

Massachusetts Association of Student Financial Aid Administrators
Executive Council Meeting
Quinsigamond Community College, Worcester, MA
February 28, 2008

In attendance: Sherri Avery, Dadizi Baker-Cummings, Susan Beard, Shawn Bennett, Tony Erwin, Beth Feinberg, Ina Frye, Yvonne Gittens, Jeremy Greenhouse, Val Harris, Gail Holt, Kim Huse, David Janey, Shawn Morrissey, Brian Murphy Clinton, Ray Nault, Catherine Nelson, Kathy Osmond, Bernie Pekala, Elayne Peloquin, Jason Shumaker, Susan Sullivan, Donna Wood Lozier, Nick Zinser

Absent: Jean Berg, Leah Barry, Jason Burke, Bob Coughlin, Meaghan Hardy Smith, Mike Ippolito, Anne Marie Juckins, Dave Kelly, Dee Ludwick, Paul Lynskey, Pam McCafferty*, Christine McGuire, Abigail McHugh, Scott McIsaac, Amy Piantedosi,

*absent voting members

President Tony Erwin called the meeting to order at 10:25AM.

PRESIDENT'S REMARKS

Tony Erwin

a.erwin@neu.edu

- NASFAA Leadership Update
Susan Sullivan and Ina Frye will be attending the conference.
- EASFAA Membership Categories
Conversation started regarding membership categories and who can run for office. Members from non-profits can be regular voting members and hold office. They are considering a change to this policy. Maine's association has eliminated associate members entirely (only financial aid administrators now). Representative from SWASFAA mentioned that their membership model is like ours. If we want to take position on how structure would work we can put forth a statement. Tony will draft a letter and send it out for comment.
- Strategic Planning
Meeting will be scheduled in May. If anyone has recommendations for a moderator/facilitator send them to Tony. We may also do an online survey with Tech. Committee's help. **At April meeting will have a draft of the survey. People should think about what kind of incentive might get people to complete the survey.**
- OIG Training
The Office of the Inspector General has been doing nationwide training and the session is very good. Tony asks if it would be applicable for our end of year event. Executive Council agreed this would be a good concurrent session at the event on June 18.
- EASFAA Fall Training
Much discussion about training (PA had opted out for same reasons as us). EASFAA is having similar difficulty in partnering with NASFAA. They want to do a spring training at the end of March. Tony will find a location, which is all that is needed. Topic regards counseling. There was also a larger conversation about decentralized training and a decision was made to be more formal about training. Setting dates, defining locations, etc. to be formalized.
- Request to sign on to letter with SSDP
Students for Sensible Drug Policy asked us to sign on to another letter; it is the exact same text as the last letter for sensible drug policy in regard to financial aid eligibility.

⇒ *Motion offered to sign on to the SSDP letter offered (Sherri), seconded (Nick), and unanimously approved.*

Future meetings:

4/17- College Board, Waltham

5/15- (TBD, with dinner afterwards)

6/18- (TBD, final meeting if needed)

PRESIDENT-ELECT'S REMARKS**Kathryn Osmond**

kosmond@wellesley.edu

- Committee Chair Selection- next year's committees coming together:
Conference Tri-Chairs: Anne Marie Juckins, Lisa Kaiser, Kelly Baran
Thinking about theme and sessions already. Dates are Nov.19-21, 2008
- Retreat in August on either 11-12 or following week 17-18 at Cape Codder in Hyannis.

SECRETARY'S REPORT**Shawn Bennett**

shawn_bennett@gse.harvard.edu

⇒ *Motion offered to accept the 1/18/2008 Executive Council meeting minutes as amended offered, seconded, and unanimously approved.*

TREASURER'S REPORT**Pam McCafferty**

pmccafferty@fsc.edu

- 2 months behind on bank reconciliation due to timing of receipt of statements.
- Income expense has -57 mistake which is the booking of a cash contribution from Val Harris.
- 2 remaining CGS scholarships paid out this year because recipients had deferred admission. Should have gone in this year's budget, Gail is wondering if/how that would be recorded.
- Phone line will be overbudget for CGS and some money may need to be moved there.
- CD expiring tomorrow, no need to liquidate at this time as rates are bad. Tony proposes a 3 month CD, which is no better or worse than 6 month CD. Beth F. suggested checking savings account rates because they may be better than those in CDs. Concern is logistics of Treasurer tracking another account. If we start to shop around for banks or other investment options we may need to assist Pam with that. Will also check long term rates on CDs
- Finance committee is meeting in May- we can look at options for new bank accounts and investment houses at that time.

⇒ *Motion to accept Treasurer's report as amended offered, seconded and unanimously approved.*

DEVELOPMENT

Jason Shumaker

jasons@mit.edu

- EASFAA is revising their budgets, and resources are down as well. They are undergoing the same process we undertook. They asked if we could share info regarding our vendors. Jason will send the most recent list to Tony.
- NYSFAA Development information: Lost 98% of its sponsorship, and are working on reserve. They are trying to determine how to proceed in future years. Conference was separate from vendor areas.

NOMINATIONS/PAST-PRESIDENT'S REPORT

Sherri Avery

savery@brandeis.edu

- An e-mail was sent to nominees not selected to appear on election ballot.
- P&P Policy and Procedure Manual- please submit your section as soon as possible or risk dire consequences!

ASSOCIATE MEMBER AT LARGE

Due to Joe's resignation we will need to have a nominee to replace him and then have a vote by the Exec. Council. Will follow up with him regarding logo copyrighting.

ARCHIVES COMMITTEE

Shawn Morrissey

smorris@frc.mass.edu

- Nothing new on archives front, compiling excel spreadsheet cataloging info. Working to get imaging firm to do electronic archiving of Secretary and Treasurer materials. Bob Shore from EASFAA archives is interviewing all living past presidents of EASFAA.

MEMBERSHIP REPORT

Beth Feinberg

b.feinberg@neu.edu

Meaghan Smith

hardyme@bc.edu

- 914 members 73% school 25% vendor 2% other
- EASFAA membership down 1042 vs. 1600 2 years ago

CONFERENCE COMMITTEE

Scott McIsaac

scott.mcisaac@nelnet.net

Yvonne Gittens

yvonne.gittens@gmail.com

Anne Marie Juckins

ajuckins@edfund.org

- Site Selection for Fall 2009: Newton Marriott is interested in having us back, but general feeling was that the staff was great but the spaces were too small (ballroom, vendor area). May be interested in investigating other sites.
- NASFAA Charity Request: National chair elect would like to do an autism charity for conference when he is chair. Wanted to know if theme could be adopted at regional and state conferences.

- 12 unpaid conference fees including 4 vendors (which may have been comps). List given to Dadizi who is known to be effective with collections.
- Need to get conference session handouts in electronic format for website, this should be a requirement of all presenters.

TECHNOLOGY COMMITTEE

Leah Barry
lbarry@bu.edu

Jeremy Greenhouse
jgreenhouse@amsa.com

- Server conversion created an issue where listserv needed to be manually moved to a new server. Some folks received unsubscribe e-mails in error. Unpaid members were also removed from the list with unsubscribe e-mail. Unsubscribe requests down.
- IP address was not being recognized and thought to be spam. Provided IP address to IT depts. that needed it.
- Some enhancements were tabled as server issues were rectified. Will add unsubscribe instructions to messages and refocus on sub-level listserv lists.
- **RFI e-mails may need to be funneled to associate member list somehow, perhaps through website - discussion point for next meeting.**

PUBLIC RELATIONS COMMITTEE

Mike Ippolito
mippolit@brandeis.edu

- No update

PROFESSIONAL DEVELOPMENT AND TRAINING COMMITTEE

Jason Burke
jburke@amsa.com

Abigail McHugh
abigail.mchugh@mcphs.edu

- EASFAA Training- Tony to ask if they can take on responsibility of finding location and getting refreshments.
- Emerging Leader Program- Exec. Council at large folks should be taking larger role next year to help PD&T with program. This should be a discussion topic at the retreat.

GRADUATE/PROFESSIONAL CONCERNS COMMITTEE

Val Harris
harrisv@harvard.edu

Brian Murphy Clinton
b.murphyclinton@neu.edu

- WebEx held for loan exit counseling. Went very well, with good turnout of about 25 people. Talked about TEACH Grant and new regulations. Format was good and the committee recommends it to promote attendance.
- Will survey membership to gauge usefulness of webex.
- Will have a spring workshop May 8 @ BU (half day session in morning); trying to get Jeff Baker to speak.

NEWSLETTER

David Kelly

dave.kelly@bankofamerica.com

Raymond Nault

naultjr_raymond@wheatonma.edu

- A winter meeting was held in late January- lost 2 committee members and will start looking for new members. CEED article received.
- Spring newsletter in works, recommend theme if you have ideas.

EASFAA

Donna Wood Lozier

dwoodlo@spfldcol.edu

- Registration is open for conference in Portland, ME- must call for hotel reservations. Conference hotel is full. Expecting 600 attendees. Lots of school presenters.
- NASFAA State award is for “program that has not been done elsewhere”. Must be supported by statistics. Tony looking for help from member and Government Relations. There is a lot of work involved in submitting a nomination for an award. We have tried many years to no avail. Shawn M., Gail H. and Kathy will provide guidance on process as they have done this in the past. Should be done for RFI for next year. Nick will e-mail national chair about extension for this year’s application deadline (if they haven’t received apps). The deadline is normally early February.
- CT Attorney General has classified CAFAA as a trade organization, EASFAA is concerned this trend could continue. Tony mentioned that MA AG not interested in this now.
- EASFAA has no policy about releasing election numbers to membership. It has been up to the chair to release at their discretion. Motion made to create policy with no conclusion due to debate. Tony said we could create policy if we’d like. TBD.

COMMITTEE ON ENHANCING ETHNIC DIVERSITY

Amy Piantedosi

amy.piantedosi@tufts.edu

Dadizi Baker Cummings

dbakercummings@amsa.com

- Next workshop is June 3 from 10-1pm, with a financial aid industry speaker and experts geared towards how diversity impacts a financial aid office and how it effects providing service to students. Researching websites to find experts in the field of diversity and will pay speaker. Looking for dynamic speaker who can attract attendees.
- Please come to the workshop in June at Northeastern!!!

GOVERNMENT RELATIONS COMMITTEE

Bernie Pekala

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Christine McGuire

chmcguir@bu.edu

- Held a meeting on 2/8, next one is 4/18
- Completed P&P section for Sherri
- Will try to review subcommittee website to keep info timely.
- Subcommittee on direct to consumer loans working with Sen. Dodd
- Subcommittee to visit statehouse on June 26 for Fin Aid 101
- TEACH Grant negotiations are over- will training be needed? Perhaps a training can be held at the year end event in mid-June. There will be a significant annual counseling expectation. Technology Committee may set up a poll online to ask membership about a timeline for a training.
- Loan Neg. Reg. will not reach consensus but will finish up soon.

- RFI publication in final draft phase, will be posted on website soon. Inquiries have been received from other organizations around the country. Tony had conversations with schools and lenders regarding RFI process. Private loans to take priority over consolidation loans. Bernie will send out a draft for comment. Tony mentioned EASFAA is interested in meeting any Govt Rels committee members who attend their conference.

EARLY AWARENESS AND OUTREACH COMMITTEE

Jean Berg
jberg@finaid.umass.edu

Kim Huse
k.huse@neu.edu

- Approved for session for MA Guidance Counselors conference in April. Will have a panel about college with middle school outreach programs along with a case study.
- Gail & Cathy told Kim about a video Alaska developed for CGS that used weather analogies for middle schoolers going to college. Will pass along flyers to Kim.

COLLEGE GOAL SUNDAY

Gail Holt
gholt@mtholyoke.edu

Paul Lynskey
plynskey@mefa.org

Catherine Nelson
cnelson@brandeis.edu

- Year number four for CGS was again successful!
- More than 300 volunteers came out on Sunday the 27th to help 1400 students and their families. Our final tallies show growth of 47%, surprisingly equal to 2007.
- Over 1000 students pre-registered for the event.
- Cathy Nelson and Gail Holt represented MA at the national CGS forum in Charleston, S.C. from Feb. 14th to 17th. A LOT of best practices were shared and we came home with a very long list. Presentations from MA included Jessica Krywosa from TERI on grassroots marketing and Gail Holt on the website functionality behind the scenes. This was a huge hit and generated much interest. 28 states were represented (62 total people) out of 34 total states.

All \$500 Educational Prize winners have been selected, notified and posted on the CGS website.

Athol – Dominica P., Athol High School
Boston – Nora L., Boston Arts Academy
Brockton – Rachael W., Brockton High School
Charlestown - Mackenzie H., Winthrop High School
Chelsea - Erika S., Northeast Metropolitan Regional High School
Chestnut Hill - Maura M., Bishop Feehan High School
Fall River - Leanne S.
Fitchburg - Lauren S., Somerset High School
Framingham - Katharine C., Framingham High School
Holyoke - Erika L., South Hadley High School
Hyde Park - Chrismanie V., CASH Hyde Park
Lawrence - Benita F., Greater Lawrence Technical High School
Lowell - Jessica W., Lowell High School
Lynn - Turi V., Lynn Classical High School
Malden - Francisca F., Malden High School
New Bedford - Elvin A., New Bedford High School
Pittsfield – Scott W., Waconah Regional High School
Somerville - Fabiano E., Somerville High School
Springfield - Brendan M., SABIS
Waltham - Jeffin V., Waltham High School
West Barnstable - Jon B., Sandwich High School
Worcester - Nicole D., Shrewsbury High School

- