatives from Campus Unions (MSCA, APA, AFSCME), Non-Unit Professionals, and Students	Union Leaders / President / SGA President	November 2022
Begin Meeting on a Regular Basis	ACCESS	December 2022
Provide Status Update to Cabinet, President, Board of Trustees, and SGA	ACCESS	February/March 2023
Submit <i>Sustainability Strategic Plan for Westfield State University</i>	ACCESS	May 2023
Present Report to Cabinet, President, Board of Trustees, and SGA	ACCESS	May 2023
Transition to Permanent Sustainability Committee	AUC / ACCESS	September 2023

Protecting the Global Nest – Going Green at Westfield State University

Begin Collaboration Meetings with Coordinator for Sustainability and Environmental Protection	ACCESS / Coordinator for Sustainability and Environmental Protection	September 2023
Provide Strategic Plan Status Update to Cabinet, President, and Board of Trustees	ACCESS / Coordinator for Sustainability and Environmental Protection	May 2024 (Continue Annually)

Background

Westfield State University (then known as Westfield State College) convened an Ad Hoc Committee on Sustainability through the All-College Committee (the precursor to today’s All-University Committee) on February 20, 2008, with a final report submitted to the All-College Committee on May 14, 2008.¹⁶

The Ad Hoc Committee on Sustainability was composed of nine faculty, staff, and students, with one faculty member on the committee (Carsten Braun of the Geography, Planning, and Sustainability Department) still employed at Westfield State University. Professor Braun graciously provided Dr. Weiss with a copy of the report submitted by the committee for reference.

Within three months of inception, the Ad Hoc Committee on Sustainability filed an eighty-four page report entitled *Sustainability in Higher Education at Westfield State College: A Report from the Ad Hoc Committee on Sustainability*. This report outlined a series of recommendations in order for the institution to comply with the American College and University President Climate Compact (ACUPCC).

One of the recommendations of the Ad Hoc Committee on Sustainability was to “establish a permanent college-wide Sustainability Committee with diverse representation to implement [our] plan” (Ad Hoc Committee on Sustainability, 2008, p. 51). Although a permanent committee continued in some form until William Bickley, our Campus Sustainability Coordinator, retired in 2014, it is no longer in existence.

Movement has been made over the past semester to revitalize a committee focusing on sustainability and environmental protection. Tarin Weiss, Professor in the Department of Chemical and Physical Sciences, submitted a letter to Edward Welsh, Chair of the All-University Committee (AUC) on Friday, April 22, 2022 joined by nine faculty colleagues requesting that “AUC create a charge for the formation of an ad hoc Sustainability Committee. Committee volunteers will produce (Fall 2022), for AUC, a set of broad recommendations to help further/build a culture of sustainability at WSU.”¹⁷ The request further stated that it would be the hope of this ad hoc committee to inspire the All-University to establish a permanent Sustainability Committee.

Supporting Evidence

Many of our sister institutions have established ‘Green Teams’ or sustainability committees devoted to advancing their institutions’ goals for reducing their carbon footprint and increasing student awareness surrounding

¹⁶ Ad Hoc Committee on Sustainability, *Sustainability in Higher Education at Westfield State College: A Report from the Ad Hoc Committee on Sustainability* (2008)

¹⁷ Weiss, Tarin, “RE: Create a charge for the formation of an ad hoc Sustainability Committee” (2022)

Protecting the Global Nest – Going Green at Westfield State University

environmental protection. Jack Duncan found at least four such teams (at least publicly-noted) across our sister institutions.¹⁸

Bridgewater State University, for example, has had an Advisory Board on Sustainability meeting monthly since its formation in 2007.¹⁹ The Advisory Board is responsible for reviewing the long-term sustainability goals of Bridgewater State University and providing recommendations on how to achieve these goals. Furthermore, the Board is responsible for “developing, reviewing, and recommending measures related to the integration of sustainable policies, practices, scholarship, and curricula across the University.” The Advisory Board is entirely composed of faculty and staff (twenty total), with only four professors within a natural or physical science-based department.

The ‘Green Teams,’ including those at other colleges, are designed to ensure that each college’s climate action plans are being adhered to, provide recommendations to campus leaders regarding new or revised initiatives addressing sustainability, and engage various constituencies (faculty, staff, and students) in becoming a sustainable campus community.

Implementation

In order to enhance community input (particularly from each of our three campus unions and student leaders) in the important work of becoming a more sustainable campus, it is recommended that the All-University Committee, in consultation with the President, charge an Advisory Committee on Conceptualizing Environmental and Sustainability Schemes (ACCESS). This committee would be given the following charge:

- **Charge:** The Advisory Committee on Conceptualizing Environmental and Sustainability Schemes (ACCESS) will be responsible for developing a strategic plan for Westfield State University to become more sustainable in line with our sister institutions; federal, state, and local directives; and campus community input. This strategic plan shall be transmitted to the President, Board of Trustees, Cabinet, All-University Committee Chair, and Student Government Association President no later than May 2023.
- In order to accomplish this, ACCESS shall:
 - Elect a Chair, Vice Chair, and Secretary.
 - Determine mechanisms for the collection of evidence and data.
 - Provide regular updates to the aforementioned campus leaders as needed.
 - Meet on a routine basis to formulate plans to gather evidence, collect feedback, and construct the strategic plan.
 - Keep the campus community informed and involved in the process.
 - Assemble the report and all required addenda in a timely manner.
 - Advise administrative leaders of any issues that arise.

¹⁸ Duncan, J., *A Comparative Study of the Ways MA State Universities are Combatting Climate Change and Promoting Sustainability* (2021)

¹⁹ [Advisory Board | Bridgewater State University](#)

Protecting the Global Nest – Going Green at Westfield State University

- ACCESS is established as an Advisory Committee under the provisions of the MSCA/BHE Collective Bargaining Agreement.

The Advisory Committee on Conceptualizing Environmental and Sustainability Schemes (ACCESS) will work together to construct a strategic plan that will guide the work of the Coordinator for Sustainability and Environmental Protection and other administrative leaders in minimizing the institution's carbon footprint and moving toward renewable energy solutions in a timely yet fiscally prudent manner. This strategic plan would model other colleges with their 'climate action plans' by presenting specific goals and dates for the completion of those goals along with a determination of how much money will be spent and where it is to be spent.

The *Sustainability Strategic Plan for Westfield State University* should be publicly posted on the sustainability webpage (similar to how the institutional strategic plan is publicly posted) in order for the University to recognize that it must be accountable for the goals that it has made. The Advisory Committee on Conceptualizing Environmental and Sustainability Schemes (ACCESS) shall transition to a permanent Sustainability Committee that will advise the Coordinator for Sustainability and Environmental Protection on mechanisms for meeting the goals of the strategic plan and ensuring that the institution is meeting its targets. The Board of Trustees should ensure on an annual basis that metrics align with the stated goals of the strategic plan and that the institution is adhering to the timeline as appropriate.

FOCUS AREA #2

Enhancing the Academic Focus on Sustainable Practices

RECOMMENDATION #3: DEVELOP A SUSTAINABILITY REQUIREMENT FOR THE COMMON CORE

Recommendation Overview

- **3.1** – Institute a thematic requirement in the updated Common Core for Westfield State University entitled “Environmental Protection and Sustainable Practices.”
- **3.2** – Require that all students take at least two core courses in this newly instituted thematic area, at least one of which must be a STEM-based course.
- **3.3** – Ensure that the requirement is interdisciplinary in nature, with some courses coming from non-STEM departments.

Timeline for Recommendation 3		
<u>Action</u>	<u>Responsible Authority</u>	<u>Date</u>
Present Proposal to SCORE	TBD	May 2022
<i>See SCORE Timeline for Information on Core Implementation</i>		

Background

The New England Commission of Higher Education (NECHE) – our accrediting body - noted in their fifth-year interim report in 2017 that Westfield State University needed to begin “assessing its common core program.”²⁰ After a number of failed attempts to update the Common Core, the Special Committee on Reforming General Education (SCORE) has been charged with “reimagining and redesigning general education at Westfield State University” with constituent input and feedback.²¹

The current Common Core at Westfield State University is comprised of distributive requirements, with students mandated to take a prescribed number of courses in a variety of subjects, such as one Literature & Philosophical Analysis course and one Traditional Mathematics course.²² Professor Lynn Shelley, one of the members of the Special Committee on Reforming General Education, noted in a Student Government Association meeting on Tuesday, March 29, 2022 that the committee is presently envisioning a Common Core comprised of ‘thematic’ areas for students to explore rather than distributive requirements by subject.²³ The new Common Core proposal would be

²⁰ Angel, David. Letter to Ramon Torrecilha. (11 July 2017)

²¹ [Welcome & Committee Charge - SCORE - LibGuides at Westfield State University \(ma.edu\)](#)

²² [Program: Common Core - Westfield State University - Acalog ACMS™ \(ma.edu\)](#)

²³ Westfield State University Student Government Association, *Meeting Minutes 3/29/2022*

Protecting the Global Nest – Going Green at Westfield State University

prepared for Governance by the 2022-2023 academic year, with the Common Core ‘grandfathered in’ with students entering in Fall 2024.

Supporting Evidence

Many of our sister institutions have recently (within the last decade) updated their general education requirements, with the University of Massachusetts Dartmouth implementing their ‘University Studies’ with thematic focus areas.²⁴ These thematic focus areas focus on unique aspects of the human condition and provide students with a well-rounded education necessary to be successful after graduation.

One such thematic area offered at UMASS Dartmouth is *The Natural World: Scientific Inquiry and Understanding*, which seeks to instill the necessity to “develop familiarity with scientific methods and acquire knowledge of science to comprehend and solve the problems we face.”²⁵ Students must take two courses – one in the scientific understanding of our world, with the other focusing on how to engage in science around you, even if you are not a STEM major. Many of the courses for this second requirement focus on climate science and policy, though the requirement does not exclusively focus on the realm of environmental science.

Implementation

It is recommended that the Special Committee on Reforming General Education (SCORE) implement a thematic set of Common Core requirements similar to those in place at UMASS Dartmouth, with sufficient emphasis placed on statistical analysis, college-level writing, research literacy, governmental scrutiny, literary dissections, and public-speaking skills - all of which will be important for the courses that focus on sustainability.

The Special Committee on Reforming General Education (SCORE) should implement a thematic requirement entitled “Environmental Protection and Sustainable Practices.” This theme would mandate that students take two courses (anywhere between six and eight credits) focusing on the importance of environmental protection and how to be sustainable. The requirement would be outlined as follows:

- **COURSE 1**
 - Must be taken within one of the following STEM-based departments:
 - Department of Biology
 - Department of Chemical & Physical Sciences
 - Department of Computer & Information Science
 - Department of Environmental Science
 - Department of Geography, Planning & Sustainability
 - Sample existing courses that would fulfill this requirement:
 - BIO 102 – Environmental Biology
 - GNSC 101 – Physical Science
 - ENVS 101 – Introduction to Environmental Science
 - GPS 106 – Environment, Sustainability & Society
 - GEOL 205 – Environmental Geology
- **COURSE 2**
 - May be taken within the aforementioned STEM-based departments or in approved courses within other departments.

²⁴ [University Studies | University Studies | UMass Dartmouth](#)

²⁵ [How It Works | University Studies | UMass Dartmouth](#)

Protecting the Global Nest – Going Green at Westfield State University

- Sample courses that would fulfill this requirement that are not from the aforementioned departments:
 - FYS 101 – First-Year Seminar (*provided the specific section focuses on the theme of environmental protection and sustainable practices – should be denoted as such*)²⁶
 - COMM 0300 – Food: Communication, Community, and Civic Engagement
 - ECON 320 – Environmental Economics
 - HIST 258 – U.S. Environmental History

In the event that the Special Committee on Reforming General Education (SCORE) adds an additional theme in the realm of scientific inquiry, then students should take one laboratory science either in this theme or in the additional theme in order to foster engagement for students in developing laboratory reports focusing on quantitative analysis and evidence-based reasoning.

The hope of the “Environmental Protection and Sustainable Practices” Common Core requirement is to imbue both the scientific lens of protecting our environment and being sustainable and in the application of this knowledge to real-world issues (such as budget policy, agricultural techniques, and economic considerations), giving students an interdisciplinary focus in this area, though students will be able to take additional science-based courses that focus on the environment and sustainability.

This revision to the Common Core shall be implemented in accordance with SCORE’s timeline for full implementation in Fall 2024. A review of existing courses that could qualify for this theme should take place during the 2022-2023 academic year.

²⁶ There has been discussion of incorporating a First-Year Seminar into the Common Core, with each section focusing on a different subject. Each section should hopefully be focused on conducting proper research and speaking in front of an audience. If certain sections focus on environmental issues, then students should be able to fulfill the second course requirement within this theme.

RECOMMENDATION #4: ADDITION OF SUSTAINABILITY-ALIGNED MAJORS/MINORS FOR REVENUE GENERATION

Recommendation Overview

- **4.1** – Conduct a comprehensive analysis of projected review from proposed major/minor options that focus on environmental protection and sustainability.
- **4.2** – If feasible, initiate process of adding additional majors/minors in accordance with Board of Higher Education policy.
- **4.3** – Formulate partnerships with area community colleges for majors/minors that are imbued with sustainability.
- **4.3** – Within the next few years, add a full-time, tenured faculty member in Atmospheric Science .

Timeline for Recommendation 4		
<u>Action</u>	<u>Responsible Authority</u>	<u>Date</u>
Begin Comprehensive Review of Proposed Major/Minor Options for Westfield State University	Academic Affairs	September 2022
Begin Conversations with Area Community Colleges on Pipelines for Sustainability-Based Majors/Minors	Academic Affairs	September 2022
Conclude Comprehensive Review of Proposed Major/Minor Options for Westfield State University	Academic Affairs	December 2022
Begin Review of Atmospheric Science Programs at Other Post-Secondary Institutions	Academic Affairs	December 2022
Conclude Review of Atmospheric Science Programs at Other Post-Secondary Institutions	Academic Affairs	February 2023
Conclude Conversations with Area Community Colleges on Pipelines for Sustainability-Based Majors/Minors & Formalize Partnerships	Academic Affairs	May 2023
<i>If Atmospheric Science, B.S. and/or Meteorology & Weather Broadcasting, B.S. determined to be feasible ...</i>		
Pilot COMM 02xx – Weather Broadcasting	Communication Department	Fall 2023

Protecting the Global Nest – Going Green at Westfield State University

Pilot CHEM 03xx – Atmospheric Chemistry	Department of Chemical & Physical Sciences	Fall 2023
Begin Process of Adding Atmospheric Science, B.S. and Meteorology & Weather Broadcasting, B.S.	Academic Affairs	February 2023
Conclude Process of Adding Atmospheric Science, B.S. and Meteorology & Weather Broadcasting, B.S.	Academic Affairs	May 2023
Convert Environmental Science Conference Room into an Atmospheric Science Laboratory	Academic Affairs / Capital Planning & Facilities	Summer 2023
Hire Full-Time, Tenured Faculty Member in Atmospheric Science	Academic Affairs	Summer 2023 <i>or</i> Summer 2024

Background

Westfield State University has continued to expand its offerings in the environmental sciences despite a precipitous drop in enrollment and is currently in the process of refining the Regional Planning program to include enhanced environmental planning opportunities.²⁷ The challenge for our institution in this area lies in the departure of full-time tenured faculty members in the natural sciences. For example, the Department of Geography, Planning, and Sustainability saw the retirement of three long-standing professors, including two during the 2020-2021 academic year.²⁸

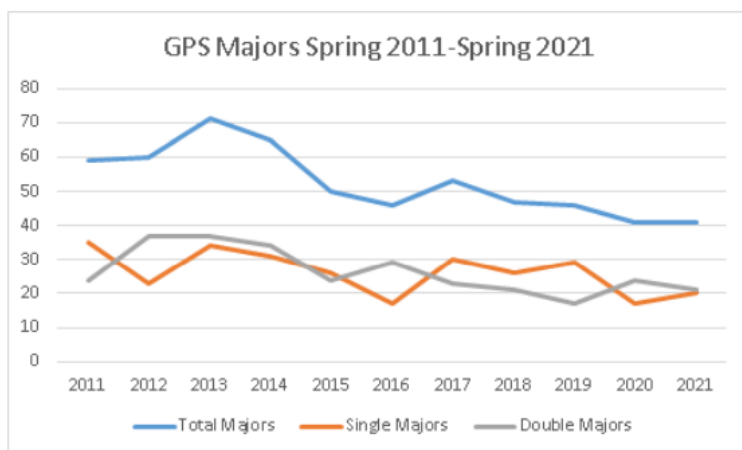


Figure 7. Enrollment in the Regional Planning, B.S. program has dropped from a high of 70 in 2013 to a low of 40 in 2021. The Department of Geography, Planning, and Sustainability is beginning to propose specific concentrations to AUC and UCC, specifically in environmental planning, to encourage further enrollment. (Department of Geography, Planning, and Sustainability)

The Department of Geography, Planning, and Sustainability has continued to innovate despite the challenges posed by lower enrollment overall in the department. On Wednesday, April 6, 2022, Chair Brian Conz submitted the

²⁷ [Urban and Regional Planning \(B.S.\), Climate Change and Energy Concentration | Curriculum](#)

²⁸ Department of Geography, Planning, and Sustainability, 2020-2021 Academic Department Annual Report (2021)

Protecting the Global Nest – Going Green at Westfield State University

following concentrations to the All-University Committee for review²⁹, with a change in the Regional Planning degree to an Urban and Regional Planning program:

- Urban & Regional Planning B.S., Concentration in Cities & Social Justice
- Urban & Regional Planning B.S., Concentration in Climate Change & Energy
- Urban & Regional Planning B.S., Concentration in Environmental Planning
- Urban & Regional Planning B.S., Concentration in Food Systems
- Urban & Regional Planning B.S., Concentration in Urban Design & Architecture
- Urban & Regional Planning B.S., Concentration in Real Estate & Economic Development

Changes to course offerings, including the revitalization of coursework on sustainable technology and transportation and the establishment of new courses in sustainable construction practices, will allow for students to hone in on sustainable practices with regard to regional planning needs and focus on a specific area of expertise – a perfect opportunity for enrollment growth in the Department for Geography, Planning, and Sustainability and the University overall.

The Department of Geography, Planning, and Sustainability has looked into developing partnerships with individual community colleges in the Pioneer Valley. A partnership was developed with Springfield Technical Community College (STCC) in 2020 in order to provide a pipeline for students in their Urban Studies program to enter the Regional Planning program at Westfield State University, but the partnership fell through due to internal conflict.³⁰ Further conversations have been attempted with other community colleges, including Greenfield Community College.

The Department of Environmental Science does have articulation agreements with area community colleges and has conducted outreach to select community colleges in western Massachusetts, particularly Berkshire Community College, where the department saw a rise in transfers to the Environment Science B.S. degree.³¹

Westfield State University has developed partnerships under then-Interim President Elizabeth Preston with area community colleges that are designed to encourage transfer students to complete their degrees online along with Springfield Public Schools to encourage more students of color to enter the teaching profession.³²

Following the start of President Thompson's administration, the institution has started conversing with area community colleges in developing pathways for students in a more meaningful fashion, but no resulting partnerships have been announced.³³

Supporting Evidence

Community college partnerships are key to the success of any public college and university, particularly in the Commonwealth of Massachusetts. Other state universities have centralized efforts to develop partnerships with area community colleges rather than rely on their individual departments to develop those pipelines. Bridgewater State

²⁹ [Proposals | Curriculog](#)

³⁰ Department of Geography, Planning, and Sustainability, *2020-2021 Academic Department Annual Report* (2021)

³¹ Department of Environmental Science, *2020-2021 Academic Department Annual Report* (2021)

³² [Governor Charlie Baker to deliver Westfield State 2016 commencement address | Westfield State University \(ma.edu\)](#)

³³ Westfield State University Student Government Association, *Meeting Minutes 11/16/2021*

Protecting the Global Nest – Going Green at Westfield State University

University has been a pioneer in the associates-to-bachelors pipeline in southeastern Massachusetts through partnerships with Massasoit Community College and Bristol Community College in 2017 that will allow community college students to attend Bridgewater State University without having to go through another admissions process and enter desired programs in a streamlined process.³⁴ Up to 350 students from Massasoit Community College alone are expected to take advantage of this program, adding substantial revenue for Bridgewater State University.

The MassTransfer program website currently offers numerous pathways for students to move from an associate's degree program to a bachelor's degree program at any of the state universities or University of Massachusetts system schools and has a visually appealing look that allows students to understand how to move from community college to a state university.³⁵

Implementation

It is recommended that the All-University Committee (AUC) and University Curriculum Committee (UCC) approve the proposals submitted by the Department of Geography, Planning, and Sustainability to modify the Regional Planning degree program to encourage students to specialize in particular areas, particularly in environmental protection and sustainable practices as they relate to regional planning needs. The modification as outlined by Chair Brian Conz should allow for the department to enhance enrollment in the major and encourage students from other departments to consider the Urban and Regional Planning degree.³⁶

Westfield State University must move forward in centralizing efforts to develop partnerships with area community colleges as announced by President Thompson at a meeting with the Student Government Association on Tuesday, November 16, 2021. The University should continue moving forward in developing partnerships with these community colleges to encourage students to obtain a bachelor's degree, which will allow our institution to generate revenue and get back on the right track financially. Some partnerships to consider that focus on environmental protection and sustainable practices include:

- **Berkshire Community College (BCC)**³⁷
 - Environmental Science A.S. → Environmental Science B.S.
- **Greenfield Community College (GCC)**³⁸
 - Environmental Conservation A.A. → Environmental Science B.S. *or* Urban & Regional Planning B.S., Concentration in Environmental Planning
 - Farm & Food Systems A.A. → Urban & Regional Planning B.S., Concentration in Food Systems
 - Science of Earth & Environment A.S. → Environmental Science B.S.
- **Holyoke Community College (HCC)**³⁹
 - Environmental Science A.S. → Environmental Science B.S.

³⁴ [Massasoit and Bridgewater State University Announce MCC2BSU to Streamline Transfer Process - Massasoit Community College](#)

³⁵ [Program Search / MassTransfer / Massachusetts Department of Higher Education](#)

³⁶ For example, art students who would've focused exclusively on art could now expand their horizons to Geography, Planning, and Sustainability through the Urban Design and Architecture program, which is interdisciplinary in nature.

³⁷ [Programs and Classes at BCC - Berkshire Community College](#)

³⁸ [Areas of Study - Greenfield Community College](#)

³⁹ [Degrees & Certificates - Holyoke Community College](#)

Protecting the Global Nest – Going Green at Westfield State University

- **Springfield Technical Community College (STCC)⁴⁰**
 - Architecture & Building Technology A.S. → Urban & Regional Planning B.S., Concentration in Urban Design & Architecture
 - Civil Engineering Technology A.S. → Urban & Regional Planning B.S., Concentration in Urban Design & Architecture
 - Electrical Engineering Technology A.S. → Urban & Regional Planning B.S., Concentration in Climate Change & Energy
 - Energy Systems Technology A.S. → Urban & Regional Planning B.S., Concentration in Climate Change & Energy
 - Landscape Design and Management Technology A.S. → Urban & Regional Planning B.S., Concentration in Environmental Planning *or* Concentration in Real Estate and Economic Development
 - Urban Studies A.S. → Urban & Regional Planning B.S., Concentration in Cities and Social Justice

Although students can seamlessly transfer from a community college to a state university through the MassTransfer program, only through sophisticated partnerships, targeted marketing, and student-centered outreach efforts can Westfield State University capture this transfer pool and expand our enrollment in the realm of environmental protection and sustainable practices moving forward.

It is further recommended that Westfield State University consider the addition of an Atmospheric Science program at Westfield State University under the Department of Environmental Science, or as an interdisciplinary degree under the auspices of the Department of Environmental Science, Department of Chemical and Physical Sciences, and the Department of Geography, Planning, and Sustainability. The University of Massachusetts Lowell is currently the only state school in the Commonwealth to offer such a program.⁴¹ To provide an alternative to students, Westfield State University should consider using primarily existing courses while adding a full-time faculty member for advanced meteorology and atmospheric science courses and a meteorology lab space that will allow our institution to become a leader in the atmospheric sciences for the Pioneer Valley.

Possible major options for Westfield State University include Atmospheric Science B.S. and Meteorology & Weather Broadcasting B.S., the latter of which would combine courses in the Departments of Communication, Environmental Science, and Geography, Planning, and Sustainability to develop well-rounded weather journalists – a field that continues to grow.⁴² The following are potential options for how these majors could be structured:

Atmospheric Science, B.S. (76 Credits)

- **Required Introductory Mathematics Courses (11 Credits)**
 - MATH 0105 – Calculus I (4)
 - MATH 0106 – Calculus II (4)
 - MATH 0123 – Mathematical Methods in the Natural Sciences (3) *or* MATH 0108 – Elementary Statistics (3)
- **Required Introductory Chemistry Courses (8 Credits)**
 - CHEM 0109 – General Chemistry I (4)
 - CHEM 0111 – General Chemistry II (4)

⁴⁰ [Degrees & Certificates - Springfield Technical Community College](#)

⁴¹ [Environmental, Earth & Atmospheric Sciences | UMass Lowell \(uml.edu\)](#)

⁴² See Appendix III

Protecting the Global Nest – Going Green at Westfield State University

- **Required Introductory Physics Courses (8 Credits)**
 - PHSC 0125 – Physics I (4)
 - PHSC 0127 – Physics II (4)
- **Required Introductory Environmental Science & GPS Courses (15 Credits)**
 - ENVS 0101 – Principles of Environmental Science (3)
 - ENVS 0106 – Introduction to Environmental Analysis (3)
 - GPS 0106 – Environment, Sustainability & Society (3)
 - GPS 0107 – Climate Change (3)
 - GPS 0230 – Meteorology (3)
- **Required Introductory Writing Courses (3 Credits)**
 - ENVS 0240 – Writing for Environmental Science (3)
- **Required Upper-Level Environmental Science Courses (9 Credits)**
 - ENVS 0210 – Environmental Chemistry, Toxicology & Pollution (3)
 - ENVS 0311 – Environmental Monitoring & Analysis (3)
 - ENVS 0330 – Environmental Data Analysis (3)
- **Required Upper-Level Atmospheric Science Courses (22 Credits)**
 - CHEM 03xx – Atmospheric Chemistry (4)
 - GPS 0330 – Climatology (3)
 - GPS 0331 – Severe and Unusual Weather (3)
 - GPS 03xx – Advanced Meteorology I (3)
 - GPS 03xx – Advanced Meteorology II (3)
 - GPS 03xx – Research Experience in Atmospheric Science (3)
 - GPS 03xx – Advanced Weather Forecasting Techniques (3)

Meteorology & Weather Broadcasting, B.S. (94 Credits)

- **Required Introductory Mathematics Courses (11 Credits)**
 - MATH 0105 – Calculus I (4)
 - MATH 0106 – Calculus II (4)
 - MATH 0123 – Mathematical Methods in the Natural Sciences (3) *or* MATH 0108 – Elementary Statistics (3)
- **Required Introductory Chemistry Courses (8 Credits)**
 - CHEM 0109 – General Chemistry I (4)
 - CHEM 0111 – General Chemistry II (4)
- **Required Introductory Physics Courses (8 Credits)**
 - PHSC 0125 – Physics I (4)
 - PHSC 0127 – Physics II (4)
- **Required Introductory Environmental Science & Meteorology Courses (15 Credits)**
 - ENVS 0101 – Principles of Environmental Science (3)
 - ENVS 0106 – Introduction to Environmental Analysis (3)
 - GPS 0106 – Environment, Sustainability & Society (3)
 - GPS 0107 – Climate Change (3)
 - GPS 0230 – Meteorology (3)
- **Required Introductory Communication & English Courses (9 Credits)**
 - COMM 0101 – Introduction to Mass Communication (3)

Protecting the Global Nest – Going Green at Westfield State University

- COMM 0106 – Video Production I (3)
- ENGL 0103 – Speech (3)
- **Required Introductory Writing Courses (6 Credits)**
 - COMM 0204 – Writing for the Media (3)
 - ENV5 0240 – Writing for Environmental Science (3)
- **Required Upper-Level Communication Courses (15 Credits)**
 - COMM 0275 – Journalism I (3)
 - COMM 0309 – Broadcast Journalism (3)
 - COMM 0375 – Journalism II (3)
 - COMM 03xx – Weather Broadcasting (3)
 - *3 Additional Credits in Communications at the 200 or 300 Level*
- **Required Upper-Level Atmospheric Science & Meteorology Courses (22 Credits)**
 - CHEM 03xx – Atmospheric Chemistry (4)
 - ENV5 0330 – Environmental Data Analysis (3)
 - GPS 0330 – Climatology (3)
 - GPS 0331 – Severe and Unusual Weather (3)
 - GPS 03xx – Advanced Meteorology I (3)
 - GPS 03xx – Advanced Meteorology II (3)
 - GPS 03xx – Advanced Weather Forecasting Techniques (3)

In order to allow these majors to be implemented, the University would need to hire one full-time tenured faculty member in Atmospheric Science to teach courses in meteorology and forecasting and assist with other environmental science courses as necessary. Assistant Professor Dr. Evanowski-Cole of the Department of Chemical and Physical Sciences, through her expertise as an atmospheric chemist, is already on board to assist in the planning of such a program. In addition, the University will need to identify a dedicated space for meteorology courses to be taken. Although lectures could be taken anywhere on-campus, having a dedicated meteorology and atmospheric science laboratory would be particularly helpful. One such option is to convert the Environmental Science Conference Room into a small laboratory (outfitted with screens for forecasting analysis and other instrumentation) and utilize part of the Wilson Hall or Science & Innovation Center roof as a modern weather station. Funding for this project can be derived from the Innovation Fund or through grant opportunities.

In addition to the aforementioned majors, Westfield State University should consider adding additional minors in order to augment enrollment in non-Common Core courses related to environmental protection and sustainability schemes and complement the aforementioned majors. The minors that Westfield State University should consider adding include Atmospheric Science, Sustainable Construction Technology & Management, and Sustainable Energy Development. They could be structured as follows:

Minor in Atmospheric Science (18 Credits)

- **Required Courses (12 Credits)**
 - GPS 0107 – Climate Change (3)
 - GPS 0230 – Meteorology (3)
 - GPS 0330 – Climatology (3)
 - GPS 0331 – Severe & Unusual Weather (3)
- **Elective Courses (6 Credits)**
 - CHEM 03xx – Atmospheric Chemistry (4)

Protecting the Global Nest – Going Green at Westfield State University

- ENV5 0210 – Environmental Chemistry, Toxicology & Pollution (3)
- ENV5 0233 – Environmental Legislation (3)
- ENV5 0311 – Environmental Monitoring & Analysis (3)
- ENV5 0330 – Environmental Data Analysis (3)
- GPS 0110 – Science for Future Presidents (3)

Minor in Sustainable Construction Management (18 Credits)

- **Required Sustainable Construction & Planning Courses (9 Credits)**
 - GPS 0105 – Introduction to Community Planning (3)
 - GPS 0352 – Planning Green Sustainable Cities (3)
 - GPS 03xx – Sustainable Construction (3)
- **Required Business Courses (9 Credits)**
 - MGMT 0107 – Software Applications in Management (3)
 - MGMT 0221 – Business Management (3)
 - MGMT 0241 – Business Law (3)

Minor in Sustainable Energy Development (18 Credits)

- **Required Courses (12 Credits)**
 - GPS 0105 – Introduction to Community Planning (3)
 - GPS 0106 – Environment, Sustainability & Society (3)
 - GPS 0245 – Sustainable Energy (3)
 - GPS 0314 – Sustainable Transportation (3)
- **Elective Courses (6 Credits; At Least 3 Credits Outside GPS)**
 - ECON 0320 – Environmental Economics (3)
 - ECON 0321 – Natural Resource Economics (3)
 - GPS 0217 – Contemporary Global Issues (3)
 - GPS 0238 – Environmental Impact Analysis (3)
 - GPS 0244 – Introduction to Geographic Information Systems (3)
 - GPS 0352 – Planning Green Sustainable Cities (3)
 - HIST 0258 – U.S. Environmental History (3)
 - PHSC 0103 – Energy, Environment & Society (3)
 - PHSC 0115 – General Physics I (3)
 - PHSC 0127 – General Physics II (3)

It is hoped that the above-mentioned minors can be implemented in the near future given that they align closely with coursework offered at area community colleges and would be a great marketing tool for the Department of Geography, Planning, and Sustainability at Westfield State University.

RECOMMENDATION #5: INCREASE OPPORTUNITIES FOR STUDENT ENGAGEMENT IN SUSTAINABILITY

Recommendation Overview

- **5.1** - Increase advertising of the existing Sustainable Energy and Development Club and Environmental Planning Club.
- **5.2** – Broaden non-GPS Department faculty support for existing clubs to strengthen and expand their impact.
- **5.3** – Inform prospective students about the University’s sustainability efforts and initiatives.
- **5.4** – Develop, market, and add research opportunities for all students regardless of major.
- **5.5** – Develop and fund an Eco-Representatives Program under the Office of Sustainability and Environmental Protection.

Timeline for Recommendation 5		
<u>Action</u>	<u>Responsible Authority</u>	<u>Date</u>
Inform incoming students of our emphasis on sustainability in order to engender a culture of sustainability among the student body.	Undergraduate Admissions / New Student Orientation / Office of Sustainability and Environmental Protection (Fall 2023 and Beyond)	August 2022
Develop Advertising Plan for Sustainability-Oriented Clubs & Organizations	SAIL / SGA Vice President for Finance / Sustainability-Oriented Clubs	October 2022
Formulate Advertising Plan for existing internship, research opportunities, and study-abroad programs that promote and link to sustainability themes	CURCA / International Programs / Academic Affairs	October 2022
Inaugurate the Eco-Representatives Program	Office of Sustainability and Environmental Protection	September 2023

Background

In 2007-2008, Westfield State University, through support of the Sustainability Officer William Bickley, instituted a student-run Green Team that participated in numerous activities and events across campus. In addition, a portion of

Protecting the Global Nest – Going Green at Westfield State University

Davis Hall was designated as a sustainable living area ('the green dorm').⁴³ Neither of those initiatives are presently exercised by Westfield State University.

In cooperation with the Department of Geography, Planning, and Sustainability, the University currently has two sustainability-related student clubs publicly-noted on the University website: the Sustainable Energy & Development Club and the Environmental Planning Club.⁴⁴ The clubs run meaningful events, such as a charity thrift store, that promote sustainable practices on-campus and beyond, but many students do not know these clubs exist.

MASSPIRG (Massachusetts Public Interest Research Group) – an external group devoted to promoting the implementation of renewable energy policies - has a presence at the University and invites student participation by visiting classrooms to solicit members and advertise its programming. The group hosts a kick-off event at the start of each academic year⁴⁵ and publishes its initiatives regularly. Internships are also available through MASSPIRG and has attracted interest from Westfield State University students looking for experience in this realm. In 2017, the group, along with Professor Brian Conz, the present Chair of the Geography, Planning, and Sustainability, held a press conference to discuss renewable energy at Westfield State University, including their hope that the University transition to 100% renewable energy for electricity use no later than 2030.⁴⁶



Figure 7. MASSPIRG's Westfield State University Chapter's 2021-2022 Initiatives (MASSPIRG WSU Instagram).

⁴³ Ad Hoc Committee on Sustainability, *Sustainability in Higher Education at Westfield State College: A Report from the Ad Hoc Committee on Sustainability* (2008)

⁴⁴ [Clubs & Organizations | Westfield State University \(ma.edu\)](#)

⁴⁵ [WSU MASSPIRG | Instagram](#)

⁴⁶ [WSU student group holds press conference to reinforce pledge for renewable energy | The Westfield News | April 1, 2017](#)

Supporting Evidence

Green Teams and/or Eco-Representative Programs currently exist at many local institutions with the aim of involving students in sustainability initiatives that match their interests. Students may receive pay per negotiated hours worked or credit for their involvement. The University of Vermont, Tufts University, and UMASS Lowell provide strong models for Eco-Representative programming, all of which are administered through their respective Offices of Sustainability.⁴⁷ UMASS Amherst runs their Eco-Representative program through a designated course, similar to how our student writing consultants on campus utilize a Tutoring Writing course for proper instruction and guidance in how to go about their job.⁴⁸ Bridgewater State University has a permanent Green Teams that works each year to promote sustainability on-campus through projects and events.

The ultimate goals of Green Teams and Eco-Representative programs are to “[promote] environmentally responsible behaviors in... residence halls [and] to create an environmentally literate student population and reduce the campus' ecological footprint. Specific activities [may] include:

- Set up an Eco-Bulletin board in their residence hall and post information.
- Conduct audits of the trash and recycling bins in their building.
- Go door to door, talking to students about sustainability.
- Conduct energy audits of light bulbs and appliances in residence halls.
- Conduct surveys about ecological issues.
- Attend bi-weekly meetings to plan activities and provide feedback to the coordinator.
- Set up and staff environmental information booths and exhibits.
- Write articles about eco-topics for the student newspaper.”⁴⁹

Implementation

Prospective students learn little about the University’s ongoing and planned sustainability initiatives. The Undergraduate Admissions Office and New Student Orientation Programs are key contacts for prospective, accepted, and recently enrolled students to learn about the sustainability initiatives being sponsored by the University. Adding a sustainability ‘station’ during New Student Orientation will allow incoming students to slowly develop a culture of sustainability over their four years at our institution. Campus tours and promotional videos for the institution should highlight our sustainability initiatives in order to engender that culture with our student body and capture prospective students interested in these endeavors. Resident Assistants and Resident Directors should stress the importance of recycling (and eventually composting) in their residence halls, and faculty should likewise stress the need to recycle in academic halls if necessary.

⁴⁷ See [Eco-Reps Program | Office of Sustainability | The University of Vermont \(uvm.edu\)](#), [Eco Representatives - Office of Sustainability \(tufts.edu\)](#), and [Sustainability Eco Rep Meeting | Calendar | UMass Lowell \(uml.edu\)](#).

⁴⁸ [Eco-Rep Program | Sustainability | UMass Amherst](#)

⁴⁹ Ad Hoc Committee on Sustainability, *Sustainability in Higher Education at Westfield State College: A Report from the Ad Hoc Committee on Sustainability* (2008), page 46.

Protecting the Global Nest – Going Green at Westfield State University

We are pleased that the Office of Student Activities, Involvement, and Leadership (SAIL) has recently acquired the Presence software system in order to provide students with a centralized, up-to-date website with information concerning clubs and organizations on-campus along with their events. It is our hope that students will take advantage of this opportunity and engage with more clubs and organizations than ever before, particularly with regard to sustainability.

Westfield State University should consider developing marketing plans to increase awareness surrounding issues of environmental protection and sustainability and how the University is tackling these issues head on. Ensuring that up-to-date information is available on a webpage of the University website will allow prospective students to realize what our University has to offer in this area.

Once the Office of Sustainability and Environmental Protection has been established, the University should incorporate and fund an Eco-Representative program, following the direction of the current tutoring program with an hourly wage set at the state minimum, with a minimum of 3-5 hours per week of participation. These Eco-Representatives would be responsible for advancing the mission of the Office of Sustainability and Environmental Protection through the development of educational programming; coordinating with clubs, organizations, and other entities; drafting grant proposals for the Coordinator of Sustainability and Environmental Protection; publicizing sustainability efforts across campus; and working in tandem with University departments to meet the goals set by the Advisory Committee on Conceptualizing Environmental and Sustainability Schemes (ACCESS).

Commonwealth of Massachusetts One Ashburton Place Boston, MA 02108		Pay Group: N06-CW Normal FLSA 6 Pay Begin Date: 04/10/2022 Pay End Date: 04/23/2022	Business Unit: HEDID																																																																									
Employee ID: [REDACTED] Department: WSC1000-Westfield State College Location: Westfield-Western Ave Job Title: Student Employee Pay Rate: \$14.250000 Hourly		TAX DATA: Federal MA State Tax Status: Single Single Allowances: N/A 1 Percent: N/A Addl. Amount:																																																																										
<table border="1"> <thead> <tr> <th colspan="5">HOURS AND EARNINGS</th> <th colspan="3">TAXES</th> </tr> <tr> <th>Description</th> <th>Rate</th> <th>Current Hours</th> <th>Earnings</th> <th>Hours</th> <th>YTD Earnings</th> <th>Description</th> <th>Current</th> <th>YTD</th> </tr> </thead> <tbody> <tr> <td>Regular Pay Enrolled Students</td> <td>14.250000</td> <td>2.75</td> <td>39.19</td> <td>4.50</td> <td>64.13</td> <td>Fed Withholding</td> <td>0.00</td> <td>0.00</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>MA Withholding</td> <td>0.00</td> <td>0.00</td> </tr> <tr> <td colspan="2">TOTAL:</td> <td>2.75</td> <td>39.19</td> <td>4.50</td> <td>64.13</td> <td colspan="2">TOTAL:</td> <td>0.00</td> </tr> </tbody> </table>					HOURS AND EARNINGS					TAXES			Description	Rate	Current Hours	Earnings	Hours	YTD Earnings	Description	Current	YTD	Regular Pay Enrolled Students	14.250000	2.75	39.19	4.50	64.13	Fed Withholding	0.00	0.00							MA Withholding	0.00	0.00	TOTAL:		2.75	39.19	4.50	64.13	TOTAL:		0.00																												
HOURS AND EARNINGS					TAXES																																																																							
Description	Rate	Current Hours	Earnings	Hours	YTD Earnings	Description	Current	YTD																																																																				
Regular Pay Enrolled Students	14.250000	2.75	39.19	4.50	64.13	Fed Withholding	0.00	0.00																																																																				
						MA Withholding	0.00	0.00																																																																				
TOTAL:		2.75	39.19	4.50	64.13	TOTAL:		0.00																																																																				
<table border="1"> <thead> <tr> <th colspan="2">BEFORE-TAX DEDUCTIONS</th> <th colspan="2">AFTER-TAX DEDUCTIONS</th> <th colspan="2">EMPLOYER PAID BENEFITS</th> </tr> <tr> <th>Description</th> <th>Current</th> <th>YTD</th> <th>Description</th> <th>Current</th> <th>YTD</th> </tr> </thead> <tbody> <tr> <td colspan="2">TOTAL:</td> <td>0.00</td> <td>0.00</td> <td colspan="2">TOTAL:</td> </tr> </tbody> </table>		BEFORE-TAX DEDUCTIONS		AFTER-TAX DEDUCTIONS		EMPLOYER PAID BENEFITS		Description	Current	YTD	Description	Current	YTD	TOTAL:		0.00	0.00	TOTAL:		<table border="1"> <thead> <tr> <th colspan="2">TOTAL GROSS</th> <th>FED TAXABLE GROSS</th> <th>TOTAL TAXES</th> <th>TOTAL DEDUCTIONS</th> <th>NET PAY</th> </tr> </thead> <tbody> <tr> <td>Current</td> <td>39.19</td> <td>39.19</td> <td>0.00</td> <td>0.00</td> <td>39.19</td> </tr> <tr> <td>YTD</td> <td>64.13</td> <td>64.13</td> <td>0.00</td> <td>0.00</td> <td>64.13</td> </tr> </tbody> </table>		TOTAL GROSS		FED TAXABLE GROSS	TOTAL TAXES	TOTAL DEDUCTIONS	NET PAY	Current	39.19	39.19	0.00	0.00	39.19	YTD	64.13	64.13	0.00	0.00	64.13	<table border="1"> <thead> <tr> <th>YEAR-TO-DATE</th> <th>PAID TIME OFF</th> <th>SICK LEAVE</th> </tr> </thead> <tbody> <tr> <td>Start Balance</td> <td>0.0</td> <td>0.0</td> </tr> <tr> <td>+ Earned</td> <td>0.0</td> <td>0.0</td> </tr> <tr> <td>+ Bought</td> <td>0.0</td> <td>0.0</td> </tr> <tr> <td>- Taken</td> <td>0.0</td> <td>0.0</td> </tr> <tr> <td>- Sold</td> <td>0.0</td> <td>0.0</td> </tr> <tr> <td>+ Adjustments</td> <td>0.0</td> <td>0.0</td> </tr> <tr> <td>End Balance</td> <td>0.0</td> <td>0.0</td> </tr> </tbody> </table>		YEAR-TO-DATE	PAID TIME OFF	SICK LEAVE	Start Balance	0.0	0.0	+ Earned	0.0	0.0	+ Bought	0.0	0.0	- Taken	0.0	0.0	- Sold	0.0	0.0	+ Adjustments	0.0	0.0	End Balance	0.0	0.0	<table border="1"> <thead> <tr> <th colspan="3">NET PAY DISTRIBUTION</th> </tr> <tr> <th>Account Type</th> <th>Account Number</th> <th>Deposit Amount</th> </tr> </thead> <tbody> <tr> <td colspan="3">TOTAL:</td> </tr> </tbody> </table>		NET PAY DISTRIBUTION			Account Type	Account Number	Deposit Amount	TOTAL:		
BEFORE-TAX DEDUCTIONS		AFTER-TAX DEDUCTIONS		EMPLOYER PAID BENEFITS																																																																								
Description	Current	YTD	Description	Current	YTD																																																																							
TOTAL:		0.00	0.00	TOTAL:																																																																								
TOTAL GROSS		FED TAXABLE GROSS	TOTAL TAXES	TOTAL DEDUCTIONS	NET PAY																																																																							
Current	39.19	39.19	0.00	0.00	39.19																																																																							
YTD	64.13	64.13	0.00	0.00	64.13																																																																							
YEAR-TO-DATE	PAID TIME OFF	SICK LEAVE																																																																										
Start Balance	0.0	0.0																																																																										
+ Earned	0.0	0.0																																																																										
+ Bought	0.0	0.0																																																																										
- Taken	0.0	0.0																																																																										
- Sold	0.0	0.0																																																																										
+ Adjustments	0.0	0.0																																																																										
End Balance	0.0	0.0																																																																										
NET PAY DISTRIBUTION																																																																												
Account Type	Account Number	Deposit Amount																																																																										
TOTAL:																																																																												

Figure 8. A pay stub as provided through the on-campus tutoring program (Daniel Currier)

FOCUS AREA #3
Publicizing Sustainability
Efforts and Metrics

RECOMMENDATION #6: CREATE A SUSTAINABILITY WEBPAGE ON THE WESTFIELD STATE UNIVERSITY WEBSITE

Recommendation Overview

- **6.1** – Create a webpage focusing on sustainability at Westfield State University, including initiatives, reports, ways to get involved, and contact information.
- **6.2** – The webpage shall be regularly updated to ensure that members of the campus community can engage fully in the initiatives.

Timeline for Recommendation 6		
<u>Action</u>	<u>Responsible Authority</u>	<u>Date</u>
Develop a draft webpage on sustainability initiatives for Westfield State University.	Marketing / ACCESS	March 2023
Formalize webpage on sustainability initiatives for Westfield State University.	Marketing / ACCESS	May 2023
Provide editing privileges to the Coordinator for Sustainability and Environmental Protection.	Marketing / Coordinator for Sustainability and Environmental Protection	September 2023

Background

Westfield State University, as discussed in Recommendation #1, once had a full-time Campus Sustainability Coordinator responsible for advancing the University’s goal of adhering to the standards of the American College and University President Climate Commitment (ACUPCC). William Bickley, who served in that position from its inception in 2007 until its removal from the campus payroll in 2014, worked with those in charge of the University website to ensure that initiatives were being publicized on a regular basis. An example of a webpage published during Bickley’s tenure can be found below:

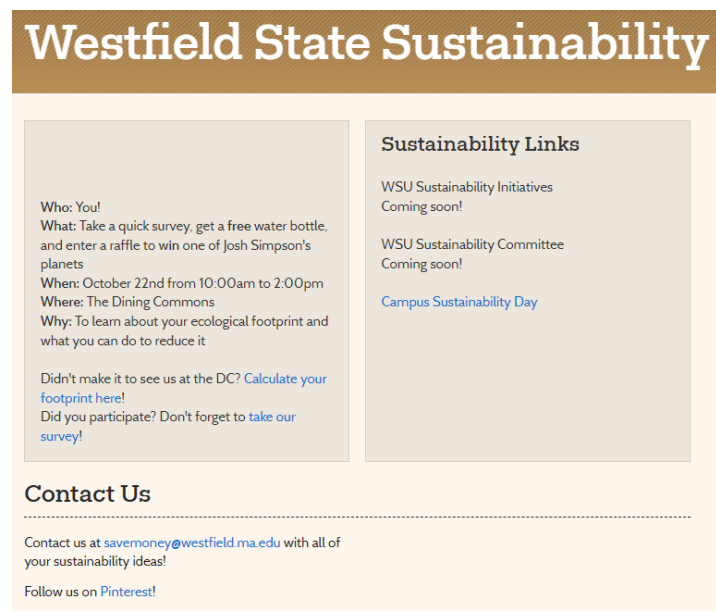


Figure 9. Westfield State sustainability webpage promoting fun events designed to foster educational knowledge surrounding climate change (Internet Archive, Approx. 2008)

After Bickley retired from the institution in 2014, the position remains unfilled and was removed from the University payroll, with the webpage on sustainability ceasing to exist there afterwards.

Supporting Evidence

Many of our sister institutions presently host sustainability webpages on their websites (UMass Amherst, UMass Boston, UMass Lowell, Fitchburg State University, Bridgewater State University, Salem State University, and Worcester State University). Worcester State University's active webpage provides a good working model through the variety of information provided.⁵⁰

These webpages contain information about current sustainability goals, when their past sustainability goals were met, and sustainability-related events happening on their campus. They are highly helpful in advertising and promoting a culture of sustainability on-campus, with information on how to get involved and how previous students have made a difference.

Implementation

It is recommended that the Director for Marketing work in consultation with the Advisory Committee on Conceptualizing Environmental and Sustainability Schemes (ACCESS) for the 2022-2023 academic year (and the Office of Sustainability and Environmental Protection thereafter) to develop a webpage for Westfield State University focusing on the sustainable practices that matter to us as an institution and what we plan on doing to meet the needs of the planet.

⁵⁰ [Sustainability | Worcester State University](#)

Protecting the Global Nest – Going Green at Westfield State University

The webpage should contain basic information such as:

- Current sustainability initiatives and goals, as well as a timeline for when goals have been met and will be met in the future.
- Information on the Office of Sustainability and Environmental Protection.
- Opportunities for students to get involved in sustainability actions and activities on campus.
- A GIS Sustainability Map (highlighting recycling bins, hydration stations, composting locations, etc).
- Information about sustainability-related groups on-campus.
- Measurements of sustainability (recycling, composting, energy savings).

