Westfield State University

IMPACT REPORT 2021–2022



BUILDING A BRIGHTER FUTURE, ONE OWL AT A TIME

WESTFIELD STATE FOUNDATION









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(through 4/2022)

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Lisa McMahon
Interim Executive Director (as of 9/25/21)*

Linda Thompson
*President, Westfield State University**

**Ex-Officio*

WESTFIELD STATE UNIVERSITY BOARD OF TRUSTEES 2021–22

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Joshua Clark '15

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Meaghan Farrell '07, M'12

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Scott Gowen '84 *(through 11/21)*

Steven Mailloux '14, M '15

John Nieb '14

Chris Montemayor '90, M'09
University Trustee Representative (as of 3/22)

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Cheryl Vieira '08

Taylor Wertz '15 *(through 5/22)*

Kathryn White '80

Emmett-Lewis Witherspoon '18





WESTFIELD STATE FOUNDATION, INC.

MISSION STATEMENT

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



GEORGE FLEVOTOMOS



LISA MCMAHON

Dear Friends,

This past year has been a year of transformation. We began the academic year under the new leadership of President Linda Thompson and we bid farewell to Dr. Erica Broman, VP of Institutional Advancement and Executive Director of the Westfield State Foundation as she left the university to begin her well-deserved retirement.

Dr. Thompson began here at Westfield State on July 1, 2021 and she hit the ground running, engaging in a productive and insightful listening tour. She met with members of the campus community, as well as greater Westfield constituents, to learn what challenges are out there and to begin to think about how Westfield State can help address these areas of concern. She plans to transform Westfield State into the premier public comprehensive institution in the Northeast region. Her strategic priorities are anchored in four goals—to enhance the student experience, enrollment, culture, and resources.

The Westfield State Foundation's mission is to support these goals in varied ways through diverse sources of funding. We are proud to share some of the impactful initiatives being done through the Foundation and Institutional Advancement, none of which would be possible without your belief in, and support of, a Westfield State education.

As always, we thank you all.

Sincerely,

George Flevotomos
Board Chair
Westfield State Foundation, Inc.

Lisa McMahon
Vice President, Institutional Advancement
Executive Director, Westfield State Foundation, Inc.



UNIVERSITY & COMMUNITY *Work Together*

WITH WESTFIELD 350 COMMITTEE SCHOLARSHIP

As 2019 marked the 350th celebration year for the City of Westfield, the rich history, heritage, and legacy of the city was abundant. The worry, however, was that like all good things, the impressive robustness of our municipality could certainly be taken for granted.

"It was our focus to promote Civic Pride with the residents of the city, to refresh everyone's appreciation for all of the wonderful attributes that make Westfield such a terrific community to live in," says Harry Rock, chair of the Westfield 350 Committee that planned the city's 350th Celebration in May of 2019.

It can be easy to overlook the elements of our community that make us proud to be a part of it in the first place, believes Rock.

"We have our own university, hospital, ice arena, YMCA, Boys & Girls Club, Children's Museum, newspaper, bike trail, airport, river, library/Athenaeum, Stanley Park, and so much more with churches, schools, shopping and recreational outlets," he says, "so our 2019 year of celebration was to use the plethora of programs, activities and events we had planned to promote Civic Pride within the children, teens, adults, seniors and families of Westfield."

It was this emphasis on Civic Pride, explains Rock, that lead the Westfield 350 Committee to create a student scholarship at Westfield State University. During the Celebration, the Committee included the University in several activities, such as: hosting community educational lectures on campus; hosting a day of running races in the field house represented by Dr. Vanessa Diana of the 350th Board of Directors; and by including three student representatives on the 350th Board of Directors as well. The entire committee agreed



that establishing an ongoing legacy presence at Westfield State University was imperative, thus leading to the creation of a scholarship in the name of the Westfield 350 Committee.

"The intent of the scholarship was to support Westfield residents and to focus on the non-traditional student with adults who were intending to attend classes later in life," explains Rock. "It was also our intent to look at supporting working adults who were attending certificate-based programs and classes to meet professional job requirements and to further their knowledge and expertise in a given subject matter."

Depending on the availability of applicants, the goal of the Westfield 350 Committee Scholarship is to benefit a City of Westfield resident—either traditional or non-traditional—depending on the pool of applicants available. Rock explains that the top priority, however, should go to non-traditional students who may be trying to begin or complete their degree later in life or someone who is required to attend a certificate program to excel in their field of work.

With an understanding and appreciation of what a wonderful community Westfield is—along with what a valued resource Westfield State University is—the Westfield 350 Committee hopes their scholarship will help future students with the continuation of their academic and career-related successes:

"It was the intent of the Westfield 350 Board of Directors to continue to view Westfield State University as a respected and valued asset within the Westfield community and to support our own residents in their educational journeys by encouraging enrollment and attendance of classes and certificate-based programs on campus," says Rock. "We hope that this scholarship will continue to instill a spirit of Civic Pride in the recipients in the years and decades to come."

HELPING STUDENTS REACH THEIR *Full Potential*



While the Westfield State Foundation has allowed students of all disciplines the incomparable opportunity to complete their college degrees, Professor Andrew Bonacci of the Music Department has seen up close the impact that these scholarships have for his students chasing their melodic dreams.

Unique to the field, the study of music involves years of experience, practice, and training prior to entering college, whether it be from public schools, church, community music schools, or simply making music with friends and family, according to Bonacci. But most students don't have resources and opportunities to engage music at a particularly high level, which makes the experiences that Westfield State University is able to offer only that much more meaningful.

"Endowed funds from the Westfield State Foundation have allowed our students to experience music making at world-class levels, through visits to Carnegie Hall, the Metropolitan Opera House, Tanglewood, and Broadway Theatres. We've invited acclaimed artists to campus to work with students in workshop, masterclasses, clinics and performances, entered students in national competitions, provided travel opportunities with elite performing experiences in commercial venues," says Bonacci.

The gifts from Westfield State Foundation have also improved the facilities and equipment for students in these creative fields: most notably by the $1.2 million gift of a Steinway pianos fleet, and also a generous $125,000 gift of support for the installation of state-of-the-art Wenger Sound-Lok practice suites in the Catherine A. Dower Center for the Performing and Fine Arts.

"While the heart of the experience of learning to become a musical artist lies in close study with our faculty members as well as interaction and music making with other students, these additional experiences and opportunities provided by the Westfield Foundation have an extraordinary impact on the daily routine of our students," says Bonacci, who believes that gifts from scholarship opportunities can help close gaps and ensure that all our students leave with a degree in hand.

Aaliyah Brown '24, recipient of the Reach to Teach, Joan E. Fuller, Cosmo Avato and Catherine A. Dower Scholarships, arrived in the fall of 2019 bursting with potential as a singer, but with little experience as an actual student of music.

"Dr. Felicia Barber came to my high school choral class to help students with technique and to promote Westfield State University. I had an internship at the time working as the choral assistant to our teacher, but that was the first time I saw someone who looked like me teaching music in school and it was enlightening," says Brown, who was previously unaware that her lifelong love of music could ever turn into a successful career.

Like many students with financial uncertainty, Brown did not originally know about the Westfield State Foundation, and assumed she'd have to apply for scholarships elsewhere. But when the onset of the Covid-19 pandemic brought a unique conversation with her advisors, the door to scholarship was opened.

"From there I filled out anything that I qualified for—even ones I didn't, just in case—and crossed my fingers," she says.

Since following Dr. Barber to the Music Department at Westfield State University and receiving countless scholarships, Brown has worked on her musical passions under the guidance of professors like Bonacci, showcasing just how incredible the gift of scholarship can be in terms of changing a student's trajectory.

"Aaliyah has quietly and systematically developed into an artist and scholar in music styles ranging from popular and gospel to jazz and classical, showcasing advanced skills and artistry singing in several styles, and in several languages," says Bonacci. "All while maintaining a grade point average of 3.9."

Feeling that every year at Westfield she has hit a new milestone either academically or creatively, Brown believes the scholarships she's received help students like her reach their full potential.

"It took such a weight off my shoulders to have financial help for college because I've paid entirely on my own. Not having as heavy of a burden has helped me focus, and it also felt validating that I was doing well enough to have my advisors support," she says, "and that gave me validation during those times when I—like every college student—started to doubt if I made the right choice about college or that I was on the right path."

