

Massachusetts Association of Student Financial Aid Administrators
Executive Council Meeting, January 20, 2017
Worcester Polytechnic Institute

In attendance: **Meredith Stover***, **Jim Slattery***, **Shawn Morrissey***, **Alex Gonzalez***, **Emir Morais***, Shannon Eagan, Monica Blondin, **Karen Van Dyne***, **Sherri Avery***, Greg Chick, **Jeremy Greenhouse***, Alexis Guay, **Stephanie Wells***, **Sabina Yesmin***, Brooke Barbieri, Jill Marr, Rosemary Hilliard, Jennifer Muldowney, Cheryl Constantine, Tony Erwin, Ryan Forsythe, Julie Wickstrom

Absent: **Katie Kelsall***, Michele Kosboth, Kristin Hmielski, **Susan Sullivan***, Ben Parsons, Nicole Cunningham, Christa Gilmore, Keith Dimilanta, Julie Lawton, Ebony Carter, Jason Marsala, Jolene Coakley, Kristi Pierce

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 November meeting. No additional updates. Motion was put forward by Jeremy and seconded by Sherri to approve minutes – all voting members in attendance approved.

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

- Review of budget – still receiving funds for conference and membership.
- Can't get on to Digital Cheetah? Greg will follow up.
- Approximately \$60K revenue from conference, may not break even but healthy reserves to cover.
- Need to focus on membership initiatives for revenue

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

No updates for this month.

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

- Working on nominations for 17-18 council. Hoping to send out e-mail solicitation to MASFAA today. Has been doing outreach and having conversations with potential candidates.
- Strategic plan update – held session at MASFAA with co-chair Sherri Avery.
- No surprises but feedback on most important issues include: membership, use of reserves to recruit, advocacy, training, collaboration with other associations, and a focus on volunteerism.
- Next steps for strategic plan – meet with committee to send out survey to membership. Explain process, provide timeline – want to be transparent. Will also extend invite to join committee.
- Hoping to bring in a facilitator to help with review of plan – perhaps a retired financial aid professional? Would serve at a couple of meetings. Would need to pay for this.

Comments:

- Shawn: for payment piece, would need to put forward a request to Executive Council for a vote
- Jeremy: Duane Quinn would be a good candidate to approach for the facilitator role.
- Shawn: could reach out to Chuck Jones winners or Leadership Academy alums for committee
- Stephanie: will suggest possible candidates for Associate Member/Executive Council position

President's Report: *Shawn Morrissey**

- As part of MASFAA president role, sits on MA OSFA Advisory Board. At recent meeting, there was a proposal to have families receiving MASSGrant funds match all or a portion of their grant funds.
- Not well received, including Clantha McCurdy.
- No EASFAA updates this month since no meeting – should have updates to share next month.

Comments:

- Jim: was this coming from the legislature? Confusing coming from an agency representing low-income families. Would be hard to explain to families receiving maximum scholarship that they would need to contribute matching funds.
- Stephanie: Charles Desmond is chair of MA Board of Higher Education and current CEO of Inversant, a non-profit that promotes the partnership of communities/institutions with families in achieving educational goals. Part of their model includes incentives for saving for college.
- Julie: Bob Hildreth, Chair and founder of Inversant, is chair of BU's Board of Overseers. Seems like this initiative is coming from the Inversant connection.
- Shawn: OSFA always looking for more funds and not receiving them from the state. Looking at all options – the issue is that not all families have the means to save, even with incentive options such as Inversant.
- Ryan: would this be a "real time" match? Yes, the proposal would require a real-time match to receive funds.
- Monica: burden not only on families but also on colleges and universities to manage that obligation.
- Shawn: savings would potentially impact TFC for families. Match is basically an imposed "gap" in a student's package receiving OSFA funds.
- Sabina: hard to see rationale of this plan in relation to needy families
- Greg: appealing to middle class families, more of a political initiative?
- Sherri: Should MASFAA submit an opposition letter to OSFA?
- Shawn: Yes. Promoting college savings and the idea of matching funds is a good concept but MASSGrant is the wrong mechanism.

Committee Updates

FAFSA Day: Keith Dimilanta, Kristi Pierce, Ryan Forsythe

- 17 events completed, 17 remaining. January 29th is the next big date. Need volunteers at remaining sites.
- 1100 attendees overall so far, down slightly from prior years. Higher attendance at earlier dates.
- Thanks to volunteers, site coordinators and the Technology Committee.
- Looking for co-chair for next year, Kristi will be rotating off. Have interested candidates but not all are MASFAA members (K-12 guidance counselors) – is that an option and would they need to be members?

Comments:

- Sherri: would be willing to waive membership fee for anyone wanting to take on the role
- Shawn: agreed, unique situation – does not seem fair to charge membership fee since most would not be taking advantage of MASFAA training, etc.
- Monica: would be a great partnership with secondary schools
- Ryan: we rely heavily on guidance community, their input greatly impacts FAFSA Day. Having one co-chair with direct involvement in high schools would be a great benefit.
- Brooke: per handbook, associate members can be co-chairs
- Shawn: president selects co-chairs with input from current chairs. Seems fine to move forward with candidates from guidance community if they are interested.

Government Relations: Cheryl Constantine and Tony Erwin

- NASFAA speaker Stephen Payne was well received at MASFAA conference.

- Working on spring event to reinvigorate conversation about how legislation is decided that impacts all of us and our students. One day virtual conference with 3 or 4 themed webinars so no travel required to attend.
- Partnering with EASFAA since they have done something similar. Approaching AICUM to partner on state budgeting piece.
- Dates are challenging. Looking for feedback on dates and subjects for webinars.
- Also revisiting State House Day event – student advocacy day organized by AICUM. Since it was hard to schedule students to meet with legislators, AICUM changed the event to a regional focus. Moderate success in Springfield/Worcester area, not so much in the Boston area.
- Another idea is to transition the event to more of a historical and educational day to include students. Highlight programs that students benefit from, share compelling stories.
- Also thinking of something for year-end event, would like to have a session or two that would lead into end of day event. Thinking of metro-west location.

Comments:

- Sabina: will the virtual webinar be saved for later viewing? Yes.
- Stephanie: offices could come up with fun ideas to participate and view as a group for webinar event
- Jim: great ideas all around. Need to bring more focus to year-end event, thanks for offering an option.
- Jeremy: could do a survey to see what types of webinars they would like?
- Monica: could do financial literacy session at year-end event.

Access, Inclusion and Diversity: *Shawn Morrissey** on behalf of Ebony Carter, Jason Marsala

- First event in December – Transgender 101. Thanks to Julie for her help with technology piece. Perfect number of attendees, very good participation.
- Planning for spring events – afternoon chat is one idea. Open to any feedback.

Graduate and Professional Concerns: Brooke Barbieri and Rosemary Hilliard

- 38 registrants for symposium, will send out reminders. Also announcing on EASFAA and other state list serves.
- Looking for new committee members
- Success with new website, using shared resources section so that all committee members can access information. Greg can help committees set that option up.

Financial Wellness: Monica Blondin and Kristin Hmielski

- Lots of resources on website.
- Looking at dates for spring or fall event – possible certification options?
- Kristin has sent out survey to membership so they will review those results to determine next steps.

Comments:

- Karen: Hult International Business School in Cambridge could be a location option
- Emir: how many committee members? Approximately 25 – meeting in person every other month, online other months.

Early Awareness: Jill Marr and Christa Gilmore

- Worcester will be location of next event. Looking at early April date.
- Recruited 4 new members this year, 2 since MASFAA conference.
- GEAR UP won't have funding for middle school programs next year.
- Looking at Springfield location for the fall.

Conference: Shannon Eagan and Alexis Guay

- 300 attendees, 10-15 registered on site
- From the survey, 75 out of 80 would go back to site. Sales manager inquiring if we are interested for 2018? Overall, they were very responsive to our requests throughout the conference.
- Raised money for charity, iPads were a big draw.
- Good feedback on food options, vendors also liked their space
- One issue with Citizens lanyards – delivery issue from vendor
- Volunteer table not as successful as we hoped but a few responses

Comments:

- Alexis: recruiting new members, 2018 location is Cape Cod
- Karen: she can cross-check list of registrants to be sure all are MASFAA members
- Julie: will run a report of conference payments
- Jeremy: if the lanyard issue was printing related, should we consider different vendor next year? Cost is an issue. Moving forward, will provide earlier dates to insure timely delivery.
- Ryan: FAFSA Day works with Happy Frog Copy Center, very happy with service.

Development: **Stephanie Wells***

- \$27,300 revenue from vendors, higher than last year.
- Charging station was new this year – may not be worth doing again next year but good to have chargers available.
- Vendor space was great, no complaints.
- Working on year-end event

Professional Development and Training: **Meredith Stover*** on behalf of Nicole Cunningham and Julie Lawton

- December tax workshop held in Worcester – 32 registrants. Next event scheduled for Wellesley College on 1/26. Robert Weinerman from Iron Bridge is covering both sessions.
- For next year, may consider doing one day for basic tax information and second day for more advanced topics. In discussing this option, would be difficult to find one location that would allow us to be there for 2 consecutive days. In order that we can continue to offer the workshops at a college location (so that the space is free of charge), and in 2 separate parts of the state, seems best to continue with 2 separate dates.
- Looking for executive council members who would like to take any of the NASFAA credential exams – we can provide a code to waive the charge. For any trainings we offer using NASFAA materials, particularly Just the Facts, presenters must have the credential in the subject matter in order for attendees to receive a credit to sit for the exam. In addition, there is a concern that in the future, NASFAA could require all presenters using their materials be credentialed. With Just the Facts taking place next fall, wanted to give enough time for interested presenters to take the exam. Anyone interested should reach out to Nicole or Julie.
- At January meeting, reviewed possible topics for additional training events: conflict resolution, leadership styles, in-office training programs, hiring practices, public speaking, and supervisory skills. Feedback from council was that an event for mid-level managers would be great. One idea – could be an opportunity to hold something at the year-end event.
- EASFAA SAP training workshop to be held in late February/early March. 3-hour event from 10:00 AM to 1:00 PM, location TBD but checking on Wellesley College. EASFAA will handle registration. Must be an EASFAA member to attend.

Membership: Ben Parsons and Jolene Coakley

No updates this month.

Technology: Greg Chick and Julie Wickstrom

- Working on listserv issue – supposed to have functionality to send out messages from the website. The issue is we can only send messages to current members – need ability to send to others as well.
- Have been using Mail Chimp but not a good option for members to communicate with each other.
- Found 2 options: (1) ListServe and (2) L-soft – similar charges, L-soft charges per email message sent out. L-soft has more advanced features but for our needs, would suggest ListServe.
- ListServe charges \$40/month and \$14 extra for additional lists (Just the Facts for example).

Comments:

- Jim: too bad we can't make it work with Digital Cheetah, that was the hope with initial contract
- Greg: MASFAA has a history of keeping in contact with non-members so we knew this was an option we needed – but otherwise very happy with Digital Cheetah.
- Ryan: FAFSA Day would like to communicate with registrants, would that be an option with Digital Cheetah?
- Shawn: we could see if we could create another level of membership for FAFSA Day registrants
- Jim: pretty sure we could make that work
- Monica: what is time commitment? Need to confirm with contract.
- Julie: would also suggest ListServe, meets our needs
- Alex: maybe we should confirm/review contract before full commitment? Just want to confirm cost and length of contract in case we can figure out a better option with Digital Cheetah at a later point. Get Executive Council approval now, Shawn will review actual contract.

VOTE: Alex put forward a motion to move forward with using ListServe.com for MASFAA's email list serv. Emir seconded the motion, all present in favor to approve.

Communications: Michele Kosboth

No updates for this month.

Miscellaneous

New business:

None

Old business:

Monica asked about the legislation proposed last year by the state of MA to require schools to provide a shopping sheet with any financial aid package?

Comments:

- Ryan: draft legislation has bounced around but nothing has moved forward.
- Shawn: not sure about current status but have not heard any feedback at the state university level.

Sherri motioned to adjourn, Stephanie seconded. All in favor to adjourn the meeting at 1:05 PM

Respectfully submitted,

Meredith Stover