Note that this report highlights information that can be immediately utilized (Mission/Goals, Academic Partnerships, Student Opportunities, Events, Sustainability in Action, Facilities, and referenced reports). Solar panel use as it relates to Wilson Hall and Bates Hall can also be tracked in the short-term. In the long-term, the University will be able to expand the webpage to include accreditation, awards, and strategic plans.

An example of how the webpage could look (subject to change given our branding) can be found below:



Figure 10. Mock-Up for WSU Sustainability Page (GEOL 0205 Spring 2022 class)

FOCUS AREA #4
**Transitioning to Renewable
Energy on Campus**

RECOMMENDATION #7: INSTALL SOLAR PANELS ON CAMPUS ROOFTOPS

Recommendation Overview

- **7.1** – Assess the University’s solar power generation capacity and opportunities for installation across campus rooftops, including residence halls, academic buildings, and administrative facilities. If solar power capabilities are much larger than the need on-campus, consider opportunities to sell electrical energy to Westfield Gas & Electric and other providers.
- **7.2** – Investigate opportunities to install solar panels above parking lots (such as South Lot).
- **7.3** – Upon completion of feasibility studies, install solar panels to generate clean electrical energy.

Timeline for Recommendation 7		
Action	Responsible Authority	Date
Conduct feasibility study on solar panel use across campus, particularly for campus parking lots. Consider any previous research as available.	Executive Director for Capital Planning & Facilities	September 2022
Hold meetings with ACCESS Committee on solar panel plans ahead of the publication of their strategic plan.	Executive Director for Capital Planning & Facilities / Vice President for Administration & Finance / Interim Director of Residential Life / ACCESS	December 2022 / January 2023
ACCESS publishes strategic plan, which should include information concerning a long-term roadmap on installing solar panels across campus.	ACCESS	May 2023
<i>Remainder of Timeline Contingent on Recommendations from ACCESS</i>		

Background

The University is obligated to comply with Executive Order No. 484 (Leading by Example – Clean Energy and Efficient Buildings⁵¹), signed by Governor Deval Patrick in 2007, that requires state agencies to develop “specific targets for energy consumption, energy conservation, renewable energy usage, building construction, and water usage.”⁵²

⁵¹ [Leading by Example Initiatives | Mass.gov](#)

⁵² [Division of Administration & Finance - AY 2011 Sustainability Goals](#)

Protecting the Global Nest – Going Green at Westfield State University

In May 2008, the Ad Hoc Committee on Sustainability recommended that the University increase reliance on renewable energy sources, with the goal of having the institution have 30% of its electricity derived from renewable energy sources.⁵³ In Fall 2010, the University, with the Massachusetts Department of Energy Resources (DOER) Leading by Example Program and the Divisions of Capital Asset Management and Maintenance (DCAMM), used American Recovery and Reinvestment Act (ARRA) funding (roughly \$527,000) to install solar voltaic systems⁵⁴ on the rooftops of Bates (182 panels) and Wilson (352 panels) Halls. At the time, the panels were estimated to reduce overall electricity costs by as much as \$49,000/year.⁵⁵

In 2011, the Campus Master Plan⁵⁶ was produced, summarizing the University's energy use/sustainability requirements (via the MA Division of Capital Asset Management and Maintenance) related to Executive Order No. 484. Goals were set for 2012, 2020, and 2050 and require that the University decrease its greenhouse gas emissions, decrease energy use per square foot and water use, increase its energy use from renewable resources and meet MA LEED Plus requirements (based on construction size) as well as energy code savings and Advanced Building energy criteria for new construction. Across Massachusetts, DCAMM is expected to (1) initiate energy-efficiency projects in buildings over 100,000 square feet, (2) "retro-commission" buildings over 50,000 square feet, (3) help develop building maintenance programs (lighting and HVAC), and (4) track energy use by facilities. These requirements are being applied to the renovation of one of the original buildings on campus – Parenzo Hall. Constructed in 1956, Parenzo Hall has served as an important academic building on-campus, particularly for students in the arts, political science, and education programs. The renovated structure will be ready for use in Fall 2023 and will achieve LEED Silver certification. The addition of external metal panels on the building will reportedly increase its thermal performance 20% above code.⁵⁷ However, the new design does not include rooftop solar panels.

In 2016, the Nettie Stevens Science and Innovation Center opened on campus. The 54,000 square foot building is LEED Silver certified, which means that all furniture and equipment as well as LED lighting meet required energy efficiency standards. However, the newest campus building does not include rooftop solar panels.⁵⁸

At the Westfield State University Board of Trustees meeting on April 27, 2022, it was announced that, because of rising utility costs, Residential Life has explored grants from the Massachusetts State College Building Authority (MSCBA) to install rooftop solar panels on residence halls.⁵⁹ Utility costs have been expected to rise over \$1 million in the next year due to inflationary pressures.

Supporting Evidence

Many state institutions have invested in solar energy. Worcester State University and Bridgewater State University are installing solar panels or already have solar panels on one or more buildings on their campuses. At Worcester

⁵³ Ad Hoc Committee on Sustainability, *Sustainability in Higher Education at Westfield State College: A Report from the Ad Hoc Committee on Sustainability* (2008)

⁵⁴ Meeting with Vice President for Administration and Finance Steve Taksar & Members of the Facilities Team (4/13/2022)

⁵⁵ [Solar panels at Westfield State University generate electricity for 2 campus buildings - masslive.com](#)

⁵⁶ Westfield State University, *Campus Master Plan Update* (2011)

⁵⁷ [Westfield State Parenzo — MDS / Miller Dyer Spears Architects \(mds-bos.com\)](#)

⁵⁸ [Westfield State University's 'green' Science and Innovation Center set to open in fall | Westfield State University \(ma.edu\)](#)

⁵⁹ Westfield State University Board of Trustees, *Meeting Minutes 4/27/2022*

Protecting the Global Nest – Going Green at Westfield State University

State University,⁶⁰ solar photovoltaics on two buildings yield 140,000 kW hours of electricity per year and, similar to the system that used to exist by the first-floor elevator in our Wilson Hall, there is a real-time read-out of energy generation produced by the panels. Bridgewater State University is expanding its solar footprint by installing a 3400-solar panel system above their Tower parking lot.⁶¹

Solar benefits are clearly evidenced below the UMASS system, as shown in Figure 11 below.⁶² For example, UMASS Boston has three buildings with solar panels generating ~5.5 MW of energy and a 10-year energy savings of \$5.5 million over 20 years.

Campus	Developer	Project Name	Expected Online Date	System Capacity (MW-DC)	System Location	Discount off Credit Value	Projected Savings 1st 12 Months ⁽⁵⁾	Projected Savings 20 Years ⁽⁶⁾
Lowell	Mass Midstate Solar 1, LLC ⁽¹²⁾	Warren A	Active	5.60	Warren	37.50%	\$340,000	\$7,931,000
Lowell	Hubbardston Solar, LLC ⁽¹²⁾	Hubbardston	Active	2.50	Hubbardston	35.00%	\$130,000	\$2,961,000
Lowell	Nexamp	Westford	Active	1.50	Westford	10% - 14%	\$23,000	\$660,000
Lowell	Mass Midstate Solar 3, LLC ⁽¹²⁾	Warren C	Active	4.20	Warren	37.50%	\$255,000	\$5,950,000
Lowell	Millbury Solar, LLC ⁽¹¹⁾	Millbury	Active	2.10	Millbury	37.50%	\$127,500	\$3,000,000
Subtotal⁽³⁾				15.90			\$875,500	\$20,502,000
Amherst	Clean Energy Collective	CEC Solar #1032, LLC	Active	1.00	Hadley	15.00%	\$10,000	\$271,429
Amherst	Nexamp Fairview Farms Solar, LLC ⁽¹⁴⁾	Whatley	Active	2.40	Whately	21.00%	\$46,000	\$1,101,000
Amherst	Nexamp Hadley Solar, LLC ⁽¹⁴⁾	Hadley	Active	1.50	Hadley	18.00%	\$16,000	\$400,000
Amherst	Borrego	Hadley	4/1/2017	2.80		12.00%	\$35,000	\$950,000
Subtotal⁽³⁾				7.70			\$107,000	\$2,722,429
Dartmouth	ConEdison	Dartmouth-II	Active	2.40	Dartmouth	30.00%	\$125,000	\$2,855,000
Dartmouth	Freetown Solar, LLC ⁽¹²⁾	Freetown	Active	6.00	Freetown	34.25%	\$330,000	\$7,563,000
Subtotal				8.40			\$455,000	\$10,418,000
Medical School	Hecate Monson I, LLC ⁽¹⁴⁾	Monson-I	6/1/2015	3.50	Monson West	38.00%	\$220,000	\$5,200,000
Medical School	SolarCity	West Brookfield	11/1/2015	1.40	Brookfield	51.00%	\$126,192	\$2,533,677
Medical School	SolarCity	Williamsburg	Active	2.10	Williamsburg	51.00%	\$258,404	\$6,000,000
Medical School	Mass Midstate Solar 2, LLC ⁽¹²⁾	Warren B	Active	6.00	Warren	37.50%	\$365,000	\$8,500,000
Medical School	Palmer Solar, LLC ⁽⁸⁾	Palmer	Active	2.50	Palmer	35.00%	\$130,000	\$3,000,000
Subtotal				10.60			\$753,404	\$17,500,000
Boston	Rustcraft Road Solar, LLC ⁽⁹⁾	Rustcraft Road Solar	12/1/2014	2.00	Dedham	20.00%	\$73,000	\$1,690,000
Boston	EMI	East Boston	12/1/2014	1.00	Boston	20.00%	\$36,500	\$845,000
Boston	Altus	Woburn Solar Canopy	10/1/2016	0.65	NEMA Zone	25.00%	\$28,826	\$665,213
Boston	EMI	480 McClellan Solar LLC	11/1/2016	0.60	NEMA Zone	20.00%	\$21,287	\$491,234
Boston	Borrego	Wildcat Solar System	12/1/2016	4.24	NEMA Zone	25.00%	\$188,211	\$4,343,326
Subtotal				5.49			\$238,323	\$5,499,772
System-Wide Totals⁽³⁾				48.09			\$2,429,227	\$56,642,201

Figure 11. Power Generation and Cost Savings from UMASS-system photovoltaics (University of Massachusetts)

Costs for these projects vary per installation type. In 2017, UMASS Amherst added solar panels to the roofs of five different buildings as well as solar canopies over two parking lots as part of a \$16 million project.⁶³ The average cost of a solar canopy similar to those in the parking lots at UMass is \$3.45-\$3.99 per watt. The price of one average canopy would start around \$38,000, but price changes based on factors like power and size.⁶⁴

Implementation

⁶⁰ [Sustainability Initiatives | Worcester State University](#)

⁶¹ [Sun Power | Bridgewater State University](#)

⁶² University of Massachusetts, *Annual Sustainability Report* (2016)

⁶³ [2017 Solar Projects | Sustainability | UMass Amherst](#)

⁶⁴ [How Much Do Solar Canopies Cost | EnergyLink \(goenergylink.com\)](#)

Protecting the Global Nest – Going Green at Westfield State University

Per the requirements of Executive Order No. 484, the Facilities Department should continue assessing the University's solar power generation capacity, as well as the potential to install solar panels on campus rooftops and ground mounts in open spaces or over parking lots. A student report from 2010⁶⁵ estimated that rooftop solar panels on campus buildings could save the University almost \$500,000 dollars, though this number is likely much higher given soaring energy costs and the relative affordability of solar technology.

A consideration of ground-mounted solar has not been quantified, however, the south-facing lawn in front of Horace Mann Center or South Lot may be ideal sites for ground-mounted panels. By 2023, once the Office of Sustainability and Environmental Protection Office is established and a strategic plan is produced, the University should begin the process of designing, bidding, and installing solar panels across our campus. Opportunities for grant funding should be prioritized in order to allow for the University to focus on other major capital improvements that would lessen overall energy needs, such as retrofitting existing buildings.

⁶⁵ Donahue. (n.d.) *Westfield State University Potential for Solar and Wind Energy* (2010)

RECOMMENDATION #8: PROVIDE ELECTRIC VEHICLE CHARGING STATIONS ACROSS CAMPUS

Recommendation Overview

- **8.1** – Install a two-port charging station in the new Parenzo Hall Parking Lot.
- **8.2** – Investigate the need and feasibility for two-port charging stations on the main campus and in South Lot.

Timeline for Recommendation 8		
Action	Responsible Authority	Date
Determine areas where charging stations could be installed.	ACCESS / Facilities	May 2023
Install a two-port charging station outside of Parenzo Hall.	Walsh Brothers / DCAMM / Facilities	Summer 2023
Install additional charging stations across campus as outlined in the ACCESS Strategic Plan.	Office of Sustainability & Environmental Protection / Facilities	Spring 2024

Background

Westfield State University is the most residential campus of the state universities, but many students continue to commute to 577 Western Avenue in order to receive a quality education. Although most of the vehicles used by commuting students are powered by fossil fuels, electric vehicles are becoming more affordable through cheaper production and the availability of government tax credits. Although electric vehicles are starting to be more prevalent in the marketplace, Westfield State University has not kept up with this reality, with no electric vehicle charging stations available on our campus. There were plans to designate charging stations in Commuter Lot, next to the new Nettie Stevens Science and Innovation Center.⁶⁶ These plans eventually fell through. The University is planning to install the wiring necessary for an electric vehicle charging station outside of Parenzo Hall, though there are no current plans on a full installation.⁶⁷

⁶⁶ [Westfield State University's 'green' Science and Innovation Center set to open in fall | Westfield State University \(ma.edu\)](https://www.westfield.edu/news/2022/09/07/westfield-state-university-green-science-and-innovation-center-set-to-open-in-fall)

⁶⁷ Meeting with Vice President for Administration and Finance Steve Taksar & Members of the Facilities Team (4/13/2022)

Supporting Evidence

Most of the state universities of the Commonwealth of Massachusetts, along with campuses for the University of Massachusetts system, have at least one electric vehicle charging station on the campus or in the general area near their campus. Many of these charging stations are built to accommodate more than one vehicle to allow for flexibility and versatility as demand increases.

The following schools in the University of Massachusetts system provide electric vehicle charging stations: UMASS Lowell (14 stations),⁶⁸ UMASS Amherst (8 stations),⁶⁹ and UMASS Dartmouth (6 stations). In the state university system, the following schools provide charging stations: Salem State University (6 two-port stations),⁷⁰ Worcester State University (1 four-port station), Fitchburg State University (1 two-port station), Fitchburg State University (1 two-port station),⁷¹ Framingham State (1 two-port station),⁷² Bridgewater State (1 six-port station).⁷³ Grants and funds for installing charging stations came from a variety of sources, such as National Grid's EV Charging Station Program⁷⁴ and Massachusetts' Multi-Unit Dwelling and Educational Campus Charging Program.⁷⁵

Implementation

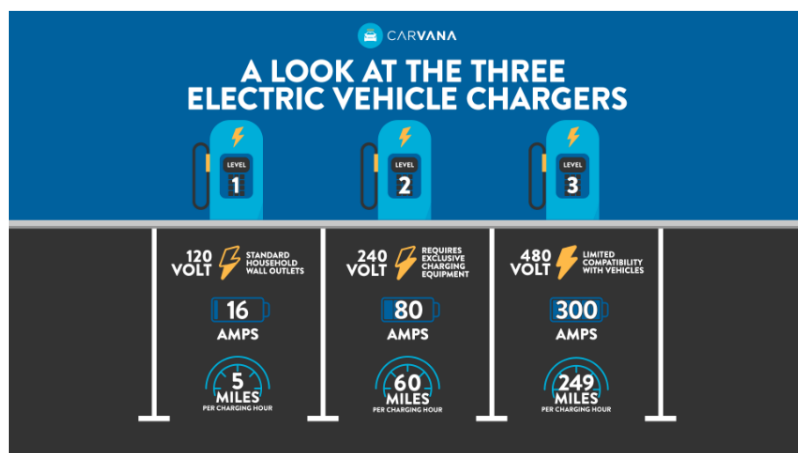


Figure 12. Three types of electric vehicle chargers (Behind the Wheel)⁷⁶

Initially, it is recommended that the University install three two-port Level 2 charging stations within the next five years. Level 2 chargers vary in price but can be as much as \$3000 per charger because they need specific wiring to

⁶⁸ [New Incentives Help University Save Energy, Money | UMass Lowell \(uml.edu\)](#)

⁶⁹ [Electric Vehicle Charging Stations | Sustainability | UMass Amherst](#)

⁷⁰ [Salem State Adds Electric Vehicle Charging Stations | Salem State University](#)

⁷¹ [University recognized with Leading by Example award for sustainability efforts | Fitchburg State University](#)

⁷² [Framingham State University - Electric Car Charging - 170 Maple St, Framingham, MA 01702, USA - School/University - PlugShare](#)

⁷³ [Power Moves | Bridgewater State University](#)

⁷⁴ [Electric Vehicle Charging Station Program | National Grid \(nationalgridus.com\)](#)

⁷⁵ [Apply for MassEVIP Multi-Unit Dwelling & Educational Campus Charging Incentives | Mass.gov](#)

⁷⁶ [How much does it cost to install an EV charger? - Carvana Blog](#)

Protecting the Global Nest – Going Green at Westfield State University

carry their required 240 volts of electricity. They are recommended due to their modest mileage for users and cost to the institution.⁷⁷

According to Facilities,⁷⁸ electrical wiring will be in place for the potential installation of an electric vehicle charging station outside of Parenzo Hall. Funding should be devoted to realizing this possibility and allow the campus to inaugurate its first electric vehicle charging station.

The possibility of adding more charging stations in lots near main campus and the commuter lot needs investigation and action (which can be explored by the Advisory Committee on Conceptualizing Environmental and Sustainability Schemes). The Office of Sustainability and Environmental Protection should carefully review the proposals outlined by ACCESS to ensure that electric vehicle charging stations can be installed on campus in a fiscally responsible manner.

⁷⁷ [How much does it cost to install an EV charger? - Carvana Blog](#)

⁷⁸ Meeting with Vice President for Administration and Finance Steve Taksar & Members of the Facilities Team (4/13/2022)

RECOMMENDATION #9: CONSIDER OTHER RENEWABLE ENERGY SOURCES

Recommendation Overview

- **9.1** – Investigate the viability of small scale wind turbines, geothermal energy, steam turbine technology and/or fuel cell technology on-campus.
- **9.2** – Determine potential costs of such renewable energy sources.
- **9.3** – Consider the input of the City of Westfield and property owners in the surrounding area.

Timeline for Recommendation 9		
Action	Responsible Authority	Date
Determine the viability of alternative energy sources for Westfield State University, including potential costs.	ACCESS	May 2023
Consult with the City of Westfield on potential thoughts surrounding the use of alternative energy on-campus.	Executive Director for Capital Planning & Facilities	September 2023
Make final decision on whether or not to proceed with some of the alternative energy proposals.	Vice President for Administration & Finance / Executive Director for Capital Planning & Facilities	December 2023

Background

The campus Steam Plant (located behind Ely Hall) provides the campus with heating and hot water through the burning of natural gas – a fossil fuel that is also used to run science laboratories and the emergency generator.⁷⁹ As discussed in Recommendation #7, the only sources of renewable energy on campus as of this writing are solar arrays located atop Wilson Hall and Bates Hall.⁸⁰

According to the *Ad Hoc Committee on Sustainability, Sustainability in Higher Education at Westfield State College* (2008), wind power may not be viable at the University (page 32).⁸¹ The committee reported that “the college has also had a wind survey conducted to determine if the college is a viable site for wind technology systems. Unfortunately, it has been determined that the college lies in an area which does not have suitable sustained winds

⁷⁹ [Facilities & Operations Staff | Westfield State University \(ma.edu\)](#)

⁸⁰ [Wilson Hall Overview \(2010\)](#)

⁸¹ *Ad Hoc Committee on Sustainability, Sustainability in Higher Education at Westfield State College: A Report from the Ad Hoc Committee on Sustainability* (2008)

Protecting the Global Nest – Going Green at Westfield State University

for this type of technology. The Facilities and Operations Department is also looking into steam turbine technology and Fuel Cell technology as other possible sources of clean energy.”

Supporting Evidence

Many institutions are working to switch from using fossil fuels for energy to renewables. The Massachusetts Department of Energy Resources (DOER) supports these efforts through its Leading By Example program, which can fund renewable energy studies and projects and ultimately help the state meet its goal of an 80% reduction in carbon emissions by 2050.⁸² For example, UMASS Lowell received \$100,000 from the program to study its renewable energy future.⁸³ UMASS Amherst, aiming to be emissions-free by 2032, has also relied on the funding. After two years of planning, the University announced that it will rely only on renewable energy by 2030 – with its energy sourced from geothermal, battery-stored solar energy, and purchased “green” energy. This initiative will cost approximately \$500 million dollars, to be raised from state and federal grants, corporate sources, philanthropy.⁸⁴

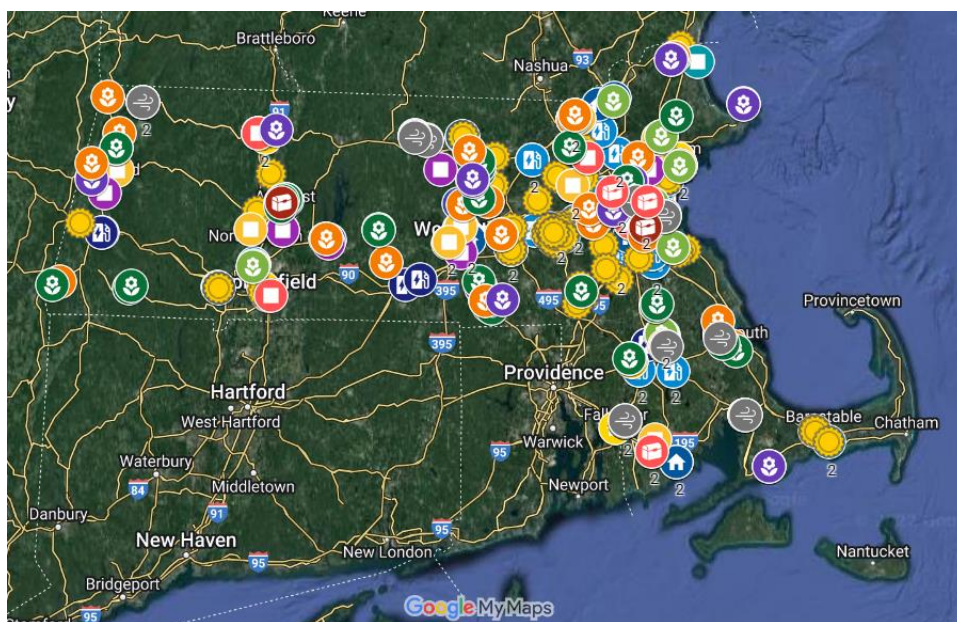


Figure 13. MA Leading By Example Project Map (Commonwealth of Massachusetts)⁸⁵

Implementation

Westfield State University, upon the completion of the strategic plan developed by the Advisory Committee on Conceptualizing Environmental and Sustainability Schemes (ACCESS), shall determine the viability of non-solar renewable energy sources on-campus. The Coordinator for Sustainability and Environmental Protection shall work in consort with the Executive Director for Capital Planning & Facilities and the Vice President for Administration and Finance in determining next steps. Small steps regarding renewable energy capital projects should be explored,

⁸² [Leading by Example | Mass.gov](#)

⁸³ [State Grant Powers Renewable Energy Master Plan | UMass Lowell \(uml.edu\)](#)

⁸⁴ [UMass Amherst goal: No emissions by 2032 \(gazettenet.com\)](#)

⁸⁵ [Sustainability at State Facilities: Projects and Headlines | Mass.gov](#)

Protecting the Global Nest – Going Green at Westfield State University

like at Fitchburg State University, where they are now utilizing geothermal heat pumps to offset their reliance on natural gas.⁸⁶ It is recommended that the University carefully consider the fiscal and environmental impact of each non-solar renewable energy proposal and determine how to proceed once ACCESS files its strategic plan.

⁸⁶ [Sustainability | Fitchburg State University](#)

FOCUS AREA #5

Making Small-Scale Shifts That Lead to Impactful Change

RECOMMENDATION #10: REIMAGINE THE VISIBILITY AND COMMUNICATION OF RECYCLING

Recommendation Overview

- **10.1** – Increase the visibility of recycling bins and associated literature across campus.
- **10.2** – Ensure that recycling bins are spread out across campus, with an adequate number placed in congregate areas that are often overlooked, including the Campus Green.
- **10.3** – As outlined in Recommendation #6, include recycling locations on a Sustainability GIS map for campus constituents.
- **10.4** – Determine if additional products can be recycled through an expansion of the recycling program.

Timeline for Recommendation 10		
<u>Action</u>	<u>Responsible Authority</u>	<u>Date</u>
Develop mechanism to increase visibility of recycling across campus.	Facilities	September 2022
Increase the number of recycling bins across campus, with particular emphasis on residence halls, academic buildings, the Campus Green, and athletic facilities.	Facilities	September 2022
Add recycling bin information to campuswide Sustainability GIS map.	Marketing / ACCESS	March 2023
Explore and expand increasing options for recycling program.	Facilities	March 2023

Background

Under the leadership of Campus Sustainability Coordinator William Bickley, the institution organized opportunities to learn and engage in recycling on-campus, with the University recognized for its dedication to recycling across campus.⁸⁷ Currently, single-stream recycling (accepting clean and dry metal, certain plastics, glass, and paper/cardboard) is available across campus using recycling bins. Bins are color coded and/or include recycling symbols and instructions for proper use.

⁸⁷ [Division of Administration & Finance - AY 2011 Sustainability Goals](#)

Protecting the Global Nest – Going Green at Westfield State University



Figure 14. Single Stream Recycling (Commonwealth of Massachusetts)⁸⁸



Figure 15. Recycling on Campus: 1. Recycling bin in Wilson Hall, 2. Recycling bin outside of Lammers Hall, and 3. Recycling bin inside a University Hall suite common area. (Cierra Guinen)

According to Antonio Santos,⁸⁹ Director of Environmental Services, recyclables (and waste) are taken away by Waste Management⁹⁰ and properly recycled/disposed. The University also recycles metal with Kane Brothers, who own Kane Scrap Iron and Metal, Inc, which has grown as of late due to the renovations in Parenzo Hall.⁹¹ Money earned from metal recycling is funneled directly into the Westfield State University Foundation for student scholarships.

As reported by Maureen Socha, Executive Director for Capital Planning & Facilities, recycling bins are readily available in the following locations:

⁸⁸ [RecycleSmart.png \(770x578\) \(recyclingworksma.com\)](#)

⁸⁹ Meeting with Vice President for Administration and Finance Steve Taksar & Members of the Facilities Team (4/13/2022)

⁹⁰ [Trash, Garbage and Recycling Services in Springfield, Massachusetts and Surrounding Areas \(wm.com\)](#)

⁹¹ [Kane Scrap Iron & Metal Inc. - Chicopee, MA 01013](#)

Recycling Inside Buildings		Bins Per Floor
Dorms		
	Dickinson	1
	Lammers	2
	Courtney	1
	Davis	1
	University	1
	New	1
Buildings		
	Scanlon	2
	Dower	3 on 1 st , 2 on 2 nd
	Ely	4 on 1 st , 4 on 2 nd , 6 on 3 rd
	Library	5 total
	Bates	1
	Wilson	3 on 1 st , 1 on 2 nd -4 th
	Mod Hall	3
	Horace Mann	3 on 1 st , 4 on 2 nd , 3 in basement
	Woodward	2
	Science Center	1

Figure 16. Recycling Bins By Building (Maureen Socha)

Maureen Socha reported that between 2020-2022 (updated as of April), the University recycled the following:

SOURCE / YEAR (in pounds, unless otherwise noted)	2020	2021	2022 (Jan – Apr)
Single-Stream Recycled Materials	428600	390860	338600
Electronics		7,798	
Straight Fluorescent Lamps		3,388 feet	
Compact Fluorescent Lamps		144 (total)	
Compost	352,220	301,620	273,060

Figure 17. Sources of Recycling at Westfield State University 2020 – 2022 (Maureen Socha)

Supporting Evidence

American University adopted a zero-waste policy in 2010, which helps ensure that all university wastes are diverted from landfills. They also practice sustainable purchasing, have eliminated water bottles and trays, and use only renewable materials to make sure no waste is going into the environment. Harvard University’s recycling efforts include accepting e-waste, ink, and cartridges.⁹² Bridgewater State University has a textile recycling program, where students and even staff can weekly recycle clothing, linens, shoes, belts, pocketbooks, and even stuffed

⁹² [A Glance at College Recycling Programs | BioEnergy Consult](#)

Protecting the Global Nest – Going Green at Westfield State University

animals. Their recycling bins are clearly labeled so students do not get confused about whether it is a trash can or a recycling bin.⁹³

Implementation

Increasing the University's recycling efforts can be achieved in the short-term with enhanced marketing of recycling bins on-campus. A lot of students neglect to notice that recycling bins are present on campus given the lack of proper signage indicating that those bins are earmarked for recycling. Therefore, creating small posters to put either on or above these recycling bins could be particularly beneficial in our quest to become a more sustainable campus. Facilities and Marketing can collaborate on an effective strategy for detailing that certain bins are indeed recycling-only in Fall 2022.

In addition, it is recommended that Facilities consider placing more recycling bins across campus, with particular emphasis on areas that students, staff, and visitors frequent, including the Campus Green. Although trash cans are prevalent across the expanse of the Campus Green, there is not a single recycling bin available in that area. Having at least one recycling bin ensures that items can be recycled if students are lounging on the Green and need to discard their plastic waste.

A Sustainability GIS map (to be uploaded to the new sustainability webpage) could include recycling bin locations campuswide as another means of marketing access to recycling across the expanse of the campus.

Finally, the University could increase its recycling options by exploring how to collect and properly recycle ink, cartridges, textiles (and shoes), as well as students' e-waste. Proper disposal of these materials would be beneficial to the environment and potentially to the campus community through potential scholarship support, as seen with our use of metal recycling on-campus.

⁹³ [A Chance to Renew | Bridgewater State University](#)

RECOMMENDATION #11: EXPAND EXISTING COMPOSTING PROGRAM TO INCLUDE RESIDENCE HALLS

Recommendation Overview

- **11.1** – Develop educational materials and signage related to composting initiatives conducted by Dining Services.
- **11.2** – Appraise and educate potential students and incoming first-year students of composting initiatives during campus tours, accepted student days, and New Student Orientation.
- **11.3** – Expand the current composting program beyond Dining Services to include residential buildings.

Timeline for Recommendation 11		
<u>Action</u>	<u>Responsible Authority</u>	<u>Date</u>
Advertise the existing composting program at the Dining Commons	Dining Services / Marketing	September 2022
ACCESS files report, which includes information regarding the expansion of the composting program on campus.	ACCESS	May 2023
Coordinator for Sustainability & Environmental Protection begins the process of expanding the on-campus composting program.	Coordinator for Sustainability & Environmental Protection / Facilities	September 2023
Complete the expansion of composting across campus.	Coordinator for Sustainability & Environmental Protection / Facilities	May 2024

Background

As noted in previous recommendations, Director of Dining Services William Connor met with the GEOL 0205 – Honors Environmental Geology course on April 5, 2022 to discuss how his division is responding to the challenge and becoming more sustainable with each passing year.⁹⁴ Students in the course were introduced to Dining Services’ sustainability initiatives, including the use of compostable products and installation of new energy-efficient equipment in the Dining Commons. Dining Services utilizes a composting system that tracks post-meal waste, with waste photographed and weighed prior to composting in a bin behind the Dining Commons. On a weekly basis, the bin is sent to a private company that converts the waste into compost, with measurements on the contents of the waste sent by the company in a follow-up report to Dining Services each week. The weekly report is used to help

⁹⁴ Meeting with William Connor, Director of Dining Services (4/5/2022)

Protecting the Global Nest – Going Green at Westfield State University

Dining Services determine what cuisines are not as popular and therefore should be reduced in their rotations. In addition, used cooking oil is collected and utilized by a private company, where it is processed for other uses.⁹⁵



Figure 18. Compostable packaging currently in use at the Dining Commons (Nathan Crane)

Supporting Evidence

Like Westfield State University, institutions across the Commonwealth are composting products in an effort to reduce their waste stream to landfills. Many of these institutions, however, have gone beyond Westfield State University’s confines of Dining Services and have instituted composting programs campuswide. At Harvard University, composting is a point of pride on-campus, with compostable products collected from their Dining Commons, retail cafes, administrative offices, dormitories, apartments, and other areas where individuals tend to congregate. Save the Stuff, a company based out of nearby Charlestown, collects the compost which, after being processed into a “high-energy product,” is used to generate energy at a water treatment plan in Lawrence, MA.⁹⁶ Similarly, at UMASS Amherst, composting is available in areas beyond the Dining Commons, including their apartment complex and day care center.⁹⁷

⁹⁵ [A Behind-the-Scenes Look at Dining Service’s Sustainability Initiatives | The Westfield Voice](#)

⁹⁶ [New life for Harvard’s compost | Sustainability at Harvard](#)

⁹⁷ [What to Compost and Where at UMass | Office of Waste Management | UMass Amherst](#)

Building	Food Waste (all types)
UMass DCs	Yes
Campus Retail Food Outlets	Yes
Res Halls Snack Bars	Yes
N. Apartments	Yes
Day Care	Yes
Some Green Offices	Yes

Figure 19. UMASS Amherst Composting Areas (UMASS Amherst)⁹⁸

Implementation

The University’s Dining Commons composting efforts are comprehensive, yet they are not well-understood or appreciated by students. In an effort to foster a culture of sustainability on-campus and instill pride in our initiatives, it is recommended that Dining Services Administration work with the Marketing Department to determine strategies for advertising their composting program to current students along with prospective applicants to the institution. Appraising students of these initiatives should become part of the learning that both prospective students and incoming students acquire during campus tours, accepted student days, and New Student Orientation to reinforce our goals as an institution to not only educate students in the majors, but to foster a community that respects the world around them (as represented by the Globe at the center of campus) At the beginning of each semester, interns from the newly-revitalized Office of Sustainability and Environmental Protection could be called upon to instruct students in the Dining Commons about proper composting and recycling procedures.

Beginning in Fiscal Year 2024, the Coordinator for Sustainability and Environmental Protection should work closely with other University departments to implement an expanded composting program on-campus, with the expansion complete by Fiscal Year 2025. Composting, as stated previously, must be properly advertised to ensure that students understand their importance and what to dispose of. Interns with the Office of Sustainability and Environmental Protection should work with Facilities to determine ideal locations for student visibility of composting and develop infographics and other marketing tools for students to understand what compost is used for.

⁹⁸ [Composting | Sustainability at Harvard](#)

RECOMMENDATION #12: DECREASE RELIANCE ON PLASTIC PRODUCTS

Recommendation Overview

- **12.1** – Develop strategies to market the use of reusable water bottles on-campus both online and in print.
- **12.2** – Provide incoming students with reusable water bottles to use across campus, reducing the need for single-use plastic products.
- **12.3** – Determine the primary sources of plastic on-campus and work to reduce their overall use.

Timeline for Recommendation 12		
<u>Action</u>	<u>Responsible Authority</u>	<u>Date</u>
Provide all incoming students with a Westfield State reusable water bottle.	New Student Orientation Team	September 2022
Develop GIS Map of Hydration Stations On-Campus	Facilities / Department of Geography, Planning & Sustainability (GIS Course)	November/December 2022
Educate all students on the importance of reducing plastic waste. Ensure faculty and staff recognize this importance as well through professional development and advertisement.	New Student Orientation Team / Facilities / Human Resources / Office of Sustainability & Environmental Protection	Fall 2022 (Continue Regularly)
Identify the sources of plastic waste on-campus and develop strategies to mitigate this waste.	Office of Sustainability & Environmental Protection	Fall 2023

Background

The University has taken strong steps to decrease students’ use of plastic over the past several years.

In order to decrease students’ reliance on plastic water bottles, the New Student Orientation program gifted participants in the Summer 2021 program with a Westfield State University reusable water bottle. There has been precedent for reusable water bottle distribution efforts on-campus, including in 2007 when the institution handed out gratuitous water bottles as part of Sustainability Day.⁹⁹

⁹⁹ Ad Hoc Committee on Sustainability, *Sustainability in Higher Education at Westfield State College: A Report from the Ad Hoc Committee on Sustainability*, page 46 (2008)

Protecting the Global Nest – Going Green at Westfield State University



Figure 20. October 24, 2007 Sustainability Day Free Swag (Ad Hoc Committee on Sustainability)

Encouraging use of these bottles is partly accomplished by the accessibility of hydration stations. Hydration stations (or water-filling stations) exist in the academic buildings, administrative facilities, and dormitories across campus. Although hydration stations are located across our campus, some of our older hydration stations don't work, particularly in Wilson Hall. Many newer hydration stations, however, are located in recently constructed or renovated facilities, such as the Nettie Stevens Science and Innovation Center and University Hall. With the renovation of Parenzo Hall, the building will include two water filling stations on each level of the building (basement, first floor, and second floor), as well as four specifically devoted to the Parenzo Gym and Banacos Center (which is currently being occupied by the Mail Room).¹⁰⁰



Figure 21. Hydration stations and water fountains in the Nettie Stevens Science and Innovation Center and Wilson Hall, respectively. Notice the design of the hydration station in the Science and Innovative Center, with the station having reusable water bottles in mind. (Caitlyn Murphy)

Beyond hydration stations, Dining Services has utilized COVID-19 relief funding to purchase reusable to-go containers that students can use regularly to acquire food in the Dining Commons and properly transport it back to

¹⁰⁰ Meeting with Vice President for Administration and Finance Steve Taksar & Members of the Facilities Team (4/13/2022)

Protecting the Global Nest – Going Green at Westfield State University

their room or other space on campus. The program has been well-received by many members of the student body and represents an affordable and innovative way to incorporate sustainable practices in University operations. Students are able to purchase these to-go containers for \$7.00 as of the Spring 2022 semester, with Dining Services washing these containers after each use.



Figure 22. Take out and returnable take out food container from the Dining Commons. (Photo: Nathan Crane)

Supporting Evidence

Plastic use and disposal, while irreplaceable for some industries (medicine, appliances, transportation, etc.) adds to environmental toxicity and significantly contributes to global waste. Decreasing the use of plastic on college campuses is a priority nationwide,¹⁰¹ and Westfield State University has worked hard to meet this priority through an emphasis on recycling across campus and shifts toward non-plastic products. Many institutions have succeeded in these efforts by trying to limit the use of single-use plastic water bottles, banning the use of plastic bags, and promoting the use of hydration stations.¹⁰² The University of California is getting rid of single-use plastic dining accessories and are being replaced with compostable or reusable alternatives. They will be phasing out of purchasing single-use plastic beverage bottles by January 1, 2023.¹⁰³ The University of California Berkeley has already enacted a wide-reaching institutional policy to eliminate all non-essential, single-use plastics by 2030 while the University of California Los Angeles is finalizing a similar policy.¹⁰⁴ Many local colleges and universities are also looking at ways to reduce their plastic consumption and the consumption of plastic in the local community. The University of Vermont continues to evaluate its water bottle ban, first enacted in 2013, to ensure that plastic use is actually declining as a result.¹⁰⁵ In 2018, students from UMass Boston began working with local restaurants and catering companies to find alternatives to their plastic use.¹⁰⁶

¹⁰¹ [A Glance at College Recycling Programs | BioEnergy Consult](#)

¹⁰² [Plastics Reduction | Sustainability | UMass Amherst](#)

¹⁰³ [The University of California moves to scrap single-use plastics - Student PIRGs](#)

¹⁰⁴ [University of California, Berkeley, leads the way with country's strongest single-use plastic ban | Sustainability & Carbon Solutions](#)

¹⁰⁵ [Plastic water bottle ban remains sore spot – The Vermont Cynic \(vtcynic.com\)](#)

¹⁰⁶ [School for the Environment Students Work with Restaurants on Alternatives to Plastic - University of Massachusetts Boston \(umb.edu\)](#)

Implementation



Figure 23. Hydration station carts for outdoor events at UMASS Amherst (UMASS Amherst)¹⁰⁷

It is recommended that the University begin to reduce plastic consumption through targeted measures prior to the development of the Advisory Committee on Conceptualizing Environmental and Sustainability Schemes' Strategic Plan and the establishment of the Office of Sustainability and Environmental Protection. Such targeted measures may include maintaining and upgrading existing hydration stations across campus and purchasing reusable water bottles for incoming first-year students. Students in Geographic Information Systems (GIS) courses can work with Facilities and other stakeholders to develop a comprehensive map of hydration stations and work in tandem with ACCESS and the Office of Sustainability and Environmental Protection (once established) to allow members of the public to explore how Westfield State University is working to be more sustainable in their practices, particularly with regard to water use.

Once the Office of Sustainability and Environmental Protection has been established, it is recommended that this office work with other divisions on-campus to educate faculty, staff, and students on plastic reduction and common sustainable practices to avoid the use of plastics as much as possible. This office should also explore plastic waste on campus and work with other offices to develop strategies to reduce plastic use across campus in line with the ACCESS Strategic Plan.

¹⁰⁷ [Plastics Reduction | Sustainability | UMass Amherst](#)

RECOMMENDATION #13: INSTITUTE A BIKE-SHARING PROGRAM TO PROMOTE ECO-FRIENDLY MOBILITY

Recommendation Overview

- **13.1** - Implement a bike sharing program in concert with the City of Westfield and ValleyBike with sixteen bikes spread evenly across four stations.
- **13.2** - Develop stations for the bike sharing program outside of Parenzo Hall, the Horace Mann Center, South Lot, and in downtown Westfield.
- **13.3** - Promote and support student memberships with ValleyBike for eco-friendly mobility to local restaurants and shops.

Timeline for Recommendation 13		
Action	Responsible Authority	Date
Begin Preliminary Discussions with the Mayor of Westfield	President Thompson / Special Assistant to the President for Community and Government Affairs	Fall 2022
Finalize Plans and Submit to Respective WSU & City of Westfield Boards for Approval	President Thompson / Special Assistant to the President for Community and Government Affairs	Spring 2023
Install bike sharing program stations in aforementioned locations.	ValleyBike / Facilities	Fall 2023

Background

Westfield State University has worked over the past decade to foster a culture of appreciation for bike-riding across campus as a means of eco-friendly, fun, and heart-healthy transportation.¹⁰⁸ Some of these efforts include a sophisticated bike storage system outside of University Hall for those with their own personal bicycle.

Bike sharing has also been explored by Westfield State University in the past as a means of allowing students without their own personal bicycle to go to class or downtown in an expeditious, yet environmentally-friendly manner. These programs provide users with a bike that can be used for a certain amount of time. Stations are set up in convenient locations where bikes can be exchanged. Bike sharing programs can be set up as a fee per use or with

¹⁰⁸ [Division of Administration & Finance - AY 2011 Sustainability Goals](#)

Protecting the Global Nest – Going Green at Westfield State University

a paid membership for a period of time (students, for example, could pay a flat rate for a semester or the Student Government Association could foot the bill as part of the Student Activity Fee).

Bike sharing has been proposed in the City of Westfield, with discussions occurring during meetings of the City's Planning Board.¹⁰⁹ The implementation of such a proposal would require public input, votes by the City Council, and meetings with the Westfield State University President regarding cost sharing.

Supporting Evidence

Other public college and university campuses across the campus utilize bike sharing programs that have been rather successful in their execution. UMass Amherst works with ValleyBike, the program currently being proposed for Westfield, MA.¹¹⁰ The University has approximately five stations across the expanse of campus in order to allow for students and other community members to move in an eco-friendly fashion. UMass Lowell provides bike sharing through FreeWheelers Bikeshare.¹¹¹ This program allows for free rental of bikes for students, faculty, and staff. Users of most bike sharing programs download an app to track bike availability and usage and to reserve a bike in advance. Some programs allow students to register their own bikes with their university to receive reimbursement of the parking pass fee, which provides an incentive to students to ride bikes.

Implementation

Plans for bike-sharing in the City of Westfield are presently being discussed by the Mayor's Office and could be fully in place prior to the 2023-2024 academic year.^{112,113} It is recommended that the University engage with the City of Westfield and determine how best to move this proposal along to ensure that students have access to this eco-friendly form of transportation that will not only benefit students and the planet, but business owners in downtown through increased traffic from students (some of whom may not have cars to travel downtown). These discussions should begin in Fall 2022, with final plans formalized with the Mayor's Office in Spring 2023.

¹⁰⁹ [Valley Bikes proposed for Westfield | The Westfield News | May 6, 2021](#)

¹¹⁰ [ValleyBike | Sustainability | UMass Amherst](#)

¹¹¹ [Free Wheelers Bike Share | UMass Lowell \(uml.edu\)](#)

¹¹² [ValleyBike will demonstrate bicycle network in Westfield next month - masslive.com](#)

¹¹³ [Westfield Mayor Michael McCabe touts Complete Streets, park on Elm St. vacant lot - masslive.com](#)

Protecting the Global Nest – Going Green at Westfield State University

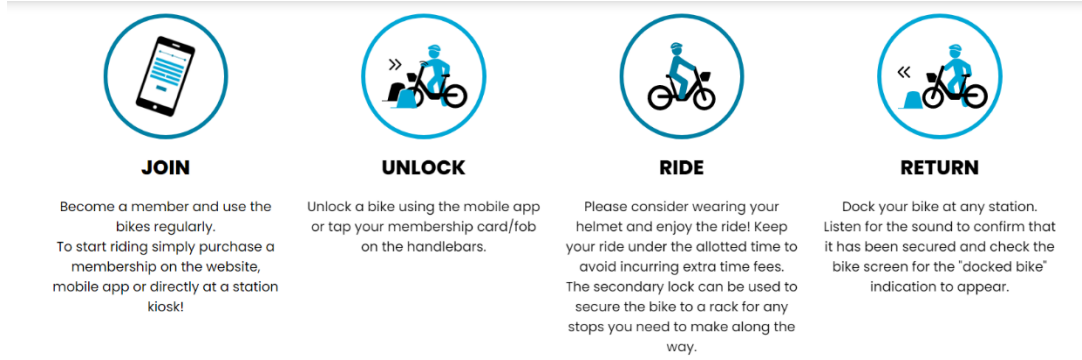


Figure 24. ValleyBike Share How it Works (ValleyBike)¹¹⁴

<p>Monthly Membership</p> <p>Access to the system for 1 month. Dock every 45 mins to avoid overage fees. One bike per phone.</p> <p>\$21.25</p>	<p>Founding Member</p> <p>Access to the system for 1 year. Dock every 60 mins to avoid overage fees. 1 bike/membership.</p> <p>\$95.63</p>	<p>2 Hour Pass</p> <p>Two hour rental using secondary lock for stops. One bike per phone.</p> <p>\$6.38</p>	<p>Access Pass</p> <p>Access to the system for 1 year. Dock every 60 mins to avoid overage fees. 1 bike/membership.</p> <p>\$10.63</p>
<p>Annual Membership</p> <p>Access for 1 year. Dock every 45 mins to avoid overage fees. 1 bike/membership.</p> <p>\$85</p>	<p>Pay Per Ride Pass</p> <p>Pay \$2.13 per ride and per bike. Dock within 30 mins to avoid overage fees. Up to 4 bikes per phone.</p>	<p>Student Annual Membership</p> <p>Access to the system for 1 year. Dock every 45 mins to avoid overage fees. 1 bike / membership.</p> <p>\$63.75</p>	<p>Employer Membership Package</p> <p>A tailored offer for your organization's staff to enjoy our electric bike share system at a discount</p>

Figure 25. ValleyBike Share Pricing (ValleyBike)¹¹⁵

¹¹⁴ [ValleyBike Share | How It Works](#)

¹¹⁵ [ValleyBike Share | Pricing](#)

CONCLUSION

The research conclusions drawn by Senior Jack Duncan (Class 2022) regarding the lack of information about Westfield State University’s sustainability initiatives and progress was a wake-up call to our leaders and concerned students. President Thompson and the Board of Trustees showed great interest in Mr. Duncan’s work and were pleased to learn that the Honors students in Dr. Tarin Weiss’ Spring 2022 Environmental Geology (GEOL 0205) class were continuing to investigate his findings in order to create a formal Sustainability Initiatives recommendation report. As evidenced in our report, the GEOL 0205 students participated in a unique experience through this multi-faceted, ever-evolving investigatory and report-writing process.

Investing in and promoting our sustainability initiatives is critical for our University and our planet – because it’s the right thing to do and we all care. A recently released Harris Poll, *Environmental Impact Survey: Exploring the impact of the environment on teens*,¹¹⁶ reports that 82% of teens believe that the state of our environment will impact their future life decisions. As such, our Gen Z population is particularly worried about the state of the environment, with 84% agreeing that climate change requires attention and 77% feeling responsible to take action. Yet, less than half think that our leaders are taking substantive action on environmental issues. At the global level, WSU can show potential and current students that we share their concerns and are taking meaningful steps to address climate change through our sustainability initiatives. At the local level, WSU leadership can act on the recommendations in this report, showing its student authors that their contributions matter.

We are grateful to have had the opportunity to not only highlight our University’s impressive on-going sustainability work but to also take on the responsibility for how and when to move forward in this area. As First Years and sophomores, we look forward to seeing the fruits of our recommendations and to continue our involvement in building a culture of sustainability on our campus.

¹¹⁶ [Survey: Climate, environment shape Generation Z life decisions \(axios.com\)](#)

APPENDIXES

APPENDIX I

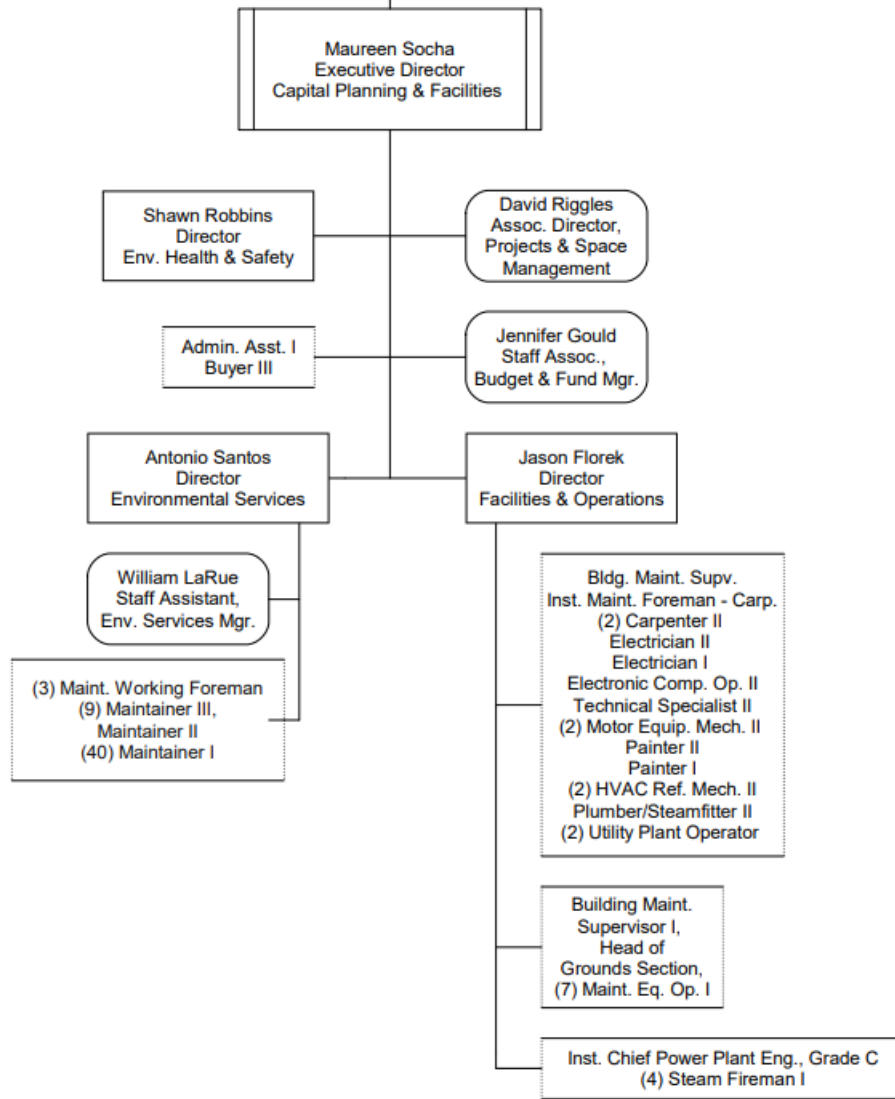
Worcester State University Sustainability Organization Chart

*Derived from Public Records
Request submitted on
Wednesday, March 11, 2022*



Appendix I. Worcester State University Sustainability Organization Chart (Public Records Request 3/9/2022)

APPENDIX II



*Appendix II. Westfield State University Organization Chart – Capital Planning & Facilities as of February 2022
(Westfield State University Office of Human Resources, Inclusion, Diversity, and Equity)*

APPENDIX III

Quick Facts: Atmospheric Scientists, Including Meteorologists	
2021 Median Pay ?	\$94,570 per year \$45.47 per hour
Typical Entry-Level Education ?	Bachelor's degree
Work Experience in a Related Occupation ?	None
On-the-job Training ?	None
Number of Jobs, 2020 ?	10,700
Job Outlook, 2020-30 ?	8% (As fast as average)
Employment Change, 2020-30 ?	900



[What Atmospheric Scientists, Including Meteorologists Do](#)

Atmospheric scientists study the weather and climate.

[Work Environment](#)

Most atmospheric scientists work indoors in weather stations, offices, or laboratories. Occasionally, they do fieldwork, which means working outdoors to examine the weather. Some atmospheric scientists may have to work extended hours during weather emergencies.

[How to Become an Atmospheric Scientist](#)

Atmospheric scientists typically need a bachelor's degree in meteorology or a related field to enter the occupation. Those who work in research typically need a master's degree or a Ph.D.

[Pay](#)

The median annual wage for atmospheric scientists, including meteorologists was \$94,570 in May 2021.

[Job Outlook](#)

Employment of atmospheric scientists, including meteorologists is projected to grow 8 percent from 2020 to 2030, about as fast as the average for all occupations.

About 1,000 openings for atmospheric scientists, including meteorologists are projected each year, on average, over the decade. Many of those openings are expected to result from the need to replace workers who transfer to different occupations or exit the labor force, such as to retire.

[State & Area Data](#)

Explore resources for employment and wages by state and area for atmospheric scientists, including meteorologists.

Appendix III. Atmospheric Scientists (Including Meteorologists) Projected Occupational Outlook (United States Department of Labor)

To: Edward Welsh, All University Committee (AUC) Chair

From: Dr. Tarin Weiss (Chemical and Physical Sciences) and Daniel Currier (Class of 2025)

Date: 5/20/22

RE: Proposal for AUC to charge a special committee, titled *Advisory Committee on Environmental and Sustainability Schemes (ACCESS)* [please note: committee name, as of 9/22, will be **Sustainability Committee**]

Proposal to the AUC: Create a charge to form a special committee on sustainability, titled Sustainability Committee ~~Advisory Committee on Environmental and Sustainability Schemes (ACCESS)~~

Charge: The Special Committee on sustainability, titled ~~Advisory Committee on Environmental and Sustainability Schemes (ACCESS)~~, will be responsible for developing an initial strategic plan for how Westfield State University can become more sustainable. Sustainability recommendations will be in line with our sister institutions, federal, state, and local directives, and campus community needs. The plan shall be submitted to the President, Board of Trustees, Cabinet, All-University Committee Chair, and Student Government Association President by May 2023. Committee action on key recommendations, if approved by AUC with an evergreen period, will proceed through May 2024. ACCESS [The Sustainability Committee] is established as a Special Committee under the provisions of the Collective Bargaining Agreement.

ACCESS The committee will:

- Meet on a routine basis to formulate plans to gather evidence, collect feedback, and construct an initial strategic plan summarizing WSU's current environmental and sustainability schemes and recommendations to support, broaden, and enhance sustainability efforts.
- Provide updates to and solicit input from the campus leaders and the campus community.
- Develop mechanisms for the collection of evidence and data.
- Assemble an initial strategic plan, including recommendations for sustaining initiatives via an Office of Sustainability.

Committee Structure:

- 8 MSCA members (broad representation from different domains of knowledge as stipulated by New England Commission of Higher Education (NECHE), and at least 1 MSCA Librarian)
- 5 Presidential appointees, with at least 1 member from Capital Planning and Facilities, 1 member from Environmental Health & Safety, 1 member from Academic Affairs, and 1 member from APA
- 2 students

Protecting the Global Nest

Going Green at Westfield State University

Daniel Currier '25

Presentation to the WSU Board of Trustees

October 12, 2022



Background

Fall 2021

- Jack Duncan '22 Research Paper – ***A Comparative Study of the Ways MA State Universities are Combatting Climate Change & Promoting Sustainability***
 - Individual Honors project in Dr. Tarin Weiss' Environmental Geology course (GEOL 0205)
 - Presented to Board of Trustees (2/17/2022)

Spring 2022

- Honors GEOL 0205 Research Paper – ***Protecting the Global Nest***
 - Authored by ten (10) first-year and sophomore students, along with Dr. Weiss.
 - Modeled after UEAAC Report
 - Thirteen (13) total recommendations
 - Submitted to Board of Trustees, President & Cabinet (May 2022)

Areas of Emphasis for Today's Presentation – Key Recommendations



Recommendation #1

Office of Sustainability & Environmental Protection



Recommendation #2

Sustainability Committee



Recommendation #4

Sustainability-Aligned Academic Innovation



Recommendation #6

Public-Facing Metrics Dashboard & Sustainability Webpage



Recommendation #7

Solar Panel Installation



Updates Since Publication of May 2022 Report

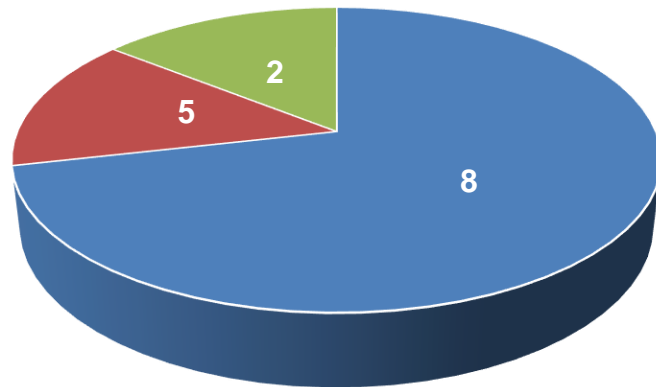
- **Sustainability Committee**
 - Charged by the All-University Committee (AUC)
 - In process of being filled with constituent representatives
- **Dining Services Compostable Products**
 - Compostable plates, cups, and silverware used when washable products aren't available
- **City of Westfield Awarded Bike Sharing Grant**
 - New stations at WSU and Downtown



Sustainability Committee

- **Charge** (Approved by AUC, 5/22; name amended 9/22)
 - Develop *Sustainability Strategic Plan* (May 2023)
 - Submission to President, Board of Trustees, Cabinet, AUC Chair, and SGA President
 - Enact Key Recommendations (May 2024)

**Sustainability Committee
at Westfield State
University**



■ MSCA ■ Presidential Appointments ■ Students

Office of Sustainability & Environmental Protection

- **Goal**
 - Centralize sustainability projects and efforts
- **Coordinator's Role**
 - Oversee short-term and long-term sustainability-focused capital projects
 - Submit grant applications to cover potential costs
 - Develop programming for student body to get involved and learn more



Public-Facing Metrics Dashboard & Webpage

- **Goal**
 - Effectively publicize sustainability information to WSU community and prospective students
 - Demonstrate institutional commitment & accountability

- **Potential Sections**

- Academic Partnerships
- Facilities Improvements
- Reports & Accreditation
- Student Opportunities

PROTECT the Nest

Sustainability at WSU

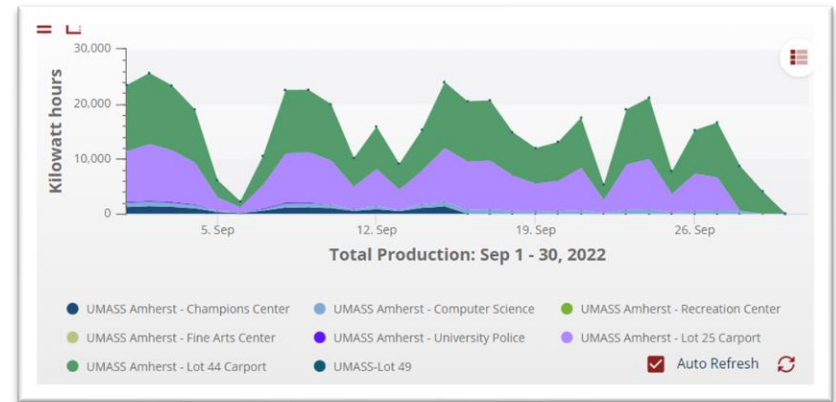
Welcome to our Sustainability Site. Here you'll find information about our campus sustainability initiatives – from [events](#) and [how to get involved](#), to [what we're accomplishing](#), to [academic programming](#).

NEWS & INFORMATION

- Sustainability Mission & Goals
- News & Events: Join Us!
- Get Involved! - Student Opportunities
- Sustainability Reports: Emissions & Infrastructure

Navigation Menu:

- Home
- Offices and Services
 - Office of Sustainability & Environmental Protection
 - Meet the Team
 - Advisory Committee in Conceptualizing Environmental and Sustainability Success (ACCESS)
 - Mission, Goals, & Action Plan
 - Academic Partnerships
 - Student Opportunities
 - Events
 - Sustainability in Action at WSU
 - Facilities
 - Solar Panel Meter
 - Reports and Accreditation



Solar Panel Installation

- **Current Conditions**
 - Solar Panel Arrays at Bates & Wilson Halls
 - Installed in 2011
- **Potential Expansion**
 - South Lot
 - Open space with perfect sun conditions
 - Residence Halls / Academic Buildings
 - Must determine potential roof replacement dates



Potential Solar Panel Array (South Lot)

Existing Solar Panel Arrays (Wilson & Bates Halls)



Sustainability-Aligned Academic Innovation

- **Potential New Majors**
 - Atmospheric Science, B.S.
 - Meteorology & Weather Broadcasting, B.S.
- **Potential New Minors**
 - Atmospheric Science
 - Sustainable Construction Management
 - Sustainable Energy Development



Sustainability-Aligned Academic Innovation (continued)

- **Anticipated Expenses**
 - At least one (1) full-time, tenured faculty member in meteorology
 - Assume \$109,000 w/ 40% Fringe Rate
 - Development of a meteorology laboratory
 - Funding from grants, annual budget, etc.
- **Anticipated Revenues**
 - Assume 5-10 New Students (Atmospheric Science and/or Weather Broadcasting) Per Year (\$11,460 Per Student)
 - \$57,300-\$114,600 Revenues Per Class (1 Year)
 - \$229,200-\$458,400 Revenues Per Year (4 Class Cohorts)



Proposed Timeline



FY23

- Development of *Sustainability Strategic Plan*
- Conduct Revenue & Expense Analyses
- Research Potential Grant Opportunities & Funding Resources

FY24

- Hire & Onboard Coordinator for Sustainability & Environmental Protection
- Pilot Atmospheric Science / Weather Broadcasting Courses

FY25

- Installation of Large Solar Panel Projects (i.e., South Lot)
- New Sustainability-Aligned Majors/Minors Offered

THANK YOU!

Daniel Currier '25

On Behalf Of ...

Jordan Aguiar, Katherine Canty, Nathan Crane, Zachary Dickinson, Cierraa Guinen, Lexus Mastromatteo, Caitlyn Murphy, Daniel Survell, Maxwell Thompson, Jack Duncan ('22), and Dr. Tarin Weiss

CONTACT: dcurrier7293@westfield.ma.edu



Results of the Mission/Vision Values Survey

Mission Statement Advisory Committee

Committee Membership

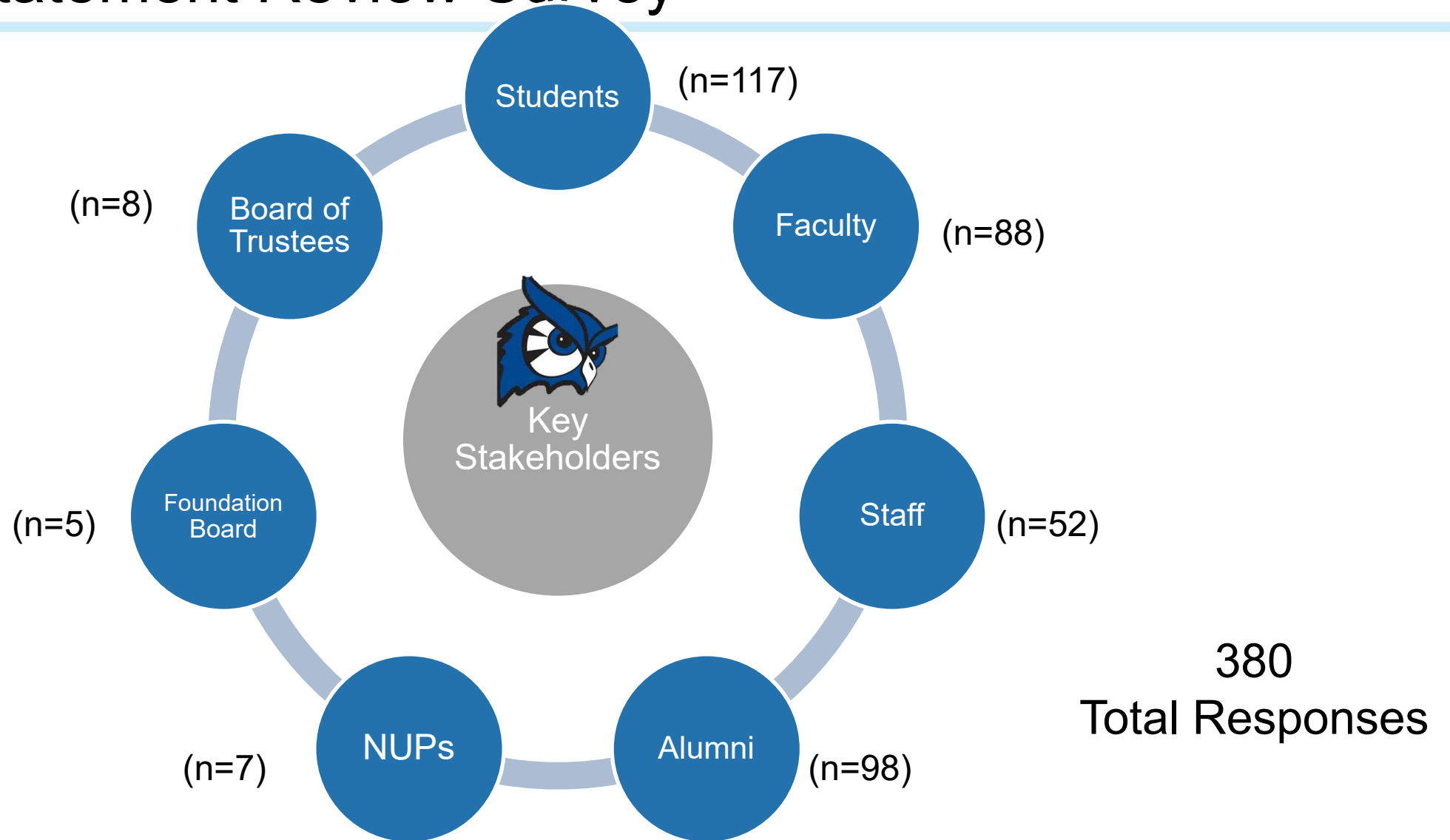
MISSION STATEMENT ADVISORY COMMITTEE

- Nancy Bals, Athletics (APA)
- David Raker, PhD, Education (MSCA)
- Rebecca Morris, PhD, Academic Affairs (NUP)*

NECHE STANDARD 1 SUBCOMMITTEE

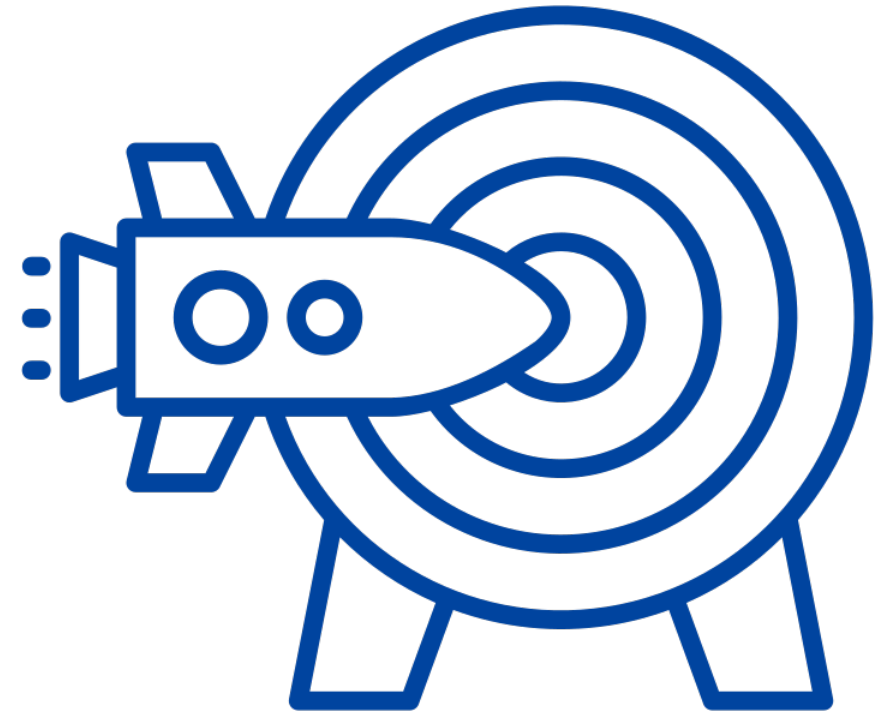
- Jesse Johnson, PhD, Mathematics (MSCA)*
- Robert Hayes, PhD, Psychology (MSCA)
- Kristie Knotts, Banacos, (APA)
- Jessica Holden, Nursing, (NUP)

Mission Statement Review Survey



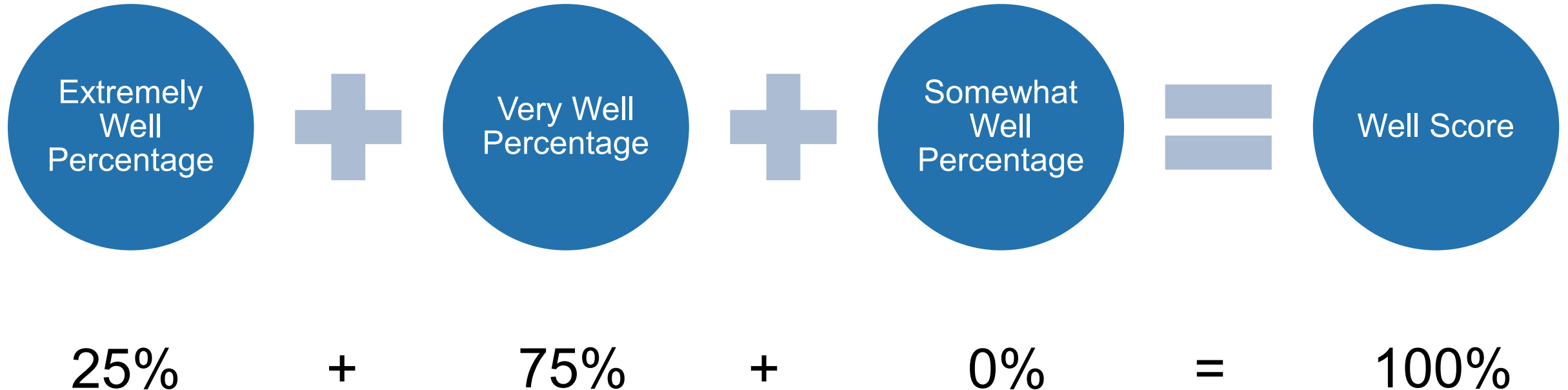
OUR MISSION

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.



MISSION STATEMENT

On a scale of 1-5 with 1="Not Well" meaning the University is not accomplishing its mission at all and 5="Extremely Well" meaning it is accomplishing its mission extremely well, please rate how well Westfield State is accomplishing its mission.



MISSION STATEMENT FIRST SENTENCE

WELL SCORE BY STAKEHOLDER

Offering accessible quality undergraduate programs by Stakeholder

Survey Item	Administrator	Alumni	Faculty	Foundation Board	Staff	Student	Trustee	Total
Undergraduate Programs	71.4%	80.6%	67.0%	100.0%	76.9%	73.5%	100.0%	79.4%
Liberal Arts	42.9%	83.3%	79.5%	80.0%	64.7%	61.4%	100.0%	69.5%
Sciences	47.9%	78.2%	72.4%	80.0%	68.7%	65.8%	71.1%	71.1%
Professional Studies	71.4%	77.7%	71.0%	60.0%	59.9%	55.3%	100.0%	66.3%
							Average for First Part of Mission Statement	71.6%

Color Code	>90%	80-89%	70-79%	60-69%	Below 60%
------------	------	--------	--------	--------	-----------

MISSION STATEMENT TWO

WELL SCORE BY STAKEHOLDER

Survey Item	Administrator	Alumni	Faculty	Foundation Board	Staff	Student	Trustee	Total
Welcoming Community	71.5%	77.3%	62.1%	60.0%	64.7%	72.2%	85.7%	70.2%
Focus on Student Engagement & Success	42.9%	80.5%	75.6%	40.0%	64.0%	69.3%	57.2%	71.9%
Contribute to Economic, Social & Cultural Growth	57.2%	67.7%	59.1%	80.0%	42.0%	60.6%	85.7%	60.2%
Developing Leaders & Engaged Citizens	57.2%	76.0%	58.6%	80.0%	46.9%	69.2%	83.3%	65.7%
							Average for Second Part of Mission Statement	67.0%

Color Code	>90%	80-89%	70-79%	60-69%	Below 60%
------------	------	--------	--------	--------	-----------

VISION

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



VISION

WELL SCORE BY STAKEHOLDER								
Survey Item	Administrator	Alumni	Faculty	Foundation Board	Staff	Student	Trustee	Total
Premier Institution in Northeast	71.5%	68.3%	45.9%	60.0%	50.0%	62.4%	62.5%	58.6%
Commitment to Student Engagement & Success	85.8%	82.8%	80.7%	60.0%	60.4%	66.9%	71.5%	73.7%
							Average for Vision Elements	66.2%

Color Code	>90%	80-89%	70-79%	60-69%	Below 60%
------------	------	--------	--------	--------	-----------

OUR VALUES

EMBRACE DIVERSITY: We treat all members of our community with dignity and respect.

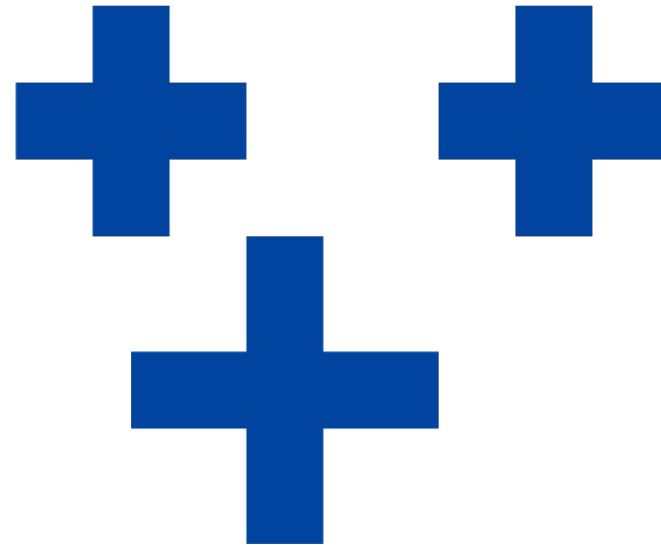
BUILD A STRONG COMMUNITY: We are inclusive and ensure equity, supporting the personal development of all community members, and embracing multiple perspectives.

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 manner.

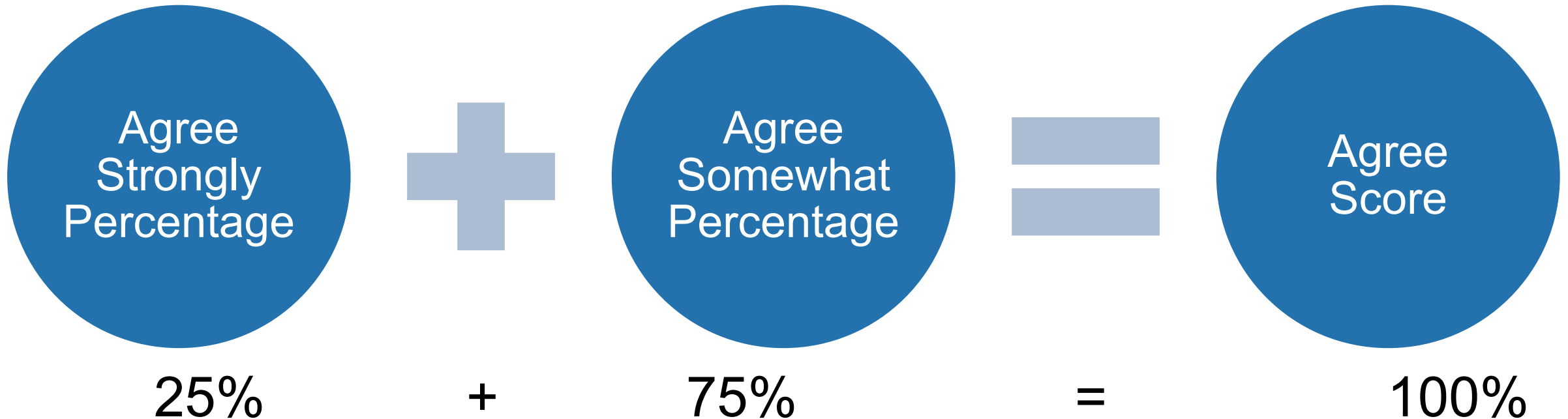
PROVIDE ACCESSIBLE EDUCATION: We commit to providing an accessible, affordable public higher education for all.



VALUES STATEMENT

Listed below are Westfield State University values. The university emphasizes these values as it strives for educational excellence. Please indicate your level of agreement with each value statement."

The scale was 1=Disagree Strongly, 2=Disagree Somewhat, 3=Neither Disagree Nor Agree, 4=Agree Somewhat, 5=Agree Strongly, and 0=Don't Know.



VALUES STATEMENT

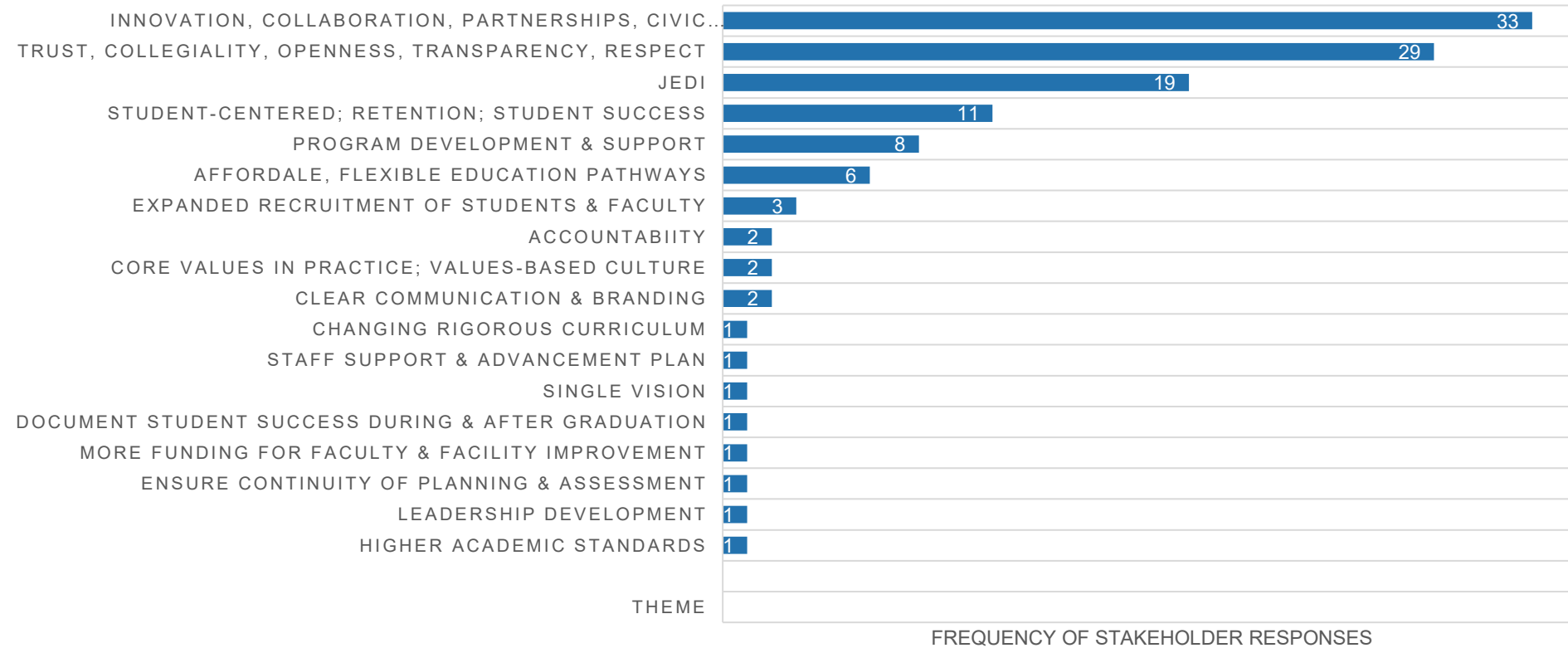
AGREE SCORE BY STAKEHOLDER

Survey Item	Administrator	Alumni	Faculty	Foundation Board	Staff	Student	Trustee	Total
Embrace Diversity: We Treat All Members with Dignity & Respect	57.2%	82.8%	80.7%	100.0%	60.4%	66.9%	100.0%	73.7%
Build a Strong Community: We are Inclusive & Ensure Equity...	28.6%	69.8%	52.3%	80.0%	36.5%	65.2%	85.7%	59.2%
Engage in the Outside Community...	57.2%	67.7%	54.0%	80.0%	38.5%	64.7%	71.4%	59.5%
Provide Accessible Education	71.50%	75.0%	70.10%	80.0%	63.4%	73.0%	71.5%	71.5%
							Average for Values Statement	66.0%

Color Code	>90%	80-89%	70-79%	60-69%	Below 60%
------------	------	--------	--------	--------	-----------

Three Other Core Values

AGGREGATED ANALYSIS OF STAKEHOLDER RESPONSES TO "THREE OTHER CORE VALUES" ITEM FOR ADMINISTRATORS, STAFF, & TRUSTEES

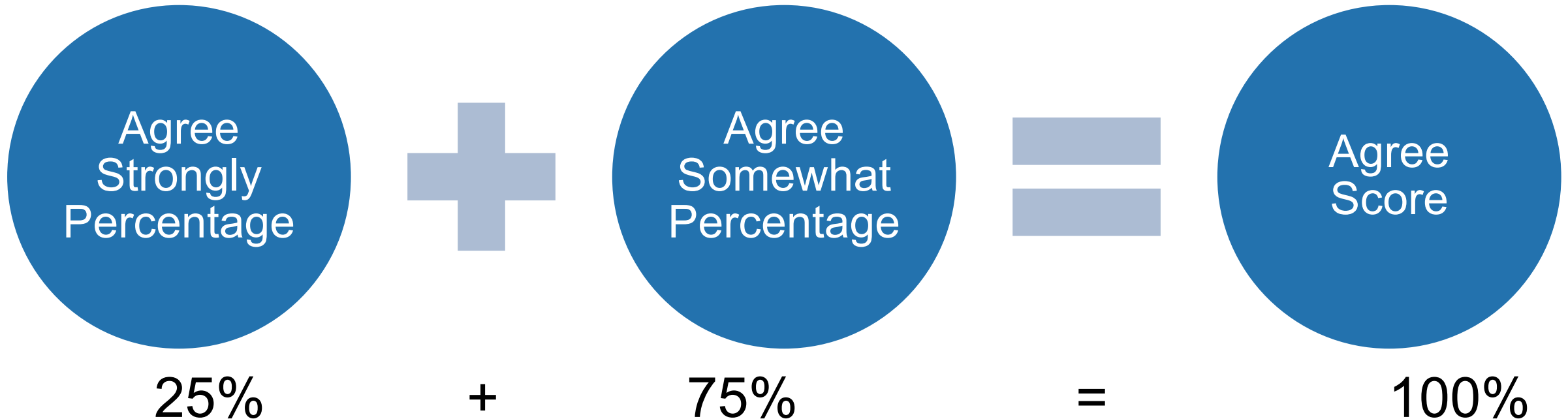


Single Most Important Thing to Rise to The Next Level

Students	Equity (15 students) Accessibility (10 students) Student Focus (9 students) Activities (6 students) Accountability (6 students) Community (5 students) Preparedness (4 students) Higher Standards (3 students) Cost (3 students)
----------	--

RELATIONSHIPS TO DECISIONS

On a scale of 1-4 with 1=Disagree Strongly and 5=Agree Strongly, how well do you feel the WSU mission/vision/value statements inform the decisions of WSU?



RELATIONSHIP TO DECISIONS PART 1

AGREE SCORE BY STAKEHOLDER								
Survey Item	Administrator	Alumni	Faculty	Foundation Board	Staff	Student	Trustee	Total
Identifies its Priorities	0.0%	26.9%	10.8%	0.0%	0.0%	14.3%	14.3%	14.1%
Plans for the Future	0.0%	23.2%	5.7%	0.0%	0.0%	18.9%	16.7%	12.8%
Evaluates its Endeavors	0.0%	26.3%	5.8%	0.0%	0.0%	15.7%	0.0%	12.0%
							Average for Strategic Decisions	13.0%

Color Code	>90%	80-89%	70-79%	60-69%	Below 60%
------------	------	--------	--------	--------	-----------

RELATIONSHIP TO DECISIONS PART 2

AGREE SCORE BY STAKEHOLDER								
Survey Item	Administrator	Alumni	Faculty	Foundation Board	Staff	Student	Trustee	Total
Department Decision	28.6%	22.0%	17.1%	0.0%	2.4%	23.3%	33.3%	18.5%
Curriculum Design	0.0%	19.6%	9.0%	0.0%	0.0%	18.6%	0.0%	12.3%
						Average for Operational Decisions		15.4%

Color Code	>90%	80-89%	70-79%	60-69%	Below 60%
------------	------	--------	--------	--------	-----------

PROCESS ROADMAP

MISSION STATEMENT REVIEW AND REVISION

RECOMMENDATION

Data-driven
OBSERVATIONS for
improvement.



REPORT OUT

Townhall with
stakeholders for
transparency and
feedback



REVIEW

Review current mission,
vision and values with
key stakeholders.



REVISION

Revision and reaction
iterative cycle



FINALIZE

Approval of Board of
Trustees.





MISSION/VISION/VALUE STATEMENT SURVEY RESULTS



Westfield State University

October 5, 2022

MISSION STATEMENT ADVISORY COMMITTEE

Table of Contents

Table of Contents

EXECUTIVE SUMMARY	2
COMMITTEE STRUCTURE	4
COMMITTEE CHARGE	4
INITIAL COMMITTEE MEMBERSHIP	4
CHARGE OF NECHE COMMITTEE	5
NECHE COMMITTEE MEMBERS	5
JOINING OF TWO COMMITTEES	5
SURVEY DESIGN	6
COMMON 7 QUESTIONS	6
IDENTIFICATION OF KEY STAKEHOLDERS	6
DEMOGRAPHIC DATA	7
SURVEY METHODOLOGY	9
SURVEY RESULTS	9
MISSION STATEMENT	10
VISION STATEMENT	16
VALUES STATEMENT	18
THREE OTHER CORE VALUES	22
RELATIONSHIP TO WSU DECISIONS	25
RELATIONSHIP TO DEPARTMENTAL AND CURRICULAR DECISIONS	27
SINGLE MOST IMPORTANT THING TO RISE TO THE NEXT LEVEL	29
SUMMARY COMMENTARY	31
MISSION STATEMENT	32
VISION	33
VALUE STATEMENTS	34
FINAL RECOMMENDATION	35
APPENDICES	36
APPENDIX A: LINKS TO SURVEYS, FACULTY SURVEY	37
APPENDIX B: FULL RESPONSES TO THREE CORE VALUES BY STAKEHOLDER	38
APPENDIX C: FULL RESPONSES TO SINGLE MOST THING BY STAKEHOLDER	48

Executive Summary

The University's mission statement is one of its most important guiding principles. Its mission establishes its character and uniqueness while providing a framework for its priorities, activities, and future. Best practice suggests an institution regularly and thoroughly review, evaluate, and, as necessary, revise its mission statement. Westfield State University's current mission, vision and value statements were last revised in May 2019. Three years later, in 2022, the Mission Statement Advisory Committee was formed and approved by the Westfield State University Board of Trustees to begin the process of reviewing the mission, vision and value statements.

The focus of the review was to engage all campus constituencies in an objective review of the current statements. Surveys were used to gather data from seven stakeholder groups—Administrators (NUPs), Alumni, Faculty (Full and Part-time), the Foundation Board, Staff, Students and members of the Board of Trustees. The committee received 380 survey responses providing rich information about stakeholder perceptions of how well Westfield State University was accomplishing its mission and how well the mission, vision and values statements informed a range of university decisions. The survey results provided valuable information that allowed the committee to evaluate the level of understanding and agreement of the stakeholder groups with the mission, vision, and values as well as how effectively the university had operationalized these statements. In short, does Westfield State University “walk the talk.”

FINDINGS

This report summarizes the findings from the 380 responses to the mission statement survey. The data show that all stakeholders identified positively with the mission statement's description of Westfield State University's commitment to offer accessible, quality undergraduate programs in liberal arts, sciences, and professional studies. Less positive responses were noted when assessing perceptions of the campus climate such as a welcoming community and the focus on student engagement and success. Outcomes such as the university's contribution to the economic, social, and cultural growth of the Northeast region and student development as responsible leaders and engaged citizens were viewed positively but at a lower level.

The vision was viewed less positively than the mission statement. Some stakeholders expressed disagreement with the vision of becoming the premier public comprehensive institution in the Northeast region. Administrators, Faculty and Staff stakeholders were less positive in most areas than other stakeholders.

The values statements regarding diversity and accessible education generated stronger positive responses for most stakeholders. Community engagement was also supported by most stakeholders.

Open-ended questions asked survey respondents to list three other core values they would like to see associated with Westfield State University. All stakeholders expressed interest in diversity and social justice issues while other frequent responses focused on trust, collegiality, openness, transparency, and respect. The full text of stakeholder responses can be viewed in an appendix to the report.

The survey also examined stakeholders' perceptions of how well different types of decisions were informed by the mission, vision, and value statements. One set of items looked at decisions involving setting priorities, planning for the future, and evaluating outcomes. The second set focused on departmental and curricular decisions. The results were not favorable. Stakeholders did not see a strong relationship between the mission, vision, and value statements and decisions made by the university. Going forward, the university may need to focus on the implementation of the strategic position outlined in the mission, vision, and values statements in addition to the crafting of the statements. Stakeholders seem to perceive that decisions and outcomes are not well aligned with strategic statements.

Survey respondents were also asked to identify the single most important thing needed for Westfield State University to rise to the next level. Responses pointed to values in the areas of diversity and inclusion, trust, integrity, and innovation.

RECOMMENDATIONS

Recommendations for next steps involve:

- Improving the mission statement so that it is motivating, inspiring and distinctive. Some areas of the mission statement could be improved by clarifying them.
- Rewriting the vision statement to avoid restating the mission statement while also pointing to a destination with action. How will Westfield State University rise to the next level? Getting buy-in on the vision/direction of the university also seems to be needed.
- Improving the authenticity of the value statements by "walking the talk." Stakeholders supported the values that had been identified but felt that the university needed to operationalize the mission, vision, and values in decisions and actions.

A student reminded us that "Actions speak louder than words. Saying something in a mission statement means literally nothing if the institution can't make the statements a reality."

Westfield State University needs to work on improving its mission, vision and value statements while also addressing organizational issues that seem to conflict with its professed values.

Committee Structure

Committee Charge

From the Charge Document creating the Mission Statement Advisory Committee on December 12, 2021. The document was sent by Academic Affairs.

“Charge: The Mission Statement Advisory Committee will engage members of all campus constituencies in a review process of Westfield State University’s mission statement.

In order to accomplish this, the Mission Statement Advisory Committee will:

- Develop a clear reporting and participatory structure that involves all campus constituencies, including alumni
- Establish a timeline for completion and revision of work
- Endeavor to complete the review in an objective manner
- **Collect and organize related data, including survey data from campus constituencies**
- Analyze data and best practice research relative to university mission statements
- Proactively collect widespread input from the campus community
- Review and edit draft documents for accuracy and readability
- Keep the campus community informed of progress through distribution of draft report sections, town hall meetings, the committee website, and regular updates
- Maintain transparency and openness in all work, respecting confidentiality where appropriate and necessary in accordance with laws and regulations
- Ensure that all constituencies have a voice in the approval of any mission statement revisions.
- Make a recommendation to the Board of Trustees and the Campus Community on necessary updates on the mission, with an **approval process by the Board of Trustees once every two academic years, beginning in May 2022.**

Committee Structure:

- 2 APA members
- MSCA members
- AFSCME member
- NUP

Initial Committee Membership

- Mark St. Jean, Information Technology Services, (APA) (Resigned)
- Nancy Bals, Athletics, (APA)

- Kimberly Miller, Administrative Assistant, Communication, (AFSCME) (Leave of absence)
- David Raker, PhD, Education (MSCA)
- Robert Chatt, PhD, Accounting and Finance (MSCA) (Resigned)
- Rebecca Morris, PhD, Academic Affairs (NUP) (Committee Chair)

Charge of NECHE Committee

From the Charge document of June 8, 2021:

“Charge: The Advisory Committee for NECHE Re-accreditation 2023 (NECHE23) will be responsible for completing and submitting the comprehensive self-study report and all addenda in preparation for the site visit of the NECHE Visiting Team in Spring 2023, as well as ensuring a productive visit by the NECHE Visiting Team.”

Description of Standard 1: Mission and Purposes:

The institution’s mission and purposes are appropriate to higher education, consistent with its charter or other operating authority, and implemented in a manner that complies with the Standards of the New England Commission of Higher Education. The institution’s mission gives direction to its activities and provides a basis for the assessment and enhancement of the institution’s effectiveness.

NECHE Committee Members

Subcommittee for Standard 1: Mission and Purposes

- Jesse Johnson, PhD, Professor, Mathematics (MSCA) (Committee Chair)
- Robert Hayes, PhD, Professor, Psychology (MSCA)
- Kristina Knotts, Counselor, Banacos Center (APA)
- Ron'na Lytle, MA, Administrative Assistant, Language and Culture Studies (AFSCME; departed WSU Summer 2022)—(No longer at the university)
- Jessica Holden, Executive Director of Nursing (NUP)
- Gloria Lopez, VP, Student Services (NUP) (no longer at the university)

Joining of Two Committees

During the Spring 2022 term, the two committees began working independently to accomplish their assigned tasks. As members began resigning from the Mission Statement Advisory Committee (resignations were due to workload with new positions and personal leave), the remaining members became concerned about having sufficient resources for completing the assigned tasks. About the same time, members of the NECHE Standard 1 subcommittee

reached out to the Mission Statement Advisory Committee due to the perceived similarity of the assignments of the two groups. Both groups were developing a survey focused on the Westfield State University mission, vision, and values statements. After clarifying the unique roles of the two committees, the members agreed to join their efforts moving forward.

Survey Design

Common 7 Questions

The combined committee believed that the best way to evaluate the current Westfield State University mission/vision/value statements was to develop an online survey that could be administered to the university's stakeholders. The survey was designed to review the current university mission statement and stakeholder perceptions of how well the university was doing in living up to the mission. Survey responses would permit the committee to gauge perceptions of how well WSU "walks the talk."

Survey questions used the following scheme:

Question	Focus
1	How well Westfield State University is accomplishing its mission (8 sub questions focused on each piece of the mission)
2	How well Westfield State University is achieving its vision (two sub questions focused on two parts of the vision statement)
3	Agreement with university value statements (five sub questions for five value statements)
4	Open ended question to identify three core value statements the respondent would like to see associated with Westfield State University
5	NECHE Standard 1 Question: How well do the mission/vision/values statements inform the decisions of the university (three sub questions)
6	NECHE Standard 1 Question: How well do the mission/vision/values statements inform decisions at the department and curriculum levels
7	NECHE Standard 1 Question: Does respondent consult mission/vision/values statements when planning

Links to finalized surveys can be found in Appendix A

Identification of Key Stakeholders

Committee members identified the following stakeholders to be included in the evaluation of the mission/vision/value statements survey pool:

Stakeholder Group	Estimated Number in Group	Source of Email List
Alumni	≈1,000	Institutional Advancement & Alumni Relations
Community Partners	≈200	No list available, attempted to connect via Chamber of Commerce
Faculty (Full & Part Time)	≈400	MSCA email list
Non-Unit Professionals (NUPs)	47	Human Resource Management's NUP email list
Parents/Champions	≈150	No list available
Staff	≈600	AFSCME email list
Students (UG & G)	≈4,000	Academic Affairs student email list
Trustees	11	Board of Trustees email list

Two stakeholder groups proved difficult to reach. There were no email lists readily available for parents/champions or community partners. The committee wishes to explore opportunities to survey community partners at future Town and Gown events.

Demographic Data

Demographic data unique to the stakeholder group was included as the final section of the survey. The demographic data by stakeholder group are shown in the table below. Some respondents declined to answer demographic questions, thus the totals for demographic variables may not sum to the sample size.

DEMOGRAPHIC DATA BY STAKEHOLDER GROUP	
Stakeholder Group	Administrators (n=9)
Tenure at WSU	Less than one year=3, 1-5 years=1, 6-10 years=0, More than 10 years=4
Gender	Male=2, Female =4, Non-binary=0, Prefer Not to Say=2
Stakeholder Group	
Stakeholder Group	Alumni (n=99)
Career Preparedness	Extremely Well=46, Somewhat Well=32, Neutral =7, Somewhat Not Well=9, Not Well=4
Benefits Outweigh Financial Costs	Yes=79, No=16, Don't Know=3
Would You Recommend WSU	Definitely =64, Probably=21, Probably Not=9, Definitely Not=4

DEMOGRAPHIC DATA BY STAKEHOLDER GROUP

Gender	Male=35, Female=56, Non-binary=2, Prefer Not to Say=5
Stakeholder Group Faculty (n=88)	
Faculty Status	Full-Time=73, Adjunct/part-time=10, Emeriti=2
Current Faculty Rank	Instructor=6, Assistant=11, Associate=23, Full Professor=39, Other=5
Tenure at WSU	Less than one year=1, 1-5 years=12, 6-10 years=16, More than 10 years=55
Gender	Male=28, Female=40, Non-binary=2, Prefer Not to Say=13
School Affiliation	School of Education, Arts, Communication & Humanities=20 School of Business, Mathematics, Computing & Sustainability=17 School of Criminology, Psychology, Social Justice, & Public Policy=18 School of Health, Natural Sciences & Human Services=22
Stakeholder Group Foundation Board (n=9)	
No Questions	No demographic questions asked due to small size of group and desire to maintain anonymity of respondents
Stakeholder Group Foundation Board (n=9)	
No Questions	No demographic questions asked due to small size of group and desire to maintain anonymity of respondents
Stakeholder Group Staff (n=54)	
Union Membership	AFSCME=15, APA=18, MSCA=11, NUP=7
Status	Full-time=45, Part-time=5
Tenure at WSU	Less than one year=6, 1-5 years=6, 5-10 years=7, More than 10 years=33
Gender	Male=8, Female=34, Non-binary=0, Prefer Not to Say=10
Stakeholder Group Students (n=117)	
Gender	Male=31, Female=75, Non-binary=6, Prefer Not to Say=4
Age	Under 21=58, 21-34=45, 35-44=7, 45-Above=5
Living Situation	Resident Hall=65, Off Campus=51
Student Status	First-Year=28, Sophomore=22, Junior=19, Senior=35, Graduate=11
Major	31 different majors were listed. Top majors were Psychology=17, Education=15, Economics=15, Business=11
Stakeholder Group Trustees (n=8)	
No Questions	No demographic questions asked due to small size of group and desire to maintain anonymity of respondents

Survey Methodology

The survey was built on Microsoft Forms to permit email responses that could be completed via computer or mobile phone. Emails were sent to the stakeholder email list with a QR code or link to the survey instrument. The survey was configured to maintain anonymous responses. No record was kept of the email or IP address of respondents. Follow up emails were sent two weeks after the initial email. Additional emails were sent during June and July, 2022 to boost response rates. The number of valid (non-blank) responses for each stakeholder group are shown below:

Stakeholder Group	Estimated Number in Group	Responses as of September 20, 2022	Response Rate
Alumni	≈1,000	98	10%
Faculty (Full & Part Time)	≈400	88	22%
Non-Unit Professionals (NUPs) (Administrators)	47	7	15%
Staff	≈600	52	9%
Students (UG & G)	≈4,000	117	3%
Trustees	11	8	73%
TOTAL		375	
Five responses were removed from the analysis due to missing data.			

Committee members reviewed the response rates and demographic data to affirm that the data collected did not reflect a sampling bias and could be generalized to the broader group of stakeholders.

Survey Results

A more complete look at the data can be found in Appendices B, C and D

Westfield State University's current mission statement as approved by the Massachusetts Board of Higher Education in May, 2019 states:

"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."

Each phrase of the mission statement was independently assessed by survey respondents and the results of those assessments will be reported below.

Mission Statement

The first part of the mission statement addresses the quality of academic programs offered by Westfield State University. The survey asked respondents to assess the university's academic programs as follows:

On a scale of 1-5 with 1="Not Well" meaning the University is not accomplishing its mission at all and 5="Extremely Well" meaning it is accomplishing its mission extremely well, please rate how well Westfield State is accomplishing its mission.

1. Offering accessible quality undergraduate programs
2. Offering accessible quality undergraduate programs in the liberal arts
3. Offering accessible quality undergraduate programs in the sciences
4. Offering accessible quality undergraduate programs in professional studies

The responses for each stakeholder group are shown as percentages in the tables below. The Well Score row shows the combined score for the "Extremely Well," "Very Well," and "Somewhat Well" responses for each Stakeholder. The Well Score thus indicates the percentage of survey respondents with a favorable response to each phrase of the mission statement.

Table 1: Offering accessible quality undergraduate programs by Stakeholder

Survey Responses	Administrator	Alumni	Faculty	Foundation Board	Staff	Student	Trustee	Total
Extremely Well	0.0%	24.5%	12.5%	0.0%	0.0%	12.8%	25.0%	14.1%
Very Well	57.1%	56.1%	35.2%	80.0%	53.8%	51.3%	75.0%	53.6%
Somewhat Well	14.3%	5.1%	19.3%	20.0%	23.1%	9.4%	0.0%	11.7%
Neutral	28.6%	13.3%	25.0%	0.0%	23.1%	20.5%	0.0%	17.9%
Not Well	0.0%	1.0%	8.0%	0.0%	0.0%	6.0%	0.0%	2.8%
Total Within Stakeholder	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Well Score	71.4%	80.6%	67.0%	100.0%	76.9%	73.5%	100.0%	79.4%

The Foundation Board and Trustees had a Well Score of 100% indicating a positive response. In their view, Westfield State University is accomplishing its mission through offerings of accessible quality undergraduate programs. All other stakeholders had a strong positive rating for this part of the mission statement.

Table 2: Offering accessible quality undergraduate programs in the liberal arts by Stakeholder

Survey Responses	Administrator	Alumni	Faculty	Foundation Board	Staff	Student	Trustee	Total
Extremely Well	0.0%	26.0%	13.6%	0.0%	3.9%	11.4%	28.6%	14.4%
Very Well	28.6%	53.1%	50.0%	80.0%	47.1%	42.1%	71.4%	44.8%
Somewhat Well	14.3%	4.2%	15.9%	0.0%	13.7%	7.9%	0.0%	10.3%
Neutral	42.9%	15.6%	18.2%	20.0%	31.4%	32.5%	0.0%	25.3%
Not Well	14.3%	1.0%	2.3%	0.0%	3.9%	6.1%	0.0%	5.2%
Total Within Stakeholder	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Well Score	42.9%	83.3%	79.5%	80.0%	64.7%	61.4%	100.0%	69.5%

Except for Alumni, Faculty, and Trustees, the Well Score for accessible quality programs in the liberal arts was lower than for undergraduate programs in general. The lower rating may be due in part to uncertainty about which programs comprise liberal arts. Alumni, Faculty, Foundation Board, and Trustees had more positive responses for liberal arts programs than other stakeholders.

Table 3: Offering accessible quality undergraduate programs in the sciences by Stakeholder

Survey Responses	Administrator	Alumni	Faculty	Foundation Board	Staff	Student	Trustee	Total
Extremely Well	0.0%	21.9%	16.1%	20.0%	2.0%	14.0%	14.4%	14.4%
Very Well	28.6%	52.1%	40.2%	60.0%	54.9%	43.0%	46.9%	46.9%
Somewhat Well	14.3%	4.2%	16.1%	0.0%	11.8%	8.8%	9.8%	9.8%
Neutral	57.1%	19.8%	24.1%	20.0%	27.5%	30.7%	25.9.0%	25.9%
Not Well	0.0%	2.1%	3.4%	0.0%	3.9%	3.5%	3.0%	3.0%
Total Within Stakeholder	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Well Score	42.9%	78.2%	72.4%	80.0%	68.7%	65.8%	71.1%	71.1%

Stakeholders indicated positive responses regarding Westfield State University's offering of accessible quality programs in the sciences ranging from 78.2% well for Alumni to a low of 42.9% for Administrators. It is notable that fewer than 4% of respondents in each stakeholder group felt that WSU was not accomplishing its mission well in the sciences.

Table 4: Offering accessible quality undergraduate programs in professional studies by Stakeholder

Survey Responses	Administrator	Alumni	Faculty	Foundation Board	Staff	Student	Trustee	Total
Extremely Well	0.0%	21.3%	18.6%	20.0%	2.0%	12.5%	0.0%	14.4%
Very Well	57.1%	52.1%	41.9%	20.0%	35.3%	35.7%	85.7%	42.5%
Somewhat Well	14.3%	4.3%	10.5%	20.0%	19.6%	7.1%	14.3%	9.4%
Neutral	28.6%	20.2%	26.7%	40.0%	37.3%	39.3%	0.0%	30.1%
Not Well	0.0%	2.1%	2.3%	0.0%	5.9%	5.4%	0.0%	3.6%
Total Within Stakeholder	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Well Score	71.4 %	77.7%	71.0%	60.0%	59.9%	55.3%	100.0%	66.3%

Discussion:

- All stakeholder groups were positive regarding the quality of undergraduate programs overall, in liberal arts, sciences, or professional studies. All stakeholder groups ranked the quality of the undergraduate programs as “Somewhat Well” to “Very Well.” Fewer than 15% of the stakeholders ranked Westfield State University as “Not Well.” Most “Not Well” rankings were very low.
- Lower rankings of academic programs may be attributed to respondents’ perceptions of lesser quality but may also be due to uncertainty about the meaning of “accessible” and/or “quality,” or lack of knowledge about WSU’s academic programs and how they compare to those of other institutions. The committee felt that the ratings might indicate that the university has not successfully communicated the quality and achievements of academic programs to stakeholders.
- Higher rankings for Alumni were favorably noted as indicative that graduates become more appreciative of the quality of WSU’s academic programs several years later. Committee members also noted the higher average responses of those in the Trustee, Foundation Board, Faculty and Student stakeholder groups. The responses of these stakeholder groups were in the “Well” category indicating that Westfield State University was doing “Well” in providing accessible and quality undergraduate programs.

The next section of the mission statement is assessed with the following items:

On a scale of 1-5 with 1=“Not Well” meaning the University is not accomplishing its mission at all and 5=“Extremely Well” meaning it is accomplishing its mission extremely well, please rate how well Westfield State is accomplishing its mission.

1. Welcoming community
2. Focuses on student engagement and success
3. Contributes to the economic, social, and cultural growth of the northeast region
4. Develops the knowledge, skills, and character essential for students to become responsible leaders and engaged citizens

Survey Responses	Administrator	Alumni	Faculty	Foundation Board	Staff	Student	Trustee	Total
Extremely Well	14.3%	38.1%	6.9%	0.0%	1.9%	11.4%	28.6%	20.4%
Very Well	28.6%	32.0%	32.2%	40.0%	47.1%	16.2%	57.1%	35.4%
Somewhat Well	28.6%	7.2%	23.0%	20.0%	13.7%	25.0%	0.0%	14.4%
Neutral	14.3%	16.5%	31.0%	40.0%	31.4%	23.1%	14.3%	22.9%
Not Well	14.3%	6.2%	6.9%	0.0%	3.9%	9.6%	0.0%	6.8%
Total Within Stakeholder	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Well Score	71.5%	77.3%	62.1%	60.0%	64.7%	72.2%	85.7%	70.2%

The Well Score for all survey respondents was 70.2% suggesting that many stakeholders felt Westfield State University was doing well in accomplishing its mission statement regarding a welcoming community.

Survey Responses	Administrator	Alumni	Faculty	Foundation Board	Staff	Student	Trustee	Total
Extremely Well	0.0%	25.8%	16.3%	0.0%	4.0%	18.4%	14.3%	17.2%
Very Well	28.6%	49.5%	41.9%	40.0%	32.0%	38.6%	42.9%	41.3%
Somewhat Well	14.3%	5.2%	17.4%	0.0%	28.0%	12.3%	0.0%	13.4%
Neutral	42.9%	14.4%	17.4%	60.0%	22.0%	24.6%	42.9%	21.0%
Not Well	14.3%	5.2%	7.0%	0.0%	14.0%	6.1%	0.0%	7.1%
Total Within Stakeholder	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Well Score	42.9%	80.5%	75.6%	40.0%	64.0%	69.3%	57.2%	71.9%

Alumni had the highest Well Score for Westfield State University's focus on student engagement and success. Faculty and Student scores for this section of the mission statement were also positive.

Survey Responses	Administrator	Alumni	Faculty	Foundation Board	Staff	Student	Trustee	Total
Extremely Well	0.0%	24.0%	8.0%	40.0%	2.0%	13.2%	14.3%	13.4%
Very Well	42.9%	38.5%	42.0%	20.0%	22.0%	32.5%	57.1%	35.4%
Somewhat Well	14.3%	5.2%	9.1%	20.0%	18.0%	14.9%	14.3%	11.4%
Neutral	42.9%	29.2%	31.8%	20.0%	48.0%	30.7%	14.3%	32.7%
Not Well	0.0%	3.1%	9.1%	0.0%	10.0%	8.8%	0.0%	7.1%
Total Within Stakeholder	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Well Score	57.2%	67.7%	59.1%	80.0%	42.0%	60.6%	85.7%	60.2%

The Well Scores for Westfield State University's contribution to the economic, social, and cultural growth of the Northeast region was rated slightly lower in some instances than previous mission statement elements. Trustees and Foundation Board members provided strong positive Well Scores on this item.

Survey Responses	Administrator	Alumni	Faculty	Foundation Board	Staff	Student	Trustee	Total
Extremely Well	0.0%	30.2%	9.2%	0.0%	0.0%	17.5%	33.3%	16.2%
Very Well	42.9%	40.6%	27.6%	60.0%	24.5%	37.7%	50.0%	34.9%
Somewhat Well	14.3%	5.2%	21.8%	20.0%	22.4%	14.0%	0.0%	14.6%
Neutral	42.9%	16.7%	33.3%	20.0%	42.9%	25.4%	16.7%	27.5%
Not Well	0.0%	0.0%	8.0%	0.0%	10.2%	5.3%	0.0%	6.9%
Total Within Stakeholder	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Well Score	57.2%	76.0%	58.6%	80.0%	46.9%	69.2%	83.3%	65.7%

Survey respondents were generally very positive regarding how well Westfield State University was accomplishing its mission to develop responsible leaders and engaged citizens. Administrators, Faculty, and Staff provided the lowest Well Scores for this element of the mission statement.

Discussion:

- The responses to these mission statement components differs from the perceptions of the quality of the academic programs.
- Two plausible explanations may be offered for neutral ratings; either the university is not accomplishing these mission elements at an acceptable level or respondents do not know whether the university is doing well on these elements. Additional research through focus groups and discussions may be needed to explain the neutral response to these elements.
- The Trustee stakeholder group in most instances had the highest opinion of how well the university was accomplishing these parts of the mission statement. The Alumni and Foundation Board were the next most positive stakeholders.
- Staff responses to this section of the mission statement are consistently lower than all other stakeholder groups. Additional research through focus groups or other discussions may be necessary to determine the underlying reasons for the sentiments of this stakeholder group. Similarly, additional discussions may be needed to understand the perceptions of the Administrator group regarding the university's focus on student engagement and success.

Vision Statement

Westfield State University's current vision statement as approved by the Massachusetts Board of Higher Education in May 2019 states:

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

The vision statement was assessed by asking survey respondents the following questions:

“Listed below is the university vision statement. How well do you believe Westfield State University is achieving its vision?”

1. Strives to be the premier public comprehensive institution in the Northeast region.
2. Commitment to student engagement and success.”

The table below summarizes the results of the assessment of the vision statement.

Survey Responses	Administrator	Alumni	Faculty	Foundation Board	Staff	Student	Trustee	Total
Extremely Well	0.0%	16.3%	8.0%	0.0%	0.0%	12.0%	12.5%	10.2%
Very Well	28.6%	36.7%	13.8%	40.0%	15.4%	34.2%	37.5%	27.5%
Somewhat Well	42.9%	15.3%	24.1%	20.0%	34.6%	16.2%	12.5%	20.9%
Neutral	14.3%	27.6%	21.8%	40.0%	17.3%	24.8%	37.50%	24.1%
Not Well	14.3%	4.1%	32.2%	0.0%	32.7%	12.8%	0.0%	17.4%
Total Within Stakeholder	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Well Score	71.5%	68.3%	45.9%	60.0%	50.0%	62.4%	62.5%	58.6%

Except for Faculty, more than half of the stakeholders thought Westfield State University was doing well in accomplishing its vision to become the premier public comprehensive institution in the region. The Faculty Well Score was slightly less than 50%.

Survey Responses	Administrator	Alumni	Faculty	Foundation Board	Staff	Student	Trustee	Total
Extremely Well	0.0%	25.3%	8.4%	0.0%	0.0%	15.6%	28.6%	13.9%
Very Well	42.9%	50.6%	39.8%	40.0%	22.9%	39.4%	28.6%	39.9%
Somewhat Well	42.9%	6.9%	32.5%	20.0%	37.5%	11.9%	14.3%	19.9%
Neutral	14.3%	14.9%	13.3%	40.0%	20.8%	23.9%	28.6%	18.8%
Not Well	0.0%	2.3%	6.0%	0.0%	18.8%	9.2%	0.0%	7.5%
Total Within Stakeholder	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Well Score	85.8%	82.8%	80.7%	60.0%	60.4%	66.9%	71.5%	73.7%

The Well Scores for all stakeholder groups were higher for student engagement and success than the previous vision element. Staff responded more negatively (18.8% “Not Well”) than other stakeholders. Staff may believe that Westfield State University could do

better in its commitment to student engagement and success.

Discussion:

- The Alumni and Trustees groups have on average responded that Westfield State University was doing “Extremely Well” to “Somewhat Well” in accomplishing its vision as seen by the high Well Scores for these stakeholders.
- It may appear that the Foundation Board was more “Neutral” about the vision statement. The lower ratings may be due to confusion about the statement (what does it mean to be the premier public comprehensive institution in the Northeast region?) or disagreement on the part of stakeholder groups with this part of the vision. Care should be taken in interpreting the percentage of responses for the Foundation Board and Trustees since these stakeholders included fewer respondents. For the Foundation Board, one respondent was 20% of the stakeholder group. The percentage of “Neutral” respondents for the Foundation Board may appear greater, but actually represents only two individuals in that group.

Values Statement

Westfield State University’s current values statement as approved by the Massachusetts Board of Higher Education in May, 2019 states:

“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 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 manner.
- **PROVIDE ACCESSIBLE EDUCATION:** We commit to providing an accessible, affordable public higher education for all.”

The values statement was assessed by asking stakeholders to respond to the following:

“Listed below are Westfield State University values. The university emphasizes these values as it strives for educational excellence. Please indicate your level of agreement with each value statement.”

The scale was 1=Disagree Strongly, 2=Disagree Somewhat, 3=Neither Disagree Nor Agree, 4=Agree Somewhat, 5=Agree Strongly, and 0=Don’t Know.

1. **“EMBRACE DIVERSITY:** We treat all members of our community with dignity and respect.
2. **BUILD A STRONG COMMUNITY:** We are inclusive and ensure equity, supporting the personal development of all community members, and embracing multiple perspectives.
3. **ENGAGE IN THE OUTSIDE COMMUNITY:** We support civic engagement in local, regional, and global initiatives.
4. **COLLABORATE WITH EACH OTHER:** We make decisions in a transparent and collaborative manner.
5. **PROVIDE ACCESSIBLE EDUCATION:** We commit to providing an accessible, affordable public higher education for all.”

The tables below summarize the assessment of the values statements. The values statement regarding excellence and integrity was addressed in the wording of the question and was not separately assessed.

Table 11: Embrace Diversity: We Treat All Members with Dignity and Respect

Survey Responses	Administrator	Alumni	Faculty	Foundation Board	Staff	Student	Trustee	Total
Agree Strongly	14.3%	51.0%	26.1%	40.0%	23.1%	34.2%	71.4%	35.6%
Agree Somewhat	42.9%	19.4%	34.1%	60.0%	28.8%	27.4%	28.6%	27.8%
Neither Disagree Nor Agree	0.0%	9.2%	11.4%	0.0%	5.8%	13.7%	0.0%	10.2%
Disagree Somewhat	42.9%	4.1%	23.9%	0.0%	32.7%	13.7%	28.6%	16.3%
Disagree Strongly	0.0%	16.3%	4.5%	0.0%	9.6%	11.1%	0.0%	10.2%
Total Within Stakeholder	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Agree Score	57.20%	82.8%	80.7%	100.0%	60.4%	66.9%	100.0%	73.7%

High positive ratings were generated by all stakeholders regarding the diversity value statement. It should be noted that higher responses of “Disagree Somewhat” and “Disagree Strongly” were also found. While the positive responses may indicate agreement with the concept of diversity, the higher negatives may indicate dissatisfaction with the university’s actions believing that all members may not be treated with dignity and respect. The wording of this value statement suggests that Westfield State University should not only “embrace diversity” but demonstrate that commitment in the way that individuals are treated (with dignity and respect).

Table 12: Build a Strong Community: We are inclusive and ensure equity...

Survey Responses	Administrator	Alumni	Faculty	Foundation Board	Staff	Student	Trustee	Total
Agree Strongly	0.0%	52.1%	19.3%	60.0%	9.6%	32.2%	57.1%	31.4%
Agree Somewhat	28.6%	17.7%	33.0%	20.0%	26.9%	33.0%	28.6%	27.8%
Neither Disagree Nor Agree	0.0%	11.5%	13.6%	0.0%	17.3%	13.9%	14.3%	13.2%
Disagree Somewhat	71.4%	6.3%	28.4%	0.0%	30.8%	10.4%	0.0%	17.6%
Disagree Strongly	0.0%	12.5%	5.7%	20.0%	15.4%	10.4%	0.0%	10.0%
Total Within Stakeholder	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Agree Score	28.6%	69.8%	52.3%	80.0%	36.5%	65.2%	85.7%	59.2%

Administrators, Faculty, and Staff were more negative regarding inclusivity and equity than other stakeholders. They may be distinguishing the value of building a strong community from university actions regarding inclusivity and equity. Alumni, Foundation Board, Student, and Trustee respondents provided a stronger positive response.

Table 13: Engage in the Outside Community...

Survey Responses	Administrator	Alumni	Faculty	Foundation Board	Staff	Student	Trustee	Total
Agree Strongly	42.9%	38.5%	20.7%	20.0%	7.7%	32.8%	14.3%	27.6%
Agree Somewhat	14.3%	29.2%	33.3%	60.0%	30.8%	31.9%	57.1%	31.9%
Neither Disagree Nor Agree	14.3%	16.7%	21.8%	0.0%	26.9%	12.9%	14.3%	17.8%
Disagree Somewhat	28.6%	3.1%	16.1%	20.0%	26.9%	9.5%	0.0%	12.2%
Disagree Strongly	0.0%	12.5%	8.0%	0.0%	7.7%	12.9%	14.3%	10.5%
Total Within Stakeholder	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Agree Score	57.2%	67.7%	54.0%	80.0%	38.5%	64.7%	71.4%	59.5%

Administrators, Faculty and Staff had lower Agree Scores for this value statement than other respondents. Lower responses may indicate skepticism about how much Westfield State University was engaging with the global community.

Table 15: Provide Accessible Education

Survey Responses	Administrator	Alumni	Faculty	Foundation Board	Staff	Student	Trustee	Total
Agree Strongly	42.9%	55.2%	36.8%	60.0%	28.8%	41.7%	42.9%	42.5%
Agree Somewhat	28.6%	19.8%	33.3%	20.0%	34.6%	31.3%	28.6%	29.0%
Neither Disagree Nor Agree	14.3%	8.3%	16.1%	0.0%	21.2%	13.0%	14.3%	13.6%
Disagree Somewhat	14.3%	7.3%	9.2%	20.0%	13.5%	2.6%	0.0%	7.3%
Disagree Strongly	0.0%	9.4%	4.6%	0.0%	1.9%	11.3%	14.3%	7.6%
Total Within Stakeholder	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Agree Score	71.50%	75.0%	70.10%	80.0%	63.4%	73.0%	71.5%	71.5%

As was noted in the discussion of mission statement elements, all stakeholders agreed that Westfield State University was providing an accessible education. Committee members noted that “accessibility” is better defined in this value statement than it is in either the mission statement or vision statement.

Discussion:

- Responses for the Trustees and Foundation Board are higher than for any other stakeholder group for Embrace Diversity and Build a Strong Community.
- Higher assessments of the Embrace Diversity and Provide Accessible Education for All value statements were observed across all stakeholder groups indicating a perception of more agreement with these sentiments
- Administrators, Faculty, and Staff tended to have lower levels of agreement with most of the value statements (the exception being the Provide Accessible Education for All).
- Staff stakeholders had the lowest level of agreement with all value statements (the exception being Build a Strong Community).

Three Other Core Values

Survey respondents were asked to name three (3) other core values that they would like to see associated with Westfield State University. Members of the committee reviewed the responses to identify and summarize common themes for stakeholder groups. The results of this review are provided in the table below.

**Responses to Open-Ended Question:
Three other core values that you would like to see
associated with Westfield State University**

Stakeholder Group	Core Value Themes
Administrators	Innovation, Collaboration, Partnerships, Civic Engagement, Global Awareness (6 Administrators) JEDI (4 Administrators) Trust, Collegiality, Openness, Transparency, Respect (2 Administrators) Program Development & Support (1 Administrator)
Alumni	Diversity and Inclusion, Engagement (students), Stability
Faculty	Global Literacy/Diversity/Equality/Humanism/Social Justice Critical Thinking/Innovative Thinking Interpersonal Development/Teamwork/Collaboration Preparation for Future Liberal Arts/Student Centered Introspection/Sense of Self/Self-study
Foundation Board	Caring, Balance between Mind and body and practical experience within the major before graduation (1 member) Caring, Balance between Mind and body and practical experience within the major before graduation
Staff	Innovation, Collaboration, Partnerships, Civic Engagement, Global Awareness (13 Staff) JEDI (7 Staff) Trust, Collegiality, Openness, Transparency, Respect (7 Staff) Affordable, Flexible Education Pathways (6 Staff) Student Centered, Retention (2 Staff) Accountability (2 Staff) Core Values in Practice; Value-Based Culture (2 Staff) Program Development & Support (1 Staff)

Responses to Open-Ended Question: Three other core values that you would like to see associated with Westfield State University (Continued)	
Stakeholder Group	Core Value Themes
Students	Respect (38 students) Accountability, Cooperation, and Transparency (20 students) High-Impact Practices and Preparedness (13 students) Community (11 students) Accessibility (10 students) Mental Health and Personal Resources (9 students) Student Activities (7 students) Honor (5 students) Student and Home-life Balance (4 students) Cost (4 students) Safety (1 student)
Trustees	Innovation, Collaboration, Partnerships, Civic Engagement, Global Awareness (3 Trustees) JEDI (3 Trustees) Trust, Collegiality, Openness, Transparency, Respect (3 Trustees) Leadership Development (1 Trustee) Expanded Recruitment of Students & Faculty (1 Trustee)

Full text of responses and committee member analyses are provided as Appendix C.

Discussion:

- It should be noted that the survey asked stakeholders to identify three OTHER core values and that this item immediately followed the section of the survey devoted to the existing Westfield State University core values. Committee members found it interesting that many of the values identified by stakeholders were aligned or matched the existing value statements. Two possible interpretations can be derived. The first is that the congruence of stakeholder responses with existing value statements may reflect broad support for the existing statements. The second interpretation may be that stakeholders wish to see additional emphasis placed on existing value statements—especially in the areas of diversity and inclusion, preparedness, and accessibility (mostly financial). In most stakeholder groups, diversity, inclusion and issues of respect were the predominant core value stakeholders wanted to see associated with Westfield State University.

Relationship to WSU Decisions

The next section of the survey examined the stakeholder’s perceptions of how well different types of decisions were informed by the mission/vision/value statements. The first set of decisions involved setting priorities, planning for the future, and evaluating outcomes. The second set of decisions focused on departmental and curricular decisions.

Stakeholders were asked the following questions for the first set of decisions:

“On a scale of 1-4 with 1=Disagree Strongly and 5=Agree Strongly, how well do you feel the WSU mission/vision/value statements inform the decisions of WSU?

1. Identifies its priorities
2. Plans for the future
3. Evaluates its endeavors”

The results are shown in the table below.

Table 16: Relationship to Decisions—Identifies its Priorities								
Survey Responses	Administrator	Alumni	Faculty	Foundation Board	Staff	Student	Trustee	Total
Agree Strongly	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Agree Somewhat	0.0%	26.9%	10.8%	0.0%	0.0%	14.3%	14.3%	14.1%
Neither Disagree Nor Agree	14.3%	44.9%	13.5%	0.0%	17.8%	40.0%	42.9%	31.6%
Disagree Somewhat	57.1%	19.2%	47.3%	50.0%	51.1%	37.1%	42.9%	37.8%
Disagree Strongly	28.6%	9.4%	28.4%	50.0%	31.1%	17.0%	0.0%	16.6%
Total Within Stakeholder	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Agree Score	0.0%	26.9%	10.8%	0.0%	0.0%	14.3%	14.3%	14.1%

The Agree Score for this item was one of the lowest of all survey responses. Many stakeholders do not perceive that the mission, vision, and value statements guide the identification of Westfield State University’s priorities.

Table 17: Relationship to Decisions—Plans for the Future

Survey Responses	Administrator	Alumni	Faculty	Foundation Board	Staff	Student	Trustee	Total
Agree Strongly	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Agree Somewhat	0.0%	23.2%	5.7%	0.0%	0.0%	18.9%	16.7%	12.8%
Neither Disagree Nor Agree	28.6%	39.3%	18.6%	0.0%	18.6%	35.8%	50.0%	29.2%
Disagree Somewhat	71.4%	23.2%	40.0%	100.0%	51.2%	30.5%	33.3%	36.7%
Disagree Strongly	0.0%	14.3%	35.7%	0.0%	30.2%	14.7%	0.0%	21.4%
Total Within Stakeholder	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Agree Score	0.0%	23.2%	5.7%	0.0%	0.0%	18.9%	16.7%	12.8%

Similarly, many respondents did not feel that the mission, vision and value statements did not inform Westfield State University’s development of plans for the future.

Table 18: Relationship to Decisions—Evaluates its Endeavors

Survey Responses	Administrator	Alumni	Faculty	Foundation Board	Staff	Student	Trustee	Total
Agree Strongly	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Agree Somewhat	0.0%	26.3%	5.8%	0.0%	0.0%	15.7%	0.0%	12.0%
Neither Disagree Nor Agree	14.3%	28.1%	11.6%	25.0%	7.0%	41.6%	66.7%	25.5%
Disagree Somewhat	14.3%	35.1%	44.9%	75.0%	48.8%	31.5%	33.3%	38.5%
Disagree Strongly	71.4%	10.5%	37.7%	0.0%	44.2%	11.2%	0.0%	24.0%
Total Within Stakeholder	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Agree Score	0.0%	26.3%	5.8%	0.0%	0.0%	15.7%	0.0%	12.0%

Likewise, many stakeholders did not feel that the mission, vision, and value statements informed the evaluation of university endeavors as shown by the low Agree Scores.

Discussion:

- The responses to these items were much lower than for other survey items.

- Alumni, Students, and Trustee stakeholder groups agreed that the university’s decisions were “Somewhat” informed by the current mission/vision/value statements in identifying priorities, planning for the future, and evaluating its endeavors. Other stakeholder groups disagreed. Less positive responses in this section of the survey may indicate that survey participants have difficulty seeing how university decisions relate to the mission/vision/value statements.
- Faculty and Staff responded that the current mission/vision/value statements did not inform identifying priorities, planning for the future, and evaluating its endeavors. The “Disagree” responses may reflect a perceived disconnect of decisions from the mission/vision/values statements.

Relationship to Departmental and Curricular Decisions

The second set of decisions focused on departmental and curricular decisions.

Stakeholders were asked the following questions for the second set of decisions:

“On a scale of 1-4 with 1=Not Well and 4=Extremely Well, how well do you feel the WSU mission/vision/value statements inform the following areas?”

1. Decisions made by your department
2. Curriculum design

Table 19: Relationship to Decisions—Department Decisions

Survey Responses	Administrator	Alumni	Faculty	Foundation Board	Staff	Student	Trustee	Total
Agree Strongly	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Agree Somewhat	28.6%	22.0%	17.1%	0.0%	2.4%	23.3%	33.3%	18.5%
Neither Disagree Nor Agree	28.6%	32.2%	25.6%	25.0%	11.9 %	44.7%	33.3%	31.7%
Disagree Somewhat	28.6%	27.1%	39.0%	75.0%	40.5%	28.7%	33.3%	33.3%
Disagree Strongly	14.3%	18.6%	18.3%	0.0%	45.2%	3.9%	0.0%	16.5%
Total Within Stakeholder	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Agree Score	28.6%	22.0%	17.1%	0.0%	2.4%	23.3%	33.3%	18.5%

Stakeholders had a moderate response to whether the mission, vision, and value statements informed departmental decisions.

Table 20: Relationship to Decisions—Curriculum Design

Survey Responses	Administrator	Alumni	Faculty	Foundation Board	Staff	Student	Trustee	Total
Agree Strongly	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Agree Somewhat	0.0%	19.6%	9.0%	0.0%	0.0%	18.6%	0.0%	12.3%
Neither Disagree Nor Agree	0.0%	45.7%	23.1%	0.0%	12.8 %	41.9%	25.0%	31.0%
Disagree Somewhat	50.0%	30.4%	42.3%	100.0%	59.0%	32.6%	50.0%	40.2%
Disagree Strongly	50.0%	4.3%	25.6%	0.0%	28.2%	7.0%	25.0%	16.5%
Total Within Stakeholder	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Agree Score	0.0%	19.6%	9.0%	0.0%	0.0%	18.6%	0.0%	12.3%

Discussion:

- The “Don’t Know” response was selected frequently by Alumni (39.8% of that group), Foundation Board (20%), and Staff (19.2%) when asked to assess how well the current mission/vision/value statements informed departmental decisions. Similarly, “Don’t Know” was selected by 43.9% of the Alumni, 60% of the Foundation Board, and 23.5% of the Staff respondents when asked to assess how well the current mission/vision/value statements informed curriculum decisions. The lack of knowledge of departmental and curricular decisions by these stakeholder groups is not unexpected.

Other than Faculty and Administrators, most of the stakeholder groups surveyed are not actively involved in departmental or curricular decision processes and may not see strong connections between the mission/vision/values statements and decision outcomes.

- Faculty and Administrators may be more aware of the relationship between departmental and curricular decisions and mission/vision/values statements, but do not perceive that these decisions are very well informed by the mission/vision/values statements.
- Decision makers at all levels of the university should have concern that all stakeholder groups are not seeing a strong relationship between the mission/vision/and value statements and departmental and curricular decisions. Possible explanations may be lack of connection of stakeholder groups with these types of decisions or lack of communication of departmental and curricular decisions with stakeholder groups. Additional research with focus groups or town halls may be needed to fully understand whether the issue lies with the departmental and curricular decision processes or the content of the mission/vision/value statements.

Single Most Important Thing to Rise to the Next Level

The final question of the survey asked respondents to answer the following open-ended question:

“What is the single most important thing that needs to be done for Westfield State University to rise to the next level in terms of reputation and stature?”

The full responses for each stakeholder group are provided as Appendix D. Members of the committee reviewed the responses to identify and summarize common themes for stakeholder groups. The results of this review are provided in the table below.

Stakeholder Group	Single Most Important Thing
Administrators	Innovation, Collaboration, Partnerships, Civic Engagement, Global Awareness (4 administrators) JEDI (2 administrators) Program Development & Support (2 administrators) Trust, Collegiality, Openness, Transparency, Respect (1 administrator) Clear Communication & Branding (1 administrator) Expanded Recruitment of Students & Faculty (1 administrator)
Alumni	Engage and educate a diverse group of students Maintain programs that have proved successful (Education, Promise, Urban Education) Engage with external community including alumni
Faculty	Increase support for student's academic and mental health Create a reflective, more inclusive and welcoming campus Decrease numbers of administration and increase faculty lines More stability in leadership Better marketing highlighting who we are and what we do well Greater support from administration for students, staff and faculty Accountability at all levels
Foundation Board	Lower costs (1 member) Improve its financial status to better support, students, faculty and staff (1 member) Prepare students for careers in finance (1 member) Improve its relationship with the surrounding community (1 member)
Staff	Trust, Collegiality, Openness, Transparency, Respect (9 staff) Student-Centered, Retention, Student Success (8 staff) Innovation, Collaboration, Partnerships, Civic Engagement, Global Awareness (5 staff) JEDI (3 staff) Changing Rigorous Curriculum (1 staff) Staff Support & Advancement Plan (1 staff) Document Student Success During & After Graduation (1 staff) More Funding for Faculty & Facility Improvement (1 staff) Single Vision (1 staff) Higher Academic Standards (1 staff)
Students	Equity (15 students) Accessibility (10 students) Student Focus (9 students) Activities (6 students) Accountability (6 students) Community (5 students) Preparedness (4 students) Higher Standards (3 students) Cost (3 students)
Trustees	Innovation, Collaboration, Partnerships, Civic Engagement, Global Awareness (2 Trustees) Program Development & Support (2 Trustees) Trust, Collegiality, Openness, Transparency, Respect (1 Trustee)

Discussion:

Responses to this question seem very similar to that of the item requesting identification of three other core values respondents would like to see associated with Westfield State University. The similarity may reflect the sentiment that Westfield State University could make strides toward becoming the premier public comprehensive institution by better following its mission/vision/value statements.

Summary Commentary

Committee members noted that the overall survey results did not indicate strong negative perceptions of the mission, vision, and value statements. The results indicated positive perceptions of the mission, vision, and value statements by most stakeholder groups.

Most stakeholders expressed that Westfield State University was doing “Well” in accomplishing its mission regarding accessible and quality academic programs. Most stakeholders had a slightly lower opinion of how well Westfield State University was accomplishing the second part of the mission.

The open-ended questions affirm the current values and vision while suggesting that improvements are needed to better position Westfield State University as a premier institution in the Northeast region. Strong emphasis on diversity, equity, and inclusion as core values that all stakeholders would like to see associated with the university affirms the hiring of the JEDI while also providing a pathway to an enhanced regional standing.

Two sections of the survey suggest that stakeholders had concerns with the operationalization of the mission/vision/value statements rather than the statements themselves. Key stakeholder groups expressed concerns about how well the mission, vision, and value statements informed the identification of university priorities, strategic planning, and evaluation of outcomes. The perceived disconnect of decisions and outcomes from these guiding documents may indicate issues that should be addressed. The next section of this report will provide observations based on best practice.

Observations

Mission Statement

Mission statements are supposed to “serve as a guide for day-to-day operations and as the foundation for future decision-making.”¹ The findings of the mission statement survey suggest that the current Westfield State University mission by most stakeholder groups to be performing the dual roles adequately but not “extremely well.” The survey results suggest that it may be time to revise and improve the Westfield State University mission statement.

Based on survey results and relevant articles on mission statements, the committee members provide the following recommendations for the revision:

- Mission statements are supposed to motivate and inspire stakeholder commitment. Westfield State University **mission statement is neither motivating nor inspiring our stakeholders**. Responses to open-ended questions illustrated the perceived problem:

From a Faculty respondent: “Given the realities of student numbers, much of these mission, vision, and values statements do not clearly align with the main drivers of decisions, which are based on enrollment, retention, and adjusting programs to shifting student needs.”

- Westfield State University’s mission statement is **not clear and easily understood**. Terminology used in the mission statement may be understood and familiar to many Faculty, Administrators and Trustees but may not be understood or appreciated by other stakeholders such as Alumni and Students.

Segmenting the type of academic programs using terms such as Liberal Arts & Professional Studies may not be well understood by all stakeholders. The term “Quality” also generated discussion about its meaning. The term “Accessibility” has many different meanings— affordable, ADA compliant, diversity etc. It is unclear what is meant by the mission statement by “accessible quality undergraduate and graduate programs in the liberal arts, sciences, and professional studies.”

From a Faculty respondent: “To borrow a phrase from the movie “Princess Bride”-- Accessibility. I do not think it means what you think it means.”

- Westfield State University’s mission **does not say what the university wants to be remembered for**. It does not leave a lasting impression. Several survey respondents indicated that they had never seen the mission statement before.
- Westfield State University’s mission statement **does not distinguish itself from other institutions**.

¹ Training Materials & Courseware Resource. (2021, September 18). *Home*. Your Training Course Material Resource. Retrieved September 26, 2022, from <https://www.trainingcoursematerial.com/free-training-articles/strategic-planning-and-thinking/assessing-your-mission-statement>

If “Westfield State University” was removed from the mission statement it is doubtful that anyone would be able to identify which institution was described by the statement. It does not even distinguish Westfield State University from the other state institutions in Massachusetts, let alone create a unique identity for the institution.

Vision

- The Westfield State University vision statement **restates parts of the mission statement**. Vision statements should provide goals that the institution strives to achieve. The entire vision statement is also contained in the mission statement. As such, the vision leaves Westfield State University rudderless.

From an Alumni respondent: What is the single most important thing that needs to be done for Westfield State University to rise to the next level...“A strong vision for the future with attainable, actionable goals that aligns with the very competitive and volatile higher education market.”

- Vision statements are supposed to **point to a destination with action**—Westfield State University’s vision is to be the premier comprehensive institution in the Northeast Region. How will we get there? What actions will we take to move closer to the vision? Survey respondents questioned whether Westfield could ever achieve that goal while others felt that it was the wrong goal for Westfield State University.

From a Faculty respondent: “Honestly, I don’t think we need to rise in terms of reputation and stature. We have a specific mission to provide a good quality education at an affordable price to the college students of Massachusetts.”

From a Faculty respondent: “I am not sure whether a “Vision” is ever “accomplished” -- right now it seems the true Vision would be “have Westfield survive as an independent quarter-public institution of higher education.”

A third Faculty respondent commented: “I don’t think reputation and stature should be our goals (I think service to the Commonwealth is more important).”

From an Alumni respondent: “Urge all to be as good as they can be and be quality and have WSU strive to be the best of its kind. It is not Ivy League and should not try to be so. It can and should be the best it can be given the need for a very fine educational institution.”

- The **second part of the vision is a value not a vision**. It also is unclear what exactly is meant by student engagement and success.

Value Statements

- Survey respondents expressed **broad support for diversity, equity, and inclusion**. A committee member wrote the following statement about students following his analysis of the student responses:

“Students showed an impressive level of awareness of what is important to themselves, their peers, and other communities. First and foremost, students value equity in the WSU community. They want themselves and others to feel welcome, celebrated, and safe regardless of identification.”

Summarizing student responses, a committee member wrote: “Students want a campus where themselves and others feel safe, respected, and accepted. Students appreciate diversity among all aspects of self-identification. Students are looking for robust diversity policies and social justice. Student explicitly cite un-punished situations regarding extreme biases and sexual misconduct.”

- The Westfield State University values statement **repeats the accessible education from the mission but defines it better than in the mission**. As was previously discussed, the term “accessible” is not clearly understood by all. The vision statement does clarify it somewhat better, but not to the level of clarity that might be desired.
- Survey respondents **questioned the authenticity of the current values statements**. Many respondents suggested that the university “needs to walk the talk.”

From a Student response: “Actions speak louder than words. Saying something in a mission statement means literally nothing if the institution can’t make the statement a reality.”

In revising the Westfield State University values statements, we should keep in mind that:

“most value statements are bland, toothless, or just plain dishonest. And far from being harmless, as some assume, they’re often highly destructive. Empty value statements create cynical and dispirited employees, alienate customers, and undermine managerial credibility.”²

Lencioni identified four types of values that organizations should consider in value statements. They are:

- Core values—deeply ingrained principles that guide all of an organization’s actions.
- Aspirational values—those that an organization needs to succeed in the future by

² Training Materials & Courseware Resource. (2021, September 18). *Home*. Your Training Course Material Resource. Retrieved September 26, 2022, from <https://www.trainingcoursematerial.com/free-training-articles/strategic-planning-and-thinking/assessing-your-mission-statement>

currently lacks.

- Permission-to-play values—those that reflect the minimum behavioral and social standards required of any employee.
- Accidental values—those that arise spontaneously without being cultivated by leadership and take hold over time.³

As Westfield State University revisits its value statements, attention should be focused on listing core or aspirational values as these will be more authentic.

Final Recommendation

After conducting this survey and analyzing the results, the Mission Statement Advisory Committee believes it would be in the best interest of Westfield State University to embark on a revision process for the university's mission, vision, and values statements. While the survey results provide some insight into the thoughts and expectations of key stakeholder groups, we recommend that additional work should be done through town halls and focus groups to better understand the opinions, thoughts and needs of these groups.

³ Ibid.

Appendices

Appendix A: Links to Surveys, Faculty Survey

Links to Survey Instrument

Stakeholder Group	URL for Microsoft Forms Survey
Administrators	https://forms.office.com/r/gTX5mJuwQt
Alumni	https://forms.office.com/r/7ZY84RPTLj
Faculty (Full & Part Time)	https://forms.office.com/r/fZ05mh3mGw
Foundation Board	https://forms.office.com/r/MXP15iNLuT
Staff	https://forms.office.com/r/qu9QuS8Xd4
Students (UG & G)	https://forms.office.com/r/trFy8RWL3p
Trustees	https://forms.office.com/r/s9CU5f5bEV

The first 8 questions on the survey are identical for all stakeholder groups. Questions specific to the stakeholder's perceptions and experience of WSU and demographic questions are included as a block after the 8 questions. The stakeholder-specific and demographic items can be viewed by clicking on the URL hyperlink above. A PDF of the faculty survey is also provided to provide an easy way to review the first 8 questions.

Westfield State University Mission, Vision and Values Statements Review Faculty Survey

The survey will take approximately 10 minutes to complete.

Dear Faculty Member,

Westfield State University has successfully navigated the challenges of the pandemic. In order to thrive going forward, the institution is working on a new strategic plan. As a member of the university community, we need your help! We would like your opinion on how we are doing now and what the university should be doing in the next few years. Your feedback is completely anonymous and voluntary. We appreciate your participation!

For questions or comments, please email: mission@westfield.ma.edu.

Westfield State University Mission Statement Assessment:

"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."

...

1. On a scale of 1-5, with 1=Not Well being the University is not accomplishing its mission at all and 5=Extremely Well being it is accomplishing its mission extremely well, **please rate how well Westfield State University is accomplishing its mission.**

	Not Well	Somewhat Well	Neutral	Very Well	Extremely Well
Offering accessible quality undergraduate programs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Offering accessible quality undergraduate programs in the liberal arts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Offering accessible quality programs in the sciences	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Offering accessible quality programs in professional studies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Welcoming community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Focuses on student engagement and success	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Contributes to the economic, social, and cultural growth of the northeast region	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Developing the knowledge, skills, and character essential for students to become responsible leaders and engaged citizens	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2. Listed below is the university vision statement. How well do you believe Westfield State University is achieving its vision?

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

	Not Well	Somewhat Well	Neutral	Very Well	Extremely Well
Strives to be the premier public comprehensive institution in the Northeast region	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Commitment to student engagement and success	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3. Listed below are Westfield State University values. The university emphasizes these values as it strives for educational excellence. **Please indicate your level of agreement with each value statement.**

Neither
 Disagree Disagree Disagree Agree Agree Don't
 Strongly Somewhat Nor Agree Somewhat Strongly Know

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.

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 manner.

PROVIDE ACCESSIBLE EDUCATION:

We commit to providing an accessible, affordable public higher education for all.

4. Please name **three (3) other core values** that you would like to see associated with Westfield State University. Please use a comma to separate each entry.

Enter your answer

5. On a scale of 1-5 where 1=Not Well and 5=Extremely Well, **how well do you feel the WSU mission/vision/values statements inform the decisions of WSU?**

	Not Well	Somewhat Well	Very Well	Extremely Well	Don't Know
Identifies its priorities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Plans for the future	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Evaluates its endeavors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

6. On a scale of 1-5 where 1=Not Well to 5=Extremely Well, **How well do you feel the WSU mission/vision/values statements inform the following areas?**

	Not Well	Somewhat Well	Very Well	Extremely Well	Don't Know
Decisions made by your Department	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Curriculum design	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Next

Thinking about WSU's Future

7. Do you consult the mission/vision/values when planning?

- Yes
- No
- Sometimes
- Don't Know

8. In your opinion, what is the **single most important thing** that needs to be done for Westfield State University to rise to the next level in terms of reputation and stature?

Enter your answer

Back

Next

The following questions are asked for classification purposes only:

9. What is your faculty status?

- Full-time
- Adjunct/part-time
- Emeriti

10. What is your current faculty rank?

- Instructor
- Assistant
- Associate
- Full Professor
- Other

11. How long have you been working at the University?

- Less than one year
- 1-5 years
- 6-10 years
- More than 10 years

12. What is your gender?

- Male
- Female
- Non-binary
- Prefer not to say

13. What is your primary school affiliation?

- School of Education, Arts, Communication & Humanities
- School of Business, Mathematics, Computing Sciences & Sustainability
- School of Criminology, Psychology, Justice and Public Policy
- School of Health, Natural Sciences and Human Services

14. Any final comments you'd like to share?

Back

Next

Westfield State University
Mission, Vision and Values Statements Review
Faculty Survey



Thank you very much for taking the time to participate in this survey!

This survey was approved by the WSU Mission Statement Review Advisory Committee and by the WSU Institutional Review Board (IRB). Your results will be anonymous. For questions or concerns, please email: mission@westfield.ma.edu

Back

Submit

Appendix B: Full Responses to Three Core Values by Stakeholder

Survey respondents were asked to name three (3) other core values that they would like to see associated with Westfield State University.

Stakeholder Group	Response to Three Other Core Values
Administrators	<p>social justice; define accessible (is this about the learner or something else); advocacy for populations different than self</p> <p>Innovative, collaborative, partnerships</p> <p>equity-oriented</p> <p>collaboration, relationships and trust</p> <p>Student-centered, collegial, community engaged</p> <p>Equity and Inclusion, Innovation (21st Century thinking/strategies to meet existing and emerging challenges); Openness</p> <p>Support the development of the whole person, provide innovative and responsive programs needed by current and future students and regional partners</p>
Alumni	<p>?</p> <p>acknowledge the education foundation that is the basis of Westfield State: It was a well-respected post-secondary institution that prepared its graduates to teach. The University seems to downplay or, in some instances, simply ignore the value of that historical beginning. The second core value is that Westfield State needs to reach out to and respect its alums who are part of that core teacher preparation foundation: Acknowledge their professional achievements as teachers. The third core value that Westfield State needs to develop is to explicitly advertise in its alumni publication and on line, how it is fulfilling the core values in its Mission Statement. This is the first time I have ever seen Westfield's Mission Statement. It's very difficult to examine department curricula as those curricular reflect the Mission Statement if the curricula are not readily available for an alum to review. Are these documents on line?</p> <p>Affordable, rigorous, welcoming/inclusive</p> <hr/> <p>Anti-Racist, LGBTQ Inclusive and Targeted Support for Low Income Students</p> <p>Athletics, International merit aid, more undergrad merit aid</p> <p>Commitment to affordability, diverse opportunities for all, access to all</p> <hr/> <hr/> <div style="background-color: #e6f2ff; padding: 5px;">Continue to facilitate public school teacher preparation/advancement/certification and licensure</div>

Stakeholder Group	Response to Three Other Core Values
	<p>Dedication to helping students in the real world, preparing students for actual jobs, Commitment Bringing fields of study to bear that weren't before.</p> <p>Dignity, respect and student success</p> <p>Disability accessibility, physical safety, career preparation</p> <p>Diversity, Honesty, integrity</p> <p>Do more about Diversity and Inclusion, be more eco friendly , offer more scholarships to low income students</p> <p>dunno</p> <p>Empathy, discernment and harmony</p> <p>Employability of graduates, Acceptance of graduates into nationally recognized graduate programs, Recognition for the quality of education</p> <p>Engage in professional working relationships with community employers, promote social development amongst students, foster positive mental health amongst students</p> <p>Ethical; Compassionate; Engaged</p> <p>Family security and connection</p> <p>Focus on Student Mental Health, Embrace Alternate Paths to Success</p> <p>Future Forward (dean system for example), Affordable Education, Flexibility (making double majors that may not be similar work, etc)</p> <p>hands on, sense of awareness, perserverence, exceptional character</p> <p>High academic achievement, great value for being educated at what they used to call "the Harvard of the state college system," academic freedom</p> <p>I feel the current values are fairly comprehensive.</p> <p>Innovate</p> <p>Integrity, Accountability, Fairness</p> <p>Integrity, Agent of Change</p> <p>Integrity, Building self-sufficient professionals</p> <p>integrity, compassion, hopefulness</p> <p>Leadership</p> <p>Less dependency on the General Court, legislature, for funding by identifying other sources, corporate/alumni/foundations.</p> <p>Maturity, independence, fragility</p>

Stakeholder Group	Response to Three Other Core Values
	<p>Mentoring program for freshmen/ I wish I had known that if I had had a problem with a professor, I could have felt comfortable going to the head of that department. I am sure things have probably changed since 1970.</p> <p>Minority outreach. Financial outreach more community</p> <p>N/A</p> <p>RESPECT of all people (students in the first instance). RESPONSIBILITY , give more meaningful responsibility to students ensuring they are more of a collaborative partner in the educational pursuits. WSU's Mascot is an Owl, therefore WISDOM, as a core value, should find its place with-in the mission providing a link.</p> <p>responsibility, accountability, critical thinking</p> <p>Strive for excellence, Focus on job placement rates, respect for all life</p> <p>Student experience, student growth, student engagement</p> <p>sustainability, experiential learning, financial literacy</p> <p>True equality in awareness of differences in culture, values and history</p> <p>Truth, Justice & EQUALITY</p> <p>uncertain</p> <p>WSU needs to do much better with student engagement particularly with respect to advisors (who my daughter says are not enthusiastic and hard to get a meeting with) and please have professors post grades in a timely manner. How are students to know how they are doing in a class when some professors don't post grades regularly? It's just pure laziness.</p>
Faculty	<p>Encourage critical thinking; Promote interdisciplinary understanding, Support lifelong learning</p> <p>academic excellence</p> <p>academic excellence, diversity of ideas, preparation for the future</p> <p>Academic standards, commitment to liberal arts identity, foster mental well being of all campus members</p> <p>affordable, inclusive, student-centered</p>

Stakeholder Group	Response to Three Other Core Values
	<p>arts, humanities, inclusion</p> <hr/> <p>challenge students to think critically and create excellent work</p> <hr/> <p>Commit to self-study and critical reflection, commit to antiracist practices and social justice, multiple perspectives are encouraged and validated.</p> <hr/> <p>Community, equity, love of learning</p> <hr/> <p>Compassion, innovation, excellence in teaching</p> <hr/> <p>Compassion, social justice and responsibility; and integrity</p> <hr/> <p>Compassion, trust, creating pathways for all students</p> <hr/> <p>Continuing to create a diverse campus community, keeping our commitment to the liberal arts as fundamental to all education at WSU, and staying humble and grounded (not sure how to translate that one into a university core value...)</p> <hr/> <p>Development of professional skill sets, treating each other with respect and professionalism, embracing efficiency</p> <hr/> <p>Diversity</p> <hr/> <p>Diversity, inclusiveness</p> <hr/> <p>embrace open exchange of opinions even if we do not agree, climate of collegiality and cooperation, value scientific discourse and academic freedom</p> <hr/> <p>Encourage innovative thinking, build alumni community, not sure what else</p> <hr/> <p>faculty stop fighting, departments fighting, transparent accurate finances,</p> <hr/> <p>Fully inclusive, Ethical, community driven</p> <hr/> <p>Grounding in the liberal arts; social & cultural critical thinking; historical civic awareness of citizenship</p> <hr/> <p>humanism, equality, transparency</p> <hr/> <p>Integrity, Diligence, Intellectual flexibility</p> <hr/> <p>Integrity, diversity and inclusion, teamwork</p> <hr/> <p>Integrity, Ingenuity, Resilience</p>

Stakeholder Group	Response to Three Other Core Values
	<p>intellectual development, global literacy, interpersonal relationships</p> <hr/> <p>Interaction with the community on cognate issues, ie; environment, activities, resources.</p> <hr/> <p>JUSTICE, EQUITY, INTELLECTUAL CURIOSITY and Commitment to creating a better world!</p> <hr/> <p>learn critical and scientific thinking, learn curiosity, learn creativity</p> <hr/> <p>Learning, Search for Knowledge, Persistence</p> <hr/> <p>liberal arts, gender equity</p> <hr/> <p>long-term thinking, prepare for climate change, zero-carbon</p> <hr/> <p>na</p> <hr/> <p>Prepare our students for the modern world, provide a well-rounded liberal arts education, support the student as an entire person (not just a number/student and support mental health as well)</p> <hr/> <p>prepare students for the future, support a multicultural environment,</p> <hr/> <p>prioritize health and well-being of campus community, promote student-centered and student-led learning environment, oriented towards social and economic justice</p> <hr/> <p>promote integrity, leadership and resilience</p> <hr/> <p>Promote respect for different perspectives, promote academic curiosity, promote individual responsibility</p> <hr/> <p>Provide better engagement with alumni. Provide more opportunities with companies in the region.</p> <hr/> <p>put back the liberal arts core, music, art</p> <hr/> <p>Respect for self and others, Commitment to local and global community, Knowledge acquisition</p> <hr/> <p>Strong support of the arts, student center education, experiential education</p> <hr/> <p>student centered, teaching institution, valuing science</p> <hr/> <p>teaching institution, student centered</p>

Stakeholder Group	Response to Three Other Core Values
	<p>value healthy and sustainable environmental relationships and practices; provide opportunities for international travel and study,</p> <p>valuing and promoting liberal arts education for all; promoting the wellbeing of students, staff, faculty and community; small class sizes</p> <p>Vision, reflective, commitment</p> <p>we prepare students for their futures in a rapidly changing world, we prepare students to learn on their own in a rapidly changing world</p> <p>wellness and having a strong sense of self; advocacy for self, the environment, and others; embrace of JEDI ideals and beliefs</p>
Foundation Board	Caring, Balance between Mind and body and practical experience within the major before graduation
Staff	<p>???</p> <p>Accessibility, Equity, Excellence</p> <p>accountability, appreciation, cooperation</p> <p>Affordable education, strong community, embrace diversity</p> <p>Challenging rigorous curriculum, high expectations in order to meet the global challenges , community outreach experiences</p> <p>Communication, respectful and engaging environment.</p> <p>community engagement, affordability, civic mindedness</p> <p>diverse, quality education and experience, engaged community</p> <p>Encouraging the formation of diverse opinions & perspectives, Creating a safe & supportive environment for staff other than faculty, Supporting an outstanding Dining Services</p> <p>Equity</p> <p>Experiential learning, professional job degrees for a changing employment market, individual student success/monitoring</p> <p>Fairness, honesty, responsibility</p> <p>Humility, Compassion and Servitude</p> <p>I would like to see the current core values in practice.</p> <p>inclusiveness, community, strong liberal arts</p> <p>Innovation, Agility, Embracing Technology</p> <p>integrity, respect, transformational</p> <p>integrity, service, acceptance</p> <p>Learning, Innovation, Accountability</p> <p>provide accessible & affordable skills training, offer flexibility in educational pathway</p> <p>Provide an engaged in person education, Provide engaged mentorship to students and alumni, Guarantee the student is the focus of every decision</p> <p>Provide civic understanding, Teach basic life skills and responsibilities, Encourage understanding of global community</p> <p>Quality experience, fac staff committed to student success in all areas, community committed to support one another</p> <p>rapport with local and regional industries, collaboration among faculty, faculty opportunities for research.</p>

Stakeholder Group	Response to Three Other Core Values
	<p>Service, Compassion, Respect</p> <p>Staff Support, Professional Development, Staff Advancement Plan</p> <p>Treat staff with respect and appreciation</p> <p>Would like to see us actually embrace diversity, build a strong community and collaborate with each other</p>
Student	<p>more diversity events, better food at the dc!</p> <p>Acceptance, diversity, and communication</p> <p>Acceptance, diversity, kindness</p> <p>accessibility, transparency, equity</p> <p>Accessible student support, local community engagement, evening classes</p> <p>Accountability, Transparency, Leadership</p> <p>Advancing Academic Achievement, Encouraging Independence, Developing Strong Work Ethic</p> <p>affordable, diverse, welcoming</p> <p>Affordable, High-quality learning, focus on individual + group growth</p> <p>Balance, Respect, Loyalty</p> <p>community, acceptance, success</p> <p>Compassion, professionalism, fairness</p> <p>Consistency, Free Time, and Cooperation</p> <p>Cost, advising, activities</p> <p>Decolonize the Curriculum, Have honest discussions about Communism, Hire Black Professors</p> <p>Diversity among students and staff, open communication with professors and students</p>

Stakeholder Group	Response to Three Other Core Values
	<p>Diversity in programs (Asian studies, other unique offerings), online instruction with integrity, off-campus alliances for students of all ages.</p> <hr/> <p>diversity, community, intersectionality</p> <hr/> <p>Ensuring students are ok mentally and physically, transparency between teachers and students, and maintaining a strong and inclusive learning environment.</p> <hr/> <p>Equality, community, communication</p> <hr/> <p>Equality, MORE student involvement, State collaboration</p> <hr/> <p>Equality, support, diversity</p> <hr/> <p>equity, community, professional success</p> <hr/> <p>Equity, Cooperation, Quality</p> <hr/> <p>Equity, understanding, cooperative</p> <p>Focus on building a cohesive campus community that is built off of the campus environment not what the board or provost wants, Listening to student feedback and having a cohesive line of communication, and to understand the makeup of the campus and work with it</p> <p>Having more activity's and helping other people that are struggling in their subjects.</p> <p>Hedonism, Benevolence, Conformity</p> <p>Honor, courage, commitment</p> <hr/> <p>I would like to see less racism, less dirty bathrooms, and more campus events.</p> <hr/> <p>I would like to see Westfield State focus a little more on helping women achieve their educational goals and offer assistance to help balance the educational demands but they will face with also maintaining their families oh, and I would like to see Westfield State do more for non-traditional students</p> <p>Inclusion, accessibility, outreach</p> <p>Inclusive towards dietary restrictions (ie allergies), dorm selection better organized, meal plans</p> <hr/> <p>integrity, growth, services</p>

Stakeholder Group	Response to Three Other Core Values
	<p>integrity, respect, responsibility</p> <hr/> <p>lgbtq, the arts, mental health</p> <hr/> <p>LGBTQ+ advocation, political activism and rallies, fight for womens rights</p> <hr/> <p>N/A, N/A, N/A</p> <hr/> <p>Preparedness, citizenship, equity</p> <hr/> <p>Professional focus, community driven, industry preferred graduates</p> <hr/> <p>Providing a voice for individuals with intellectual disabilities/differences, exploring the stigmas behind mental health and anxiety and challenging them, educating students about internships and other outside opportunities</p> <hr/> <p>Respect, diversity, community</p> <hr/> <p>Respect, Kindness</p> <hr/> <p>Safety</p> <hr/> <p>school funding for clubs, because the clubs need to make the money themselves, and in order to access the little money they make you must ask for it and get it approved. clubs shouldn't have to bay by the mile for transportation, either.</p> <hr/> <p>Social progress, Creativity, protection against hate crimes</p> <hr/> <p>Strive to help students succeed academically all throughout the time they are there</p> <hr/> <p>Teamwork, Unity, Honor</p> <hr/> <p>Trust, Family, Standard</p> <hr/> <p>Upholding the written values and university rules, zero tolerance for discriminatory or violent behaviors/ threats, etc.</p> <hr/> <p>Welcoming, Respectful, Adaptive</p>
Trustee	<p>Diversity; Student Engagement; Growth</p> <p>Flexibility, Outreach, Inclusion</p>

Stakeholder Group	Response to Three Other Core Values
	<p>honesty, building of authentic interpersonal relationships, performance driven high expectations for all constituents</p> <p>inclusive, leadership development, collaboration</p> <p>Offer more up to date innovative course offerings, Be more inclusive of students of color, offer more incentives to attract first generation college students</p> <p>Respect, openness to change/innovation, transparency</p>

Appendix C: Full Responses to Single Most Thing by Stakeholder

Stakeholder Group	Single Most Important Thing Responses
Administrators	<p>clear communication and branding on the website, program development, and expanded recruitment of students, faculty and staff</p> <p>innovative curricula</p> <p>It needs to be equity-oriented and exemplify everything this means.</p> <p>collaborate more between departments creating better relationships to ultimately serve our biggest stakeholders, the students.</p> <p>Develop new programs</p> <p>Innovation - the university and its programs need to adapt to current realities and offer programs that people want not what we have always done well. We need to make the university more visible - Signage, Signage, Signage, everywhere!!!</p> <p>I think we have the components we need but often get in our own way with disagreements that take a lot of time and distract us from the efforts of promoting our reputation and stature.</p>
Alumni	<p>engage with the community</p> <p>?</p> <p>Academic Excellence. Provide pertinent course/major offerings that are adaptive to the current job market.</p> <p>Add more graduate courses of study</p> <p>Assist in the economic growth of the immediate Westfield community.</p> <p>Be more visible in the community and state wide.</p> <p>Become D2 in sports</p> <p>broader international engagement.</p>

Stakeholder Group	Single Most Important Thing Responses
	<p data-bbox="394 323 1312 384">Commit all departments to teaching, instructing and mentoring at the highest level without any regard to political affiliation.</p> <hr data-bbox="380 384 1386 388"/> <p data-bbox="394 401 764 428">Consistency in all aspects of endeavors</p> <div data-bbox="380 436 1386 573" style="background-color: #e6f2ff; height: 65px; margin-bottom: 10px;"></div> <p data-bbox="394 627 1084 655">Continue to reach out to the community and keep alumni well informed.</p> <div data-bbox="380 663 1386 846" style="background-color: #e6f2ff; height: 87px; margin-bottom: 10px;"></div> <p data-bbox="394 854 581 882">diversity of thought</p> <div data-bbox="380 890 1386 940" style="background-color: #e6f2ff; height: 24px; margin-bottom: 10px;"></div> <p data-bbox="394 995 1341 1022">Dr. Dobbelle was not good for the university. Hopefully the new president will open doors for WSU.</p> <hr data-bbox="380 1031 1386 1035"/> <p data-bbox="394 1039 691 1066">Embrace STEM more heavily</p> <div data-bbox="380 1075 1386 1171" style="background-color: #e6f2ff; height: 46px; margin-bottom: 10px;"></div> <div data-bbox="380 1180 1386 1230" style="background-color: #e6f2ff; height: 24px; margin-bottom: 10px;"></div> <p data-bbox="394 1239 1341 1299">Focus on staff wellbeing/retainment- happy engaged staff with no shortages means more devoted staff, who students will get more out of to achieve other goals</p> <div data-bbox="380 1308 1386 1444" style="background-color: #e6f2ff; height: 65px; margin-bottom: 10px;"></div> <div data-bbox="380 1453 1386 1503" style="background-color: #e6f2ff; height: 24px; margin-bottom: 10px;"></div> <p data-bbox="394 1570 1373 1661">Get rid of Dr -REDACTED-. He scapegoats students in the Learning Disabilities programs for the issues of other students. There is TOO much drama in the dorms and Res Life needs to acknowledge that a lot of the issues are about backbiting and revenge, and scapegoating students in the LD program</p>

Stakeholder Group	Single Most Important Thing Responses
	<p data-bbox="391 443 1344 558">Higher-ups need to listen to departments, as they are the ones working closely with students and community. Many times staff have the right decisions on how to move forward, and they are not seen through as it goes up the the staff ladder. I feel as though my time as Westfield was positive because of the FACULTY and they need to be prioritizes in decision making processes.</p> <hr/> <p data-bbox="391 638 1344 695">I believe they should treat every individual equally whether they are a transfer student or not. My experience at WSU was not what I expected.</p> <hr/> <p data-bbox="391 716 532 743">I do not know.</p> <hr/> <p data-bbox="391 884 1344 968">I had a wonderful experience at WSU. When I started in 2008, it was about 13k to attend. The price of attendance has grown significantly since then and something needs to be done. Otherwise we risk not being able to recruit the best candidates!</p> <hr/> <p data-bbox="391 1108 1344 1192">I wish I knew. My colleagues from Smith school of social work were all envious at the superior education and training I received from Westfield's Masters in mental health counseling. Somehow, highlighting certain departments and successful Alum so Westfield gets more recognition</p> <hr/> <p data-bbox="391 1272 1344 1329">If we can draft students into the military and put their life's on the line, let's allow them to have a beer and smoke like responsible adults and not be treated like kids by WSU.</p> <hr/> <p data-bbox="391 1472 1344 1556">Improve on your education degrees at the undergraduate and graduate level. The name Westfield State still currently holds value as a great teachers college but it's losing that reputation since the focus has shifted to other degrees. Get back to the roots of the college.</p> <hr/> <p data-bbox="391 1654 1344 1738">In my opinion, the WSU needs to stop getting wrapped around all the divisions and work to get progress done - Westfield Promise is an awesome program but I fear through endless paperwork and inefficiency this program will deteriorate.</p>

Stakeholder Group	Single Most Important Thing Responses
	<p data-bbox="391 338 1362 422">In Question #7, what do you mean by "when planning"? "When planning" what, exactly - - planning a visit to the school, planning to donate to the school? This question is impossible for me to answer sensibly.</p> <p data-bbox="391 443 594 470">Increase enrollment</p> <p data-bbox="391 491 797 518">Increase visibility amount peer institutions.</p> <p data-bbox="391 688 1349 745">Iron out its leadership and academic structure in a manner that best supports student and financial success for the University</p> <p data-bbox="391 856 1162 884">Keep graduates better informed so that we can support you in these endeavors.</p> <p data-bbox="391 905 894 932">Keep providing a quality, truthful education to all</p> <p data-bbox="391 1001 1192 1029">Keep the cost of achieving a Bachelor's degree within reach of the common student.</p> <p data-bbox="391 1092 1219 1119">Keep up with technology, social issues and things that are important to future students</p> <p data-bbox="391 1260 1357 1344">Making diversity, inclusion, and accessibility an ACTUAL priority. Wheel chair users can barely make it through half the buildings, students of color are still treated poorly but professor and peers with little done about it, and staff facing issues in the work place are shrugged off by administration</p> <p data-bbox="391 1404 1239 1432">More academic involvement in national organizations that support academic disciplines</p> <p data-bbox="391 1453 565 1480">More affordable</p> <p data-bbox="391 1501 751 1528">More athletic success; PhD programs.</p> <p data-bbox="391 1602 1362 1659">More campus activities, better advisors with more availability to meet with students. Get professors to post grades in a timely manner.</p> <p data-bbox="391 1694 1297 1751">More emphasis on work experience and support the " real world working "career professional Adjunct Faculty</p> <p data-bbox="391 1772 578 1799">More scholarships</p> <p data-bbox="391 1820 946 1848">More solid alumni network. Plug-ins for great internships.</p> <p data-bbox="391 1869 907 1896">Motivate more high school students to get into WSU!</p>

Stakeholder Group	Single Most Important Thing Responses
	<p>Needs to help alumni more with regards to career related planning and job searching</p> <hr/> <p>Play up the stories of successful former alums, especially if they are high profile people.</p> <hr/> <p>Programs that attract more diverse students</p> <hr/> <p>Providing space for those who do not identify as cis- white- middle class etc</p> <hr/> <p>Reward merit and don't do down the rabbit hole of social justice endeavors. WSC is a fine academic institution and prepared me very well for my career, stick to what you do best; Teach those who want to learn.</p> <hr/> <p>Stability at the top, too many leadership changes.</p> <hr/> <p>Stronger sense of pride amongst alumni</p> <hr/> <p>Student engagement in greater Springfield area</p> <hr/> <p>Student Scholarships</p> <hr/> <p>Student success</p> <hr/> <p>Urge all to be as good as they can be and have it continue to be quality and have WSU strive to be the best of its kind. It is not Ivy League and should not try to be so. It can and should be the best it can be given the need for a very fine educational institution.</p> <hr/> <p>Well, if you really desire to be noticed, start a Quidditch team. The championships are held in Central Park NYC in the Fall.</p> <hr/> <p>You must stop virtue signaling and embracing the principles of "equity" (anger, division based on race, lack of accountability, pain & suffering for all) and return to the principles of equality (truth, justice, peace & fair competition). If you do not, WSU's reputation & stature will collapse.</p>
Faculty	<p>Implementation of JEDI office and clear support of diverse students, faculty, and staff</p> <hr/> <p>A more inclusive and diverse atmosphere</p> <hr/> <p>Academic Affairs has lots of work to do on retention, having a willingness to stop investing in antiquated academic programs, and align academics to the local workforce needs in our region.</p> <hr/> <p>accessibility - affordable on-line education</p>

Stakeholder Group	Single Most Important Thing Responses
	<p>Accountability for administrative decisions</p> <hr/> <p>actually support a multicultural environment</p> <hr/> <p>becoming a community as a whole campus</p> <hr/> <p>better communication with most effected students, faculty and staff before a new decision is made</p> <hr/> <p>Build integrity</p> <hr/> <p>Change the culture of the campus— address past trauma — tell the absolute truth — bring all into the decisionm making process and get rid of people who hold us back. This means senior level administrators who have harmed the workforce and who do not operate with the core values expressed here!</p> <hr/> <p>Community partnerships (local and beyond)</p> <hr/> <p>Consistently empowering employees</p> <hr/> <p>Continue to invest in our students, programs and faculty. These are our greatest assets.</p> <hr/> <p>develop/maintain reasonably high standards for students so the value of our degree doesn't get watered down</p> <hr/> <p>Diversity</p> <hr/> <p>enrollment and building strong pipelines to be seen as the place to go</p> <hr/> <p>Enrollment and retention</p> <hr/> <p>Everyone stop saying, "that's the way we always do it here at WSU"</p> <hr/> <p>fill in faculty lines with new scholars from more diverse backgrounds - if students are not inspired in the classroom, they won't stay!</p> <hr/> <p>Fund, staff, and redevelop the Philosophy dept.</p> <hr/> <p>Given the realities of student numbers, much of these mission, vision, and values statements do not clearly align with the main drivers of decisions, which are based on enrollment, retention, and adjusting programs to shifting student needs. I am not sure whether a "Vision" is ever "accomplished" -- right now it seems the true Vision would be "have Westfield survive as an independent quarter-public institution of higher education."</p>

Stakeholder Group	Single Most Important Thing Responses
	<p>Have an overall positive engagement for students, staff, and faculty.</p> <hr/> <p>High levels of customer support - meaning student services-having a welcoming and helpful atmosphere in all areas.</p> <hr/> <p>Hire less admin and more faculty</p> <hr/> <p>hire more full time faculty lines</p> <hr/> <p>Honestly, I don't think we need to rise in terms of reputation and stature. We have a specific mission to provide a good quality education at an affordable price to the college students of Massachusetts. I think there are a couple of things we could do to improve WSU - deal with the problems of racism and have fewer administrators. In the years I have been at WSU, the number of administrators has grown incredibly - particularly because of the new college/university structure, but also because of the addition of many vice presidents. Yet, the number of total students at the university over the past 15 years has not grown. I also strongly believe that there needs to be significant work done by students, faculty, and admin (working together, not top-down) to eradicate racism and the kind of hate speech we all know exists.</p> <hr/> <p>I don't think reputation and stature should be our goals (I think service to the Commonwealth is more important)</p> <hr/> <p>Improve our marketing function. Many groups on campus do not use it for their programs and it is not clear that outside advertising is aligned with our proximal and distal goals. People outside the university need more awareness of our incredible value and students on campus need strong communications to grow their sense of belonging to the WSU community.</p> <hr/> <p>increase / maintain enrollment</p> <hr/> <p>Increase enrollment</p> <hr/> <p>lower the faculty course load</p> <hr/> <p>maintain our standards instead of dumbing them down in the face of the decreasing undergrad population</p> <hr/> <p>More diversified, residential students.</p> <hr/> <p>More knowledge needs to be given to the freshman students so they know how to access all tools available to them</p> <hr/> <p>more money</p> <hr/> <p>More transparency between administration and faculty/staff - this, in turn, will create a more cohesive community of people who care about this university and want to take it to the next level.</p> <hr/> <p>Open governance</p> <hr/> <p>prioritize teaching</p>

Stakeholder Group	Single Most Important Thing Responses
	<p>Prioritize undergraduate instruction</p> <hr/> <p>Provide more hands-on experiences (i.e. internships) during first/second year on campus</p> <hr/> <p>Reinforce image as excellent liberal arts education provider, not a medical trade school</p> <hr/> <p>Respect the realistic hiring / graduate school requirements of the commonwealth and region. It seems that our students are 'allowed' to graduate when their abilities, understanding, and knowledge is far lacking for meaningful employment or graduate school admission. Simply earning the very basics of basic isn't enough.</p> <hr/> <p>smaller class size, allow for more small seminar-style classes, wider range course offerings</p> <hr/> <p>Stabilize its operations and organization, there has been too much change and turnover recently for our campus to function properly</p> <hr/> <p>Stop fighting with each other. Have competent VPs (Enrollment and Admin & Finance leadership are NOT helping the current climate)</p> <hr/> <p>Strengthen student initiative</p> <hr/> <p>The Counseling Center needs urgent attention; allocate human resources that are culturally responsive and trained to support all students. Invest in hiring faculty and staff of color. old policies to add</p> <hr/> <p>To actually be culturally competent, not just competent with the cultures that are popular now</p> <hr/> <p>To assemble a stable, committed, professional administration instead of an endless cycle of transients whose grand plans outstrip their abilities, tenures and the fundamental needs of the institution.</p> <hr/> <p>To invest in and value liberal arts education</p> <hr/> <p>Transparency and trust between president/administration and faculty</p> <hr/> <p>Understand and incorporate perspectives of those who are not admin.</p> <hr/> <p>unsure</p> <hr/> <p>we need more permanent faculty</p> <hr/> <p>We need to develop a system where non-performing or under-performing faculty and staff are held accountable.</p> <hr/> <p>We need to stop empire building with the resulting bloated administration, and hire qualified, committed teachers. Then we can start meeting the key elements of the mission statement.</p>

Stakeholder Group	Single Most Important Thing Responses
	<p>Well first off, stop assuming there is only one thing that would put us over the hump. Getting to the next level is a combination of factors. From the faculty side of things, the university can provide more support for the things it asks us to do, better recognition when we do them well, and it can find ways to clear obstacles in our paths. With respect to support, the admissions and enrollment people tried to ask faculty to help with recruitment this past semester. Since I need the students to come here to justify my classes and my job, I have a vested interest in this and so I am happy to help on this front. But serving my existing students is my number 1 priority, and I don't have the time or the expertise required to help with recruitment. So when they asked us to email students that visited for Accepted Student Days, if they had a form ready for us to fill in and send out, that would have made it a lot easier. Or for the Accepted Student Days themselves, we were not given a whole lot of support in terms of what makes for an engaging day with students and parents. If the admissions folks want help with these critically important roles, then it would be awesome to have some support so it is easier for us to help in return. Simply dumping "create content for Accepted Student Days that are upcoming" in our laps a week or two in advance is a recipe for disaster. In terms of clearing obstacles, find ways to simplify or streamline the processes that faculty have to go through to try new things or gain new skills. Many faculty I have spoken with have said they apply for funding through the Grants Office to get professional development because the \$600 faculty funds we have available is too difficult to access. There are people here who are trying to do big things, great things, things that will engage students and bring more in. But the red tape they have to wade through is soul crushing and eventually saps their will to do these awesome things. And that is bad for all of us. Finally, the university really needs to find ways to promote itself better. For example, a cursory Google search revealed that CollegeAffordabilityGuide.org ranked WSU as the #1 most affordable college in MA. How is this not on every billboard between the NY border and Boston on the pike? Why do we not have a giant banner across the front of campus with that on it? Or maybe on the webpage – instead of seeing "thanks for sticking with us" as the first thing when I open our webpage, I could be reading "#1 RANKED SCHOOL IN MASSACHUSETTS FOR AFFORDABILITY, SO COME TO WSU WHERE YOUR DOLLAR GOES FARTHER!" or something equally cheesy but focused on that affordability thing. For goodness sakes, we should be raining leaflets onto high schools throughout the state with this written on it and flying it on a giant banner behind those little prop planes at every beach in New England this summer. It should be at every festival and show and...you get the picture. At a time when student debt is mounting and weighing down more young folks, the affordability angle is more important than ever. We have declining enrollment as the #1 ranked affordable school in the state. How we managed that is beyond me. In tougher economic times, people are supposed to shift to cheaper options, so we should be seeing a boost in enrollment not a decline. But we're seeing that decline instead, and I bet a chunk of that is because people don't realize WSU is as great of an option as it is. Promoting that better will be key moving forward.</p>
Foundation Board	<p>Improve its financial status to better support students, staff and faculty</p> <p>Improve its relationship with the surrounding community</p> <p>Prepare students for careers in finance. Does Fidelity or John Hancock recruit at Westfield?</p>
Staff	<p>Reevaluate it's priorities - are we serving all populations or one specific one.</p> <p>Address morale problems within it's staff and faculty membership.</p> <p>Attract students</p> <p>become more student centered</p> <p>Break down departmental silos and find ways to make departments/groups/staff/faculty/students work together</p> <p>Build a values-based culture</p> <p>build more of a campus community for the students - it still seems like a commuter school in some respects</p>

Stakeholder Group	Single Most Important Thing Responses
	<p data-bbox="391 296 1317 384">Clear communication from administration - we cannot continue operating in a way that allows incorrect information to be sent out to employees and students without proper corrections. It creates too much confusion, lowers involvement in extra activities, and weakens morale.</p> <p data-bbox="391 401 954 430">Commit to actively promoting and supporting social justice</p> <p data-bbox="391 516 831 546">Create an positive community for students</p> <p data-bbox="391 562 980 592">Decrease the power and control of the office of the Provost</p> <p data-bbox="391 606 979 636">documentation of student success during but after graduation</p> <p data-bbox="391 651 1321 707">Enhanced psychological and social support for the undergraduate students. They are all suffering irrespective of race, class, & sexual identity.</p> <p data-bbox="391 722 644 751">Focus on student retention</p> <p data-bbox="391 810 626 840">honest communication</p> <p data-bbox="391 940 1338 997">need more funding so that programs can be improved, faculty can be retained/hired, and facilities can be maintained/improved</p> <p data-bbox="391 1100 1360 1157">Programs need to cooperate with each other and stop competing. Science building should house ALL sciences and not business classes.</p> <p data-bbox="391 1325 1062 1354">recognize the demographics & focus more on non-traditional students</p> <p data-bbox="391 1518 1276 1575">Solidify a community that is engaged together to produce the highest quality experience for students</p> <p data-bbox="391 1696 894 1726">Student satisfaction. Support and welcome students.</p> <p data-bbox="391 1740 855 1770">support the programs that support our students</p>

Stakeholder Group	Single Most Important Thing Responses
	<p>The STUDENT needs to be the focal point of every decision that is made at the University, not the faculty and staff. Too many decisions on this campus are paralyzed by contracts that make faculty and staff more important than the well-being of the students...and the students know it and are furious about it.</p> <hr/> <p>The WSU community needs to engage with and support each other in all areas of campus.</p> <hr/> <hr/> <p>We have to figure out our "why". Why are we here? Why are we doing what we do? Once we figure out our "why", we then need to make sure that all departments and divisions build around the "why". We need a single vision for a period of time that everyone follows, even if they don't like it.</p> <hr/> <p>We need systems to ensure continuity of planning and assessment to move forward. Otherwise we spend a lot of time spinning our wheels.</p> <hr/> <p>We need to shift our priorities back to being community focused instead of self-serving. It's sad when we lose so many qualified faculty and staff because of inequities in pay, unfair treatment and self-serving behaviors. I have never seen us lose this much talent so quickly. We need to be a united and strong front and put those who are only looking out for their selfish interests on notice. Also, we have a lot of dead weight who need to be removed (both faculty and staff). If you are not committed to students, you should not be working in higher education.</p> <hr/> <p>Work with each other</p>
Student	<p>accessibility</p> <hr/> <p>Accountability at the staff level. Particularly, the student feedback forms at the end of the semester actually need to be utilized instead of just filed away. This will help make sure Westfield State has a reputation of good professors and keep the lousy ones away. Otherwise, students will keep using sites like RateMyProfessor.com to make course decisions.</p> <hr/> <p>Affordable cost for students</p> <hr/> <p>Athletics Boost</p> <hr/> <p>Being able to accept all points of view to come to a compromise between any ideology or opinions.</p> <hr/> <hr/> <p>better mental health resources</p> <hr/> <p>Better overall quality in terms of living and eating and communication between professors</p> <hr/> <p>Bringing the community together more</p> <hr/> <p>Care for the students and be fair to the students regarding financially, housing stuff and overall respect</p>

Stakeholder Group	Single Most Important Thing Responses
	Communicate between administrative departments
	Communicate with the students in more clear and concise terms about things they need to do, ie. housing selection process, it seemed a little jank this semester
	Community Building - Both on Campus and within the town/neighborhood towns
	Demystify Socialist and Communist theories (Marx, Engels, Lenin, Mao)
	don't keep secrets from students, be more transparent, we deserve to know what happens on our campus
	fund the clubs, collaborate with communities/programs OUTSIDE of westfield state
	Have actual punishment for people who sexually assault other students.
	Helping people to become successful
	High quality professors
	I Think it is great how it is
	Improve equity and diversity on campus
	Improving Student equity
	intersectionality
	LGBTQ+ advocacy and more easily accessible ways to alter your preferred name and pronouns in the school system such as email, PLATO, rosters, and ID cards
	Listen and put students first
	Listen to students when it comes to their departments and curriculum design
	Make building more accessible for people with physical disabilities
	making people feel heard and safe.
	More accommodating dining for those of different religions, listing of ingredients.
	More gender inclusive spaces like gender neutral bathrooms. You can't put up gender neutral bathroom signs in Wilson then take them down a week later
	More inclusive and equity community as the campus had many issues relating that
	More money to create better programs that students would actually be interested in participating in
	More online or night classes in core studies such (1 example is math)
	More than 1time slot per class
	N/A

Stakeholder Group	Single Most Important Thing Responses
	<p>Need more industry involvement in all areas. Not just career fairs but employers that actively seek out our graduates. Networking opportunities for students are not overly abundant here, when they do exist it's not with top firms.</p> <p>Needs to build a better sense of community and student morale</p> <p>Not sure</p> <p>Offer classes in the manner the institution advertised. I was told it's a university without walls, and it's anything but.</p> <p>Online course need to be offered in CRJU and SOCI more often to allow students to complete their degrees easier. Special arrangement courses are more expensive and often times are more confusing. When a degree is offered in complete online format it should be just that and not a circus of last minute arrangements and stressful dead end communications for students with advisors and other staff for months on end.</p> <p>PRICE AND REPUTATION</p> <p>Pride. Every school needs pride, you want the students to be proud about where they go to school and I believe that is the most important thing that Westfield State needs to go to rise to the next level.</p> <p>Prioritize students!!</p> <p>Professional development programs!! give students of all major these oppurtunities to grow their experiences and resume like the movement science department.</p> <p>Put students and student needs first</p> <p>Remind professors to recognize some students have accomodations</p> <p>Responsiveness to students</p> <p>Since this is my first year, I am not really sure.</p> <p>Something needs to be done about the alarming amount of racially biased incidents as well as suicides on campus.</p> <p>Staff and Administration that cares more about us, the students rather than the paycheck.</p> <p>Stop overpricing students. Housing, gym facilities, food, pantry, figure out student parking on campus.</p> <p>Taking racial equity and justice more seriously</p> <p>Talk about the positive aspects of the students</p> <p>The online degree programs courses need to be offered online and in a reasonable manner so that students trying to complete their degrees don't have to make special arrangements for classes that should be offered online which cost the students more money in the long run because it's the special Arrangement course when it should be offered online because it is a core major requirement</p>

Stakeholder Group	Single Most Important Thing Responses
	<p>To actually listen to the students who pay tens of thousands of dollars and make the appropriate changes and adjustments. I find that students are widely ignored and when we go to question or suggest fixes we are ignored and no one takes the time to listen because I doubt anyone even reads what we say</p> <p>Value other people</p> <p>vOv</p> <p>Westfield State University must move past the scandals of the [REDACTED—past presidents] Administrations and market itself as an affordance opportunity to receive a quality education that hones in on advanced research, writing, and public speaking as a means of graduating students with the best skills possible to be successful.</p> <p>With a declining traditional student body age, unique ways to get alternate enrollment is key. How will you appeal to the non high-school population to get more enrollment?</p>
Trustee	<p>Be a university of choice for science and innovative programs. Old school course offering is not working.</p> <p>continue to increase the number of educational programs at the university</p> <p>Demonstrate bold honesty in assessment of all departments</p> <p>Engage with the community and communicate all that WSU has to offer, broadening the reach of that messaging. Those most local to us may not appreciate all the university has to offer (students often overlook those schools closest to us); at the same time, drawing students from a wider geography will increase our diversity, our reputation, and our stature.</p> <p>Focus on core proficiencies</p> <p>Lower cost</p> <p>Respect and openness and humility</p>

PERFORMANCE METRIC DASHBOARD

AREAS OF FOCUS:



THE STUDENT EXPERIENCE

Definition: Access to a Fully Integrated and Exceptional Student Experience

Key Words: Student Success and Completion; Professional Development; Career readiness/preparedness; Lifelong learning; Community engagement; Critical thinking skills

Data Reporting Date:

Metric	Benchmark(s)	Status	Notes	Data Holder(s)
Avg. Seats Filled Per Class (overall, by school, by department)	98%	92.6% UG 86.68%		Registrar's Office
Retention Rate	80%	73%	Benchmark from Strategic Plan	Office of Institutional Research (from IPEDS)
4 yr. Graduation Rate	55%	53%	Benchmark from Strategic Plan	Office of Institutional Research (from IPEDS)
6 yr. Graduation Rate				
total	68%	63%	Benchmark from Strategic Plan	Office of Institutional Research
Career Success Metric(s)				
Working full time or in Graduate School	100%	84%		Career Center 2020 Postgrad Survey
Full-time employment	75%	73%		Career Center 2020 Postgrad Survey
Part-Time Employment	1%	5%		Career Center 2020 Postgrad Survey
Employed in careers related to major -	95%	85%		Career Center 2020 Postgrad Survey
Graduate School Success Metric				
In Graduate School	25%	17%		Career Center 2020 Postgrad Survey

ENROLLMENT

Definition: Prepare to recruit, welcome, and support students in an increasingly competitive environment

Key Words: Access, Affordability

Data Reporting Date:

Metric	Benchmark(s)	Status	Notes	Data Holder(s)
Overall Undergrad Day Enrollment	4900	3209	F22	Office of Institutional Research (from Common Data Set)
Overall Enrollment	1000	761	F22	
Overall Graduate Enrollment	1000	774	F22	
Percentage of Students from Diverse Backgrounds (Racial/Ethnic)	27%	26%	Benchmark from Strategic Plan	Office of Institutional Research (from IPEDS)
Enrollments from Outside Massachusetts				

F21 out of state first time deposits	15%	9.5%		Enrollment F21 Deposit Profile
F21 out of state transfer deposits	15%	11.4%		Enrollment F21 Deposit Profile
Undergrads with permanent residence outside MA	30%	9%	Fall 2021	Office of Institutional Research (HEIRS)
International Enrollments				
International Enrollment	10%	0.5% (18 students)	Nonresident alien fall 2021	Office of Institutional Research (HEIRS)
MSI/HSI Enrollment				
HSI Enrollment	25%	12% Hispanic	% of all UG and GR students Fall 2021	Office of Institutional Research (HEIRS)

CULTURE

Definition: Consistently live our Institutional Values

Key Words: Workforce Alignment and Outcomes, Diversity

Data Reporting Date:

Metric	Benchmark(s)	Status	Notes	Data Holder(s)
2020 National Survey of Student Engagement (NSSE) Results				
FY Student-Faculty Interaction	22.8	22.2	Benchmark- Carnegie Class	NSSE
FY Effective teaching Practices	38.2	37.9	Benchmark- Carnegie Class	NSSE
FY Quality of Interactions	43.0	40.7	Benchmark- Carnegie Class	NSSE
FY Supportive Environment	36.2	33.8	Benchmark- Carnegie Class	NSSE
Seniors- Higher Order Learning	40.6	38.2	Benchmark- Carnegie Class	NSSE
Seniors-Reflective & Integrative Learning	39.0	37.5	Benchmark- Carnegie Class	NSSE
Seniors- Learning Strategies	39.0	37.9	Benchmark- Carnegie Class	NSSE
Seniors- Quantitative Reasoning	30.0	30.0	Benchmark- Carnegie Class	NSSE
Seniors- Collaborative Learning	33.5	31.2	Benchmark- Carnegie Class	NSSE
Seniors- Discussions with Diverse Others	39.4	36.8	Benchmark- Carnegie Class	NSSE

RESOURCES

Definition: Expand the Institutional Resources

Key Words: Fiscal Stewardship

Data Reporting Date:

Metric	Benchmark(s)	Status	Notes	Data Holder(s)
Residential Occupancy Rate	89%	78%	Benchmark from Strategic Plan	Residential Life
Total Fundraising (Annual)	\$750,000	\$1,534,134	Benchmark from Strategic Plan	Advancement
Modified Composite Financial Index (CFI)	4.1	4.7	Adjusted FY 2021 (excludes GASBs, Foundation, HEERF) Benchmark from Strategic Plan	Finance
Grant Dollars Awarded	\$6,000,000	\$2,750,000		Office of Grants and Sponsored Programs

PERFORMANCE METRIC DASHBOARD- (IN PROGRESS)

AREAS OF FOCUS:



THE STUDENT EXPERIENCE

Definition: Access to a Fully Integrated and Exceptional Student Experience

Key Words: Student Success and Completion; Professional Development; Career readiness/preparedness; Lifelong learning; Community engagement; Critical thinking skills

Data Reporting Date:

Metric	Benchmark(s)	Status	Notes	Data Holder(s)
Yield for Student Accepting Admission Offer		<ul style="list-style-type: none"> 5394 Acceptances 921 Deposited (17.1%) 797 Enrolled (14.8%) 	First Year Students, F22	Office of Admissions
Yield for Student Accepting Admission Offer		<ul style="list-style-type: none"> 412 Acceptances 266 Deposited (64.6%) 213 Enrolled (51.7%) 	Transfer Students F22	Office of Admissions
Yield for Student Accepting Admission Offer Combined-F22		<ul style="list-style-type: none"> 5,806 Acceptances 1,187 Deposited (20.4%) 1,010 Enrolled (17.4%) 		Office of Admissions
FT Staff to Student Ratio				
FT Faculty to Student Ratio		1:21	As of fall 2021	Office of Institutional Research (from IPEDS)
Dismissal Rate		10.5%	AY 2021-2022	Registrar
6 Yr. Graduation Rate				
First year, Full Time		60%		Office of Institutional Research
First year, Part Time		14%		Office of Institutional Research
Not First year, Full Time		68%		Office of Institutional Research
Not First Year, Part Time		39%		Office of Institutional Research
Participation				
Participation in Student Clubs/Organizations				Student Affairs
Participation in Academic Support Services				Center for Student Success and Engagement
Participation in Non-Academic Support Services				Student Affairs

Programmatic Innovation (New Academic Programs, New Student Success Programs)				
Student Participation Rates in High Impact Practices (HIPs)		55% 33%	Two or more HIPs One HIP	NSSE Multi Year Report 2020
Career Success				
Participated in Field-Based Experiences		57%		Career Center 2020 Postgrad Survey
Obtained Employment less than 3 months after graduation		39%		Career Center 2020 Postgrad Survey
Salary Information for employed graduates		14.93% at \$45,000-\$49,999		Career Center 2020 Postgrad Survey
Both Employed and in Graduate School		7%		Career Center 2020 Postgrad Survey

ENROLLMENT

Definition: Prepare to recruit, welcome, and support students in an increasingly competitive environment

Key Words: Access, Affordability

Data Reporting Date:

Metric	Benchmark(s)	Status	Notes	Data Holder(s)
MSI/HSI Enrollment Progress				
Financial Aid Gap for High Needs Students	\$2500		Benchmark from Strategic Plan	Office of Financial Aid
Equity Agenda Enrollment Goal (TBD)	TBD	TBD		
MSI Enrollment		25% Minority	% of all UG and GR students Fall 2021	Office of Institutional Research (HEIRS)
Enrollments by Year/Class				
Marketing				
Percentage of Revenue Spent on Marketing		0.9%		Finance- Maria Feuerstein

CULTURE

Definition: Consistently live our Institutional Values

Key Words: Workforce Alignment and Outcomes, Diversity

Data Reporting Date:

Metric	Benchmark(s)	Status	Notes	Data Holder(s)
Faculty Turnover Rate				Human Resources
Staff Turnover Rate				Human Resources
Turnover Rate of Faculty/Staff from Diverse Backgrounds (Racial/Ethnic)				Human Resources
Select Campus Climate Survey Results (TBD)				Human Resources
Number of Community Building Events				
Faculty/Staff Awards				Office of Faculty Affairs/Human Resources
Faculty Professional Distinctions (Research, Teaching, Service to Professional Organizations)				Office of Faculty Affairs

RESOURCES

Definition: Expand the Institutional Resources

Key Words: Fiscal Stewardship

Data Reporting Date:

Metric	Benchmark(s)	Status	Notes	Data Holder(s)
Avg. Credit Hour Generated Per Full-Time Faculty				Office of Institutional Research

Enrollment as Percent of Annual Budgeted Enrollment		FY22 Budget- 3216 FY22 Actual- 3215 As % of Budgeted- 100% FY22 Budget vs. Actual % Change- 0%	Day Division	Finance
		FY22 Budget- 1361 FY22 Actual- 1368 As % of Budgeted- 101% FY22 Budget vs. Actual % Change- .5%	CGCE FTE Conversion	
Total Revenue as % Budgeted Revenue		FY22 Budget- \$112,261,799 FY22 Actual- \$125,477,835 As % of Budgeted- 112% FY22 Budget vs. Actual % Change- 11.8%	Total Unadjusted Revenue	Finance
Adjunct Expenses as % Prior Year Adjunct Expenses		FY21 Actual- \$3,004,577 FY22 Budget-2,482,705 FY22 Actual- 3,030,436 % Change from Prior Year- 1% As % of Budgeted- 122% FY22 Budget vs. Actual % Change- 22.1%	Day Division	Finance
Financial Aid Discount Rate		Enrollment will be presenting new discount rate methodology at the October Trustees meeting		Financial Aid
Alumni Giving (%)		1.87%	FY22	Advancement
Facilities Condition Index (FCI)			The state has contracted with Cannon Design to complete and update all State university FCIs. WSU has not been scheduled yet.	Facilities



Board of Trustees

October 12, 2022

MOTION

To amend the Westfield State University's Board of Trustees Bylaws **Article V.** by adding **Section 10.** to establish a standing committee to consider and recommend to the Board policies and actions regarding the Division of Justice, Equity, Diversity, and Inclusion activities. The proposed language of Section 10 is as follows:

Section 10. Justice, Equity, Diversity, and Inclusion (JEDI) Committee

- A. *Membership.* The justice, equity, diversity, and inclusion committee shall consist of at least three voting trustees.
- B. *Responsibilities.* See the Justice, Diversity, Equity & Inclusion Charter for a more detailed listing of responsibilities. The committee shall provide oversight to the University's strategic planning of activities, initiatives, and practices designed to enhance the campus climate and culture.

Robert A. Martin, Ph.D., Chair

Date

**WESTFIELD STATE UNIVERSITY
BOARD OF TRUSTEES
BYLAWS**

ARTICLE I.

Board Authority and Responsibilities

Section 1. Statutory Duties and Responsibilities. The governance of Westfield State University is vested in the board of trustees. As such, but subject to the provisions of the General Laws and regulations of the Commonwealth, the board may do the following:

- A. Periodically review the University's mission and purposes.
- B. Appoint the president, who shall be the University's chief executive officer, and set appropriate terms of employment, including but not limited to compensation.
- C. Support the president and annually assess his or her performance based on such goals and other criteria as the board may prescribe from time to time after consultation with the president.
- D. Review and approve the University's table of organization with specific attention to administrative positions such as Vice President and Dean. Determine broad policy guiding the appointment of all faculty members and employees, on the recommendation of the president, and consistent with its other policies and with any applicable collective bargaining agreements.
- E. Review and approve proposed changes in the University's academic programs and other major enterprises consistent with the University's mission, plans, and financial resources.
- F. Approve the annual budget and fees, regularly monitor the University's financial condition, establish policy and approve guidelines affecting all institutional assets, including investments and the physical plant.
- G. Encourage its members to contribute financially to the University's fund-raising goals, participate in strategies to secure sources of support, and authorize University officers to accept gifts or bequests subject to board policy and the regulations of the Commonwealth.
- H. Adopt bylaws, rules, and regulations for the governance of its members, officers, agents, and employees and require adherence to such rules.
- I. Determine the University's structure and major academic programs and services needed for the successful conduct of its mission and purposes.

- J. Grant diplomas and confer degrees based upon the recommendation of the president and faculty.
- K. Grant honorary degrees.
- L. Approve the naming of University buildings, facilities and spaces according to applicable policies and procedures.
- M. Serve actively as advocates for the University in appropriate matters of public policy in consultation with the president and with other responsible parties, as the board shall determine.
- N. Periodically assess its own performance in order to set an example for the University community and to seek ways to strengthen its effectiveness as a corporate body.
- O. Exercise such other authority as from time to time may be conferred upon the board in accordance and compliance with the applicable laws and regulations of the Commonwealth of Massachusetts.

Section 2. Trustee Duties and Responsibilities. Recognizing the significance of serving on the board of trustees of Westfield State University, each trustee is expected to adhere to the following principles:

- A. To remember that no individual board member has legal standing or authority to act on behalf of the board or the University except only as and to the extent authorized by the board. Only the full board as a corporate body is vested with such authority.
- B. To devote time to learn how the University's missions and multiple purposes are met and to understand the University's uniqueness, strengths, and needs.
- C. To become familiar with and committed to, and to abide by, the board's responsibilities and policies, as set forth in these bylaws and in applicable provisions of law, including the provisions of chapter 15A of the General Laws of Massachusetts.
- D. To accept and defend academic freedom and the practice of collaborative governance as fundamental characteristics of good University governance.
- E. To assist the board in its efforts to balance its responsibilities in serving its broad public trust with advocacy for the University's needs to fulfill its mission and purposes.

ARTICLE II.

Officers of the University

Section 1. President of the University. Subject to governing provisions of law, the president of the University shall be appointed by the board and shall serve at its pleasure. The president shall be the University's chief executive officer and the chief adviser to and executive agent of the board of trustees and shall, for those purposes, assume such responsibilities and exercise such authorities as the board shall from time to time confer on him or her. The president shall endeavor to attend the meetings of board committees and shall bring any matter before the board or any of its committees as may be required by these by laws or by any applicable policy or directive of the board or as he or she may deem appropriate.

Section 2. Other Officers. In consultation with the president, the board shall determine the number of vice presidents and the number of such other senior administrative officers necessary to efficiently and effectively manage and administer the University. All such vice presidents and senior administrative officers shall be hired by the president, be under the president's supervision and shall exercise such powers and duties as he or she may prescribe.

ARTICLE III.

Officers of the Board

Section 1. Election. At its regular meeting held in June of each year, the board shall elect a chair, vice chair and secretary, all of whom shall be voting trustees. The chair and vice chair shall have renewable one-year terms, but shall not serve more than three consecutive years.

Section 2. Chair. The chair of the board shall preside at all meetings of the board. He or she shall have the authority to perform the duties usually attached to the office, including establishing the time and place of all meetings and (but subject to the requirements of these bylaws) setting the agenda therefor and shall have such other authority and duties as are prescribed by these bylaws and from time to time by the board.

Section 3. Vice Chair. The vice chair of the board shall have the authority to perform the duties of the chair of the board in the event of the chair's absence or incapacity. The vice chair may have such other authority and duties as are prescribed by these bylaws and from time to time by the board.

Section 4. Secretary. The secretary shall be elected annually and shall ordinarily serve for at least two consecutive years but not more than three years. The secretary shall ensure that the board of trustees is acting in accordance with these bylaws, that bylaw amendments are promptly made as necessary, that the minutes of board and committee meetings are accurate, entered into the records of the University and promptly distributed to all trustees, that meetings are properly scheduled and noticed, and that board policy statements and other official records are properly maintained. The secretary shall perform

such other duties as are prescribed from time to time by the board and may be assisted in all duties by a staff member designated by the president at the request of the secretary.

ARTICLE IV.

Meetings of the Board of Trustees

Section 1. Board Meetings. Meetings of the board of trustees shall be held on the campus or any other place that the board may from time to time designate. All meetings of the board and its standing and special committees or subcommittees shall be noticed and conducted in accordance with the relevant General Laws of Massachusetts, including the state's open meeting law.

Section 2. Regular Meetings. There shall be five regular meetings of the board of trustees each year; one such meeting shall be held in June. Each meeting shall be held at such time, date and place as the board shall prescribe. At such meetings any business relating to the University may be discussed and transacted.

Section 3. Special Meetings. The chair of the board shall have the power to assemble the board at any time in special meetings. He or she shall also assemble the board in such meetings upon the written request of at least six members of the board. At a special meeting, the board shall deal with only the business that was stated in the call for and notice of the meeting.

Section 4. Notice of Meetings. Notice of the time, place and date (and, in the case of a special meeting, the purpose) of each meeting shall be served either personally, by e-mail or by mail not less than seven (7) nor more than thirty (30) days before the meeting upon each member of the board and upon the president. If mailed, such notice shall be directed to the trustee at his or her address as it appears in the records of the University unless he or she shall have filed with the secretary a written request that notices be mailed to the address designated in such request; unless he or she requests otherwise, notice shall be directed to the president at the University. A notice of every meeting shall be posted in accordance with the requirements of the state's open meeting law.

Section 5. Quorum. A simple majority of the voting members of the board then in office shall constitute a quorum for the transaction of board business. The trustees present at any meeting, if constituting less than a quorum, may adjourn any meeting until such quorum shall be present, but shall conduct no other business. All questions coming before the board of trustees shall be determined by a majority vote of those trustees voting on that issue. Voting by proxy is not permissible.

Section 6. Pro Tempore Chairman. If the Chair and Vice-chair are absent, the trustees present may elect a chair *pro tempore* to preside at the meeting.

Section 7. Remote Participation. In accordance with 940 CMR 29.10, the board may authorize remote participation in its meetings.

Section 8. Executive Sessions. Executive sessions of the board and its committees shall be convened and conducted in conformity with the state's open meeting law. In addition

to any person whose attendance may be permitted by law, the board and any of its committees may in any particular case or cases permit persons (including the president) who are not members of the board to attend all or any part of an executive session in order to give information or advice as deemed necessary or appropriate by the board or such committee. The topics and purposes of executive sessions shall be limited to those matters permitted by the state's open-meeting law.

Section 9. Rules of Procedure. Business before the board shall be conducted according to the latest edition of Robert's Rules of Order when not inconsistent with these bylaws or with any other rule or order of the board. The board should prescribe protocols governing the petitions of persons wishing to address the board and ensure their availability in a policy separate from these bylaws.

ARTICLE V.

Board Committees

Section 1. Standing Committees. The board shall establish certain standing committees as it wishes. It shall minimally have (1) an executive committee, (2) an academic and student affairs committee, (3) a finance and capital assets committee, (4) an audit committee, (5) a governance and nomination committee, and (6) an advancement and enrollment management committee. Each standing committee shall have a written description of its responsibilities.

Section 2. Appointment of Committee Members. The chair of the board of trustees, in consultation with the executive committee and president, shall appoint annually from among the voting members of the board the members and chairs of all committees, subject to the consent of the board of trustees. The board chair shall serve as an ex officio member of all committees, except the Audit Committee. Unless the board shall otherwise permit or require, a majority of the voting members of each committee shall constitute a quorum for the conduct of business.

Section 3. Notice of Meetings. Notice of each committee meeting shall be given to the members of the committee in such fashion as the committee shall from time to time prescribe and otherwise in accordance with the requirements of Article IV, Section 4, of these bylaws and applicable provisions of law.

Section 4. Executive Committee

- A. *Membership.* The executive committee shall consist of the board chair, the most recent past board chair, the board vice chair, and the board secretary. The chair of the board shall chair this committee. The executive committee shall convene when called by the chair, by any two members of the committee or, by the president and any single member of the committee. In the event of a permanent or temporary vacancy of the board vice chair, secretary, or past board chair, the chair of the board of trustees, in consultation with the executive committee and president, shall appoint a

replacement from among the other voting members of the board to fill that position until a replacement is elected to office or becomes available.

B. *Responsibilities.*

- 1) The executive committee shall exercise in emergencies all the authority of the board of trustees consistent with the policies of the board or with any action taken earlier by the board. The committee shall not preempt the board except in those emergency circumstances that do not permit the handling of a matter in the normally prescribed manner by the board and shall be required to secure the board's ratification of any actions taken at the board's next meeting. The executive committee shall have the authority to determine, in its sole discretion, whether an emergency exists for the purposes of this paragraph, and in any such case shall make a record of its decision and the reasons therefor. In the event of an emergency the executive committee may waive the meeting notice requirements of Article IV.
- 2) Unless the board shall otherwise direct, the executive committee shall act on behalf of the board and shall exercise all of its authorities during the period commencing upon the conclusion of the board's meeting in June of each year and ending upon the convening of the board's next regular meeting. The committee shall be required to secure at such meeting the board's ratification of any actions taken during such period.
- 3) A decision of the board to decline to ratify any act done by the executive committee under the authorities conferred on it by the preceding paragraphs shall have only prospective effect and shall not operate to impair or limit the effect of such act as and when taken and shall not operate to impair or limit the efficacy or effect of anything done or not done pursuant to or in reliance on such act prior to the date on which the board declines to ratify it.
- 4) The executive committee also shall have the responsibility to oversee the president's annual performance evaluation in accordance with the board's standing policies and procedures.
- 5) The executive committee shall provide general oversight of progress toward planning goals and other matters related to University long-range and facilities planning and otherwise advise the president and board chair.

Section 5. Academic and Student Affairs Committee

- A. *Membership.* The Academic and Student Affairs Committee shall consist of at least three voting trustees.

- B. *Responsibilities.* The Academic and Student Affairs Committee shall consider and recommend to the board policies and actions regarding the academic affairs of the University, including admission policies, new curricula (graduate and undergraduate), student records and research; student life, including intramural and varsity athletics, health services, housing, student activities, and student government; and shall advise the President on matters relating to academic and student affairs of the University.

Section 6. Finance and Capital Assets Committee

- A. *Membership.* The Finance and Capital Assets Committee shall consist of at least five voting trustees.
- B. *Responsibilities.* The Finance and Capital Assets Committee shall consider and recommend to the board policies and actions regarding the formulation of the University's operating budget and the establishment of student fees. The committee oversees the development and review of long-range plans as well as the University's capital budget. The committee shall also consider and recommend to the board policies and actions regarding capital planning, development, and security of the campus.

Section 7. Audit Committee

- A. *Membership.* The audit committee shall consist of at least three voting trustees; provided however, that no more than one committee member may also be a member of the *Finance and Capital Assets Committee*. In no case may a trustee serve on the committee for more than three consecutive years.
- B. *Responsibilities.* The committee shall oversee the University's financial practices and standards of fiscal conduct. The committee shall oversee all external financial audits, ensure compliance with legal and regulatory requirements, and monitor internal controls and risk management systems. The committee shall have the authority to ask any employee of the University to appear before it within the mandate of the committee, as well as the authority to engage independent counsel and any other professional advisors as may be necessary to carry out its duties, providing the board has approved the expenditure of funds for such engagements.

Section 8. Governance and Nomination Committee

- A. *Membership.* The governance and nomination committee shall consist of at least three voting trustees. Ordinarily, not more than two committee members shall be new in any given year, but in no case shall a trustee serve on the committee for more than five consecutive years.

- B. *Responsibilities.* The committee shall work with the board chair and the president to help the board function effectively, efficiently, and with integrity. Its responsibilities shall minimally include (1) nominating annually the board chair, vice chair, and secretary; (2) working with the board chair and president to nominate potential new trustees to the Governor according to procedures separate from these bylaws; (3) ensuring that a substantive orientation process is in place for all new board members; (4) overseeing, or determining with the board chair and president, the timing and process of periodic board self-assessment; (5) encouraging board members to participate periodically in in-service education opportunities; and (6) ensuring that the board adheres to its rules of conduct, including conflict-of-interest and disclosure policies, and that it otherwise maintains the highest levels of integrity in everything it does.

- C. *Review and Revisions of Policy and Bylaws.* Subject to the board's approval, the committee shall establish and periodically revise its policies and procedures consistent with each of the foregoing responsibilities and any others assigned to it by the board. It shall periodically review the adequacy of the board's bylaws. This committee shall first consider all recommendations for amendment of these bylaws. In sum, this committee is responsible for good governance especially those policies and practices affecting the performance of the governing board and its members in service to the University and to the public trust.

Section 9. Advancement and Enrollment Management Committee

- A. *Membership.* The advancement and enrollment management committee shall consist of at least three voting trustees.

- B. *Responsibilities.* The committee shall (1) provide oversight of university advancement and (2) facilitate board and board member participation in advancement. Committee responsibilities shall minimally include overseeing university advancement plans, goals and projects, monitoring progress toward meeting those goals, and advising the president on matters related to university advancement; considering and recommending fundraising policies and procedures; establishing a Memorandum of Understanding with the Westfield State University Foundation, Inc.; establishing goals for board member participation in charitable giving; and participating in identifying, cultivating, and approaching major donors. With regard to enrollment management, the committee shall (1) provide oversight to enrollment management strategies and plans, and (2) monitor key metrics to help track progress toward the stated goals. The committee shall set minimal standards for board participation toward assisting enrollment efforts.

Section 10. Justice, Equity, Diversity, and Inclusion (JEDI) Committee

- A. Membership.* The justice, equity, diversity, and inclusion committee shall consist of at least three voting trustees.
- B. Responsibilities.* See the Justice, Diversity, Equity & Inclusion Charter for a more detailed listing of responsibilities. The committee shall provide oversight to the University's strategic planning of activities, initiatives, and practices designed to enhance the campus climate and culture.

ARTICLE VI.

Indemnification

The board recognizes and acknowledges that the Commonwealth has undertaken to indemnify its members in the manner and to the extent set forth in chapter 15A, §22, of the General Laws, and that the Commonwealth has undertaken to indemnify the officers and employees of the University to the extent provided in General Law chapter 258, section 9. The board may secure a policy of directors' and officers' liability insurance in a manner consistent with law and in the best interests of the University.

ARTICLE VII.

Conflict of Interest and Annual Disclosure

All members of the board are state employees within the meaning of the state's ethics statute (chapter 268A of the General Laws). Violations of the statute may give rise to both civil and criminal penalties. Each member of the board is therefore expected to be familiar with the requirements of the ethics statute and to comply with them.

All trustees are advised to disclose to the board any actual or potential conflict of interest at the earliest practicable time and to take such other action in that regard as the law may require. Further, each trustee is advised to absent himself or herself from discussions of and to abstain from voting on any matters under consideration by the board of trustees or its committees if to do otherwise would constitute an actual or potential conflict of interest. The minutes of such meeting shall, as appropriate, reflect that a disclosure was made and that the trustee having an actual or potential conflict of interest absented himself or herself from discussions of and abstained from voting on the affected matter.

ARTICLE VIII.

Board Membership and Trustee Terms

The board is composed of 11 members who are appointed by the governor of the Commonwealth of Massachusetts. Each member is appointed for a five-year term, with the possibility of one additional term of five years. Each member of the board is required to take an oath to discharge faithfully, impartially, honestly, and to the best of his or her abilities the duties of a trustee.

The members of the board recognize and acknowledge that, by taking up their appointments as such, they have assumed an obligation, fiduciary in its nature, to conduct themselves, to exercise their authorities and to discharge their responsibilities for the benefit of the University and of those whom it serves and not for any other purpose. They also therefore recognize and acknowledge that it is both necessary and appropriate for all members of the board to be regular in their attendance at meetings of the board and at meetings of the committees on which they serve, to assume an equitable share of the responsibilities that fall to members of the board individually, to inform themselves concerning the University's mission and purpose and to commit themselves to promoting the University's success in its efforts to provide an excellent and accessible education to its students. Because the board's effectiveness as the governing body of the University depends on the commitment its members make to these principles, the board as a whole recognizes and acknowledges that it is itself responsible both for monitoring the manner and extent to which its members adhere to them and for bringing its concerns to the attention of any member whenever it judges him or her to have failed to have adhered to them fully or appropriately.

ARTICLE IX.

Amendments

At any meeting of the board that has been duly called, noticed and convened, these bylaws may be amended or repealed in whole or in part by the affirmative vote of at least two-thirds of the members of the board then in office. A draft of the proposed amendment shall be given to each member at least five days before a regular or special board meeting at which such vote is to be taken.

ADOPTED MARCH 25, 1981
AMENDED NOVEMBER 8, 1983
AMENDED JUNE 3, 1986
AMENDED SEPTEMBER 2, 1986
AMENDED MAY 7, 1990
AMENDED FEBRUARY 3, 1997
AMENDED DECEMBER 3, 1998
AMENDED DECEMBER 7, 2000
AMENDED JUNE 12, 2002
AMENDED APRIL 13, 2006
AMENDED OCTOBER 6, 2008
AMENDED FEBRUARY 9, 2012
AMENDED JUNE 26, 2014
AMENDED OCTOBER 8, 2014
AMENDED JUNE 25, 2015
AMENDED FEBRUARY 15, 2018
AMENDED DECEMBER 17, 2020
AMENDED OCTOBER 12, 2022



Board of Trustees

October 12, 2022

MOTION

To approve the expenditure of an additional \$4,000 in FY23 to procure an ambulance for the Sports Medicine and Human Performance Department from Specialty Vehicles, Inc.

With approval from the Board of Trustees in April 2022 to purchase an ambulance for \$5,000, this will bring the total purchase price of the vehicle to \$9,000 in FY23.

Robert A. Martin, Ph.D., Chair

Date

Memo

To: Westfield State University Board of Trustees
From: Chris Perkins
Cc: Robert Rausch
Date: 10/3/2022
Re: Vehicle Acquisition – Ambulance (update)

- **Additional Funding source**
 - Academic Affairs equipment budget (14000-3110)
- **Identify the fiscal year in which the purchase would be made**
 - FY 2023
- **Reason/need for the additional funding**
 - Originally approved for \$5,000 requested to purchase an ambulance from Southwick Fire Department directly.
 - During their purchase from Specialty Vehicle, Inc., Southwick Fire Department traded and were credited more than the initial \$5,000.
 - Specialty Vehicle, Inc. had agreed to resell it to us at a new purchase amount of \$9,000.
 - We are requesting an additional \$4,000 in funding.
- **Consequences if the request were not to be approved**
 - Continue to outsource to services who can provide an ambulance for a few hours during class time.
 - Utilized Westfield Fire Department (pre-Pandemic)
 - Approx. \$500 per 4 hour class
 - only active with students for about 3 hours
 - Rotating students through, might see it for 45-60min each
 - Previously scheduled for 5 nights of ambulance overview and 3 other classes to conduct the IPHC Simulations



Specialty Vehicles, Inc.

18 Commerce Blvd.
Plainville, MA 02762

Phone # : (508) 699-0616
Fax # : (508) 699-0977

Bill To:

Westfield State University
577 Western Avenue
Westfield, MA 01085

INVOICE

9984

Date: 10/03/2022
Customer # : 1207
Customer PO # :
Sales Person: Mark Hooper

Ship To:

Westfield State University
577 Western Avenue
Westfield, MA 01085

New Vehicle:

VIN #	Year	Make	Model	Vehicle #	Manufacturer	Mileage
1FDXE4FP8ADA16609	2010	Ford	E450	L313310SD	Life Line	0

Price of Used Ambulance Sold "As Is".

\$9,000.00

SUBTOTAL: \$9,000.00
MPSS: \$0.00
SUBLET: \$0.00
FREIGHT: \$0.00
TAX: \$0.00

INVOICE TOTAL: \$9,000.00

Please remit payment to Specialty Vehicles Inc.



Board of Trustees

October 12, 2022

To approve the changes and accept the newly revised Student Travel Policy (4040), as presented.

Robert A. Martin, Ph.D., Chair

Date

Westfield State University

Policy concerning:

APPROVED: October 2010

Section Student Affairs

number 4040

page 1 of 1

REVIEWED: ~~December-October 20~~22~~14~~

STUDENT TRAVEL

PURPOSE

~~This policy provides the Westfield State University requirements and controls in connection with department sponsored and student sponsored travel; and, incorporates by reference, all applicable definitions, responsibilities, conditions, exceptions and travel forms included in the Westfield State University Student Travel Policy and Procedures Manual.~~

POLICY

- ~~• Authority and responsibility for approval and control of all Westfield State University department sponsored and student sponsored travel rests with the area Vice President or designee.~~
- ~~• While Westfield State University reserves the right to impose special requirements in any instance, the procedures and conditions set forth in the Westfield State University Student Travel Policy and Procedures Manual have application to all such student travel.~~
- ~~• Responsibility for observing the Westfield State University Student Travel Policy, requirements and controls rests with the student traveler.~~

REVIEW

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



STUDENT TRAVEL POLICY AND PROCEDURES MANUAL

Remove Procedures from Policy

An Education Leader and Innovator Since 1838

TABLE OF CONTENTS

<i>Description</i>	<i>Page</i>
SECTION I - Introduction and Definitions	
Introduction	4
Responsibility of Westfield State University	
General Responsibility of the Student Traveler	
Definitions	4
• Area Vice President	
• Host Department Head	
• Department-sponsored Travel	
• Domestic Travel	
• Employee	
• International Travel	
• MyWestfield	
• Receipt	
• Student	
• Student-sponsored Travel	
• University	
SECTION II- Policy	
Student Travel Policy	5
SECTION III - Procedures	
Specific Responsibilities	6-7
Student Traveler Responsibility	
Sponsoring Group Responsibility	
Host Department Head Responsibility	
Area Vice President Responsibility	
Travel Conditions	
Alcoholic Beverages	7
Chaperones	7
Conference/Workshop Registration	7
Contracts for Services	7-8
Defensive Driving Class	7-8
Deposit Forfeit	8
Emergency Notification	8
Immunization	8
Gratuities	8
Liability	8-9

Remove Procedures from Policy

TABLE OF CONTENTS

<i>Description</i>	<i>Page</i>
Travel Conditions (continued)	
Lodging.....	9
Meals.....	9-10
• Standard Meal Allowance Guidelines	
• Meal Allowance Rates	
Missed Connections.....	10
Modes of Transportation.....	10-12
• Air Travel	
• Ground Transportation	
o Personal Vehicles	
o University-Owned Vehicles	
o Leased/Rental Vehicles	
o Other Ground Transportation	
Solicitation.....	12
Travel Advance.....	12
Travel Reimbursement.....	12-14
Waiver.....	14
Exceptions	
Athletic Team Travel.....	14-15
Domestic Exchange.....	15
Education Abroad.....	15
Federal Grant Travel.....	16
Student Government Association (SGA) Travel.....	16

SECTION IV – Appendix

Travel Forms	
Appendix A Form: AUTHORIZATION TO PAY.....	17
Appendix B Form: BANNER REQUISITION/REQUEST TO PURCHASE.....	18
Appendix C Form: REQUEST TO TRAVEL for Employees & Grad Students under Stipend.....	19
Appendix D Form: STUDENT REQUEST TO TRAVEL.....	20
Appendix E Form: TRAVEL ADVANCE PAYMENT.....	21
Appendix F Form: TRAVEL REIMBURSEMENT.....	22
Appendix G Form: TRAVELER MEAL CERTIFICATION.....	23
Appendix H Form: W-9.....	24
Appendix I Form: WAIVER.....	25

SECTION I - Introduction and Definitions

Introduction

Responsibility of Westfield State University

Westfield State University is responsible for establishing travel management policies and procedures that provide support services for authorized travelers and, at the same time, maximize the cost savings for the University.

University Administrative Policy #0390 (updated February 2009) articulates the policy, guidelines and procedures in effect for all employees who travel on behalf of the University. This policy is intended to:

- Ensure compliance with state and federal regulations
- Establish guidelines for approval, control and accounting for employees who travel on University business.
- Ensure fairness for both the traveler and the University.

University departments, at their discretion, may impose more restrictive guidelines for budgetary and control reasons, but they may not be less restrictive than guidelines set forth by the University.

The Westfield State University Student Travel Policy and Procedures Manual defines the University's Student Travel Policy, procedures and the responsibilities of student travelers and guidelines for sponsoring groups, department support staff, host department heads and area vice presidents who provide support services for authorized student travelers.

General Responsibility of the Student Traveler

A student traveler on University business has the responsibility to act prudently and to only incur travel expenses, which are necessary, reasonable and appropriate as they relate to the purpose of the travel, for which documentation is required. Student travelers are required to obtain prior written approval for travel from the host Department Head or designee and may not authorize their own travel nor approve their own expense reimbursements. Student travelers are responsible for prompt submission of travel-related documents and accounting for any advances received or expenses incurred.

Definitions

As used in this document, the following words shall have the following meanings:

- **Area Vice President** – refers to a University officer or authorized designee.
- **Host Department Head** – refers to a University department supervisor or authorized designee.
- **Department-sponsored Travel** - is any student travel/trip offered by a University department that extends beyond University property.
- **Domestic Travel** - is any travel within the United States and its territories and possessions including Guam, Puerto Rico and the U.S. Virgin Islands.
- **Employee** - is any University employee, whether serving full or part-time, temporary or permanent, compensated or uncompensated.
- **International Travel** - is any travel outside the United States and its territories and possessions.
- **MyWestfield** – refers to the Westfield State University portal that allows members of the University community to communicate with one another.
- **Receipt** - refers to itemized proof of payment showing what was obtained, the date, and at what cost.
- **Student** - is any non-University employee enrolled at the University.
- **Student-sponsored Travel** - is any student travel/trip offered by a University recognized student organization that extends beyond University property.
- **University** - refers to Westfield State University.

SECTION II – Policy



Section: Student

Westfield State University

Number:

Policy concerning: Student Travel

Page:

APPROVED: _____

REVIEWED: _____

STUDENT TRAVEL POLICY

Purpose

This policy provides the Westfield State University requirements and controls in connection with Department-sponsored and Student-sponsored student travel; and, incorporates by reference, all applicable definitions, responsibilities, conditions, exceptions and travel forms included in the Westfield State University Student Travel Policy and Procedures Manual.

Policy

1. Authority and responsibility for approval and control of all Westfield State University Department-sponsored and Student-sponsored student travel rests with the area Vice President or authorized designee.
2. While Westfield State University reserves the right to impose special requirements in any instance, the procedures and conditions set forth in the Westfield State University Student Travel Policy and Procedures Manual have application to all such student travel.
3. Responsibility for observing the Westfield State University Student Travel Policy, requirements and controls rests with the student traveler.

Review

This policy shall be reviewed annually by the Vice President for Administration and Finance.

SECTION III - Procedures

Specific Responsibilities

Student Traveler Responsibility

- Students are expected to be aware of, and comply with, the University's Student Travel Policy, procedures and the responsibilities of student travelers as presented in the Westfield State University Student Travel Policy and Procedures Manual available online in MyWestfield on the Campus Life Tab in the Student Travel Channel and also from the Office of the Vice President of Student Affairs.
- Students are required to secure approval from the host Department Head prior to participating in any Department-sponsored or Student-sponsored travel.
- Students are expected to be aware of, and adhere to, travel departure times. Travelers who miss travel connections are personally liable for any costs, however incurred, in securing substitute transportation.
- Students are personally responsible for any injury or damage they cause to other persons or their property; and, the University and its agents assume no liability for any such damage or injury.
- Students are personally liable for any costs, however incurred, that are not included in the travel package as advertised.
- Students are responsible for returning any cash advance issued by the University in excess of substantiated expenses within fifteen (15) days after completion of their trip.
- Students are expected to behave responsibly.
- Students who violate standards of conduct set forth by University policy are subject to the procedures and sanctions of the University Student Conduct Code. Failure to comply with University policy, procedures, conditions and guidelines may subject a student to University judicial action.

Sponsoring Group Responsibility

Prior to the student travel departure date, a representative of student group sponsoring the travel opportunity shall meet with an employee designated by the host Department Head or designee to review the University's Student Travel Policy, procedures and the responsibilities of student travelers, and guidelines for sponsoring groups, department support staff, host department heads and area vice presidents who provide support services for authorized student travelers.

Host Department Head Responsibility

When a student travel request is submitted in compliance with University policy, it is the responsibility of the host Department Head to recommend the student request to the area Vice President for action.

Host Department Head guidelines:

- Forward a completed STUDENT REQUEST TO TRAVEL (Appendix E) with supporting documentation (i.e. conference/workshop agenda, registration form and travel itinerary) to the area Vice President.
- Incur the least expense to the University when a selection of rooms and rates are available and to take advantage of reduced rates by making reservations early and, to seek special rates such as the state government or university rate.
- Obtain the hotel's cancellation policy at the time of booking (hotel cancellation charges caused by failure to cancel guaranteed reservations are not reimbursable).
- Provide the University Finance Office with a University-assigned Vendor ID number or a completed W-9 form (Appendix I) to enable University payment to be made directly to the hotel.
- Initiate an online BANNER REQUISITION or a REQUEST TO PURCHASE (Appendix B) to encumber University funds where applicable.
 - When University funds are encumbered for student travel, the following are the appropriate Banner Pools and Object Codes to include on the requisition where applicable:
 - Pool EE (7120): Dept. Dues/Entry Fees (Conference Registration)

- Pool EE (7122): Daily Space Rental (Hotel/Lodging)
- Pool JJ (7418*): Food Service - Off Campus (Meals)
- Pool MM (7705*): Student Transportation – Airfare/Vehicle Rental/Parking/Taxi/Tolls/Mileage
*Indicates that a Contract for Services is necessary for requisitions valued at \$200.00 or more.
- The Vendor identified on the requisition will be the Student Traveler if the University is to reimburse a student. Similarly, the Vendor may be a hotel, a professional organization sponsoring a conference, a transportation provider or any other service provider, etc.
- Submit an AUTHORIZATION TO PAY (Appendix A) along with appropriate attachments documenting allowable expenses approved by the Department (i.e. original invoices or receipts).

Area Vice President Responsibility

The responsibility of the area Vice President is to review and act upon each student request to travel as recommended by a host Department Head.

Travel Conditions

Alcoholic Beverages

Alcohol shall not be permitted on buses or any other vehicle used in connection with Department-sponsored or Student-sponsored travel.

Chaperones

The University shall require at least one University employee to accompany any trip which in the judgment of the University requires the presence of a professional staff member. The chaperone's responsibility will be to assist student travelers to receive contracted services and to observe University-required conditions for student travel.

Conference/Workshop Registration

- On behalf of all approved payees, the host Department Head or designee shall provide the University Administration & Finance Office with the Vendor ID number pre-assigned by the University or a completed Form W-9 (Appendix I), or equal, to enable the University to process payment.
- Conference or workshop registration fees are reimbursable when pre-approved by the University.
- Fees for a guest, spouse, etc., as well as extra conference activities, i.e. tours and attractions, are not reimbursable.

Contract for Services

A written Contract for Services is required with vendors whenever a financial transaction is involved. Contracts shall contain specific information to include: performance terms; exact overall costs; hotel costs; transportation costs; departure and return dates; times and locations; number of spaces provided; name of hotel(s) and public transportation carrier(s); clear statement of refund policy; payment deadlines if applicable; the availability of complimentary spaces; a clear statement delineating routine or special expenses not included in the price of the trip. A copy of all contracts must be on file in the office of the host Department Head or designee. Any contract to which the University is party must be approved and signed by a University Vice President or designee having the authority to do so; no student, student group, advisor or other person not authorized to execute contracts in the name of the University may make any agreement on the University's behalf.

Defensive Driving Class

The University offers a Defensive Driving Class (DDC) free of charge to any University employee or student who registers for it. Successful completion of the DDC is required of all students who drive University-owned, leased or

rented vehicles. The Defensive Driver Class is presented by University Police Officers and it includes both classroom and hands-on training. Defensive Driving Classes are typically offered once or twice per month during the school year. To register or to learn more about the DDC, contact University Administrative Services (413-572-5209).

Deposit Forfeit

Individuals may forfeit deposits in the event that they cancel their participation in Department-sponsored or Student-sponsored travel and cannot find a replacement. All cancellation, refund and deposit policies shall be clearly stated in a contract or in some other document descriptive of the travel. A copy of the cancellation, refund, and deposit policy, which may vary from trip to trip, must be given to each participant prior to his/her initial deposit; and the participant is required to read and sign a copy of the cancellation, refund, and deposit policy.

Emergency Notification

Any University student in receipt of information relative to a student health and/or safety emergency shall immediately report it to the Westfield State University Department of Public Safety (413-572-5202).

Immunization

Immunization requirements are available online from the Centers for Disease Control and Prevention (CDC) at <http://www.cdc.gov/travel/travel.html>.

Gratuities

Gratuities (tips) shall be limited to twenty percent (20%). Examples of gratuities include (not all-inclusive) business meals, housekeeping service, luggage assistance, and bus driver, etc.

Liability

Commercial General Liability

The University maintains a Commercial General Liability Insurance policy, which provides liability coverage for employees, volunteers, agents and others while working for or on behalf of the University. The coverage can provide protection in cases involving bodily injury, property damage, and personal injury caused by the negligence of an insured while carrying out his or her duties. There are coverage exclusions where certain types of claims are not covered, e.g., discrimination, personal automobile, watercraft, etc. The coverage is afforded to individuals anywhere in the world. There is no restriction on where injuries or accidents may take place, as long as the suit is brought in the United States. To be covered by the University's policy, individuals on travel status must be working in official capacity at the time of an accident. The facts and nature of the suit will dictate whether coverage will apply.

General Liability

Neither the University nor any student organization assumes any financial or other responsibility for its or any other person's failure to provide, in whole or in part, any service or product in connection with any Department-sponsored or Student-sponsored travel; nor does any University or student organization assume any financial or other responsibility for the quality or any such service or product that it or any other person provides in connection with any such travel. In the case of all travel, the provision of any service or product and the quality or quantity of any such services are the sole responsibility of the travel agency, tour operator and other vendors of services and products. The University may in any particular case, but at its sole discretion, take such steps as it deems appropriate to secure such vendor's fulfillment of any obligations undertaken in connection with any Department-sponsored or Student-sponsored travel or to secure refunds from vendors with respect to services or products not provided or not properly provided, but the University assumes no obligation to take such steps and no liability in consequences of its doing so. The University assumes no obligation to make refunds to students in the event that any such travel is cancelled, postponed or altered.

Travel Agency

The travel agency or tour operator (if any) shall be required to carry adequate liability insurance and/or show proof of adequate liability coverage by insurance carriers authorized to do business in the Commonwealth.

Lodging

The host Department Head or designee and the student traveler are expected to incur the least expense to the University when a selection of rooms and rates are available.

- The Department Head or designee is expected to take advantage of reduced rates by making reservations early; and, should seek the special rate, such as government or university rate.
- The Department Head or designee shall provide the Administration & Finance Office with a Vendor ID number or a completed Form W-9 (Appendix I) for payments made directly to the hotel.
- The Department Head or designee should obtain the hotel's cancellation policy at the time of booking. Hotel cancellation charges caused by failure to cancel guaranteed reservations are not reimbursable.
- Student travelers may stay in a standard room, single room rate, at a non-luxury hotel.
- Student travelers should be aware of the hotel's late check-in procedures.
- Student travelers should request and record the hotel reservation number in case of billing disputes and to expedite the check-in process.
- When traveling to a conference, the University assumes student travelers will stay at the hosting hotel even if the rate exceeds a non-luxury hotel rate. If there is a choice of hosting hotels, travelers are expected to stay at the least expensive property. If the hosting hotel is unavailable, personal safety should be taken into consideration when making an alternate choice of lodging. Accommodations should be suitably located and meet reasonable standards for safety, cleanliness and comfort.
- When traveling with a guest and occupying a double room, the student traveler must indicate the single room rate on the AUTHORIZATION TO PAY (Appendix A). If there is a difference between the single and double room rate, the student traveler is responsible for the difference.
- Hotel amenities (i.e. laundry, phone calls, internet charges, in-room mini bar refreshments and snacks, in-room movies, room service, spa/fitness fees, etc.) are considered personal expenses and are not payable or reimbursable expenses.
- Hotel parking is reimbursable if the traveler is staying at the hotel or attending a pre-approved event.
- Hotel room upgrades are not reimbursable expenses. Student travelers may choose to upgrade a room, but the difference in the price of the standard single room rate and the upgrade is the student traveler's responsibility. Hotel room upgrades must be explained on the AUTHORIZATION TO PAY (Appendix A) when submitting a student request for reimbursement.
- Reasonable tips for luggage assistance and housekeeping service are allowed when itemized.
- Taxes on hotel bills are reimbursable.

Meals**Standard Meal Allowance Guidelines**

- Standard Meal Allowances are not applicable when meals are included as part of a registration or other general fee.
- Full Travel Status: Absent from home more than 24 hours. Persons shall be reimbursed as follows for meals when on full travel status (when absent from campus for more than 24 hours) as follows:
 - Travel begins:
 - Before 6:00 a.m. (entitled to a Breakfast, Lunch and Dinner reimbursement)
 - Between 6:00 a.m. & noon (entitled to a Lunch and Dinner reimbursement)
 - Between noon & 6:00 p.m. (entitled to a Dinner reimbursement)
 - Travel ends:
 - Between 6:00 a.m. & noon (entitled to a Breakfast reimbursement)
 - Between noon & 6:00 p.m. (entitled to a Breakfast and Lunch reimbursement)
 - After 6:00 p.m. (entitled to a Breakfast, Lunch, Dinner reimbursement)
- Partial Travel Status: Absent from home less than 24 hours:

- Travel begins: Two hours before working hrs (entitled to a Breakfast reimbursement)
- Travel ends: Two hours after working hours (entitled to a Dinner reimbursement)
- Meal Allowance Rates (covering actual meal expenses incurred including tips) will not exceed the following:
 - Breakfast \$ 8.00
 - Lunch \$12.00
 - Dinner \$20.00
 - A total per diem of \$40.00 is allowable for travel status of 24 hours or more.

Missed Connections

It is the responsibility of each student traveler to be aware of and adhere to departure times. Participants who miss travel connections are personally liable for any costs incurred in securing substitute transportation.

Modes of Transportation

Air Travel

The host Department Head or designee shall compare airline rates and take advantage of the lowest available pricing for the location and date of travel. Student travelers are expected to purchase the lowest-priced, coach airfare.

- The University will not reimburse upgrades to Business and First Class seating. Upgrading the class of airfare tickets is not an allowable expense reimbursement and therefore not permitted unless the traveler pays the incremental difference. Free upgrades are permitted but must be noted as such on the AUTHORIZATION TO PAY (Appendix A) for students and on the TRAVEL REIMBURSEMENT (Appendix G) for University employees and graduate students under stipend.
- The University will not reimburse tickets purchased with frequent flyer miles. Frequent flyer mileage programs should not influence the traveler's flight selection or routing.
- Since cancellation fees can be substantial once bookings are made, travelers are encouraged to book as far ahead of the departure date as possible once travel plans are firm. Making airline reservations twenty-one (21) days in advance and booking over a Saturday night can save up to seventy percent (70%). Saturday night stay over is encouraged when net savings exceeds seventy-five dollars (\$75) or more. Travelers must document the savings for a Saturday night stay over.
- If it is necessary to cancel a trip, the traveler should ask the issuing agency or airline about the terms and conditions that apply for future trips.
- Penalties imposed as a result of canceling a ticket or fees assessed for reissuing a non-refundable ticket are not allowable expense reimbursements, except in a case where a penalty is imposed as a result of canceling a ticket due to University business reasons and extenuating circumstances are documented in writing and approved by the University Administration & Finance Office.
- Lost or stolen airline tickets are not a reimbursable expense. Student travelers should contact the issuing travel agency or airline.

Ground Transportation

- Motor vehicles needed for University business use are acquired through purchase, lease, lease-purchase, state and federal surplus property sources and through donation. Vehicle acquisition must be recommended by a department head/director through the budgetary process and those which are approved must be procured in accordance with the University's Purchasing Policy.
 - Operators may only transport passengers traveling on University business.
 - Operators are subject to all state and municipal traffic laws and regulations and are personally responsible for traffic violation penalties. The University cannot reimburse the cost of fines for traffic or parking violations; any such fine incurred will be charged to the person to whom the vehicle was made available.
 - Vehicles may be used for University business only. Pleasure riding or use of vehicles for personal business is absolutely forbidden.
 - Vehicles may not be used for out-of-state travel without prior approval of the department head.
 - Misuse of a vehicle - The following are infractions of the University vehicle use policy:
 - Allowing an unauthorized person to operate the vehicle.

- Driving without a valid motor vehicle operator license of the appropriate class for use of vehicle.
 - Improper parking of the vehicle, which includes the parking of vehicles in tow zones, fire lanes and sidewalks on University property.
 - Reckless abuse of the vehicle which includes the use of the vehicle for a purpose it was not intended and the intentional physical abuse of the vehicle.
 - Use of a vehicle for any unauthorized purpose, including personal use.
 - Use of the vehicle in an unsafe or unlawful manner including but not limited to violation of state motor vehicle laws, failure to use and to ensure that all passengers use all available safety equipment and operating the vehicle while impaired.
- Personal Vehicles
 - The University assumes no liability for a student choosing to ride in a private vehicle to or from any off campus destination. Participants who travel in personal vehicles do so at their own risk.
 - The University does not provide insurance coverage for students operating a privately owned vehicle. The owner/driver is solely responsible for automobile insurance coverage. The owner/driver will be responsible for the deductible portion of the owner's/driver's collision coverage.
 - University-Owned Vehicles
 - A mileage log must be maintained for each University-owned vehicle, identifying the date and purpose of each trip and the beginning and ending odometer reading.
 - Accidents involving University-owned vehicles - Any accident in which a University-owned vehicle is involved must be reported immediately to the University Department of Public Safety.
 - Damage Claims to University Vehicles - Damage costs shall be paid from the department/trust fund budget to which the vehicle is assigned.
 - Insurance on University-owned vehicles - The University's fleet insurance policy is primary, i.e.; it provides full value liability and collision insurance. For accidents involving University-owned vehicles used for University business, the driver's personal automobile insurance becomes secondary coverage. The driver will not be responsible for any deductible while the University's primary insurance is in place. It is possible that the University's fleet policy limits could be exceeded in extraordinary cases. If a student is authorized to use a University-owned vehicle for business purposes and an accident occurs while the student is using the vehicle for personal business, the University's fleet policy will not provide coverage.
 - Operators must be employed by, or working on behalf of, the University and have a valid driver's license to be covered by the University's fleet insurance policy.
 - Reimbursement will be allowed for necessary expenses, such as charges for fuel, oil, garaging, parking fees, and toll charges.
 - Travelers may arrange for the use of a leased/rented vehicle through the host Department Head or designee. University van reservation information is available to University employees in MyWestfield on the Student Services Tab on the Campus Center Channel under Campus Center Contact Information at <http://www.wscnna.edu/prospective-students/campus-life/campus-center/campus-center-contact-information/>
 - Accidents involving leased or rental vehicles must be reported immediately to the University Department of Public Safety as well as the host Department Head or designee who arranged for the leased or rented vehicle.
 - Leased/Rental Vehicles
 - Damages to non-University vehicles caused by a University vehicle - Vehicle damage settlement claim costs are to be paid from the budget from which the vehicle was purchased or assigned.
 - Operators shall be at least 21 years of age, hold a valid driver's license, and have passed the University in-house certification program and comply with all of the rules, regulations and procedures of this program.
 - Operators shall only transport passengers traveling on University business.
 - Rental Insurance - The University requires the purchase of Collision Damage Waiver (CDW) insurance when renting a motor vehicle for University business. Vehicle insurance covered by the University lease or rental agreement is primary, i.e.; it is required to provide full value liability and collision insurance. For accidents involving leased or rented vehicles used for University business, the driver's personal automobile insurance becomes secondary coverage. The host department will be responsible for any deductible while the leased or rented vehicle's primary insurance is in place. It is

possible that the leased or rented vehicle insurance coverage limits could be exceeded in extraordinary cases. If a student is authorized to use a University-leased or rented vehicle for business purposes and an accident occurs while the student is using the vehicle for personal business, the leased or rented vehicle insurance policy will not provide coverage. The driver's personal automobile insurance would then be the primary coverage. The leased vehicle insurance policy becomes secondary coverage.

- **Other Ground Transportation**

Student travelers are expected to travel via the least expensive, most direct, and efficient means available. This includes taxis, limousines, transporter services, and rail service.

- Any mode of transportation that exceeds the costs of a customary taxi charge are allowed only when justified business reasons preclude the use of more economical mode of transportation.
- Limousine and transporter services are allowed as reimbursable expenses only if the cost is less than, or equal to, the cost of a customary taxi charge; and, receipts are available to document the expense.
- Rail service as an acceptable means of transportation when financial savings are achieved.
- Students traveling to the same destination should consider sharing transportation whenever possible.
- Taxi service is allowed as reimbursable expenses when receipts are submitted to document the expense.

Solicitation

No student may solicit or offer student trips (Department-sponsored or Student sponsored) as an independent representative of a travel agency or tour operator (see Westfield State University Administrative Policy #0500, Campus Sales and Solicitation Policy).

Travel Advance

- Prior to the date of departure, the host Department Head or designee may arrange for payment to the student traveler or Vendor in advance for the following expenses:
 - Prepayment or deposit for conference/workshop registration.
 - Airfare (only in cases where airfare is an allowable expense)
 - A one-night deposit for hotel accommodations
 - Seventy-five percent (75%) of the predetermined meal allowance, where allowable, for trips involving five (5) consecutive days or more.
- To receive advance payment for a University undergraduate student, an AUTHORIZATION TO PAY (Appendix A) must be completed and submitted with acceptable receipts or documentation.
- To receive advance payment for a University employee or graduate student under stipend, the TRAVEL ADVANCE PAYMENT (Appendix F) must be submitted with acceptable receipts or documentation.
- Student travelers must provide, in advance, conference information indicating whether meals are included with the registration costs and dates & times of departure and return, in order to calculate meal allowances. Reimbursements for student travel shall be consistent with Westfield State University Administrative Policy #0300 – Reimbursement of Personal & Petty Cash Funds.
- Student travelers are responsible for returning any cash advance issued by the University in excess of substantiated expenses within fifteen (15) days after completion of their trip.

Travel Reimbursement

- Student reimbursement where allowable occurs after the host Department Head or designee initiates a BANNER PURCHASE REQUISITION or submits a REQUEST TO PURCHASE (Appendix B) followed by submittal of an approved AUTHORIZATION TO PAY (Appendix A). Graduate students paid a stipend are considered employees under University travel guidelines and are therefore reimbursed upon the host Department Head or designee submittal of an approved REQUEST TO TRAVEL (Appendix D) followed by submittal of an approved TRAVEL REIMBURSEMENT (Appendix G).
- For meal reimbursement, when conference/workshop program documentation does not indicate that meals are included with the registration fee, the TRAVELER MEAL CERTIFICATION STATEMENT (Appendix H) must be

signed and submitted with the AUTHORIZATION TO PAY (Appendix A) and the TRAVEL REIMBURSEMENT (Appendix G).

- The Department Head or designee shall submit the completed AUTHORIZATION TO PAY (Appendix A) to reimburse an entitled student or the TRAVEL REIMBURSEMENT (Appendix G) to reimburse an entitled graduate student under stipend, to the Finance Office, within 45 calendar days from the end date of travel.
 - All reimbursable receipts claimed must be attached.
 - Reimbursement will only be made for original, itemized receipts. Photocopied receipts cannot be accepted. A credit card receipt listing the total cost cannot be accepted.
 - The AUTHORIZATION TO PAY (Appendix A) and the TRAVEL REIMBURSEMENT (Appendix G) which are expected to document only allowable reimbursement requests, must be submitted in U.S. Dollars with an explanation and translation of any international receipts and their conversions.
 - When calculating conversion rates, student travelers must use the currency rates that were in effect when the travel took place. Therefore, currency receipts should be saved and used for converting international currencies back to U.S. Dollars. By using a major credit card when traveling internationally, the conversion is cared for automatically.
 - International Amount x Exchange Rate = U.S. Dollars
 - U.S. Dollars x Exchange Rate = International Currency Amount
 - Rates may be obtained from the [O and A Currency Converter web site](#).
 - Travel reimbursement cannot be charged to any petty cash funds.
- Student travelers must repay any improper reimbursement received within fifteen (15) calendar days after receipt of a written notice from the University. A student who wishes to appeal the audit review finding should contact the Finance Office.
- U.S. Internal Revenue Service Requirements
 - To insure that reimbursements for travel do not become reportable taxable income to travelers, the following procedures are in effect:
 - Reimbursements and advances will be made for University business expenses only.
 - Travelers must provide original receipts when seeking reimbursement. Receipts must contain the dollar amount, time, use, and business purpose of expenses in a timely manner, not to exceed forty-five (45) days after the expenses are incurred.
 - Travelers must return any advance amount in excess of substantiated expenses within fifteen days after completion of the trip.

Summary of Reimbursable and Non-reimbursable Expenses

- Reimbursable Expenses (examples, not all-inclusive):
 - Airfare booked at lowest available coach fare
 - Conference registration fee
 - Ground transportation (taxi, bus, subway, airport shuttle, etc.)
 - Lodging in a standard room, single room rate, at a non-luxury hotel including all taxes
 - Meals while on travel status at current rates established by the University
 - Mileage where allowable will be reimbursed at the standard mileage rate established by the University. Print and attach a MapQuest direction page indicating destination and distance when submitting a mileage reimbursement request on the AUTHORIZATION TO PAY (Appendix A) or TRAVEL REIMBURSEMENT (Appendix G). Dates of travel and purpose must also be included. If mileage is submitted for numerous travel dates, a separate sheet may be attached for each trip.
 - Parking and tolls including airport and hotel parking
 - Reasonable tips (20%) for business meals, housekeeping service, luggage assistance, and taxi
 - Rental of a compact, economy, or mid-sized automobile or van
 - VISA fees for international travel
- Non-Reimbursable Expenses (examples, not all-inclusive):
 - Air travel life insurance; trip cancellation insurance
 - Airline stopover charges or additional rerouting of air flight made for personal convenience
 - Air-phone usage
 - Articles and/or cash stolen or lost
 - Car rental charge over the mid-sized rate unless directed by a specific physical or medical reason
 - Driver's license or renewal fees

- Fees for personal credit cards, fees or charges including liability insurance for lost card use by third parties.
- Gasoline and other operating expenses for personal vehicles
- Non-authorized traveler expenses i.e., spouse, children, guest, etc.
- Optional trip insurance
- Passport & passport photos
- Personal expenses i.e., laundry/dry cleaning, toiletries, salons/barbers, city tours, golf, country club dues, health and fitness fees, pet care, shoe shine, souvenirs, personal entertainment, baby-sitting, hotel in-room movies, mini-bar services, newspapers, personal phone calls, and damaged attaché or luggage.
- Traffic or parking violations and fines; court fees
- Transportation when not on travel status
- Unauthorized trips or entertainment

Waiver

The University reserves the right to require, as a condition of any student's participation in Department-sponsored or Student-sponsored travel, a University student (or a parent or guardian of a minor), to sign a WAIVER (Appendix J) of all claims against the University and its employees for liabilities that may arise out of such travel.

Exceptions

Athletic Team Travel

The following Athletics Department Policy is in effect to facilitate Athletic team travel.

- Varsity athletic teams travel to and return from contests (and practices as needed) in buses and/or vans.
- The Athletics Department charts buses annually through the University-approved bid process. Bids are received and evaluated by the departments of Athletics and Purchasing. Bids are evaluated by a number of written factors, price and safety being most important factors.
 - Policies and procedures established by the bus company must be followed.
 - Coaches traveling with their team are responsible for leaving the bus last and making sure it is clean.
- The Athletics Department leases and rents vans on an as-needed basis.
 - Athletics Department coaches are expected to drive all vans utilized for Athletic trips. The Department Head or designee may make an exception for student drivers who have successfully completed the University's Defensive Driver Course.
 - Drivers must be 21 years of age or older and possess a valid driver's license.
 - Drivers may not carry more than 12 people plus baggage in a 15-passenger van.
 - Drivers must obey all traffic laws including speed limits.
 - Passengers may not exceed the maximum capacity of any vehicle.
 - Seat belt use is required of all passengers at all times when the vehicle is moving.
 - Storage containers may not be fixed to the exterior of any vehicle and towing a trailer is prohibited.
 - Students may not drive on long distance trips between 12 midnight and 6:00 a.m.
 - Teams traveling long distance are not authorized to travel more than 13 hours without stopping overnight for at least eight hours.
- In every travel situation, the Department Head or designee shall be aware of and pre-approve all travel.
 - Safety is the primary concern when planning student-athlete travel/trips.
 - In the event of extreme adverse weather conditions, student-athlete travel will be postponed.
- Coaches travel with their team unless they are cleared by the Department Head or designee. Student athletes must travel with their teams, portal to portal.
- Alcoholic beverages are not allowed on any vehicle owned by, rented by, leased by, chartered by, in the custody of, or under the control of Westfield State at any time.
- Entry fees for away contests are paid in advance through the Banner Requisition procedure.