Throughout her time at Westfield State University—which will end following the completion of her teaching requirements this fall—Brown has performed at local gigs both on campus and around the City of Westfield, held her position as a long-time lead vocalist for both small and large student jazz ensembles, and is now appearing as a vocalist in a faculty jazz ensemble as well. Yet to date, her proudest accomplishment thus far has been her senior recital: a two-part capstone paper consisting of research that highlights Black women composers, and a one-hour long split recital containing Classical performance combined with Jazz performance.

> "I am thoroughly grateful to receive this scholarship and dedicated to using it to enrich my educational experience and in turn, enrich the experience of those I teach in the future. I will continue to work hard to make your investments worthwhile."
>
> —AALIYAH BROWN
>
> *Cosmo Avato '50 Scholarship for Education, Catherine A. Dower Scholarship for Music, Urban Education/Joan E. Fuller Scholarship*

Aside from her impressive accolades she will depart from Westfield with, Brown remains humbled by the opportunities the Foundation brought her and will continue to offer to students in the Music Department for years to come.

Conversation and reflection, she admits, often remind her just how fortunate she truly is.

"I wouldn't have time to even think about my accomplishments—much less work on them—if not for the scholarship support. I probably would have had to either drop out or change my major from music education, if not for the help of the Foundation," she says.

Kamal Ali Scholarship, Rosa Amaral Mellow Scholarship



"Your generosity has allowed me to continue my education as a student and reach my goals of becoming a Nurse. I have hopes that one day I will be able to help other students achieve their goals just as you have helped me."

IREM KARAARSLAN '23
NURSING

Mildrem Maude Evans Scholarship



"My future is the most important thing to me and I am really thankful. Receiving this scholarship motivates me to keep doing great in and out of the classroom."

JOEL PEREZ GUZMAN '25
MOVEMENT SCIENCE

Alumni Association Scholarship, Barbara A. "Katie" Welch Scholarship, Student Senate Scholarship, Thomas H. Convery '78 Scholarship for Community Service, Westfield State Foundation Scholarship



"I have always been driven to give back to the institutions that I am part of, and Westfield State's Student Government has been nothing short of remarkable. As the Class of 2024 President, I find a great sense of purpose in advocating for my class."

KAITLYN EGAN '24
CRIMINAL JUSTICE, SOCIOLOGY



B.J. Bourdon/Zonta Scholarship



"I want to thank you for supporting students like myself. With the help of this scholarship, I am able to financially continue to pursue my degree and see that I will one day be the type of mentor that drives the next generation."

JAYCEN MACMASTER '25
ECONOMICS, FINANCE

Celeste M. Loughman Scholarship



"I am beyond thankful for your generosity and support. People like you truly inspire me to help others and believe in humanity. Majoring in Secondary Education has inspired me to be a selfless person and you have inspired me to follow my dreams with passion."

BANEN MUSTAFA '23
ENGLISH

Lawrence J. Pizzano Scholarship, Randi M. Lemenager '17 Memorial Scholarship, Westfield State Foundation Scholarship, Mary & Herman MacDougall Scholarship



"Through the generousity and support from Westfield State, I will be able to pursue my dreams of honoring my father's legacy through making an impact on the lives of my students and the community."

HUNTER ACCONCIO '23
SPECIAL EDUCATION, LIBERAL STUDIES, BA

BUILDING A *Brighter Future*

ONE OWL AT A TIME

WESTFIELD STATE UNIVERSITY

Celebrates the Investiture of

DR. LINDA THOMPSON

as 21st President

Westfield State University marked a significant milestone in 2022 with the investiture of Dr. Linda Thompson as its 21st president. Titled "Bridge to the Future: Restoring our Health," the ceremony was held on the University's Campus Green, uniting students, faculty, staff, alumni, and community leaders in celebration of Dr. Thompson's leadership and vision for the future. During the event, Dr. Thompson emphasized the need for restoration of both the University's physical and community well-being as pillars of her new presidency.

The investiture was highlighted by a week filled with celebratory events showcasing Westfield State's academic achievements and cultural offerings. Festivities kicked-off with an Academic Achievement Ceremony in University Hall recognizing student accomplishments followed by a concert by the Westfield State University Wind Symphony

Events also included a presentation by Anthony Ray Hinton, author of *The Sun Does Shine: How I Found Life and Freedom on Death Row*. Hinton's event, held at the Woodward Center, was a reminder of Westfield State's commitment to justice and equality.

A day of innovation and inspiration was also held starting with the Lt. Governor Regional STEM Summit in University Hall. This eventhighlighted Westfield State's role in advancing STEM education in the region. The evening concluded with a dinner, a reception, and a concert featuring performances by the Westfield State Big Band, Gospel Choir, and Alumni Jazz Ensemble.

To close out events, the day consisted of CURCA presentations and a faculty scholarship showcase, which offered a platform for students and faculty to share their research and academic endeavors. The week-long celebration ended up with a Jazz Brunch.

Dr. Linda Thompson's investiture marked the beginning of a new chapter for Westfield State University, with a mission to build on its proud history while looking forward to a future of health, inclusivity, and academic excellence.






WESTFIELD STATE UNIVERSITY
BARRE, MASSACHUSETTS

















An impactful *2021–2022 Academic Year* because of *YOU!*

Over *1,400+* alumni, parents, students, organizations and friends donated *$1.5+ million* to support Westfield State University programs and students

Total Gifts & Grants

1,429 donors
15% increase in all donors
35% Increase in alumni donors



300+ Scholarships
were awarded totaling
over $320,000



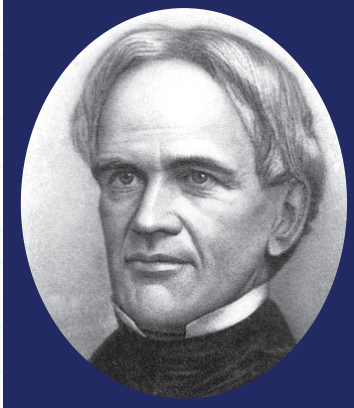
879 alumni donors from
over 70 class years
between 1949–2022



$236,830
awarded for internships,
leveraging state match

Owl Athletics raised *$65,453* to support student-athletes

373 GIFTS | 252 DONORS



Thank You

FOR BUILDING ON OUR
FOUNDING LEGACY

"A different world cannot be built by indifferent people."
—Horace Mann

WESTFIELD STATE FOUNDATION, INC.

(A COMPONENT OF WESTFIELD STATE UNIVERSITY)

Statements of Financial Position

June 30, 2022

ASSETS

	2022	2021
Assets:		
Cash and equivalents	**$405,612**	$299,930
Restricted cash	**1,101,338**	699,521
Unconditional promises to give, net	**239,213**	188,922
Investments	**14,261,061**	16,607,203
Other assets	**16,165**	2,470
Property and equipment, net	**46,544**	56,299
Property held for future development	**360,877**	360,877
Total Assets	**$16,430,810**	$18,215,222

LIABILITIES AND NET ASSETS

Liabilities:		
Accounts payable and accrued expenses	**$2,459**	$2,118
Deferred revenue	**21,325**	12,660
Agency funds held	**294,224**	261,762
Total Liabilities	**318,008**	276,540
Net Assets:		
Without donor restrictions	**533,415**	456,146
With donor restrictions	**15,579,387**	17,482,536
Total Net Assets	**16,112,802**	17,938,682
Total Liabilities and Net Assets	**$16,430,810**	$18,215,222

Westfield State University

Institutional Advancement DASHBOARD

June 30, 2022 – 4th Quarter

Executive Summary

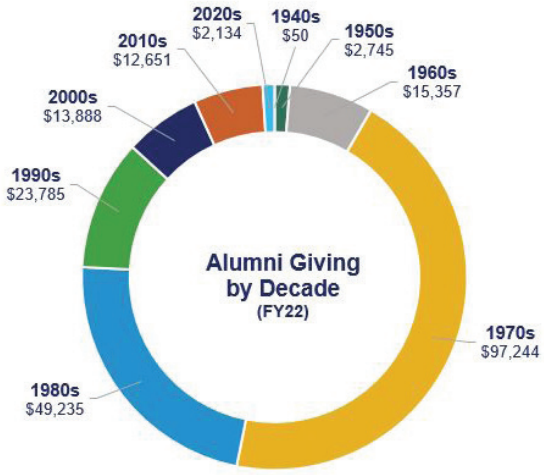
1,429 Total Donors
- 305 New Donors
- 486 Reactivated Donors
- 638 Retained Donors

