

Massachusetts Association of Student Financial Aid Administrators
Executive Council Meeting, October 21, 2016
Worcester Polytechnic Institute

In attendance: ***Meredith Stover****, ***Jim Slattery****, ***Katie Kelsall****, ***Shawn Morrissey****, ***Stephanie Wells****, ***Alex Gonzalez****, ***Emir Morais****, Shannon Eagan, , Monica Blondin, ***Susan Sullivan****, ***Sabina Yesmin****, Brooke Barbieri, Ebony Carter, Ben Parsons, Nicole Cunningham, ***Karen Van Dyne****, Rosemary Hilliard, ***Sherri Avery****, ***Jennifer Muldowney****, Jason Marsala, Cheryl Constantine, Christa Gilmore, Alexis Guay, Kristi Pierce, Julie Wickstrom, ***Jeremy Greenhouse****

Absent: Greg Chick, Jolene Coakley, Tony Erwin, Keith Dimilanta, Ryan Forsythe, Julie Lawton, Michele Kosboth, Kristin Hmielski, Jill Marr

Bold italics* = voting member

Meeting started: 10:00 AM. Welcome to everyone from President Shawn Morrissey and thank you to WPI and Monica Blondin for hosting.

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

- Shawn shared with Executive Council the news of the death of Anthony Crowe, former MASFAA Executive Council member and Government Relations co-chair. Anthony worked as an aid administrator at Northeastern University, Boston College, and Berklee College of Music.
- Family requested donations in his memory to the MSPCA. Shawn put forward a motion to donate to the MSPCA in honor of Anthony from MASFAA – Jim seconded the motion.
- Should we also consider doing something for his children? Collection at conference? MASFAA could match donations up to a certain amount?
- Decided to make a donation now to MSPCA now in the amount of \$200. Shawn put forward the motion, Karen seconded.
- Will find out more about family's needs and follow up at a future meeting.

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

- Review of minutes from the September meeting. No additional updates. Motion was put forward by Susan Sullivan and seconded by Sherri to Avery to approve minutes – all voting members in attendance approved.

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

- Will plan to review and send out reimbursements weekly.
- Working on getting a report that includes the budget as well as spending. Will send out updated Treasurer's reports via email next week.
- Karen proposed the idea of setting up a Drop Box for saving documents – lots of paper documents to transfer each time a new Treasurer is elected. This would allow the documents to be scanned and saved on the Cloud – would need to have paper documents shredded. She will look into the cost of scanning and shredding.
- Taxes are in the final stages of being filed – questions will come up about budget and the expenses related to the new website.

Comments:

- Katie: do we have Cloud storage via the website?
- Jim: there is information also on external drives that would need to be saved
- Julie: Google drive is another option but Drop Box is probably the least expensive option.
- Shawn: need to retain some documents? Katie will confirm with accountant at next meeting.

Past President's Report: *Jim Slattery**

- Nominations Committee update – need to communicate positions to membership. Email to go out shortly.
- Working on conference session related to strategic plan.

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

- Nominations for MASFAA awards. Will vote this afternoon. Chuck Jones' wife is coming to the conference.
- Reached out to Clantha McCurdy at MA OSFA to see if she could help with securing Elizabeth Warren as potential speaker at a future event. Clantha will check with her connections at the MA Board of Higher Education.

Comments:

- Shawn: could have a web presence to make it an even bigger draw for Elizabeth Warren – EASFAA promotion?

Committee Updates

Conference: Shannon Eagan and Alexis Guay

- Waiting for website to open up conference registration. Hotel was holding room rate until 10/17.
- Is the listserv down? Yes – but we can still communicate to membership.
- In past years, we have charged a late fee for registering after the deadline – confirmed with council that we are not in a position to do that this year.

Comments:

- Julie: we could communicate to membership about room rates now
- Susan: for some schools, need to submit payment request for rooms so that would be helpful to start on now.
- Shawn: asked Shannon to compose a short email with information about hotel registration, cost of conference, and a possible registration timeline and send it to Susan who will coordinate sending it out.
- Julie: meeting with web vendor Digital Cheetah next week which should hopefully tie out some of the remaining pieces of the website.
- Stephanie: what is this year's charity? Center of Hope Foundation (www.thecenterofhope.org).

FAFSA Day: Keith Dimilanta, Kristi Pierce, Ryan Forsythe

- 34 events scheduled from November through March.
- Site coordinators meeting held this month. Won't be sending out bulk materials but will still have materials – distributed most at site coordinators meeting.
- Thanks to Technology Committee for their help with registration.
- College Coach will be answering FAFSA Day related calls through January

Comments:

- Jim: how are the overall numbers and sites compared to last year? Very similar.
- Karen: no site for Somerville this year? They opted to try it on their own – not sure why?
- Stephanie: due to the success of FAFSA Day in past years, many towns are opting to do their own event and build on it.

Government Relations: Cheryl Constantine and Tony Erwin

- Conference session all set.
- Attended the NASFAA Advocacy Pipeline in Washington, DC with Kathy Anderson. Visited over 20 offices, talked about graduate and professional issues. Met with Representatives Katherine Clark and Michael Capuano, and Senator Ed Markey.

Access, Inclusion and Diversity: Ebony Carter, Jason Marsala

- Looking for profiles in financial aid for the website. Show pride in schools and MASFAA organization. Do you have a co-worker that embodies AID?