- For student-athlete lodging, the Athletics Department uses outside vendors to assist in locating amendable team hotels and motels. A rooming list is submitted in advance. Telephone and movie services are turned off in rooms so charges are not allowed. Coaches are required to submit an itinerary in advance to the Director or Associate Director of Athletics. Team rules are explained to each team by the coach when on overnight trips. These rules include a no guest policy and a curfew.
- Meal money is provided by the Athletics Department for student-athletes, coaches and athletic trainers traveling with teams.
 - For trips requiring one-half day of travel, \$7.00 per person is issued.
 - For trips that requiring one full day of travel, \$15 per person is issued (\$3.00 Breakfast, \$5.00 Lunch and \$7.00 Dinner).
 - A total per diem of \$20.00 a day, or more, is allowable for student-athletes traveling to participate in National Collegiate Athletic Association (NCAA) competition.
- For international travel, vendors are hired by the Athletics Department to book all travel outside of the continental United States for travel squads which include administrators, coaches, managers, student-athletes, and certified or student-athlete trainers as needed.

Domestic Exchange

- Student traveling on domestic exchange must receive appropriate University approval by their Department Head and the director of the Westfield State University International Programs Office prior to departing for domestic exchange.
- For all requirements and rules governing the Westfield State University domestic exchange, including the National Student Exchange Program, visit the Westfield State University [IPO website](#) and contact the [director of the Westfield State University International Programs Office](#).

Education Abroad

Student travelers must receive appropriate University approval by their Department Head or the director of the Westfield State University International Program Office and the area host Department Head/supervisor prior to traveling internationally.

- Student Passport and VISA expenses may or may not be allowable reimbursements. Students are advised to consult with their Academic Department Head or the director of the Westfield State University International Programs Office.
- For all requirements and rules governing the Westfield State University Education Abroad Program, visit the Westfield State University [IPO website](#) and contact the [director of the Westfield State University International Programs Office](#).

Federal Grant Travel

Here is a summary of U.S. Office of Management and Budget requirements for federal travel grant regulations. Source: Federal Grants Management Handbook, OMB CIRCULAR A-21 ([Ctrl+Click to follow link for complete federal travel grant regulations](#)) or go to <http://www.whitehouse.gov/omb/rewrite/circulars/a021/a021.html>.

- General
 - Travel costs are the expenses for transportation, lodging, subsistence, and related items incurred by employees who are in travel status on official business of the institution. Such costs may be charged on an actual basis, on a per diem or mileage basis in lieu of actual costs incurred, or on a combination of the two, provided the method used is applied to an entire trip and not to selected days of the trip, and results in charges, and is in accordance with institution's travel policy and practices consistently applied to institutional travel activities.
- Lodging and Subsistence
 - Costs incurred by employees and officers for travel, including costs of lodging, other subsistence, and incidental expenses, shall be considered reasonable and allowable only to the extent such costs do not

exceed charges normally allowed by the institution in its regular operations as a result of an institutional policy and the amounts claimed under sponsored agreements represent reasonable and allocable costs.

- **Commercial Air Travel**
 - Federal regulations prohibit the charging of business class or first class air travel to federally-sponsored projects. Federally-sponsored trips must utilize U.S. flag carriers at the lowest available rates. In a case where a U.S. flag domestic carrier is not available or if other than the lowest rates are charged, a letter or notation of justification must be included with the AUTHORIZATION TO PAY (Appendix A).
 - Airfare costs in excess of the lowest available commercial discount airfare, federal government contract airfare (where authorized and available), or customary standard (coach or equivalent) airfare, are unallowable except when such accommodations would:
 - require circuitous routing
 - require travel during unreasonable hours
 - excessively prolong travel
 - greatly increase the duration of the flight
 - result in increased costs that would offset transportation savings
 - offer accommodations not reasonably adequate for the medical needs of the traveler
 - Where an institution can reasonably demonstrate to the Sponsoring agency either the non-availability of discount airfare or government contract airfare for individual trips or, on an overall basis, that it is the institution's practice to make routine use of such airfare, specific determinations of non-availability will generally not be questioned by the government, unless a pattern of avoidance is detected. However, in order for airfare costs in excess of the customary commercial airfare to be allowable, e.g., use of first-class airfare, the institution must justify and document on a case-by-case basis the applicable condition(s) set forth above.
- **Air Travel by other than Commercial Carrier**
 - Costs of travel by institution-owned, leased, or chartered aircraft, as used in this paragraph, includes the cost of lease, charter, operation (including personnel costs), maintenance, depreciation, insurance, and other related costs. Costs of travel via institution-owned, leased, or chartered aircraft shall not exceed the cost of allowable commercial air travel, as provided for above.
- Federally-sponsored project travel must adhere to University travel guidelines unless the sponsor imposes greater restrictions.

Student Government Association (SGA) Travel

- SGA-recognized student clubs and organizations petition SGA for travel funding. SGA-recognized student clubs and organizations are eligible for one hundred percent (100%) of conference registration expenses, fifty percent (50%) of lodging expenses, and fifty percent (50%) of University van transportation expenses. Airfare and meals are not allowable expenses as per SGA By-Laws; however, the SGA Executive Council will act on airfare requests when funding for students attending academic conferences is available from non-SGA sources. This involves a reimbursement process outside of SGA Finance Bylaw practices.
- SGA Office professional staff members make all travel arrangements and process all payments for students traveling on behalf of SGA-recognized clubs and organizations. Most SGA-funded travel is prepaid.

SECTION IV – APPENDIX

APPENDIX A (Form) - AUTHORIZATION TO PAY

The AUTHORIZATION TO PAY is completed by the host Department Head or designee to authorize the University to payment a pre-approved expenditure. This form is available in the MyWestfield portal on the Employee Resource Tab in the Odyssey Channel under the Administration & Finance link (see Purchasing & Accounts Payable).

WESTFIELD STATE UNIVERSITY
AUTHORIZATION TO PAY

ACCOUNTS PAYABLE USE ONLY

DEPARTMENT: _____

DATE: _____

We hereby acknowledge we are in full receipt of the goods and services provided and you are hereby authorized to pay the following:

VENDOR NUMBER/NAME	PURCHASE ORDER NO.	VENDOR INVOICE NUMBER
A _____	P _____	_____
Name: _____		

Authorization and Approval for Payment Against a Purchase Order PURCHASE ORDER COMPLETE? YES NO

Approval: _____ DEPARTMENT HEAD/CHAIR SIGNATURE _____ DATE

VENDOR REMIT TO ADDRESS	CHART	FUND	ORG	ACCOUNT	PROGRAM	TOTAL
_____	W	_____	_____	_____	_____	\$ _____
	W	_____	_____	_____	_____	\$ _____
	W	_____	_____	_____	_____	\$ _____
	W	_____	_____	_____	_____	\$ _____
	W	_____	_____	_____	_____	\$ _____
	W	_____	_____	_____	_____	\$ _____
	W	_____	_____	_____	_____	\$ _____
LESS DISCOUNT -						\$ _____
NET AMOUNT						\$ _____
DESCRIPTION: _____	ACCOUNTS PAYABLE USE ONLY					ACCOUNTS PAYABLE USE ONLY
						1099: _____
						Invoice Date: _____
						Check Due Date: _____
						Handcheck No: _____
					Enclosures: _____	

IF PURCHASE ORDER IS NOT REFERENCED ABOVE THE FOLLOWING SIGNATURE IS REQUIRED.

Distribution: 1099 & 1099-NEC - Accounts Payable - First Congress - Revised February 2020

A PURCHASE ORDER IS REQUIRED FOR ALL PURCHASES/PAYMENTS OVER \$200.00

APPROVAL: _____
VICE PRESIDENT/PRESIDENT

_____ DATE

APPENDIX B (Form) - BANNER REQUISITION OR REQUEST TO PURCHASE

WESTFIELD STATE UNIVERSITY

REQUEST TO PURCHASE						RO	SUGGESTED VENDOR			
DEPARTMENT: _____						P.O. NUMBER	_____			
FUND(S) _____						P	_____			
<small>STATE FUND(S) _____</small>						Date Needed: _____				
<small>DATE: _____</small>						Date: _____				
<small>CONTACT: _____</small>						VENDOR TEL NO.: (____) - ____ - ____				
<small>VENDOR CODE</small>						A _____				
CHART	FUND	ORG	ACCOUNT	PROG.	TOTALS					
W										
W										
W										
W										
Total										
QUANTITY	UNIT	DESCRIPTION	FOB:	TERMS:	CONFIRMATION:	UNIT PRICE	TOTAL PRICE			
COMMENTS: _____						TOTAL _____				
FOR OFFICE USE ONLY				AUTHORIZATION AND APPROVAL			LEGEND			
CHECK ONE STATE AWARD PAR _____ LB _____ MHEC CONTRACTS _____ E & I CONTRACTS _____ BID NUMBER _____ NON-CONTRACT ITEM _____				MMARS ONLY: ORG# _____ S/ORG# _____ APPR# _____ SUB# _____ OBJ# _____ S/OBJ# _____ DOC TYPE _____ DOC# _____			Requisitioner _____ Date _____ Department Head _____ Date _____ President or Vice President _____ Date _____		WYTE - PURCHASING CANARY - MMARS PINK - RETAINED BY REQUESTOR	
				APPROVED <input type="checkbox"/> REJECTED <input type="checkbox"/>			02/10			
				APPROVED <input type="checkbox"/> REJECTED <input type="checkbox"/>						

The BANNER REQUISITION or a REQUEST TO PURCHASE is completed by the host Department Head or designee to encumber Department funds. The BANNER REQUISITION form is available in the MyWestfield portal on the Finance and Development Tab in the REQ's and PO's Channel under Create a Requisition. The REQUEST TO PURCHASE form is available in the MyWestfield portal on the Employee Resource Tab in the Odyssey Channel under the Administration & Finance link under Purchasing & Accounts Payable.

Remove Procedures from Policy

APPENDIX C (Form) REQUEST TO TRAVEL for Employees & Grad Students Under Stipend

The REQUEST TO TRAVEL form is prepared by the University employee or graduate student under stipend who is seeking University approval to travel. This form is available to employees in the MyWestfield portal on the Employee Resource Tab in the Odyssey Channel under the Administration & Finance link (see Travel Forms).

WESTFIELD STATE UNIVERSITY
Request to Travel Form

Name: _____ Title: _____

Collective Bargaining Affiliation:
 AFSCME MSCA APA Non-Unit Professionals Non-Unit Classified Contracted Employee

Department: _____

Destination (City, State/Country): _____

University Vehicle Requested? Yes No Departure Date: _____ Return Date: _____

Purpose of Trip (including a detailed description of the specific benefit to the University):
(If attending a meeting, attach attached program/conference material showing schedule)

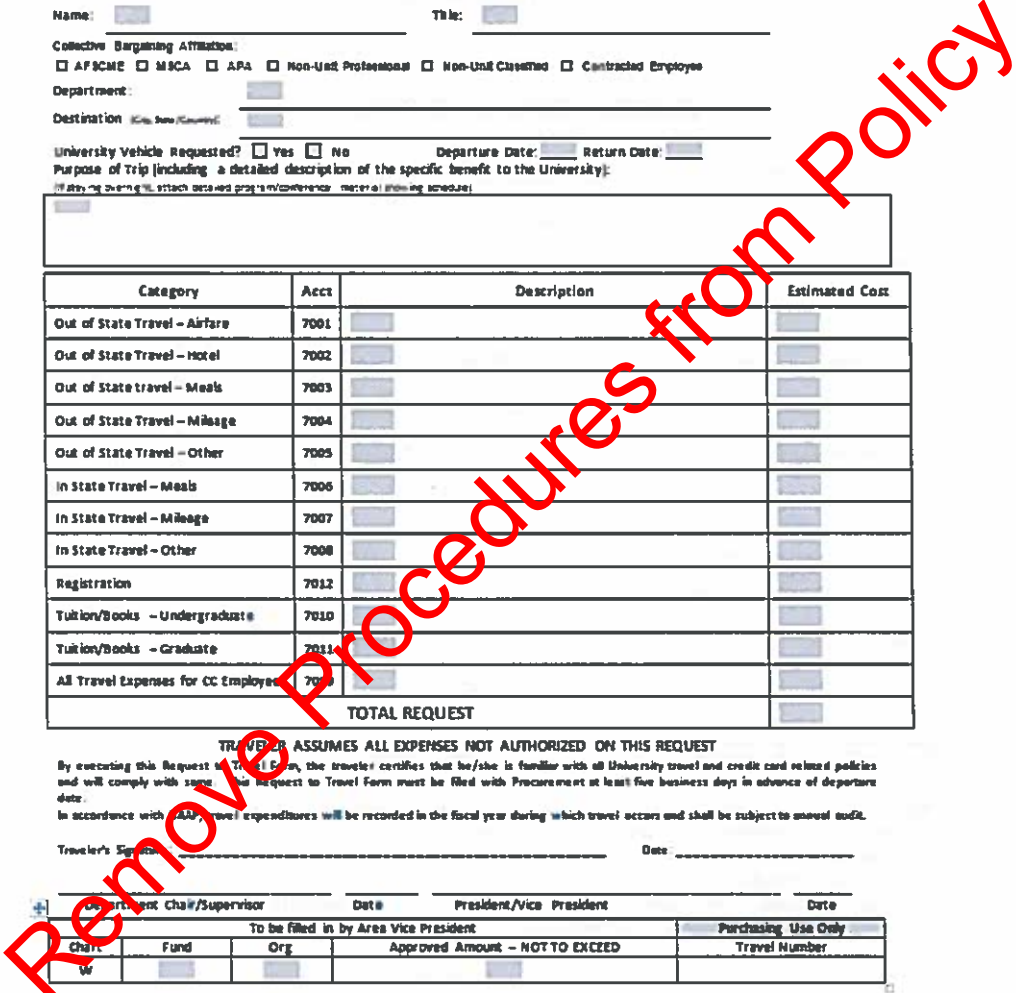
Category	Acct	Description	Estimated Cost
Out of State Travel - Airfare	7001		
Out of State Travel - Hotel	7002		
Out of State Travel - Meals	7003		
Out of State Travel - Mileage	7004		
Out of State Travel - Other	7005		
In State Travel - Meals	7006		
In State Travel - Mileage	7007		
In State Travel - Other	7008		
Registration	7012		
Tuition/Books - Undergraduate	7010		
Tuition/Books - Graduate	7011		
All Travel Expenses for CC Employees	7009		
TOTAL REQUEST			

TRAVELER ASSUMES ALL EXPENSES NOT AUTHORIZED ON THIS REQUEST
 By entering this Request to Travel Form, the traveler certifies that he/she is familiar with all University travel and credit card related policies and will comply with same. This Request to Travel Form must be filed with Procurement at least five business days in advance of departure date.
 In accordance with AAU, travel expenditures will be recorded in the fiscal year during which travel occurs and shall be subject to annual audit.

Traveler's Signature: _____ Date: _____

Department Chair/Supervisor		Date	President/Vice President		Date
To be filled in by Area Vice President					
Chart	Fund	Org	Approved Amount - NOT TO EXCEED		Purchasing Use Only Travel Number
W					

Revised 8/11/14*



APPENDIX D (Form) – STUDENT REQUEST TO TRAVEL

The STUDENT REQUEST TO TRAVEL form is initiated by the University student who is seeking University approval to travel. This form is available in MyWestfield on the Campus Life Tab in the Student Travel Channel (see Travel Forms).



Westfield
STATE UNIVERSITY
Founded 1838

STUDENT REQUEST TO TRAVEL

Form Use: To request student travel. (Use Request to Travel form for Graduate Student under depend)

Name of Sponsor (WSU Department or Student Group) _____

Name of Student Traveler (First, Middle, Last) _____

CWID# _____, SSN _____, DOB (M/D/Y) _____

Student Status Female, Male, Commuter, Resident Student, UG Student, Grad Student

Current Mailing Address of Student Traveler _____

Current Phone Number _____ Preferred E-Mail Address _____

Purpose of Travel (if staying overnight, attach detailed program/conference material showing schedule):

Use check (✓) to identify extent of travel: Within the U.S. A., International Travel

Destination: _____ Primary means of Transport: _____

Departure Date: _____ Return Date: _____

<u>Student Traveler Agreement</u>	<u>University Approval</u>
<p>I hereby request University approval to travel under the provisions of the Westfield State University Student Travel Policy. Furthermore, by affixing my signature below, I acknowledge all conditions and procedures published in the current Westfield State University Student Travel Policy and Procedures Manual and I accept all Student Traveler responsibility.</p> <p>_____ Signature of Student Traveler Date</p>	<p>This student travel request is appropriate as to purpose.</p> <p>_____ Signature of Dept Head or Designee Date</p> <p>This student request is approved.</p> <p>_____ Signature of Vice President or Designee Date</p>

An Education Leader and Innovator Since 1838

REMOVE PROCEDURES FROM POLICY

APPENDIX E (Form) – TRAVEL ADVANCE PAYMENT

The TRAVEL ADVANCE PAYMENT FORM is initiated by the host Department Head or designee to authorize a University payment for an allowable travel expense to be paid in advance for a University employee or graduate student under stipend. This form is available in the MyWestfield portal on the Employee Resource Tab in the Odyssey Channel under the Administration & Finance link (see Travel Forms).

**WESTFIELD STATE UNIVERSITY
TRAVEL ADVANCE PAYMENT FORM** I _____

NAME: _____ DEPARTMENT: _____ DATE: _____

VENDOR NUMBER/NAME	TRAVEL ENCUMBRANCE NO.	INVOICE NUMBER <small>Accounting Use Only</small>
VENDOR No. A _____ NAME: _____	E _____	_____

AUTHORIZATION AND APPROVAL FOR PAYMENT AGAINST A TRAVEL NUMBER

APPROVAL: _____

PAYMENT DUE DATE: _____	CHART	FUND	OFF. ACCOUNT	TOTAL
_____	W	_____	_____	\$ _____

COMPANY RETURN TO ADDRESS:	DESCRIPTION:
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Copy Description - When & Yellow - Account Payable - Post - Original

0513

Remove Procedures from Policy

STUDENT TRAVEL POLICY AND PROCEDURES MANUAL

APPENDIX F (Form) – TRAVEL REIMBURSEMENT

WESTFIELD STATE UNIVERSITY TRAVEL REIMBURSEMENT FORM

E # Banner Travel Number		A # Banner ID Number		I # Accounting Use Only						
Name:		CHART		FUND	ORG	ACCT	SCRIPTI	GROSS AMOUNT	LESS ADVANC	TOTAL DUE
Street:		DEPARTURE		Date:		Time:		7001	Airfare	
City, State & Zip:		RETURN		Date:		Time:		7002	Out of State Hotel	
AVING FRO	RETURNING TO							7003	Out of State Meals	
Ho <input type="checkbox"/>	Home <input type="checkbox"/>							7004	Out of State Mileage	
Vc <input type="checkbox"/>	Work <input type="checkbox"/>							7005	Out of State Other	
								7006	In State Meals	
								7007	In State Mileage	
								7008	In State Other	
								7009	Registration	
								7010	Tuition/Books U. Grad	
								7011	Tuition/Books - Grad	
								7059	All Travel - CC Employee	
TOTAL DUE									\$0.00	

MEALS				MILEAGE			OTHER EXPENSES		
DATE	REMARKS	AMOUNT	TOTAL	MILES	RATE	TOTAL	DESCRIPTION	TOTAL	
					0.56				
					0.56				
					0.56				
					0.56				
					0.56				
					0.56				
TOTAL			\$0.00	TOTAL		0.00	TOTAL		\$0.00

Please complete the following information if trip is covered under an in-state travel Request to Travel Form.
Please attach a copy of meeting agenda, proof of registration, conference attendance certificates, or applicable CEU/CPE certificates to this form.
In accordance with GAAP, travel expenditures will be recorded in the fiscal year during which the travel occurs and shall be subject to annual audit.

I recognize that each employee is responsible for reporting fraud, waste, and abuse.
I hereby certify under penalty of perjury that the above amounts as itemized are true and correct, were incurred by me during necessary travel in the service of the Commonwealth and conform fully with the Travel Regulations.

Traveler's Signature _____ Date _____

Supervisor's Signature _____ Date _____

The TRAVEL REIMBURSEMENT FORM is initiated by the host Department Head or designee for a University employee or graduate student under stipend who is seeking a travel reimbursement payment. This form is available in the MyWestfield portal on the Employee Resource Tab in the Odyssey Channel under the Administration & Finance link (see Travel Forms).

APPENDIX G (Form) – TRAVELER MEAL CERTIFICATION STATEMENT

The TRAVELER MEAL CERTIFICATION STATEMENT is initiated by the traveler attending a conference/workshop who intends to seek a meal allowance (where allowable) for meals not included as part of the registration fee. This form is available in MyWestfield on the Employee Resource Tab in the Odyssey Channel under the Administration & Finance link (see Travel Forms).

The Request To Travel Form Must Include:

- Location
- Start and End Dates
- Hotel Information, if applicable
- Registration, if applicable
- Transportation, if applicable
- Meals, if applicable

The traveler should attach to the *Request To Travel Form*, the official conference pages that are applicable to the above categories. Please do not send voluminous documents. One or two pages will satisfy the internal requirements.

¹Note: If conference documentation does not indicate that meals are included, the traveler could be entitled to a meal allowance. The following certification statement must be signed in order to receive the standard meal allowances.

TRAVELER MEAL CERTIFICATION STATEMENT FORM

I certify under the penalties of perjury that the conference I attended on [] (date),
In [] (place) did NOT include any meals as part of the registration fee.
Therefore, I am entitled to a meal allowance in accordance with the University's travel policy.

Traveler's Signature: _____ Date: _____

STUDENT TRAVEL POLICY AND PROCEDURES MANUAL

APPENDIX H (Form) – W-9

A completed Form W-9 (for a U.S. person) or a Form W-8 (for a foreign person) is required by the University Administration & Finance Office for purposes of IRS reporting whenever a Vendor ID number has not already been assigned to the payee by the University. These forms are available in the MyWestfield portal on the Employee Resource Tab in the Odyssey Channel under the Administration & Finance link (see Purchasing & Accounts Payable).

Form W-9
 (Miscellaneous Substitute W-9 Form)
 Rev. April 2009

Request for Taxpayer Identification Number and Certification

Complete form should be given to the requesting department or the department you are currently doing business with.

Please print or type

Name (Last, first name, if not names, first last & give the name of the person whose TIN you enter in Part II (see separate instruction on page 2))

Business name (if different from above (see separate instruction on page 2))

Check the appropriate box: Individual/Sole proprietor Corporation Partnership Other

Legal Address: number, street, apt. or suite no. Residence Address: if different from legal address, number, street, and apt. or suite no.

City, state and ZIP code City, state and ZIP code

Phone # () Fax # () Email address

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. For individuals, this is your Social Security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instruction on page 2. For other entities, it is your employer identification number (EIN). If you do not have a number, see How to get a TIN on page 2. Note: If the account is in more than one name, see the chart on page 2 for guidelines on whose number to enter.

Vendor: **DUNS**
 Dunn and Bradstreet Universal Numbering System (DUNS)

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding because of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
- I am an U.S. person (including an U.S. resident alien), and
- I am currently a Commonwealth of Massachusetts state employee: (check one) No Yes If yes, in compliance with the State Ethics Commission requirements.

Certification instructions: You must check box 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply.

Sign Here: Authorized Signatory Date

Purpose of Form
 A person who is required to file an information return with the IRS and (a) give your correct taxpayer identification number (TIN) to report, for example, income from your real estate transactions, or (b) report interest you paid, acquisition cost, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien) to give your correct TIN to the person requesting it (the requester) if it is applicable to:

- Certify the TIN you are giving is correct (or you are waiting for a number to be issued).
- Certify you are not subject to backup withholding.

If you are a foreign person, use the appropriate Form W-8. See Pub 515, Withholding of Tax on Nonresident Aliens and Foreign Corporations.

What is backup withholding? Persons making certain payments to you must withhold a designated percentage, currently 28% and pay to the IRS if such payments under certain conditions. This is called "backup withholding." Payments that may be subject to backup withholding include interest, dividends, broker and barter account transactions, rents, royalties, nonemployee pay, and certain payments from taxing authority operators. Real estate transactions are not subject to backup withholding.

If you give the requester your correct TIN, make the proper deductions, and report all your taxable interest and dividends on your tax return, payments you receive will not be subject to backup withholding. Payments you receive will be subject to backup withholding if:

- You do not furnish your TIN to the requester, or
- You do not certify your TIN when required (see the Part II instructions on page 2 for details), or
- The IRS tells the requester that you furnished an incorrect TIN, or
- The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends (any), or
- You do not certify to the requester that you are not subject to backup withholding under 4 above (for separate interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See the Part II instructions on page 2.

Penalties

Failure to furnish TIN. If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

Civil penalty for false information with respect to withholding. If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.

Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

Misuse of TINs. If the requester discloses or uses TINs in violation of Federal law, the requester may be subject to civil and criminal penalties.

PART 16-A W-9 (Rev. April 2009)

Remove Procedures from Policy

APPENDIX I (FORM) – WAIVER

The WAIVER form is to be completed by the student traveler and retained by host Department Head or designee. This form is available in MyWestfield on the Campus Life Tab in the Student Travel Channel (see Travel Forms).



Waiver

ACTIVITY _____ DATE _____

I, the undersigned, in consideration of the opportunity to participate in the University department, sponsored or student-sponsored ACTIVITY described above, do hereby release The Commonwealth of Massachusetts, the Massachusetts Board of Higher Education and Westfield State University, together with their agents, officers, employees, volunteers and representatives, from all liability claims, suits or actions for any loss, damage, injury to person or property, or death caused by the ordinary negligence resulting from, or arising out of, my participation in this ACTIVITY. Furthermore, I do not possess any health problems or physical limitations that I, or my doctor feel would result in my active participation or the safety of other participants.

Personal and Contact Information

Participant's Name _____ Birth Date: ____/____/____

Local Address Street/City/State/Zip: _____

Cell Phone: (____) _____ U.W.I.D. Number _____ Email _____

Emergency Contact Name: _____ Emergency Contact Phone #: (____) _____

I, the participant, understand and agree:

1. To follow safety and other instruction's provided by the staff in charge of the ACTIVITY.
2. To share in the responsibility for my own safety and not endanger other participants.
3. To immediately report all unsafe acts and dangerous conditions to the staff in charge.
4. To immediately report all injuries to the staff in charge.
5. To refrain from possession and/or use of alcohol or drugs during the ACTIVITY.
6. That participation in the ACTIVITY is voluntary.
7. That I have the physical capability reasonably necessary to engage in the ACTIVITY.
8. That in case of emergency, accident or illness, I give my permission to be treated by a professional medical person and admitted to a hospital if necessary.
9. To be the party responsible for all medical expense that is incurred on my behalf.
10. That the Commonwealth of Massachusetts permits Westfield State University to accept responsibility only for the acts of its officers, employees, and/or agents and that Westfield State University is prohibited from accepting any liability for the acts, omissions and conduct of other persons participating in the ACTIVITY.
11. That the participant shall indemnify, defend and hold harmless the State, Westfield State University, its officers, agents and employees from all claims, suits, or actions of any nature arising out of my participation in the ACTIVITY other than negligent acts of Westfield State University, its officers, employees, and/or agents.
12. That I am participating in the ACTIVITY at my own risk and that by signing below, I acknowledge that I understand this assumption of risk and agree to the conditions listed above.

Furthermore, I understand that all Westfield State University student conduct regulations and procedures are in effect,

Participant's Signature _____ Date _____

An Education Leader and Innovator Since 1838

Westfield State University

Policy concerning:

APPROVED:

Section: Student Affairs

Number: 4040

Page: Page 1 of 2

REVIEWED: October 2022

STUDENT TRAVEL

PURPOSE

To define the Westfield State University guidelines to be taken in connection with Department-sponsored and Student-sponsored travel.

POLICY

All travel by University students and advisors is to be funded according to the Commonwealth of Massachusetts (state) laws and regulations and University policies and procedures. The student traveler in addition to the student advisor(s) is responsible for ensuring adherence to applicable travel policies and procedures as outlined in the University Travel Policy (0390) and the Student Advisor Manual. All travel is contingent on available funds.

1. All travel funds will be allocated by the Vice President for Administration & Finance to the appropriate department cost center under the approval of the area Vice President on an annual basis. Departmental travel expenses and student travel expenses are limited to and shall not exceed the amount budgeted and allocated.
2. In determining the use of travel funds, departmental and administrative area supervisors and Vice Presidents shall consider the extent to which participating in the travel or activity requested will primarily benefit the University and the student.
3. Reimbursements for travel related expenses must follow all University policies and procedures, state laws and regulations, and the applicable collective bargaining agreements regardless of the source of funds. Travel procedures and forms can be found on myWestfield > Documents > Administration and Finance > Travel Information.
4. Prior to any travel, funds must be pre-approved and encumbered on a Request to Travel Form using the travel procedures.
5. The University shall not reimburse any expenses for persons accompanying an advisor or student on a trip (i.e. spouse, child, guest, pet, etc.).

Westfield State University

Policy concerning:

APPROVED:

Section: Student Affairs

Number: 4040

Page: Page 2 of 2

REVIEWED: October 2022

6. Student travel is restricted to students registered with the University and must be approved in advance by the President or a Vice President. Such travel must contribute directly to the student's education or benefit the University.
7. In accordance with the Massachusetts Conflict of Interest Law (G.L. c.268A), employees/advisors are prohibited from earning personal frequent flier miles, hotel rewards, and other rewards or points during state or university funded travel.

TRAVEL ARRANGEMENTS

All University travel shall be arranged through the Institutional Travel Manager to include, but not limited to airfare, hotels, car rentals and conference registrations.

NON-REIMBURSABLE EXPENSES

Expenses of a personal nature, unreasonable or excessive expenditures, and those not specifically related to the conduct of University business are not reimbursable. Types of expenses that will not be reimbursed include, but are not limited to:

1. Alcohol;
2. Excessive or extravagant costs (e.g. exclusive restaurants and hotels);
3. Personal entertainment;
4. Travel insurance;
5. Traffic, toll, or parking violations;
6. Insurance for a personally owned car;
7. Articles stolen from a personal or rental car; and
8. Briefcase and luggage purchases.

REVIEW

This policy will be reviewed every three years by the Vice President for Administration and Finance and/or the Dean of Students.



Board of Trustees

October 12, 2022

To approve the FY23 Operating Budget as presented and to authorize the President to make budget adjustments to these funds.

Robert A. Martin, Ph.D., Chair

Date

Westfield State University
Finance and Capital Assets Committee

FY23 Operating Budget
Summary of Changes from Provisional to Final Budget
October 12, 2022

Executive Summary

At the June 2022 Board of Trustees meeting, the University proposed a FY23 Provisional Budget to allow more time for better information on key metrics such as enrollment, occupancy, and meal plan participation as well as state appropriation. Following the Glide Path strategy, most of the projected deficit was reduced. The FY23 Provisional budget projected a remaining net deficit of \$1.06M, with a commitment to provide a “final” balanced budget at the October Board of Trustees. The focus of this document will be to explain updates on key revenue and expense changes and major variances from the FY23 Provisional Budget to the October Budget in order to approve the FY23 budget. Materials from FY23 Provisional budget are attached for reference.

The campus was able to present a balanced FY23 October Budget due to several key factors. First, the state received additional appropriation of \$641k and was able to realize a directly correlated fringe benefit reduction of \$251k. Second, the campus also reduced a payroll allowance of \$166k to cover projected funding gaps related to collective bargaining increases, as the state does not cover the full cost. While the campus is able to present a balanced budget, enrollment challenges continue to have a significant impact on revenue. Tuition and fee revenue declines were offset by higher than planned occupancy rates and dining plan participants.

Enrollment

Annual average enrollment in terms of billable students is anticipated to be 2,997, which is 218 students lower than the prior year budget of 3,215, a 7% decline. The campus utilizes an average annual enrollment by semester and factors in historical average declines from fall to spring to arrive at an annual projected total. Enrollment continues to be an ongoing concern, especially given the multi-year impact on lower fall enrollment. Overall, since the peak enrollment of 4,645 in FY17, day student enrollment has declined by 1,648 or 35% based on the FY23 revised budgeted enrollment.

Revenue

Revenue has increased from the FY23 Provisional Budget to the FY23 October budget by \$3.1M. Major changes are as follows:

- \$1.26M Additional State Appropriation due to state funding of FY23 CBA and additional unplanned appropriation as explained above.

- \$1.5M Residential Life & Dining revenue due to higher occupancy and meal plan participants. In a recent MSCBA residential hall market analysis of rental rates, WSU's average housing rate of \$8,300 was more competitive than the cost of off campus housing.
- \$990k Increase due to ARPA funding for Covid expenses and capital projects.
- (\$862k) decrease to Tuition & Fee Revenue driven by lower enrollment.

Expenses

Expenses have increased from the FY23 Provisional Budget to the FY23 October budget by \$3.2M. Major changes are as follows:

- \$1.29M of FEMA reimbursement Funds received in FY22 which are to be rolled over in FY23 to provide one-time funding to support marketing, recruitment, strategic initiatives, and innovation.
- \$1.0M Increase to Capital Projects which are being funded by ARPA funds.
- \$753k Increase to Dining Program Expenses driven by higher service level requirements and food costs related to additional meal plan participants.

Reserves

The overall campus use of reserves has increased from the provisional budget by \$1.1M mainly due to \$1.3M of FEMA reimbursement funds received in FY22 that will be utilized in FY23 to support marketing, recruitment, strategic and innovative initiatives. Actual reserve availability was also trued up based on year end activity with only minor changes. Despite the planned use of reserves, the year over year growth in cash reserves from FY22 is greater than the planned use of reserves requested for FY23.

Summary

Revenue growth through enrollment and alternative revenue sources continues to be one of the highest campus priorities as we continue to navigate a highly competitive landscape. The campus Glide Path Strategy was crucial for balancing the FY23 October Budget. However, the Glide Path Strategy relies on enrollment growth or alternative revenue streams to be successful. Enrollment continues to decline, having a multi-year compounding effect on revenue.

Several strategies have been employed to support revenue growth including the creation of the Innovation Fund and the use of FEMA reimbursement funds. However, return on investment is not expected to be immediate and may take some time.

It's imperative that the campus continue to collaborate and work as a community to achieve the permanent savings required to fully close the structural deficit while also working on increasing revenue through enrollment and alternative means. The campus will need to continue to focus on innovative approaches to enrollment, retention, branding and marketing, exploring alternative revenue generation.

Westfield State University
FY23 October Budget

	Year over Year Comparison			
	FY22 Final Budget	FY23 October Budget	\$-Fav / (Unfav)	% - Fav / (Unfav)
Revenue:				
State Appropriation	31,988,905	35,404,926	3,416,021	11%
Total Tuition/Fee Revenue	36,100,094	34,813,216	(1,286,878)	(4%)
Foundation	839,000	1,065,500	226,500	27%
Grant Revenue	1,535,937	1,678,737	142,800	9%
Other Revenue	2,645,783	2,869,509	223,726	8%
CGCE	12,024,757	12,140,783	116,026	1%
Residential Life	14,659,945	15,477,267	817,322	6%
Dining Services	8,799,412	9,303,938	504,526	6%
Covid Related Grants (HEERF / ARPA)	3,667,966	1,908,352	(1,759,614)	(48%)
Total Revenue	\$ 112,261,799	\$ 114,662,227	\$ 2,400,429	2%
Expense:				
Compensation	43,040,061	44,804,892	1,764,831	4%
Fringe	5,043,794	4,682,228	(361,566)	(7%)
Department Operations	14,542,147	15,205,475	663,328	5%
Strategic Investments	351,581	372,581	21,000	6%
Financial Aid	4,299,221	5,158,621	859,400	20%
Debt Service	2,099,258	1,481,315	(617,943)	(29%)
FEMA Reimbursement Funds		1,269,232	1,269,232	
Contingency	650,000	629,000	(21,000)	(3%)
Capital Investments	2,575,000	3,575,000	1,000,000	39%
CGCE	8,768,566	9,465,305	696,739	8%
Residential Life	16,270,859	17,635,468	1,364,609	8%
Dining Services	7,677,659	7,961,754	284,095	4%
Utilities	2,370,619	2,833,500	462,881	20%
All Other	4,610,169	5,825,116	1,214,946	26%
Covid Related Expenses	3,667,966	908,352	(2,759,614)	(75%)
UEAAC Savings	(1,886,114)	-	1,886,114	(100%)
Total Expense	\$ 114,080,785	\$ 121,807,837	\$ 7,727,052	7%
Unadjusted Net Profit/(Loss)	\$ (1,818,986)	\$ (7,145,609)	\$ (5,326,623)	293%
Revised Structural Deficit	\$ (2,883,584)			
Net Profit/(Loss)	\$ (4,702,570)	\$ (7,145,609)	\$ (5,326,623)	113%
Reserve Funding:				
Planned Use of Reserves	950,958	2,983,610	2,032,652	214%
Capital Rollover	868,028	1,511,196	643,168	74%
Total Use of Reserves	\$ 1,818,986	\$ 4,494,806	\$ 2,675,820	147%
Structural Deficit	\$ 2,883,584	2,650,803	(232,781)	(8%)
Adjusted Surplus/(Deficit)	-	\$ -	\$ -	

Westfield State University
FY23 October Budget

PLANNING ASSUMPTIONS:

	FY22 Final Budget	FY23 October Budget	\$-Fav / (Unfav)
Revenue Assumptions			
Billable Students	3,215	2,997	(218)
% Change YoY	-9.5%	-6.8%	
Housing Students	1,769	1,788	19
% Change YoY	32%	1%	
Occupancy Rate	73%	75%	
In-State Tuition and Fees Incr.	0%	3.4%	
General Fee Increase	-	322	322
Residential COA Incr. (weighted avg.)	3%	3%	
State Appropriation as % of Revenue	28%	31%	
Investment Earnings	\$ 325,000	\$ 115,000	\$ (210,000)
Operating Reserve / Contingency	\$ 650,000	\$ 1,898,232	\$ 1,248,232
Expense Assumptions			
Strategic Plan Funding	\$ 100,000	\$ 121,000	\$ 21,000
Financial Aid Increase	\$ 200,000	\$ 700,000	\$ 500,000
UEAAC Savings	\$ 1,700,000	\$ 1,400,000	\$ (300,000)
Overhead Contributions			
Dining Contribution	\$ 1,121,753	\$ 1,342,184	\$ 220,431
CGCE Contribution	\$ 3,256,191	\$ 2,750,478	\$ (505,713)
Net Results			
CGCE Surplus	-	-	-
Residential Housing Deficit	(1,610,914)	(2,158,201)	(547,287)
Dining Deficit	-	-	-

**Westfield State University
FY23 Detailed Budget by Trust Fund
OCTOBER BUDGET**

	Operating Budget	Innovation Fund	FEMA Reimb. Funds	ARPA Funding Covid	Grants	Capital Project Fund	CGCE	Residential Life	Dining Services	Other Trust Funds	FY23 Budget
Revenue											
Scholarship Allowance					(11,520,448)						(11,520,448)
Tuition and Fees	34,813,216						12,140,783			120,000	47,073,999
Federal Grants and Contracts				1,908,352	8,161,185						10,069,537
State Grants and Contracts					4,885,000						4,885,000
Private Grants and Contracts					153,000					-	153,000
Residence Fees								15,251,805			15,251,805
Dining Fees									9,303,938		9,303,938
FEMA Reimb.			-								-
Other Operating Revenues	594,502							185,462		929,175	1,709,139
Commissions	310,832							40,000			350,832
State General Appropriations	35,404,926										35,404,926
Foundation Support	1,065,500										1,065,500
Innovation Fund		800,000									800,000
Investment Income	115,000										115,000
Total Revenue	72,303,976	800,000	-	1,908,352	1,678,737	-	12,140,783	15,477,267	9,303,938	1,049,175	114,662,227
Expenses											
Personnel	44,804,892				309,500		3,596,931	2,194,132	2,274,990	54,166	53,234,611
Fringe Benefits	4,682,228				126,324		1,562,003	919,122	922,552	23,266	8,235,495
Operations	15,205,475				974,913		4,231,371	2,320,785	4,223,107	1,548,309	28,503,960
Strategic Investments	372,581										372,581
Utilities	2,833,500							1,952,470			4,785,970
Debt Payments	1,481,315								541,105		2,022,420
FEMA Reimb. Spending Plan			1,269,232								1,269,232
Operating Contingency	629,000									19,441	648,441
Capital Projects				1,000,000		4,086,196					5,086,196
Scholarships	5,158,621				268,000		75,000	89,395		40,000	5,631,016
Transfers	(311,506)				80,446	(2,575,000)	2,750,478	(1,286,603)	1,342,184		-
MSCBA Assessment								10,309,563			10,309,563
Innovation Fund Expenditures		800,000									800,000
ARPA Grant for Covid Expenses				908,352							908,352
Total Expense and transfers	74,856,105	800,000	1,269,232	1,908,352	1,759,183	1,511,196	12,215,783	16,498,865	9,303,938	1,685,182	121,807,836
Net Revenue over Expense	(2,552,129)	-	(1,269,232)	-	(80,446)	(1,511,196)	(75,000)	(1,021,598)	-	(636,007)	(7,145,609)
Planned Use of Reserves	922,925		1,269,232		80,446		75,000			636,007	2,983,610
Capital Rollover						1,511,196					1,511,196
Glide Path	2,650,803										2,650,803
Total Use of Reserves	3,573,728	-	1,269,232	-	80,446	1,511,196	75,000	-	-	636,007	7,145,609
Net Surplus/(Loss)	1,021,598	-	-	-	-	-	-	(1,021,598)	-	-	-

Notes:

1. Other Operating Revenues consist of parking, application fees, phone fee, non-credit program revenue and other miscellaneous fees
2. Transfers represent the movement of cash from one trust fund to another
3. Planned Use of Reserves may require minor adjustments following year end accounting validation
4. UEAAC Savings of \$1.4M is integrated into the Provisional Budget

Westfield State University
Finance and Capital Assets Committee

FY23 Provisional Operating Budget

June 22, 2022

OVERVIEW

The past few years have presented several challenges for our campus, and higher education in general, that have had a direct impact on the financial operations of the university. The impact of the Covid-19 pandemic still lingers but has improved significantly. The current enrollment climate is challenging due to the demographic impact, ability to increase retention and shifting demands for new programs and certificates. This has created a highly competitive higher education landscape not only in Western Massachusetts, but many parts of the country. Certain key economic factors such as inflation, supply chain issues, and a labor shortage have placed significant financial pressure on the campus, having the greatest impact on Facilities and Dining Operations who more heavily rely on labor and the delivery of goods/services. While the Dining Services program can scale more easily, Residential Life has a higher degree of fixed costs making it harder to scale the program.

The work of the UEAAC Committee saw progress in FY22, with the Academic Affairs Restructure plan complete, the Office of Strategic Finance and Institutional Planning established, integration of AIS and IT Operations, and the hiring of a JEDI Officer to name a few. Total savings of approximately \$1.4M has been fully integrated into the Provisional Budget Model. The campus is hoping to receive additional state appropriation of \$751k above what was budgeted in FY22 as well as appropriation to cover a majority of collective bargaining increases. FY21 and FY22 compensation and related appropriation are now included in the Provisional Budget. Final FY23 collective bargaining agreements (CBAs) and related appropriation funding will be included in the October Final Budget after increases are completed and the Commonwealth passes a FY23 budget this summer.

A critical element to partially closing the structural deficit is the Glide Path Strategy, which relies on a 50/50 split for a draw on use of cash reserves as well as the equivalent in campus budget reductions. The campus has held back funding on several vacant positions in order to partially meet its obligation for the Glide Path Strategy. To date, the campus has solved approximately \$1.6M. The structural deficit is currently projected at \$5.3M. The current projection indicates there would be an additional enrollment decline of 174 students, which is factored into the Provisional Budget. The most recent projection is based on a point in time data on registered students, transfers, and first year freshman deposits. It's important to note that the Glide Path Strategy relies on a multi-year improvement to enrollment, retention and other revenue gains in order to lower cash reserve draw downs in future years.

The Provisional Budget reflects that the campus has solved a portion of its structural deficit, in FY23, with \$1.0M remaining unsolved, based on more current enrollment data. This was accomplished by holding back funding from vacant position lines. Campus leadership will

undertake a further review of budget alternatives to bring the budget back into balance over the summer months.

PROVISIONAL BUDGET PLAN FY23

Developing a FY23 Provisional Budget was determined to be necessary since many key planning elements such as enrollment and state appropriation are still shifting and not certain. Furthermore, while it seems we are moving past the most difficult phases of the Covid-19 pandemic, enrollment still remains challenging and continues to decline. The glide path will allow the university more time to plan for and implement marketing, branding and offer new programs and educational opportunities.

- The FY23 Provisional Budget reflects a total remaining deficit of \$1.06M which is comprised of a \$0.04M operating deficit and a \$1.02M deficit in Residential Life following a campus transfer of \$1.9M to ensure proper MSCBA required reserve funding. UEAAC permanent reductions of \$1.4M (20% of the projected \$6.9M) have now been fully realized in order to close part of the structural deficit. Further UEAAC savings are unknown at this time.
- Enrollment continues to trend downward resulting in a continuation of a structural deficit. The campus is planning for enrollment of 3,073 billable students on a full year average basis, which is a reduction of 174 students from the April Planning Scenario of 3,250 and 142 students (or 4.4% fewer) from the FY22 Budget of 3,215. This will have a compounding affect as smaller cohorts of incoming classes progress toward graduation. The FY23 Provisional Budget Model reflects year over year net Tuition and Fee decline in revenue of \$.04M mainly due to significantly lower enrollment which is partially offset by an increase mandatory in-state tuition and fees of 3.2%.
- Federal Funding - HEERF II funds of \$2.8M are expected to convert to reserves (a combination of unspent HEERF funds and final HEERF payments in FY22). The campus is also anticipating \$1.6M of reimbursement for prior year Covid-19 related expenses through the FEMA program, an undertaking which took over a year of effort by several departments in Division of Administration and Finance. If the FEMA reimbursement is received in FY23, the campus will place those funds in a contingency account for utilization to be determined by the President. Federal funding will not offset the ongoing structural deficit as funds are considered one-time only whereas the structural deficit reflects the ongoing result of lower enrollment and increasing expenses over time.
- American Rescue Plan Act (ARPA) - State funding of \$3.5M is expected to be received by the campus as follows: FY23 \$1.9M to be utilized to offset Covid-19 related expenses and for maintenance projects, (which are the required uses of those funds by law) and \$1.6M in FY24 for same purposes.
- Financial challenges are significant in Residential Life and Dining Services, as expected, due to the overall enrollment impact. Occupancy is projected to be only 70%, with 1,690

students expected to live on campus, versus design occupancy of 2,397. Given that a majority of expenses in Residential Life are fixed in the form of MSCBA debt obligations, cost containment strategies are challenging for housing operations. Residential Life is currently projecting a total deficit of \$2.9M and will require an additional \$1.9M in funding from the campus operations in order to fully fund the projected loss and MSCBA required reserve balance, which is 5% of prior year expenses. Breakeven occupancy targets are estimated between 90% - 95%. The flat room pricing structure was implemented and is considered successful as housing prices on campus are now competitive with rental markets. If the campus cannot recover occupancy to its breakeven targets, strategies will be required to ensure financial stability and the campus will have to continue financially supporting the residential program.

- As of the timing of this writing, the campus made a decision to close Dickenson Hall this fall in order to achieve financial savings with regards to staffing by way of not filling vacant positions, and cleaning and utility costs. This decision was triggered by lower occupancy in residential students and does not affect returning students. A financial assessment of cost avoidance is being developed, but is not yet finalized.
- The President's Innovation Fund offered the campus an opportunity to submit ideas that support return on investment, cross-functional collaboration, and alignment to the campus mission statement. The Innovation Fund Work Group received 12 applications and was able to approve 4 of those applications. Return on Investment (ROI) has not been integrated into the Provisional Budget Model as the timing of decisions did not coincide with planning, however, ROI is expected to be integrated into the October Final Budget for those initiatives that anticipate ROI within FY23.
- Dining Services participation rates follow enrollment and occupancy levels. Currently, it is expected to contribute \$1.3M to the campus to support their overhead costs. All residential students are required to participate in one of several dining options. Unlike residential life, dining expenses are more variable and based on staffing and food costs which has experienced significant pressure due to high inflation and significant labor shortages. A stable level of staffing is required to properly service the projected residential population.
- The campus is anticipating approximately \$0.9M in COVID related expenses, such as the need for temporary staff, PPE, academic technology, COVID-19 testing, and sanitization supplies still remain necessary. The campus is expecting to utilize ARPA funding to offset covid related costs, which will result in a budget neutral impact to the Provisional Budget.
- CGCE has merged certain some administrative positions with the Day Division as part of the UEAAC recommendation, however, for planning purposes, the FY23 Provisional Budget assumes steady state in alignment with fiscal treatment as in previous years, since the merge of financials has not been completed. Revenue is expected to be relatively flat year over year at \$12.1M, which represents a minor increase of \$0.1M, mainly due to graduate

credits. It is assumed that CGCE will contribute \$2.78M to the campus, in support of overhead costs, which includes \$300k related to UEAAC savings on APRs.

FY23 BUDGET BALANCING STRATEGY

When factoring the most recent enrollment projection, the campus has only partially reduced the \$5.3M structural deficit, with \$1.06M remaining. Significant progress has been made, but the Cabinet will be evaluating potential strategies to balance the FY23 structural deficit over the summer months and heading into the fall. The structural deficit projection will be updated once more accurate enrollment and state appropriation amounts are known.

SUMMARY

The FY23 Provisional Budget was developed in order to support critical operations and opportunities, as several critical planning elements still remain uncertain. Key revenue indicators such as enrollment and state appropriation will be better known as we approach the fall, at which time the campus will develop a final budget in October. The campus continues to carefully evaluate the balance between affordability, enrollment, and strategic investments while striving to balance the budget, however, the sharp and continued declines in enrollment continue to present a significant financial challenge for the campus. The campus will continue to work toward meeting its obligation for the Glide Path strategy to close the structural deficit in the Final October FY23 budget.

