

Massachusetts Association of Student Financial Aid Administrators  
Executive Council Meeting, February 17, 2017  
Worcester Polytechnic Institute

In attendance: **Meredith Stover\***, **Shawn Morrissey\***, **Alex Gonzalez\***, **Emir Morais\***, Monica Blondin, **Sherri Avery\***, **Jeremy Greenhouse\***, **Stephanie Wells\***, Brooke Barbieri, **Jennifer Muldowney\***, Julie Wickstrom, **Katie Kelsall\***, Michele Kosboth, Kristin Hmielski, **Susan Sullivan\***, Julie Lawton, Ryan Forsythe

Absent: Ben Parsons, Nicole Cunningham, Christa Gilmore, Keith Dimilanta, , Ebony Carter, Jason Marsala, Jolene Coakley, Kristi Pierce, **Jim Slattery\***, Shannon Eagan, **Karen Van Dyne\***, Greg Chick, Alexis Guay, **Sabina Yesmin\***, Jill Marr, Rosemary Hilliard, Cheryl Constantine, Tony Erwin

***Bold italics\**** = voting member

Meeting started: 10:25 AM. Welcome to everyone from President Shawn Morrissey. Thanks to Monica Blondin and WPI for hosting.

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

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

Past President's Report: **Shawn Morrissey\*** for **Jim Slattery\***

- Working on nominations for 17-18 Executive Council. There are 2 candidates for President, looking for just one more position.
- Also reviewing online voting options – there are many of them and most do not require payment. Will work with Greg and Julie to set up. Should be ready to go soon.
- Strategic plan update – will send message out to listserv with updates and a request for committee candidates. Working on a survey to share with membership, will get input from committee. Per Shawn, we have a membership to Survey Monkey – Greg can help with that.

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

- Looking at next year's committees and determining who is staying and who is leaving. For those committees needing new members and/or co-chairs, have some names of people to approach.
- Probably a "no" to our hope of having Elizabeth Warren speak at a MASFAA event and honor her with the Edward M. Kennedy Award. Could still opt to give her award at another time.

**Comments:**

- Jennifer: Are Executive Council members allowed to be committee co-chairs? Yes, but often the issue is the time commitment.
- Shawn: let's hold off on awarding the Edward M. Kennedy Award to Elizabeth Warren – maybe there will be a time in the next year or two that would allow her to accept in person and speak at a MASFAA event.

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

- Good reserves but income is consistently declining. Need to think about this as we plan for conference.
- Membership and conference revenues were down, hotel and meal costs were higher.

**Comments:**

- Michele: website was a big impact for this year. Won't have the issue this year of not being able to renew membership in July, listserv is also working.

- Emir: for year-end event, since it is so late in the year, maybe invite non-members?
- Shawn: hoping to have a more robust year-end event this year. Inviting non-members would be a good way for them to see what we are about. Could have them pay with membership dues and have it count toward next year.
- Emir: need to showcase website features at an upcoming event, lots of potential.
- Kristin: we should revisit the idea of sending out a letter to colleges about membership. Michele mentioned this could be a joint effort with Communications committee.
- Katie: session at year-end event on job security? Provide support to professionals who are dealing with enrollment issues, legislative changes, etc.

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

- EASFAA online training –Cash Management credential training. Two days, 2/28 and 3/1, need to be EASFAA member plus additional fee which allows for credentials.
- Next Thursday, 2/23, there will be EASFAA Satisfactory Academic Progress training at Wellesley College.
- EASFAA conference registration is now live – this year's conference is in Burlington, VT.

**Committee Updates**

FAFSA Day: Keith Dimilanta, Kristi Pierce, Ryan Forsythe

- End of season, 30 events, four more to go. Next date is March 4<sup>th</sup>. Have a good number of volunteers in place for that date.
- 1100 attendees so far, down from last year. Much higher attendance at earlier events. For more recent events, many sites reporting anywhere from two to eight families in attendance.
- Thanks to all the volunteers and the Technology Committee for all their help.
- Met at ASA recently to kick off planning for 17-18 FAFSA Day. Dates will be 11/5/17 and 1/28/18.
- Looking at other potential dates. 320 volunteers in total this year – not sure how that compares to last year. Will have complete wrap-up at a future meeting once all events are completed.

**Comments:**

- Shawn: will you encourage site hosts to go with earlier date? Yes – most are going in that direction anyway.

Graduate and Professional Concerns: Brooke Barbieri and Rosemary Hilliard

- Symposium was a success, 60 attendees. Will follow up with evaluations at a future meeting.
- Brooke will be rotating off as co-chair, Rosemary will be continuing as co-chair. Looking for more committee volunteers.

**Comments:**

- Emir: wellness theme was well received, nice to step away from the financial aid focus. Good mix of sessions.

Financial Wellness: Monica Blondin and Kristin Hmielski

- Shared feedback from membership survey regarding financial wellness. 133 responses.
- Symposium in early October seems like it would be well received – any issues with that timing?
- Idea of some type of forum on website where members could post questions/ideas and others could respond. Seems like the website could accommodate something like this – would allow members to view when they wanted to instead of using the listserv.
- Higher Education Financial Wellness Summit ([www.hefwa.org](http://www.hefwa.org)) is holding national summit in MN – can now submit proposals.

- Monica mentioned the idea of a comedian who presented at a conference she attended – may be something for us to consider for a future conference. Very funny and pertinent material to all in attendance. She can find out contact information.
- **Comments:**
  - Greg: for forum option, need to be logged in to Portal – My Groups. Can create new groups anytime.
  - Julie Wickstrom: Just the Facts typically is held during October
  - Julie Lawton: trying to set dates soon for Just the Facts in order to better juggle fall dates for so many events.
  - Emir: For HEFWA, do they make materials available on website at any point? Monica thinks they do – she will be attending this year’s event.
  - Michele: instead of a separate event in October, could we have a “track” at conference for financial wellness?
  - Shawn: likes the “track” idea, could also have conference pre-session. This would work well with this year’s Cape Cod location – many attendees will be traveling the day before.
  - Ryan: stand-alone event could have sponsorship
  - Ryan: curious about what types of work/collaboration that schools are doing with companies that offer financial literacy products? Approached by credit unions looking for banking business that also offer financial literacy products.
  - Monica: WPI hosted fair last year for students – depends on college and what they want to promote/accept.
  - Kristin: these type of events help to bring folks to campus based on student interests.
  - Michele: a list of “best practices” might be helpful information for institutions making these choices
  - Emir: vetted an offer from a large bank to offer a refinance calculator on their website – declined offer – looking for options in the spirit of educating general public, not selling a service.
  - Jeremy: depends on institution, some students do not have access to a bank account so they do need help at that level.
  - Stephanie: RFI season is upon us – many schools are asking about what types of debt management products are offered – good way to vet that information.
  - Julie Lawton: most schools have established banking relationships, not easy to change

Government Relations: Cheryl Constantine and Tony Erwin

No updates this month

Access, Inclusion and Diversity: Ebony Carter, Jason Marsala

No updates this month

Early Awareness: **Meredith Stover\*** for Jill Marr and Christa Gilmore

- Date for next event is 4/27/17 at Worcester East Middle School, 420 Grafton St., Worcester, MA 01604.
- Setup and lunch will begin at 12:30 PM and the program runs from 1:30 – 3:45 PM. Anyone is welcome – please let Jill or Christa know if you are interested in volunteering – lunch will be provided.

Conference: Shannon Eagan and Alexis Guay

No updates this month

Development: **Stephanie Wells\***

- Helping Jim with potential candidates for Associate Member nomination.
- Working on year-end event plans.

### Professional Development and Training: Nicole Cunningham and Julie Lawton

- Julie mentioned that for EASFAA conference, membership dues are paid at the same time for the upcoming year. We do something similar with our conference but if the year-end was well attended, could consider moving in that direction as well. One issue with year-end event, for most schools, that would be the prior fiscal year.
- Thinking of an event for supervisors – but may combine with year-end event.
- For tax workshops, may change format to one day focused on basic tax training and one day for more advanced topics. Robert Weirnerman could also accommodate this option.
- Reminder to Exec Council members about fee waiver for NASFAA credentials – we need credentialed presenters! Must be used by the end of March.
- Working on mapping out dates for Just the Facts and Leadership Academy. Will start their planning in the spring/summer for all fall events.
- NASFAA may be eliminating some of their training materials, perhaps CORE materials? Available at least through 17-18, we use for Just the Facts training. Assuming NASFAA's decision may be financial related with so many online webinars and other training delivery options.

#### **Comments:**

- Shawn: maybe get a sense from different committees about interest in presenting at year-end event? Revisit at March meeting.
- Susan: Leadership Academy participants will be at year-end event.
- Emir: need to confirm a date and location for year-end event
- Emir: what is the volume of NASFAA credentialed members? Very few – can view all credentialed professionals on the NASFAA website.
- Monica: Do you have to be credentialed? NASFAA is heading in the direction of requiring users of their materials be credentialed in the subject matter.

### Membership: Ben Parsons and Jolene Coakley

No updates this month

### Technology: Greg Chick and Julie Wickstrom

- Thanks to Greg and Sue for dealing with many of the listserv issues and getting emails out to membership. Very happy that new listserv is up and running!
- Emir: reminder to upload photos, etc. from your events – just uploaded photos from GPCC symposium.

#### **Comments:**

- Shawn: Potential opportunity for combined messaging from Technology and Communications committees about features of new website.

### Communications: Michele Kosboth

- Also excited about list serv for email messages – thank you!
- Sabina Yesmin has volunteered to co-chair.
- Working on blog posts – let her know any ideas. Some topics include international and undocumented students, how are colleges responding? Study Abroad, PPY are also topics of interest.
- How useful is newsletter? Need feedback.
- Will work on outreach to campuses re: membership and also any strategic plan updates.

#### **Comments:**

- Ryan: worked on the newsletter in the past. Committee did most of work, mostly sales type of articles from vendors. Assuming a low number of overall hits, real time messaging is better.
- Stephanie: for international student issues, ASA employees have presented to guidance counselors – could be a good resource. Also, need to revisit PPY survey to membership – the timing may be better now that most schools have made policy decisions.
- Michele: survey would be good information – financial aid folks are willing to share information so we should get a good response.

### **Miscellaneous**

#### Old business:

- Kristin mentioned from a recent AICUM meeting that Senator Eileen Donahue is revisiting the idea of a uniform shopping sheet requirement for MA. AICUM is not in favor
- Other AICUM updates - it's looking better for the possibility of a reciprocity agreement for state authorization for online programs. The issues have been mainly with for-profit institutions. Also revisiting State House Day, more of a Financial Aid 101 format.
- Emir asked about Anthony Crowe and whether or not a contribution in his memory was made? Need to revisit at March meeting.
- Revisit of MA OSFA proposal to require MassGrant recipients to “match” their award on some level? Next MA OSFA meeting will be in advance of our March meeting so more details from Shawn next month.

#### **Comments:**

- Shawn: Government Relations has been working with AICUM on State House Day but will confirm.
- Ryan: has MASFAA or AICUM formally expressed an opinion about the shopping sheet? Yes on both – MASFAA submitted a response last March. Should we do again?
- Shawn: can send another letter although our position has not changed

#### New business:

None

Susan motioned to adjourn, Emir seconded. All in favor to adjourn the meeting at 12:30 PM

Respectfully submitted,

Meredith Stover