

Massachusetts Association of Student Financial Aid Administrators
Executive Council Meeting, November 16, 2016
Southbridge Hotel and Conference Center

In attendance: **Meredith Stover***, **Jim Slattery***, **Katie Kelsall***, **Shawn Morrissey***, **Alex Gonzalez***, **Emir Morais***, Shannon James, Michele Kosboth, Monica Blondin, Kristin Hmielski, **Susan Sullivan***, Ben Parsons, Nicole Cunningham, **Karen Van Dyne***, **Sherri Avery***, Christa Gilmore, Greg Chick, Keith Dimilanta, **Jeremy Greenhouse*** Julie Lawton, Alexis Guay

Absent: **Stephanie Wells***, **Sabina Yesmin***, Brooke Barbieri, Ebony Carter, Jill Marr, Rosemary Hilliard, **Jennifer Muldowney***, Jason Marsala, Cheryl Constantine, Jolene Coakley, Tony Erwin, Kristi Pierce, Ryan Forsythe, Julie Wickstrom

Bold italics* = voting member

Meeting started: 2:20 PM. Welcome to everyone from President Shawn Morrissey.

Secretary's Report: **Meredith Stover***

- Review of minutes from the October meeting. No additional updates. Motion was put forward by Michele and seconded by Katie to approve minutes – all voting members in attendance approved.

Treasurer's Report: **Katie Kelsall* and Karen Van Dyne***

- Approximately \$50K in membership and conference dues since late October – will have complete report for our next meeting.
- Numbers are down, third year in a row that both membership and conference revenues are lower.
- Filing taxes today most likely, just need Shawn's signature.

Comments:

- Shawn: similar issues reported by other state associations at EASFAA. Hopefully we can get feedback at conference and business meeting. Will also have a session on strategic plan.
- Emir: if mentioning at business meeting, need to give perspective on prior year numbers
- Alex: do we have an idea of the numbers?
- Karen: lots of receivables pending

President-Elect's Report: **Susan Sullivan***

- Awards are all set to be presented at Thursday evening reception.
- No feedback yet on request to have Elizabeth Warren as a guest speaker.

Past President's Report: **Jim Slattery***

- Could not get slate of candidates in place for conference. Had hoped that direct outreach would yield candidates. Will put out calls for nominations.
- Will have session at conference (lunch on Thursday) with Sherri on strategic plan. Inserts in conference bags to promote session.

President's Report: **Shawn Morrissey***

- Working on website and conference mostly.
- No specific updates but will have information to add with Technology and Conference updates.

Committee Updates

Conference: Shannon Eagan and Alexis Guay

- Numbers are lower, currently 244 registrants plus conference committee members brings it to 267. 330-350 in prior years.
- Everything is on schedule.
- May need help moving attendees out of eating areas to stay on schedule

Comments:

- Katie: expecting any late registrants? Usually 10-15 in prior years, maybe higher.
- Alexis: can we process credit cards? We think so.
- Ben: what time does registration open? 8:00 AM.
- Shawn: any head tables – no. But we do have reserved signs as needed.

FAFSA Day: Keith Dimilanta, Kristi Pierce, Ryan Forsythe

- 14 events so far, heard back from 10 sites.
- Over 700 attendees – numbers are down but most likely to the changes with timing and prior prior year. More events in January.
- Thanks to Greg and Julie for their help with the FAFSA Day website.

Comments:

- Alex: some interest at sites about completing CSS PROFILE. Otherwise, positive feedback about earlier dates.
- Meredith: large number of attendees at Framingham High School site, also interest about CSS PROFILE.
- Keith: would need specific resources for CSS PROFILE

Government Relations: **Shawn Morrissey*** on behalf of Cheryl Constantine and Tony Erwin

- Tony and Cheryl could not attend meeting. Looking forward to session at conference.

Access, Inclusion and Diversity: Ebony Carter, Jason Marsala

- No updates to report.

Graduate and Professional Concerns: **Emir Morais*** on behalf of Brooke Barbieri and Rosemary Hilliard

- Theme for symposium is wellness and professional development.
- Sessions include desk yoga, federal update with Betsy Mayotte from ASA. Agenda will be set in December with registration going out in January.
- Will set up easel sign outside of ballroom with symposium date.

Comments:

- Shawn: confirm with him once registration is open and he will market event with EASFAA – they are open to promoting any MASFAA events.
- Greg: do attendees have to be MASFAA members? Yes.

Financial Wellness: Monica Blondin and Kristin Hmielski

- Have been working with Greg to get their section of website up and running. Working on logo for committee.
- Hoping to launch survey to find out what members want within the financial literacy realm.
- Committee members will be available during conference to provide information about committee and financial literacy.
- 3 sessions at conference.

- Planning for possible symposium type of event in April or October. Online resources for now – using the tool kit idea. Resources include books, other conferences, websites, etc.

Comments:

- Greg: how will you send out survey? Reminder that MASFAA has premium package Survey Monkey software.
- Shawn: what is preferred name of committee? Just want to be consistent: Financial Wellness Committee.

Professional Development and Training: Nicole Cunningham and Julie Lawton

- Just the Facts is complete – excellent comments from attendees. Good attendance each week, participants were very appreciative of program. A couple of attendees could be future instructors.
- Working on possible NASFAA credential piece for attendees.
- Tax workshops are next: 12/9 in Worcester and 1/26 in Wellesley.
- Co-chair Julie Lawton introduced herself – has been working on Leadership Academy in the fall. Thanked Sue Sullivan for her presentation. Prior Leadership Academy participants presented at Just the Facts.

Early Awareness: Jill Marr and Christa Gilmore

- Not much activity to report – next meeting in late November. Targeting Worcester, MA for next location.
- Will have signage in vendor area for collections of college t-shirts. Hoping to also solicit new members.

Development: *Stephanie Wells**

- No updates to report. Thanks to Stephanie for all her efforts in securing vendors for conference. \$27,600 in revenue from vendors.

Membership: Ben Parsons and Jolene Coakley

- Jolene is caught up with checks. Will be at registration table for conference.
- Thanks from Shawn to Ben and Jolene for their work in getting membership registration up and running.

Comments:

- Shawn: how is membership registration process with new site? Depends, there have been some issues.
- Greg: has been able to reach out to those having issues for the most part
- Ben: fewer “holes” for members to slip through with new site.
- Shawn: history/profile section for members will be helpful for MASFAA. Will encourage members to complete it as part of conference.
- Ben: is there a way to link information to LinkedIn? Per Greg, doesn’t think is possible.

Technology: Greg Chick and Julie Wickstrom

- Thanks to Julie for all her help with new site.
- Actively monitoring registration and membership. Listserv is still in progress. Using MailChimp now to send out messages. There is functionality to send messages from website but not exactly what we had previously.
- Set up online store for vendors to pick what they wanted to sponsor. Will push forward with developing other new features and keep us posted.

Comments:

- Emir: will there be functionality to have MASFAA specific email addresses? Per Greg, that won’t be an option.
- Keith: will there a mobile app? Yes but need to be a MASFAA member so it won’t be as helpful for FAFSA Day.
- Shawn: would we want to have access to site for different membership levels – thinking of FAFSA Day? Greg – would take a lot of configuration but in the long run could be helpful.

- Shawn: is it possible to reactivate old listserv? Try with another vendor?
- Greg: any ideas? Nelson at Noetic is not interested. Shawn will reach out to EASFAA.
- Sue: if continuing with MailChimp, may have to change payment process. October/November are high volume months – need more access.
- Kristen: still OK to send messages via website? Yes, but only going to current members.
- Jim: can we import into non-membership category? Only have emails, not names, etc.
- Michele: quick online search, L-Soft listserv, can have up to 500 subscribers, we have 1400.
- Shawn: EASFAA uses a couple of options – he will research. He also offered a HUGE thank you to Greg for all his time and efforts in setting up new website.

Communications: Michele Kosboth

- Messages going out on Facebook. Focused on communicating via social media outlets.
- Can post to Facebook page. Sue will post during awards ceremony.

Miscellaneous

New business:

None

Old business:

Need to revisit membership and conference registration breakdown at next meeting

Karen motioned to adjourn, Sherri seconded. All in favor to adjourn the meeting at 4:00 PM

Respectfully submitted,

Meredith Stover