MULTI-YEAR FINANCIAL FORECAST FY24-FY28 - UPDATE

In the spring, the campus began updating the multi-year financial forecast, FY24 – FY28, with key units across campus. The goal is to develop a longer-term financial plan to coincide with market conditions, academic program offerings, resource allocation and campus growth strategies.

There are several forecasting methods commonly used in multi-year financial planning: Straight line, which applies constant growth rates, moving average, which relies on patterns in financial results to predict future revenues and expenses, and bottoms up, which relies on analytically based financial and metric inputs. The Office of Strategic Finance and Institutional Planning has initiated the development of a bottoms up, analytically based multi-year financial forecast for the campus by integrating projections on key metrics such as inflation, enrollment, occupancy, and meal plan participation rates. SFIP also involved several units on campus to participate by providing operational business intelligence about key plans for future spending, debt service, and known escalations or savings on key budget line items. Several assumptions were also made based on reliable historical data and are subject to change.

The campus will be shifting its financial aid model to a discount rate strategy vs fixed budget strategy in order to remain competitive. A multi-year financial aid strategy is being developed by Enrollment Management to implement this new approach which will become a part of the Multi-Year Financial Forecast starting with FY24.

At the present time, the campus Financial Model is designed as a roll forward with the ability to develop a forecast through FY28 with several components being formula driven by metrics and related rates and other inputs being backed by analysis. To complete the multi-year forecast, the Academic Affairs Master Plan, return on investment from the Innovation Fund, financial outcomes from the President's Strategic Vision & Marketing plan, and more accurate enrollment counts on average billable students must be integrated. Once those key pieces of information are made available, the forecast will be updated and is expected to be finalized to coincide with the October Final Budget presentation. Campus goal will be to utilize a rolling multi-year forecast approach and integrate this process into the overall campus planning structure so that an updated forecast is developed annually.

Westfield State University
FY23 Provisional Budget

			FY23 Provisional Budget		Year-Over-Year Comparison	
	FY21 Budget	FY22 Budget	April	June - Final Recommended	\$-Fav / (Unfav)	%-Fav / (Unfav)
Revenue:						
State Appropriation	26,516,934	31,988,905	31,988,905	34,143,763	2,154,857	6.7%
Total Tuition/Fee Revenue	40,121,046	36,100,094	37,705,755	35,675,439	(424,655)	(1.2%)
Foundation	445,000	839,000	839,000	1,065,500	226,500	27.0%
Grant Revenue	1,591,550	1,535,937	1,535,937	1,678,737	142,800	9.3%
Other Revenue	2,721,655	2,645,783	1,883,064	2,652,447	6,665	0.3%
CGCE	11,809,587	12,024,757	12,140,783	12,140,783	116,026	1.0%
Residential Life	9,692,044	14,659,945	15,477,267	14,681,387	21,442	0.1%
Dining Services	5,197,401	8,799,412	7,967,013	8,550,425	(248,987)	(2.8%)
Covid Related Grants (HEERF & ARPA)		3,667,966	-	918,352	(2,749,614)	(75.0%)
Total Revenue	\$ 98,095,216	\$ 112,261,799	\$ 109,537,724	\$ 111,506,833	\$ (754,965)	(0.7%)
Expense:						
Compensation	42,004,728	43,040,061	44,165,017	44,317,517	(1,277,456)	(3.0%)
Fringe	6,618,501	5,043,794	5,742,796	5,041,369	2,425	0.0%
Department Operations	11,769,893	14,542,147	15,047,432	15,243,229	(701,082)	(4.8%)
Strategic Investments	370,685	351,581	451,581	372,581	(21,000)	(6.0%)
Financial Aid	3,820,771	4,299,221	5,088,621	5,153,715	(854,494)	(19.9%)
Debt Service	1,029,231	2,099,258	1,481,315	1,481,315	617,943	29.4%
Contingency	425,000	650,000	650,000	629,000	21,000	3.2%
Capital Investments	2,301,200	2,575,000	2,575,000	2,575,000	-	0.0%
CGCE	8,571,068	8,768,566	9,349,879	9,363,824	(595,258)	(6.8%)
Residential Life	12,144,594	16,270,859	17,528,733	17,635,468	(1,364,609)	(8.4%)
Dining Services	7,113,002	7,677,659	6,845,260	7,208,240	469,419	6.1%
Utilities	2,140,619	2,370,619	3,195,940	2,833,500	(462,881)	(19.5%)
Innovation Fund Expenditures		-	-	800,000	(800,000)	
All Other	4,646,036	4,610,169	4,979,665	4,982,744	(372,575)	(8.1%)
Covid Related Expenses		3,667,966	1,500,000	918,352	2,749,614	75.0%
UEAAC Savings		(1,886,114)	(1,353,920)	-	(1,886,114)	(100.0%)
Total Expense	\$ 102,955,329	\$ 114,080,785	\$ 117,247,318	\$ 118,555,854	\$ (4,475,069)	(3.9%)
Unadjusted Net Profit/(Loss)	\$ (4,860,113)	\$ (1,818,986)	\$ (7,709,594)	\$ (7,049,020)	\$ (5,230,034)	(287.5%)
Revised Structural Deficit		\$ (2,883,584)	\$ -	\$ -	\$ 2,883,584	100.0%
Net Profit/(Loss)	\$ (4,860,113)	\$ (4,702,570)	\$ (7,709,594)	\$ (7,049,020)	\$ (2,346,450)	(49.9%)
Reserve Funding:						
Planned Use of Reserves	3,205,745	950,958	1,450,958	1,801,047	(850,089)	(89.4%)
Capital Rollover	1,654,368	868,028	868,028	1,537,156	(669,128)	77.1%
Glide Path Strategy				2,650,803	(2,650,803)	
Total Use of Reserves	\$ 4,860,113	\$ 1,818,986	\$ 2,318,986	\$ 5,989,006	\$ (4,170,020)	(229.2%)
Temporary Structural Deficit Offset	\$ -	\$ 2,883,584	\$ -	\$ -	\$ (2,883,584)	(100.0%)
Adjusted Surplus/(Deficit)	-	-	(5,390,609)	(1,060,014)	(1,060,014)	(100.0%)

**Westfield State University
FY23 Provisional Budget**

	FY21 Budget	FY22 Final Budget	April	June - Final Recommended	YoY Change B/(W)
Revenue Assumptions					
Billable Students	3,552	3,215	3,250	3,073	142
% Change YoY	-15.9%	-9.5%	-5.6%	-4.4%	
Housing Students	1,338	1,769	1,788	1,690	79
% Change YoY	-43%	32%	1%	-5%	
Occupancy Rate	55%	73%	78%	70%	
In-State Tuition and Fees Incr.	3%	0%	3.2%	3.2%	3.2%
General Fee Increase	290	-	361	361	361
Residential COA Incr. (weighted avg.)	2.6%	2.6%	3.4%	3.4%	-0.8%
State Appropriation as % of Revenue	27%	28%	29%	31%	-3%
Investment Earnings	\$635k	\$325K	\$115K	\$115K	-\$210K
Operating Reserve / Contingency	\$425k	\$650K	\$650K	\$629K	-\$21K
Expense Assumptions					
Strategic Plan Funding 1-Time	\$107K	\$100k	\$100k	\$121K	\$21k
Financial Aid Increase	\$250k	\$200k	\$700k	\$700k	\$500k
UEAAC Savings	-	\$1.7M	\$1.3M	\$1.4M	-\$300k
Overhead Contributions					
Dining Contribution	-	\$1.1M	\$1.1M	\$1.3M	\$200k
CGCE Contribution	\$3.2M	\$3.2M	\$2.75M	\$2.78M	-\$420k
Net Results					
CGCE Surplus	-	-	\$41k	-	-
Residential Housing Deficit	\$879k	\$1.6M	\$2.0M	\$2.95M	-\$1.35M
Lansdowne Deficit	\$1.4M	\$100k	-	-	\$100k
Dining Deficit	\$513k	-	-	-	-

Notes:

1) A portion of the overall Utility expense increase is included in the Residential Life expense budget of \$1.8M. Campus wide, Utilities are expected to increase by 25.4% or \$1M.

Westfield State University
FY23 Detailed Budget by Trust Fund
Provisional Budget

	Operating Budget	Innovation Fund	ARPA Funding Covid	Grants	Capital Project Fund	CGCE	Residential Life	Dining Services	Other Trust Funds	FY23 Budget
Revenue										
Scholarship Allowance				(11,520,448)						(11,520,448)
Tuition and Fees	35,675,439					12,140,783			120,000	47,936,222
Federal Grants and Contracts			918,352	8,161,185						9,079,537
State Grants and Contracts				4,885,000						4,885,000
Private Grants and Contracts				153,000					-	153,000
Residence Fees							14,455,926			14,455,926
Dining Fees								8,550,425		8,550,425
Other Operating Revenues	599,548						185,462		699,175	1,484,184
Commissions	318,725						40,000			358,725
State General Appropriations	34,143,763									34,143,763
Foundation Support	1,065,500									1,065,500
Innovation Fund		800,000								800,000
Investment Income	115,000									115,000
Total Revenue	71,917,974	800,000	918,352	1,678,737	-	12,140,783	14,681,387	8,550,425	819,175	111,506,833
Expenses										
Personnel	44,317,517			309,500		3,578,268	2,194,132	2,116,117	54,166	52,569,700
Fringe Benefits	5,041,369			126,324		1,554,185	919,122	805,627	23,266	8,469,892
Operations	15,243,229			974,913		4,156,371	2,320,785	3,759,864	1,498,541	27,953,704
Strategic Investments	372,581									372,581
Utilities	2,833,500						1,952,470			4,785,970
Debt Payments	1,481,315							312,774		1,794,089
Operating Contingency	629,000							208,858	878	838,736
Capital Projects					4,112,156			-		4,112,156
Scholarships	5,153,715			268,000		75,000	89,395	5,000	40,000	5,631,110
Transfers	457,892			80,446	(2,575,000)	2,776,959	(2,082,482)	1,342,185		-
MSCBA Assessment							10,309,563			10,309,563
Innovation Fund Expenditures		800,000								800,000
ARPA Grant for Covid Expenses			918,352							918,352
Total Expense and transfers	75,530,117	800,000	918,352	1,759,183	1,537,156	12,140,783	15,702,986	8,550,425	1,616,851	118,555,853
Net Revenue over Expense	(3,612,143)	-	-	(80,446)	(1,537,156)	-	(1,021,598)	-	(797,676)	(7,049,020)
Planned Use of Reserves	922,925			80,446				-	797,676	1,801,047
Capital Rollover					1,537,156					1,537,156
Glide Path	2,650,803									2,650,803
Total Use of Reserves	3,573,728	-	-	80,446	1,537,156	-	-	-	797,676	5,989,006
Net Surplus/(Loss)	(38,416)	-	-	-	-	-	(1,021,598)	-	-	(1,060,014)

Notes:

1. Other Operating Revenues consist of parking, application fees, phone fee, non-credit program revenue and other miscellaneous fees
2. Transfers represent the movement of cash from one trust fund to another
3. Planned Use of Reserves may require minor adjustments following year end accounting validation
4. UEAAC Savings of \$1.4M is integrated into the Provisional Budget

Westfield State University
FY23 Undergraduate Enrollment Projection

6/21/2022

Comprehensive U/G Enrollment Data for Summer and Fall 2022

New Student Registration Projection	
First Year First Time	840
Transfers	210
Total New Students	1,050 a.

Returning Student Registration	Eligible	Projection - Registered	%
Seniors	827	717	87%
Juniors	679	680	100%
Sophomores	791	690	87%
First Years	136	159	
ReEnrolling		34	
Visiting		5	
Total Eligible/Registered	2,433	2,285	94%
Estimated Registered W/D's		(50)	
Holds to come back		70	
Total Registered		2,305	
2.5% Melt Rate		(58)	
Total U/G Registered Students	2,433	2,247	92% b.

Full Year Average Billable Student Calculation				
	Apply Spring	Average		
Fall Enrollment	Melt 9%	Billable	Less XRG	FYA Billable
a. + b.				
Total Undergraduate Billable Students	3,297	2,968	3,133	(60) 3,073

Provisional Budget Model

April Projection	3,247	Previous Enrollment Target
Revised Projection	3,073	Used in the Provisional Budget Model
Diff B/(W)	(174)	

Financial Impact of Revised Enrollment Projection

Tuition & Fees	\$ (2,004,953)	General Fee \$11,500/Student
Housing Operations	\$ (795,879)	55% of U/G student Count @ \$8,300
Total Additional Deficit	\$ (2,800,832)	

Note:

- 1) Dining Operations are projected to experience revenue declines of \$452,980, but will lower expenses to balance their budget.
- 2) The Enrollment Projection above was developed using a combination of known registration information and assumptions
- 3) A more accurate enrollment projection will be available closer to the fall at which time the October Final Budget will be updated

WESTFIELD STATE UNIVERSITY
Schedule of Annual Tuition and Fees
FY22 - FY23 Comparison
FY23 Approved - 2/17/2022
Updated 5.10.22 - SHIP Rate Finalized

	FY22 Approved	FY23 Approved	\$ Change	% Change
TUITION:				
√ Resident	970	970	0	0.0%
Proximity	1,455	1,455	0	0.0%
Non-Resident & Foreign	7,050	7,050	0	0.0%
MANDATORY FEES:				
Student Activity	123	162	39	31.7%
General Fee	9,216	9,538	322	3.5%
Capital Improvement Fee	100	100	0	0.0%
Technology Fee	730	730	0	0.0%
√ Total Mandatory Fees	10,169	10,530	361	3.6%
Total In-State Tuition/Fees	11,139	11,500	361	3.2%
ROOM RATES:				
√ Estimated and Adjusted Weighted Average Room Rate	8,068	8,300	232	2.9%
MEAL PLAN RATES:				
Unlimited Meal Plan	4,500	4,724	224	5.0%
On the Go Dining Plan	1,500	1,546	46	3.1%
Blue 15	4,300	4,516	216	5.0%
Gold 10	4,100	4,306	206	5.0%
Hoot 5	2,500	2,576	76	3.0%
Commuter 5	2,500	2,576	76	3.0%
Total Recommended Change in Mandatory Fees ⁽²⁾	23,707	24,524	817	3.4%
OTHER FEES:				
Study Abroad Fee	40	50	10	25.0%
Practical Exam, Equipment and Clinical Fee	140	240	100	71.4%
Student Teaching (practicum) Fee	250	250	0	0.0%
Nursing Fee ⁽¹⁾	1,794	1,794	0	0.0%
Late Registration Fee	25	25	0	0.0%
Late Payment Fee	100	100	0	0.0%
Bad Check Fee	25	25	0	0.0%
Reinstatement Fee	50	50	0	0.0%
ID Card Replacement Fee	40	40	0	0.0%
Parking	100	100	0	0.0%
Parking - CGCE	60	60	0	0.0%
WAIVABLE FEES:				
Student Health Insurance (see note below)	3,504	3,663	159	4.5%
Wellness Center	185	185	0	0.0%
Lifetime Owls (opt in fee)	75	75	0	0.0%

√ Average student annual change in fees is calculated using the gray shaded areas.

√ Student Health Insurance Plan rate decided 5.10.22. Plan changes were made to minimize increase in cost.

Note:

1. The Nursing Fee includes coverage for clinical requirements by healthcare facilities and payment for Assessment Technology Institutes (ATI).
2. Actual cost of attendance is determined by financial aid and may vary from the weighted average estimated cost of attendance.

	Deferred Maintenance	Funding Source				Total	Comment
		Campus	DCAMM	MSCBA	ARPA		
Physical Plant Projects							
1. Deferred Maintenance	Y	514,278	1,472,735	1,589,323		3,576,336	DCAMM Matching Funds
2. Infrastructure Repairs/Maintenance	Y	150,000				150,000	
3. MEP/F Master Plan Phase II	Y	200,000				200,000	Utilization Study
4. Emergency Equipment Failure	Y	150,000				150,000	
5. Critical repair contingency	Y	100,000				100,000	
6. Roof Tie Downs-Ely & Bates		50,000				50,000	
7. Opacity Monitoring System for Power Plant	Y	25,000				25,000	
8. University Fuel Pumps Controls System	Y	20,749				20,749	
9. Wilson Gender Inclusive Studies & Work		20,000				20,000	Part of multi-year commitment
10. Salt spreader for sidewalks		11,100				11,100	
Sub-total		1,241,127	1,472,735	1,589,323		4,303,185	
Information Technology							
1. Data Center Routers		332,000				332,000	End of Life
2. Faculty / Staff LifeCycle		200,000				200,000	Replacement Schedule
3. Classroom Technology		125,000				125,000	
4. Computer Lab Replacement		125,000				125,000	
5. VM Storage Switches		88,000				88,000	
6. ODA Patching		18,500				18,500	
7. Automic Automation Upgrade EOL		12,000				12,000	
8. Ellucian Experience		25,000				25,000	Banner System
Sub-total		925,500	-	-		925,500	
Other Projects							
1. Miscellaneous moves & studies		200,000				200,000	To fund DCAMM Studies
2. Furniture upgrades and equipment replacement	Y	23,000				23,000	
3. Fitness center upgrades	Y	48,282				48,282	Replace Equipment
4. Academic Space Upgrades	Y	137,091				137,091	Multiple programmatic projects
Sub-total		408,373	-	-		408,373	
Total		2,575,000	1,472,735	1,589,323		5,637,058	
Projects Funded via Rollover							
1. Rollover Facility Projects	Y	241,107				241,107	
2. Rollover for DCAMM Projects	Y	1,222,675				1,222,675	
3. Rollover for IT Projects		73,375				73,375	
4. Rollover for Dining Services						-	
Sub-total		1,537,156	-	-		1,537,156	
Grand Total		4,112,156	1,472,735	1,589,323		7,174,215	

Notes:

- 1) MSCBA Project may change as final decisions are made
- 2) The estimates noted above are construction estimates not project cost estimates. Once studies have been completed and bids received, total project costs will be determined.

Item	Type	Project	Estimated Construction Cost / Match	Description
1	F&O	Roof Tie Downs-Ely & Bates	50,000	Life safety issue. Currently as roof work, drain work etc is being completed, there are no tie off areas available. This is a code issues as well as a severe risk for falling off the roof.
2	F&O	Opacity Monitoring System for Power Plant	25,000	Mandated to run the steam system
3	F&O	University Fuel Pumps Controls System	20,749	Needed to be able to get fuel for the Facilities, Police and other University vehicles
4	F&O	Wilson Gender Inclusive Studies & Work	20,000	Students were told we would work on creating GI restrooms every year
5	F&O	Salt spreader for side walks	11,100	Need replacement for unrepairable spreader. This spreader does all the sidewalk on campus
6	F&O	Wilson Roof Replacement	50,000	Replacement of the roof on Wilson Hall. Roof Warranty expired in 2014.
7	F&O	Wilson Fire Systems	1,365,450	This is the second year of a 2 year project to install fire sprinkler system in Wilson Hall.
8	F&O	Ely Hall HW Storage Tank & Circulator Pumps	241,380	Replace the HVAC Pumps, Heat exchangers and Domestic Hot water storage tank in Ely.
9	F&O	Power Plant Deaerator & Condensate Rec Tank	303,415	Replace the Steam Deaerator and Condensate Receiver tank in the Power plant that services the University
10	F&O	Trades Roof	20,000	Replace the roof on the Trades building. The roof warranty expired in 2004
11	F&O	Ely Pool Repair	6,769	Repair the pool in Ely. Original project was to repair existing concrete, cleaning, treating and replacing rebar and cathodic protection and concrete coating. During that project further damage was found, we are currently working on defining the new scope of work needed for the repair.
Total Facilities Projects			2,113,863	

12	Non F&O	Data Center Routers (91357)	332,000	Data center router and components are 5 years past EOL - we have had one failure already. If these routers fail, we lose connectivity to 80% of the campus and the internet.
13	Non F&O	Miscellaneous Moves & Studies	200,000	Required for unforeseen and unbudgeted projects that require House Doctor studies and/or moves
14	Non F&O	Utilization Review	200,000	Phase II of the Master Plan Process.
15	Non F&O	Faculty Staff Lifecycle (91354)	200,000	Impact on delivery of education
16	Non F&O	Emergency HVAC Equipment Failure	150,000	Campus is required to fund all emergencies for HVAC building equipment failures.
17	Non F&O	Infrastructure Repairs/Maintenance	150,000	Required for unforeseen Infrastructure failures that risk occupancy of a buildings (e.g., steam lines, power grid, road repairs, etc.)
18	Non F&O	Classroom Technology Replacement (91355)	125,000	Impact on delivery of education
19	Non F&O	Computer Lab Replacement (91356)	125,000	There were zero dollars allocated to this last year and our labs are critical for student success
20	Non F&O	Contingency	100,000	Contingency for critical unfunded campus needs that may arise during the fiscal year
21	Non F&O	VM Storage Switches (91357)	88,000	These switches are critical the servers that are housed on them and the vendor is desupporting this version in FY23. All servers internally (with a few exceptions) are housed in the environment these switches service.
22	Non F&O	ODA Patching (91225)	18,500	Patching the Banner database is critical to our cybersecurity efforts as all of our PII is housed there. This is also a compliance requires for PCI-DSS which is assessed annually.
23	Non F&O	Automic Automation Upgrade EOL (91225)	12,000	Software is EOL and will no longer function at the end of the term in FY23 - this software is the job scheduling software that automates all our background jobs that provide data, reports, account creations etc. to the campus.
Total Non-Facilities Projects			1,700,500	

Total FY23 Project Cost	3,814,363
<i>Less: DCAMM Funding</i>	<i>1,472,735</i>
Campus Funding	2,341,627

Note:

1. Funding may be from multiple sources; DCAMM, rollover funding from prior year, FY21 Campus Capital Budget
2. Amounts represented above are estimates

**Westfield State University
FY23 Capital Rollover Requests**

6/17/2022

1) University Funded								University Funded
Submitted by	Project Name	Justification (2-3 Words)	Request Type	Capital Category	FY22 Approved Funding Amount	Amount Spent by June 30th FY22	Remaining \$ / Unspent	FY23 Rollover Request
Facilities & Operations	Academic Space Renovations	renovations to academic spaces	Other Project	Other Project	43,069	-	43,069	43,069
Facilities & Operations	Scanlon-Window AC/dumpsters	Parenzo relocation costs	Other Project	Other Project	43,943	1,170	42,773	42,773
Facilities & Operations	UEACC Moves	moves related to UEACC	Other Project	Other Project	125,000	50,457	71,265	71,265
Facilities & Operations	Common area furniture upgrades	upgrades for furniture	Other Project	Other Project	20,000	-	20,000	20,000
Facilities & Operations	MEPF Master Plan	extension needed	Other Project	Other Project	200,000	140,000	60,000	60,000
Facilities & Operations	Wilson Gender Neutral Restroom	extension needed			9,000	5,000	4,000	4,000
Alan Blair	Recruit Upgrade to Slate	pushed back (91225/7100)		IT Rollover				25,000
Alan Blair	DegreeWorks Upgrade	scribing (91225/7100)		IT Rollover				10,000
Alan Blair	Campus Labs (Software)	pay year 2 of 3 (transfer to 91442/xxxx)		IT Rollover				38,375
Total University Funded								314,482

2) DCAMM Funded Projects WSU Match							DCAMM MATCH
FUND DESCRIPTION	ORG DESCRIPTION	NOTES	FUND	ORG			FY23 Rollover Request
Power Plant DA & Condensate Tanks DCAMM Match	Capital Planning	Project delayed to FY23	91418	1141			125,050
Ely Hot Water Tanks & Circulator Pumps DCAMM Match	Capital Planning	Project delayed to FY23	91417	1141			57,960
Wilson Sprinklers DCAMM Match	Capital Planning	Rollover	91415	1141			585,332
HMC AC	Capital Planning	Project completion delayed	91059	1141			200,738
Unallocated Match	Capital Planning	OPM/project contingency	91222	1141			204,323
Ely Pool	Capital Planning	Additional repairs needed	91425	1141			4,593
Dower Boiler	Capital Planning	Final completion	91426				44,679
Total Capital Rollover Requests							1,222,675

Total Capital Rollover Requests 1,537,156

June 20, 2022

To: Steve Taksar

From: Gary Duggan

Subject: Ford Limited Sale of 2022 Transit Vehicles

Hi Steve,

Our Account Manager at Enterprise recently made me aware of a sale that Ford was having on 2022 Transit vehicles. She recommended that we apply for this sale and replace eight of the 2017 and seven of the 2018 Ford Transits that we currently lease through Enterprise with these 2022 models. In addition to replacing our older Transit vehicles with new 2022 models, this sale would also reduce our monthly rental costs for these vehicles.

We did apply to replace these fifteen Transit vehicles through this sale but I don't know yet if Ford accepted our application. I will stay in contact with our Account Manager at Enterprise and give you an update when she is able to determine if we will get these vehicles through this limited sale. I have listed the fifteen vehicles below and highlighted them in yellow on the FY21 Fleet Summary tab in the FY23 Budget Lease Purchase Vehicle file.

	Vehicle	VIN	Year	Make	Model
1	228R3C	1FTYR1ZM9HKA25399	2017	Ford	Transit-250
2	228R43	1FTYR3XM2HKA22746	2017	Ford	Transit-250
3	228R2Z	1FTYR1ZM1HKA25400	2017	Ford	Transit-250
4	228R36	1FTYR1ZM3HKA25401	2017	Ford	Transit-250
5	22BK3K	1FTYR2CM5HKA15399	2017	Ford	Transit-250
6	228R5J	1FTYR2CM6HKA15542	2017	Ford	Transit-250
7	22DBRH	1FTYR1ZMXHKA33141	2017	Ford	Transit-250
8	22JQQ2	1FTYR1ZM3JKA14145	2018	Ford	Transit-250
9	22JQRQ	1FTYR1ZM5JKA14146	2018	Ford	Transit-250
10	22JR9L	1FTYR1ZM7JKA14147	2018	Ford	Transit-250
11	22JRFV	1FTYR1ZM9JKA14148	2018	Ford	Transit-250
12	22JRGW	1FTYE2CMXHKB05336	2017	Ford	Transit-150
13	22JRGH	1FTYR1ZM0JKA14149	2018	Ford	Transit-250
14	22N8KF	1FTYR2CM4JKA11821	2018	Ford	Transit-250
15	22N8LF	1FTYR2CM6JKA11819	2018	Ford	Transit-250

Regards,

Gary

Gary Duggan
Director of Procurement and Administrative Services
Westfield State University

Westfield State University
 FY23 Lease and Motor Vehicle Schedule

6/17/2022

FY23 New Vehicle Purchase	Quantity	Cost/ Month	Total Cost
EMT Ambulance	1		\$ 5,000

Existing Vehicle Summary	Quantity	Cost/ Month	Annual Cost
Existing Lease Commitments:			
Facilities, Public Safety, Media Services, Mail Services, Catering	22	\$ 14,250	\$ 171,000
5% Escalation			\$ 8,550
Program Service fee			\$ 8,082
2020 Transit F250 Cargo (Van)	1	\$ 537	\$ 6,448
2020 F-350 Chassis (Truck)	1	\$ 688	\$ 8,260
FY23 Lease Schedule			\$ 202,341

FY22 Vehicle Lease Schedule	\$ 202,341
FY23 Vehicle Lease Schedule	\$ 202,341
Difference B/(W)	\$ -

Notes:

- 1) Monthly Lease Agreements Include Maintenance Charges
- 2) It's possible that the monthly lease payments may be lowered due to a 1-time program offered by FORD to move inventory



Board of Trustees

October 12, 2022

To approve the use of reserves totaling \$1,326,406 which is equal to the FEMA reimbursement. The revenue was recognized in FY22 when the reimbursement was requested and approved; most of the cash reimbursement was received in FY23.

Funds will be used for strategic investments as shown in the attached summary, in support of institutional priorities as approved by the President. If funds are not fully spent in FY23, unspent funds will be automatically rolled forward into FY24. A year-end report will be provided to the Finance and Capital Assets Committee.

Robert A. Martin, Ph.D., Chair

Date

Westfield State University
Strategic Investment Plan for Use of FEMA Reimbursement Funds
FY23 FEMA Budget

9/8/2022

Category	Total
Marketing, Branding, Advertising for increased recruitment activities	\$ 600,000
Support Innovation and Design Thinking Program and Projects	\$ 300,000
Recruitment Initiatives	\$ 60,000
University Strategic Initiatives	\$ 366,406
Total	1,326,406

Note:

1. Funding will be derived from FEMA reimbursement received in FY23.
2. Due to timing issues, FEMA reimbursement is a use of cash reserves and requires board approval.
3. Projects may cross two fiscal years.



Board of Trustees

October 12, 2022

MOTION

To approve the Bachelor of Fine Arts in Graphic Design.

Robert A. Martin, Chair

Date

Massachusetts Department of Higher Education
Notice of Intent Template

Send one copy via email to programreview@bhe.mass.edu. No paper copy is needed.

Use One Application for Each Program Approval Requested.

Please don't hesitate to contact programreview@bhe.mass.edu with any questions.

A. Overview

1. Proposed Program Title: BFA in GRAPHIC DESIGN
2. Proposed Degree Level: Undergraduate

B. Chief Academic Officer Certification

All proposals must be reviewed and approved by the Chief Academic Officer of the institution. For institutions that do not have a Chief Academic Officer, review and approval by the President may substitute.

(a) Chief Academic Officer (CAO) Name and Title: Dr. Juline Mills, Interim Provost and Vice President, Academic Affairs
CAO Phone Number and Email: (413) 572-8691, jmills@westfield.ma.edu
I have reviewed this proposal and it has my approval. I certify that all information in this Notice of Intent is true to the best of my knowledge.
Signature: _____ Date: _____
Form should be signed and dated by hand, not electronically, and then a pdf sent.

C. Statement of Institutional Approval

1. The institution has fully complied with its own internal review process for designing and approving new programs. <input checked="" type="checkbox"/> Yes _____ No Please provide a brief description of your process:
2. Date of Board of Trustee vote approving proposed program:

D. Institutional Eligibility

<p>1. Is the institution based in Massachusetts, and has it maintained a physical presence in Massachusetts for no less than six consecutive years? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>2. Has the institution been operated continuously by the same governing entity for the last six-years? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No If no, please describe change:</p>
<p>3. Has the institution been accredited without sanction or probation by the Commission of Institutions of Higher Education of the New England Association of Schools and Colleges continuously for the last six years? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>4. Is the institution under any investigation or corrective action by the state or federal government, including the Massachusetts Attorney General and the Massachusetts Department of Higher Education, for any matter reasonably related to an academic program or to academic quality? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If the yes, please provide a description of the action:</p>

E. Program Eligibility Boxes will expand if the answer extends past the space provided.

<p>1. Program Description: What is the rationale for starting the new program? What knowledge and skills will students acquire? How will students be taught (e.g. online, in class, practicum)?</p> <p>The Art Department feels that to further enrollment in the Art Department, the Department needs to develop Bachelor of Fine Arts (BFA) programs. Currently the University only offers a BA program. Students who are serious about pursuing art during their junior and senior years of high school are told by their teachers to look at and pursue college and university programs that offer BFA programs that will provide them with a professional career degree program (employment ready) with intensive work in the visual arts. A BFA program that will allow them to discover their own expressive artistic voice, the communicative power of visual art, and graduate with a greater level of artistic development. The BA in Art with a Concentration in Graphic Design program is the Department's largest concentration and minor.</p> <p>The classes will be taught in the studio rooms of The Catherine Dower Center for Performing and Fine Arts as well as online (remote and pure online teaching modalities) and through on and off campus internship programs. Within the Catherine Dower Center for Performing and Fine Arts, the Art Department has the facilities (21,028 square feet) to offer and meet the needs of a BFA degree. The facility has three Mac Labs, 3D printers and a large format color printer in addition to printmaking, painting, drawing, sculpture, and ceramics studios to support the program's Foundation Program. The students of this degree program will acquire a general foundation of the arts (studio and art history classes) along with an artistic development in graphic design for a professional career in this field of visual art.</p>
--

Currently there is no state 4-year institution that offers a BFA program west of Boston, MA or Lowell, MA. The closest state 4-year institution that offers a BFA program in Graphic Design is 97 miles away, Mass Art, or 104 miles away, UMass Lowell, from Westfield, MA, or the Pioneer Valley of Central Massachusetts. A student from Pittsfield, MA must travel 135 miles to a BFA Graphic Design program. A few years ago, UMass Amherst did offer a BFA in Graphic Design, but this institution no longer offers this program. Students in this region of Massachusetts may not want to or afford to attend a 4-year institution that is 100 miles away or more from their home. With the beginning of the Mass Transfer Pathways in Art in the fall of 2018, students of the three regional community colleges (Holyoke Community College, Springfield Technical Community College, and Greenfield Community College) along with Berkshire Community College in Berkshire County and Mt. Wachusett Community College and Quinsigamond Community College in Worcester County have no other transfer offer for a BFA in Graphic Design then to attend a state 4-year institution or private 4-year institution in Eastern Massachusetts.

2. Mission Alignment: Briefly describe how the proposed program aligns with the institution's mission and stated objectives.

The proposed program aligns with the University's 2018-2023 Strategic Plans through reforming legacy programs (BA in Art) and gearing them towards innovation and career pathways (Strategic Goals, Goal 1, The Student Experience). This program also aligns with University's Strategic Goals Goal 2 Enrollment by increasing the academic profile of the university through offering professional degree programs (BFA's) to a new group of students looking for this path towards their future careers. Goal 1 University Initiatives align with this program through developing high impact engaging pedagogies in creative work and experiential learning, internships, and course development. As stated by NASAD, *a BFA is a professional career degree program with intensive work in the visual arts with employment in commercial settings upon graduation.*

3. Curriculum: Attach curriculum outline (Form 1A, p. 4 for an undergraduate program, Form 1B, p. 5 for a graduate program).

Highlight courses which overlap with those in the program(s) identified in question 4: Alignment with Existing Programs.

ART 0101, ART 0103, ART 0104, ART 0105, ART 0106, ART 0107, ART 0108, ART 0109, ART 0201, ART 0204, ART 0205, ART 0209, ART 0212, ART 0214, ART 0216, ART 0333, ART 0380, ART 0340, ART 0377, ART 0320, 200-300 level Art History Elective, 200-300 level Studio Electives

Describe any independent work, internship, or clinical placement arrangements.

-ART 0337 Graphic Design Internship, The Graphic Design Internship program prepares students for work in the Graphic design/Web/Design/Multimedia fields of visual arts. The internship can be a placement in a department on-campus which has projects for a graphic design intern or an off-campus placement at an advertising, marketing agency or graphic design firm. The following grade point averages 3.0 GPA in the Art Major, 3.0 GPA in the Graphic Design Concentration, a 2.8 overall Westfield GPA, Junior Standing (54 credits) along with the completion of ART 0228 Graphic design1 and ART 0210 Typography 1 are required for a Graphic Design Internship placement. A departmental

acceptance of an internship is by application and approval by the Art Department's Internship Coordinator, the Art Department's Chairperson, and Westfield's Career Center. Visit the Art Department's web page for the application and for more information on the department internships.

Prerequisites: ART 0228, ART 0210, 3.0 GPA in the Art major, 3.0 GPA in the Graphic Design Concentration, 2.8 overall Westfield GPA, and Junior Academic Standing (54 credits).

-ART 0340 Internship, The ART 0340 prepares students for work site work experience in their field of visual arts study. This internship prepares the student for daily worksite procedures and experiencing projects from development through completion in the many fields of the visual arts that assists in later job placements. The following grade point averages 3.0 GPA in the Art Major, a 2.8 overall Westfield GPA, and Junior Academic Standing (54 credits) along with the completion of four 200 level art studio classes from the Art Major for Internship placement. A departmental acceptance of an internship is by application and approval by the Art Department's Internship Coordinator, the Art Department's Chairperson, and Westfield's Career Center. Visit the Art Department's web page for the application and for more information on the department's internships. This class can be taken twice.

Prerequisites: Four 200 level art studio classes from the Art Major, 3.0 GPA in the Art Major, a 2.8 overall Westfield GPA, and Junior Academic Standing (54 credits).

-ART 0320 Thesis, this mentored independent study course represents the culmination of advanced studies in Fine Art, Illustration, and Animation and is for the development and production of a Thesis Exhibition and Thesis Paper. Seniors studying graphic design should sign up for ART 0380 Graphic Design Capstone and not this class. Students can choose to take ART 0380 and ART 0320.

Prerequisites: Senior standing (90 credits) and have completed all of the Art Major classes along with all of the required 300 level classes in the student's field of visual arts study. Students must have and maintain a minimum 3.0 grade-point average in all art courses. This course can be taken in both the fall and spring semester of a student's senior year.

- 4. Alignment with Existing Programs:** At least 50% of the proposed new program's core and elective credits are derived from course credits of up to three previously approved programs. Yes ___ No
General Education courses may not be counted in this calculation unless they count towards the major.

Name of Program 1: Bachelor of Art in Art

Name of Program 2 (if applicable): Bachelor of Art in Art with a Concentration in Graphic Design

Name of Program 3 (if applicable):

Attach curriculum outline for each program (Form 1A, p. 4 for an undergraduate program, Form 1B, p. 5 for a graduate program). Highlight courses which overlap with those in the proposed new program identified in question 3: Curriculum.

5. **Faculty.** Complete Form 2 for all faculty members who will teach in the proposed program (page 6).
6. **Facilities and Equipment.** Will any new facilities or equipment be needed for this new program? _____ Yes No
If yes, please describe:

F. Articles of Amendment

Institutions must file Articles of Amendment with the Secretary of State as part of their application. As of October 1, 2014, the fee charged by the Secretary's Office was \$15.

The Secretary's Office can be contacted at corpinfo@sec.state.ma.us or 617-727-7030. Explain that you seek to file Articles of Amendment to your charter, and you will be directed to the proper staff member and application depending on whether you are a domestic nonprofit or LLC. For domestic nonprofits, the amendment expands Article II, the purpose of the corporation; for LLCs, the amendment expands part 3, the general character of the business. **In either case, please make sure to name each proposed degree specifically, e.g., Bachelor of Science in Business, Master of Arts in Education.**

Articles of Amendment are put on hold pending DHE review of the new program. The Secretary's Office approves The Articles of Amendment upon confirmation from DHE that we have approved the new program.

1. Please attach a pdf of the date-stamped copy of the Articles of Amendment filed with the Massachusetts Secretary of State.

FORM 1A: Undergraduate Program Curriculum Outline

(Insert additional rows as necessary.)

3. Required (Core) Courses in the Major (Total # courses required = 27)		
4. Course Number	Course Title	Credit Hours
ART 0101	First-Year Seminar	1
ART 0103	Drawing I	3
ART 0104	Design Fundamentals	3
ART 0105	Three-Dimensional Design	3
ART 0106	Art Survey: Prehistoric to Middle Ages	3
ART 0107	Art Survey: Renaissance to Present	3
ART 0108	Computer Graphics for Art Applications I	3
ART 0109	Writing for Art and the Artist	3
ART 0201	Printmaking I	3
ART 0204	Pottery I	3
ART 0205	Sculpture I	3
ART 0209	Color Theory and Practice	3
ART 0214	Drawing II	3
ART 0216	Painting I	3
ART 0333	Early 20th Century Art	3
	One 200-300 Level Art History Course	3
ART 02XX	Graphic Design I	3
ART 0212	Computer Graphics II	3
ART 02XX	Typography I	3
ART 02XX	Graphic Design II	3
ART 03XX	Typography II	3
ART 02XX	User Experience / User Interface Design	3
ART 03XX	Graphic Design III	3
ART 0380	Graphic Design Capstone	3
	Two Studio Electives / Internships (200-300 Level Courses)	6
	Sub Total Required Credits	76
5.		
6. Elective Courses (Total # courses required = 1)		
	Two General Elective Courses	6

	Sub Total Elective Credits	6
Indicate Distribution of General Education Requirements Below		
		# of Credits
Arts and Humanities, including Literature and Foreign Languages		16
Mathematics and the Natural and Physical Sciences		13
Social Sciences		9
	SubTotal General Education Credits	38
Curriculum Summary		
Total number of courses required for the degree		38
Total credit hours required for degree		120
Prerequisite, Concentration or Other Requirements:		
<p>-BFA in Graphic Design major must complete a minimum of 27 credits of coursework within the Art Department at Westfield State. Students are advised to consult their advisors for information on course sequencing and general core requirements.</p> <p>-BFA in Graphic Design majors intending to pursue graduate work are advised to take additionally recommended studio courses of their choice. It is also advisable to take additional Drawing / Computer Graphics / Graphic Design classes.</p> <p>-A mandatory review of a Graphic Design major's artwork from the first two-year sequence of classes will occur at the end of a Graphic Design major's fall sophomore semester. Satisfactory completion of the portfolio review is required for all Graphic Design majors that have completed 45 credits of University classes to continue as a Graphic Design Major. Students must pass the portfolio review to continue in the major. This in person portfolio review by the Art Department's faculty will occur at the end of the semester during the week of finals. Students will have to submit their portfolio digitally before the Tuesday of Thanksgiving Break.</p> <p>*The department's acceptance of the 60-credit transfer student's (junior standing) portfolio submission upon entering the University will meet this requirement.</p> <p>Graphic Design Internship:</p> <p>ART 0337 Graphic Design Internship prepares students for work in the Graphic Design / Web Design / Multimedia fields of the visual arts. The internship can be a placement in a department on-campus or an off-campus placement at an advertising, marketing agency or graphic design firm. A cumulative grade point average in art classes along with the completion of certain classes are required for internship placements. A departmental acceptance of an internship is by application and approval of the Internship Coordinator, the Art Department's Chairperson, and The Career Center. This class can be taken twice.</p> <p>For more information on internships, please see the Internship Requirement Form on the Art Department's web page or the University Catalog</p>		

FORM 1B: Graduate Program Curriculum Outline

(Insert or delete rows as necessary.)

7. Major Required (Core) Courses (Total # of courses required = 0)		
8. Course Number	Course Title	Credit Hours
[Course Number]	[Course Title]	[0]
[Course Number]	[Course Title]	[0]
[Course Number]	[Course Title]	[0]
[Course Number]	[Course Title]	[0]
[Course Number]	[Course Title]	[0]
[Course Number]	[Course Title]	[0]
[Course Number]	[Course Title]	[0]
[Course Number]	[Course Title]	[0]
	SubTotal # Core Credits Required	
Elective Course Choices (Total courses required = 0) (attach list of choices if needed)		
[Course Number]	[Course Title]	[0]
[Course Number]	[Course Title]	[0]
[Course Number]	[Course Title]	[0]
[Course Number]	[Course Title]	[0]
[Course Number]	[Course Title]	[0]
[Course Number]	[Course Title]	[0]
[Course Number]	[Course Title]	[0]
	SubTotal # Elective Credits Required	
Curriculum Summary		
Total number of courses required for the degree		[0]
Total credit hours required for degree		[0]
Prerequisite, Concentration, Dissertation or Other Requirements:		

Form 2: Program Faculty

In cases where the match between the faculty member's field of expertise and the proposed program is unclear, additional information on qualifications may be requested.

Name <i>If faculty member has not yet been hired, write: Not Yet Hired.</i>	Degree and Field	Title	Full- or Part-time at the institution
Example: Apple, Thomas	Ph.D. in Criminal Justice	Assistant Professor	Full-time
Shapleigh, David	MFA Painting	Professor & Chair	Full-time
Christian Swaidan	M.A. Art History; Ed.D. Educational Leadership	Associate Professor	Full-time
Imeh, Imo	Ph.D. Art History	Associate Professor	Full-time
Keim, Barbara	Ed.D. Art Education / MFA Computer Art	Professor	Full-time
Ramirez, George	MFA Graphic Design	Assistant Professor	Full-time
Wainright, Jamie	MFA Printmaking	Professor	Full-time
Donovan, Celeste	Ph.D. Art History	Adjunct Professor	Part-time
Amber Scoon	Ph.D. Philosophy, MFA Painting	Adjunct Professor	Part-time
Kate Martineau Dempsey	Ph.D. Art History	Adjunct Professor	Part-time
Gabriel Phipps	MFA Painting	Adjunct Professor	Part-time
Paul Bloomfield	BA Photography, MA Art History	Adjunct Professor	Part-time
Molly Hatch	MFA Ceramics	Adjunct Professor	Part-time
Nowinski, Maggie	MFA Visual Arts	Adjunct Professor	Part-time
O'Brien, Patrick	MFA Illustration	Adjunct Professor	Part-time
Montgomery, Susan	MFA Painting	Adjunct Professor	Part-time
Colin McMullan	MFA Sculpture	Adjunct Professor	Part-time
David While	BFA Illustration	Adjunct Professor	Part-time



Board of Trustees

October 12, 2022

MOTION

To accept the annual report for fiscal year ending June 30, 2022, as prepared by the university's Administration and Finance Division and to authorize the submission of this report to the State Comptroller's Office, the Massachusetts Department of Higher Education, and the State Auditor's Office, as required by the Massachusetts Department of Higher Education. This annual report includes the Westfield State University FY22 Financial Statements, audited by O'Connor & Drew, P.C.

Robert A. Martin, Ph.D., Chair

Date



Board of Trustees

October 12, 2022

MOTION

Board of Trustees Bylaws, Article 1, Section 1B, establishes the role of the Board of Trustees in setting presidential compensation. President Thompson's compensation will be increased as follows: annual salary will increase by 2% or \$5,260, housing allowance by \$5,000 per year, and car allowance by \$300 per year. These changes will be effective with the first payroll period of Fiscal Year 2023 (FY23). The final FY23 Operating Budget presented in October 2022, will be adjusted to reflect the approved changes.

These changes are based on recommendations from Dr. Carlos Santiago, Commissioner of the Massachusetts Department of Higher Education, in his August 31, 2022, letter regarding President Thompson's compensation, housing allowance and car allowance. As described in the Commissioner's letter, the proposed changes are based on a recent study of presidential compensation conducted in FY22 by EY Parthenon utilizing CUPA data, peer survey data, and cost of living analysis. It has been over 10 years since the last presidential compensation study was conducted.

Robert A. Martin, Ph.D., Chair

Date



Massachusetts Department of Higher Education

MAIN OFFICE
One Ashburton Place, Room 1401
Boston, MA 02108
TEL (617) 994-6950
WEB www.mass.edu

OFFICE of STUDENT FINANCIAL ASSISTANCE
75 Pleasant Street
Malden, MA 02148
TEL (617) 391-6070
WEB www.mass.edu/osfa

Carlos E. Santiago
Commissioner
Chris Gabrieli
Board Chairman

August 31, 2022

Chair Bob Martin
Westfield State University
577 Western Avenue
Westfield, MA 01086

Dear Board Chair Bob Martin,

The Massachusetts Commissioner of Higher Education has the authority to set initial compensation (including non-salaried issues such as car and housing allowances) for incoming presidents and in response to merit-based evaluations (with local boards). The Commissioner also has the authority to adjust compensation to ensure competitiveness among and across our public higher education institutions.

It has been at least ten years since the Department of Higher Education commissioned the last presidential compensation study. Given my interest in determining how competitive we might be in attracting and retaining presidential talent, the Department of Higher Education engaged a consultant (EY Parthenon) to conduct such a study for the Community College and State University presidents in FY22.

EY's study consisted of three components: current state conversations with selected stakeholders, a market assessment of salaries using data from the 2021 College and University Professional Association for Human Resources (CUPA) Administrator Surveys, and an executive benefits study using data from CUPA, responses from a survey sent to a selection of peer states and a supplementary analysis of the cost of living and cost of labor in peer states. The market assessment of salaries formed the core of the study.

EY developed peer comparison groups for each community college and state university using regional context (geographical proximity, cost of living), Carnegie classification, metropolitan setting, and total student enrollment. Using the presidential salary data for the peer groups, EY established market consensus estimates for the 25th, 50th, and 75th percentiles of presidential salaries. Using the 50th percentile as the market consensus, EY established a competitive base salary range of

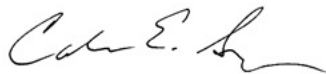
85% to 115% of the market consensus. This range informs the recommendations for changes to existing presidential salary levels. The executive benefits data in CUPA and from EY's survey was limited in scope, but the cost-of-living analysis established that housing costs in Massachusetts were the second highest in the state peer group. Thus, in addition to making salary adjustments, I am authorizing changes in the annual car and housing allowance.

The chart below lists President Thompson's current salary, the new merit increase for FY22, and the adjusted car and housing allowance.

President:	Linda Thompson
FY22 Salary (annual salary as of 7/22)	\$263,000.00
FY23 Salary	\$268,260.00
Adjusted Annual Housing Allowance	\$23,000.00
Maximum Car Allowance	\$7,500.00
Maximum FY23 Compensation	\$298,760.00

Local Boards of Trustees have the authority to enact these changes immediately or over multiple years. I know that you join with me in ensuring that our presidential positions remain competitive, thus allowing us to attract and retain talented individuals.

Sincerely,



Carlos E. Santiago, PhD
Commissioner

cc. President Linda Thompson



Board of Trustees

October 12, 2022

MOTION

To accept the dashboard of performance metrics as presented on October 12, 2022, and to authorize the Executive Committee of the Board to make such adjustments as may be warranted based upon discussion with the President and Cabinet.

Robert A. Martin, Ph.D., Chair

Date



Board of Trustees

October 12, 2022

MOTION

To ratify the July 27, 2022, actions of the Executive Committee in the approval of the use of ARPA maintenance funds as required by state law, for the projects recommended, in priority order based on option one and two. Further, to allow the President to shift the priorities of the projects based on updated facilities assessments and report back to the Board at the next scheduled meeting on any changes in scope or priority. Funding for the work related to the projects listed, may not exceed the available ARPA funding as noted in the attached materials.

Robert A. Martin, Ph.D., Chair

October 12, 2022
Date



Board of Trustees

October 12, 2022

MOTION

To ratify the July 27, 2022, actions of the Executive Committee in the approval of the transfer of \$800,000 from the University's investment accounts with Eaton Vance/WhiteOak Advisors, to the University's operating account at Berkshire Bank, consistent with the University's Investment Policy (0430), FY23 provisional budget, and verified with the financial analysis presented today.

Robert A. Martin, Ph.D., Chair

October 12, 2022
Date