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

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

Highlights

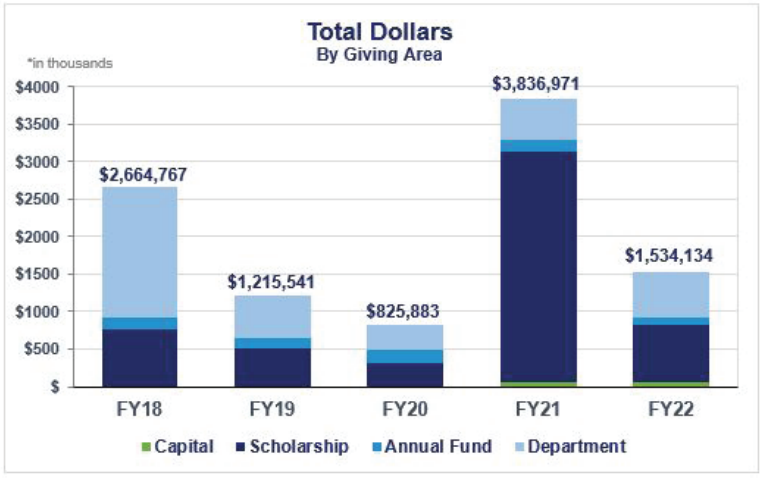
- **15%** increase of donors (1,429 in FY22 vs. 1,239 in FY21)
- **35%** increase of alum donors (879 in FY22 vs. 652 in FY21)
- Over **70 Class Years** of alumni giving, ranging from donors in Class of 1949 through Class of 2022

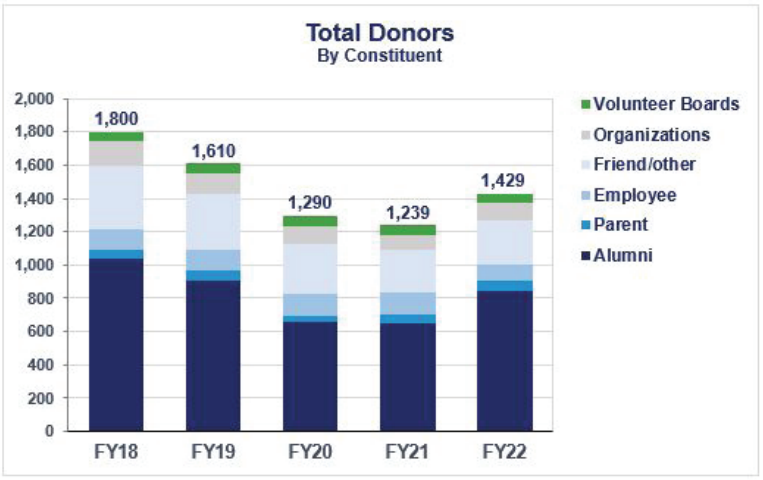


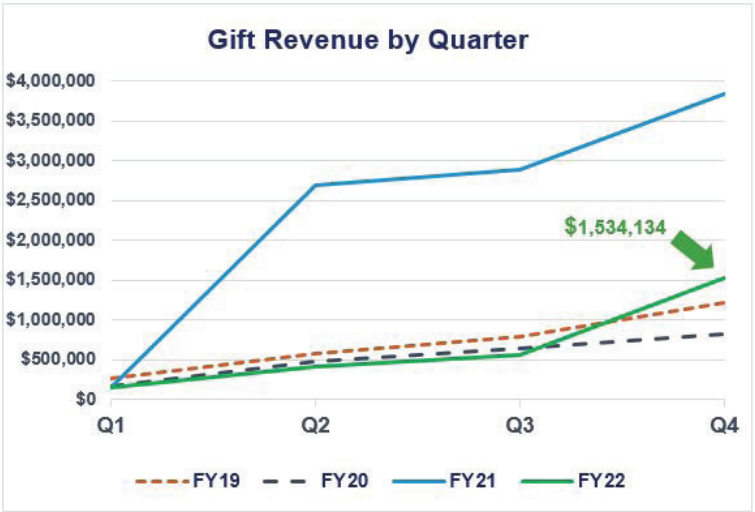
Institutional Advancement
(413) 572-8645
westfield.ma.edu

$1,534,134 Dollars | **1,429** Donors | **$251.80** Average Gift* | **1.87%** Alum Part.

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







Westfield State University

Institutional Advancement DASHBOARD

June 30, 2022 – 4th Quarter

Fundraising Priorities

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

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

PRESIDENTIAL INITIATIVE
DONORS: 30
DOLLARS: $32,645

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

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

New this year!

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

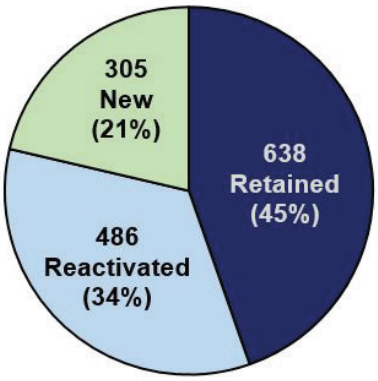
Grant Activity

$59,500 Grants Received in FY22

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

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

DONOR RETENTION



Total FY22 Donors: 1,429

RETAINED DONOR:
A donor who gave last year and gave again this year.
Increased vs. 529 retained last year (+21%)

REACTIVATED DONOR:
A donor who gave sometime in the past, but not last year, and gave again this year.
Increased vs. 394 reactivated last year (+23%)

NEW DONOR:
A donor who had given a gift for the first time.
Decreased vs. 316 new last year (-3%)

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

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



Although I have only spent one year at Westfield State, it has ***truly become my home.*** I look forward to becoming a proud alumnus of the place I call home.

DANIEL CURRIER ’25
ACCOUNTING, FINANCE

Thomas H. Convery ’78 Scholarship for Community Service, Westfield State Foundation Scholarship, Student Senate Scholarship, Berkshire Bank Scholarship, Alumni Association Scholarship

YOU MAKE *the difference!*

OPPORTUNITY	GIFT	YOUR IMPACT
Westfield Fund Unrestricted (Area of Greatest Need), Financial Assistance, and Internships	**ANY**	Opens doors for current students by supporting critical philanthropic priorities of Westfield State.
Student Scholarships	**ANY**	An impactful way to make a difference while honoring a family member, friend, or colleague or supporting programs and causes that are meaningful to you.
Sponsor-A-Student	**$1,000**	Support a single student with a one-time scholarship award in your name or the name of a loved one. (We will share with you the name of your student and the impact of your gift.)
Sponsor-An-Intern	**$2,500**	Support a deserving student's passion for real world practice by underwriting a powerful semester long experience.
Travel Abroad Experience	**$1,000+**	Sponsor a student's, once-in-a-lifetime experience, as they immerse themselves in a foreign culture for a semester. Many of our students have only dreamed of this opportunity!
Owls Helping Owls/ Student Emergency Fund	**ANY**	A fund to support the essential needs of our students facing unforeseen financial hardships.
Owl Club Athletics	**ANY**	Aid the Westfield State Owl Club in support of all teams.
Last Mile Fund	**$1,000+**	Many of our seniors struggle with finances or unforeseen obstacles; this fund comes at the critical "last mile" to graduation, assuring a pathway for the student to complete their degree.
Endowed Scholarship	**$25,000+**	Generate income in perpetuity by naming a fund for whatever purpose you chose.
Albert And Amelia Ferst Interfaith Center	**ANY**	Directly benefits the programming of the Interfaith Center as they support our Westfield State students.
Common Goods Food Pantry	**ANY**	Directly supports our campus food pantry and our students struggling with food insecurity.
FSSN (Fostering Student Success Network) *Supporting F.A.C.E.S.*	**ANY**	Committed to supporting current and former foster youth and homeless youth.
Bequest Intention	**ANY**	Bequeath a portion of your will, insurance, or retirement asset to be used for any of the aforementioned purposes.
Charitable Gift Annuity	**$50,000+**	Support any designation while receiving tax guaranteed income for life.

For more information, contact Bonnie Clark Hanson at 413-572-8631, bclark@westfield.ma.edu or visit westfieldalumni.org/foundation.



WESTFIELD STATE FOUNDATION

Westfield State University

The Westfield State Foundation, Inc. is profoundly grateful to our many donors. Please find our Honor Roll of Donors at **westfieldalumni.org/honorroll**

If interested in supporting Westfield State students, please contact Bonnie Clark Hanson at 413-572-8631 or bclark@westfield.ma.edu for information.

westfieldalumni.org/foundation