

MEMBERS:

Co-Chair: Kathryn Osmond

Co-Chair: none

Members: none

Last Name	First Name	Title	Institution/Organization
Osmond	Kathryn	Retired	

PURPOSE:

Include purpose of the committee here.

2014-2015 OBJECTIVES:**Description of duties of MASFAA Representative to EASFAA**

Appointed by the MASFAA President for a two year term, this individual will represent MASFAA as a member of EASFAA. The duties and responsibilities of the MASFAA Representative to EASFAA are:

- Serve as intermediary between MASFAA membership and EASFAA membership and the Executive Council of each Association.
- Be prepared to report at each associational council meeting.
- Update each association on what the other is doing regarding association business and activities.
- Attend EASFAA Council meetings as scheduled and represent MASFAA at the Annual EASFAA Conference.
- Submit written material for publication on website, in blog, or other medium, as requested by EASFAA.
- Work with the two associations to coordinate training/professional development.
- With regard to EASFAA programs in Massachusetts, assist EASFAA with site location and coordination and serve as trainer if called upon.

MONTHLY REPORT: AUGUST 2014

EASFAA Report submitted by Kathryn Osmond, EASFAA Representative, August 5, 2014

EASFAA Retreat in Providence, RI, July 15-16, 2014.

Tony Erwin is President and Kelly Morrissey is President-Elect. Seeing as how there is a strong Massachusetts leadership position, a goal for the EASFAA representative this year will be to increase membership from Massachusetts.

Conference: The EASFAA Conference will be held, Tuesday, May 19-Friday, May 22, 2015, in historic Newport RI. The conference theme is “Charting New Courses and Building New Bridges. The conference website will go up in September, and I will be after MASFAA for conference sessions. The conference hotel will be the Newport Hyatt. A special event will be planned. I hope to see a large MASFAA Contingency in attendance. I will be seeking the cooperation of Executive Council in encouraging attendance. In 2016, the Conference will be in Atlantic City, and that might be more of a challenge.

The conference fee will be slightly higher to account mainly for increases in food costs. Each category of registration (early bird, regular, on-site) will increase by \$20, making the registration amounts: \$370, \$395, \$410.

Training: Larry Chambers is the chair of training this year. The NASFAA training will be on Need Analysis, and it appears to be a comprehensive program, including:

- The history/evolution of need analysis
- A review of all three formulas, including automatic zero and the Simplified Needs Test
- An introduction to Institutional Methodology (with case studies)
- Impact of DOMA changes
- Hand calculations for all three FM formulas
- Scenarios to illustrate applying professional judgment to need analysis
- The importance of understanding need analysis

If MASFAA is interested, I will tell Larry and give him the PD&T co-chair contacts.

Communication (mine!): I broached the subject of emailing MASFAA members about EASFAA activities. The problem is that all MASFAA members get the email, even those who are already EASFAA members. Some people are sensitive about repeated emails, and some might even feel “spammed.” But the sense of the meeting was that it should be done anyway.

On the Hill Event: I was unable to go, but there was lively discussion about the event, co-sponsored by EASFAA and the Tri-State group. NASFAA was active in the event. Since MASFAA is active in the area of legislation, I will repeat some of the EASFAA concerns. Basically, EASFAA believes that it can and should have its own agenda, that it will usually correspond to NASFAA’s, but that it may differ in some respects. Next year’s event, it was emphasized, will be an EASFAA event. NASFAA’s input will be sought, but the event will be planned and carried out by EASFAA.

State Association Organizational News: I broached the topic on which we spent much time last year: the long lag-time between elections and taking office – in particular, the case of what I call the President Elect-Elect. It appears (I tried to take notes) that most other states do not have this large lag-time.

New Hampshire has been engaged in serious reorganization. It has changed its bylaws to include a new position, President-Elect. The fiscal year will start in January.

Maine is thinking of adding a Vice President and Secretary to its roster of positions.

New York will have a Vice President for membership and a 2nd Vice-President for Training. They have a new terminology for Associate Member: It is “Affiliate Member.” Among its projects, New York is working with COHEAO in the hope of preserving Perkins.