EASFAA: *Shawn Morrissey**

- Attended September meeting. Upcoming EASFAA training sessions – have to be EASFAA member to attend. If we take on the training piece, would not need to be an EASFAA member. Do we have the resources and interest?
- NASFAA task force to look at regional associations. May be able to provide some type of “umbrella” leadership to states that rely on regional associations to a greater extent. EASFAA conference attendance is down, NASFAA is up.

Comments:

- Nicole: Does the EASFAA training involve NASFAA CORE materials? No – separate. Shawn will find out topics and time of year – need to see if we have capacity.
- Stephanie: working with our vendors to boost exhibitor participation at EASFAA

Graduate and Professional Concerns: Brooke Barbieri and Rosemary Hilliard

- On schedule with symposium. Focus will be on wellness and professional development. Betsy Mayotte from ASA will give a federal update.

Comments:

- Karen: met with Edward Jones recently, would be willing to do some type of basic investment training?
- Rosemary: focusing more on general well-being vs. investment wellness but could do a combination
- Emir: can take a look at the Powerpoint presentation from Edward Jones to vet it before deciding to move forward, may be a good approach.

Early Awareness: Jill Marr and Christa Gilmore

- Carnival of Learning event was yesterday in Lawrence. 60 middle school students and 6 college speakers. Focus was on the prospect and excitement of attending college.
- Event ran smoothly – will review evaluations and report back at next meeting.

Development: *Stephanie Wells**

- Locked in with vendors for conference. \$24,000 committed – just waiting to hear back from Wells Fargo.
- MEFA will be hosting the charging station. Citizens is doing the lanyard and the bags are sponsored by College Ave.
- Have all logos for vendors to be included in the conference agenda details.
- A couple of vendors are not coming back from last year but we have added new vendors including ELM and FolderWave.

Comments:

- Jim: for the vendors not returning from last year, do we know why? Per Stephanie, no response to either a group email or a personal email from her.
- Jeremy: good to consider non-financial vendors (FolderWave) in addition to financial vendors that offer products of interest to attendees.
- Jason: should also consider vendors that office managers use or make decisions about
- Karen: how many outstanding payments? MEFA, Sallie Mae and ASA --- but Sallie Mae and ASA want to use a credit card.

Membership: Ben Parsons and Jolene Coakley

- Training next week with Digital Cheetah on how to collect dues via website payment for membership.

Comments:

- Shawn: Since there are a number of member schools who prefer to pay via check, email going out today to everyone in the membership database on how to update membership information online and pay membership dues via check.

Technology: Greg Chick and Julie Wickstrom

- Good news is that the site is easy to update and looks great – bad news is that not everything is working as planned.
- The listserv is not working – Greg has asked the vendor to help us configure. In the meantime, Greg, Julie or Sue can send an email out to membership as needed.
- Most everything else is working – FAFSA Day site is good and people are able to volunteer.
- Email went out today to membership about job postings – schools complete request which then goes to a site administrator to approve and post. Feedback that some are having issues with posting positions.

Comments:

- Sue: if anyone has a job posting, send to her, Greg, or Julie and they can help.
- Julie: will add more language on the website about trouble shooting error messages and who to contact.
- Jennifer: one of her co-workers had trouble getting Just the Facts information. She reached out directly to Nicole.
- Julie: website should also work on mobile devices – let her know if you are getting errors so they can review and fix.
- Emir: content on the home page – some content needs to be deleted and/or updated.
- Sue: working on functionality for right now but will go back and update content.
- Shawn: Any update on logo (difficult to read on site)? Jim – sent email but have not heard back. May need to submit ticket – will follow up with Julie.
- Sue: if more volunteers are needed for FAFSA Day, we can send out another email to membership closer to November 6th.

Financial Literacy: Monica Blondin and Kristin Hmielski

- Met in September, attendance was split between in-person attendees and callers.
- Resources on the Web subcommittee – posted an article on new website. Trying to showcase different people in MA who are focusing on financial literacy on their campuses.
- Events subcommittee – will have a panel session at conference. May not have enough time to cover all of the information they have so they are looking to hold some type of event in the spring to continue the conversation.

Comments:

- Monica: OK to use MASFAA logo?
- Shawn: any committee can use logo as needed.

Professional Development and Training: Nicole Cunningham and Julie Lawton

- Just the Facts is ongoing – requesting evaluations after each session, great feedback so far.
- Leadership Academy – great turnout – 2 sessions to date and will continue throughout the year.
- Tax workshops are scheduled for December 9th at Clark University in Worcester and Wellesley College on January 26th.

Communications: Michele Kosboth

- Working with Sue on sending out communications – Facebook has had some great posts.
- While at the Executive Council meeting, many attendees received an email about membership – but it was not the language provided by Shawn. Digital Cheetah sent out the email outlining the new website and how to update your membership. Shawn asked Julie to put in a ticket with updated language which explains in more detail how to update your membership profile.

Comments:

- Sue: setting up your membership profile is similar to LinkedIn – you can update your profile and also post a photo.
- Julie: should we post something on Facebook letting members know if they want to send something out to membership, who do they contact?
- Sue: Yes, agreed that we should do that.
- Stephanie: not receiving any MASFAA related emails?
- Sue: working on the listserv, acknowledged that not everyone is getting the emails (including herself)
- Monica: who do we contact if we want to post something on Facebook? Email Michele and she can help with Facebook posts.

Miscellaneous

New business:

None

Old business:

None

All in favor to adjourn the meeting at 11:54 AM.

Respectfully submitted,

Meredith Stover