New Jersey: NJ is adding co-chairs and tri-chairs to its Executive Council. It sounds much like our model with regards to committees. They are splitting Treasurer and Past Treasurer duties, with one taking accounts receivable and the other accounts payable.

RI and Vermont both seem to have struggled to fill positions. RI had only 1 person stand for the office of President-Elect, and Vermont had no candidates for that office. (The current VT person will continue.)

Tri-State is comprised of DC, MD, and DE. Each state elects its own President and also the Chair of the Tri-State group. They plan to invite Directors at non-member colleges to lunch to find out what the organization can do for them to get them to join.

Finances: EASFAA is on sound financial ground. Finances and membership are good. EASFAA is hoping to expand membership.

The webinars have been successful both in substance as training tools and also as a means to expand membership in the organization. There was some discussion about people who are allowed to sign up for the webinars but then never pay. There is no means by which we can tell if they joined the webinar or did not. If everyone had paid, membership would top 800.

EASFAA is examining expenses, in particular, audit expenses, and looking to make savings where possible. Also, for the webinars, Go to Meeting is offering savings over the current software. Training expense is down due to the use of the webinars.

Engagement: There is a book which we will be getting from Tony. It addresses issues facing professional organizations, focusing on how to engage younger members. Eileen O’Leary spoke after dinner about how NASFAA will be using some of the ideas.



MONTHLY REPORT: SEPTEMBER 2014

The EASFAA conference website is up and running. As promised, the Conference Committee and the President are ready to start taking conference sessions.

There will be a Council Meeting at the Conference Hotel in November (November 3-4), so stay tuned for details of the meeting and a “review” of the hotel.

Let me know if you want anything brought up at the meeting.



MONTHLY REPORT: OCTOBER 2014



MONTHLY REPORT: NOVEMBER 2014

November 9, 2014

EASFAA Report to MASFAA 11-9-2014, by Kathryn Osmond, Representative to EASFAA

The EASFAA officers and state representatives met on November 3 and 4, adjourning in time for members to get back home to vote.

Tony Erwin, President, is visiting all of the state conferences. He is also scheduling meetings with other regional presidents in order to coordinate and collaborate. NASFAA is also participating in this endeavor. NASFAA, for example, will post events to the NASFAA calendar that are regional. NASFAA and the regions are looking for ways to align services and efforts. NASFAA is not looking to take over but just to reduce duplication of effort.

Road to Relevance

A large part of the meeting was devoted to the book Road to Relevance. It is a book that seeks to help membership organizations, which are frequently in a state of declining membership, become relevant and viable once more. Each EASFAA Board member was assigned certain questions based on the book and asked to discuss those questions. It was an interesting and, I believe, useful exercise. NASFAA went through it and will work to implement some changes that came out of the discussion.

I will not try to duplicated the discussion but I do recommend that MASFAA's Executive Council undergo the exercise. I have saved and will scan the outline and questions. It is a good reminder to be relevant and stay relevant, and it is a good exercise to go through.

Archives

We had a long discussion of the EASFAA archives. Bob Shorb (who started his career in Massachusetts before moving to NY) will serve as archivist for two more years but then will hand over the position to someone else. After retiring from financial aid, Bob became the president of Tuition Exchange, and the EASFAA records are stored with archived Tuition Exchange records.

What should be scanned, what should be stored, where, and by whom (who will succeed Bob)? A task force will be formed to answer these questions.

Conference

The planning for the next conference in Newport is just about over. The Conference Committee is looking at a new way to do conference evaluation. At the conclusion of the session, attendees would be able to scan a code and then go to an on-line survey. The Committee is confirming that there is wi-fi in each meeting room.

The moderator's duties will also change and be expanded. The moderator will not only introduce sessions but will be responsible for evaluating sessions.

The Committee is looking for a relaxing activity for the Conference and is considering a tour of a local vineyard, dinner train, or harbor tour. The Cliff Walk is not being considered as it is scheduled only for the day-time.

They have 50 session proposals thus far and will be meeting to go through them. Registration will be open in mid to late January.

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Federal Relations

Federal Relations is planning another Hill visit and details about the messaging to Congress and "ownership" of the project will be clarified.

Leadership

This Committee is developing modules to used for training and professional development in the areas of leadership and mentoring. The modules will be made available to the state organizations free of charge.

Membership

Email went out to all members who did not renew for this year. Currently there are 648 members, of which 204 are new.

I believe that I heard mention that there are 142 NY members and 84 from Massachusetts. I see this as a challenge to beat New York!

Multicultural Committee

The Committee will sponsor an interesting day-long program on race and financial aid with race and admission as the background.

Training Committee

The Committee has begun the webinars with a timely webinar on Veterans coming up. They are now using Go-to-Meeting as the software and are able to report on how many registered and how many actually attended.

To register, one must now be a member. But the ability to become a member right then and there with a credit card now exists. We discussed a practice that we all know happens but with no solution: multiple members of an office who are not EASFAA members listening in with the one EASFAA member in the group.

We also reviewed how long a webinar should be on the website, and the consensus was for no longer than a year.

Vendor Relations

EASFAA has a number of levels and various ways that vendors can participate. It has: Conference Program only, Bronze, Silver, Gold. Gold is only level to carry a free registration, and there is only 1 free registration. The other vendors will all have to register and pay for the conference.

We discussed a "banner" that could be placed atop the main page of the website and possibly the blog.

State News of Interest

Connecticut is using PayPal and has had some issues with it. The fees are high, and they cannot be charged off to the individual using the service. Connecticut must pay.

New Hampshire is looking forward the finalization of its new by-laws. Under the leadership of Elizabeth Kneuffel, it has revamped its organization and is back in business!

New York has 1571 members in the state organization. It is a part of the COHEAO movement to preserve Perkins. **NYSFAA, SUNY, and COHEAO have formed a coalition.**

New Business

Under new business was a proposal from NASFAA to revamp the Board somewhat. The idea is that Board tenure would last more than 1 year, with representatives from the state organizations serving for 2 years. It got kind of complicated after that point, and I will pursue the text of the proposal.

MONTHLY REPORT: DECEMBER 2014



MONTHLY REPORT: JANUARY 2015



MONTHLY REPORT: FEBRUARY 2015



MONTHLY REPORT: MARCH 2015



MONTHLY REPORT: APRIL 2015

MONTHLY REPORT: May, 2015

- ◆ EASFAA completed a successful year under the leadership of Tony Erwin. The webinars were outstanding and are creative ways to bring training and professional development to a far-flung audience.
- ◆ This year's conference in Newport RI had a strong program with a variety of timely sessions and seasoned presenters. Massachusetts was well-represented among the presenters and in the audience. I won't go through the names of the presenters in case I might forget someone!
- ◆ Kelly Morrissey will succeed Tony as President of EASFAA, continuing the legacy of Massachusetts providing leadership to the regional association.
- ◆ I have to admit that I was initially somewhat skeptical about EASFAA and its place among professional organizations. Standing between NASFAA, on the one hand, and MASFAA, on the other, has to be a difficult position. I now see it as a valuable enhancement to our array of professional organizations. The professional development and training opportunities offered by EASFAA are critical resources, especially to aid professionals in states that have small state organizations and to professionals (anywhere) who rely on the internet for training because they can't really leave the office. It also offers another opportunity for aid professionals to gain leadership experiences, important to their advancement.
- ◆ MASFAA can perhaps learn some new tricks from EASFAA and the member states. I am thinking here of the structure of the elected offices and specifically the role of Vice President as a way of dividing up some of the responsibilities of the President and making that office seem more reasonable to prospective candidates. The timing of elections and the assumption of office is another area to explore. I found the discussion around [The Road to Relevance](#) meaningful, given the time pressures of financial aid and the generational differences in belonging to them and being active in them. The session at the EASFAA Council meeting was a bit on the long side, but the discussion could be abbreviated and focused.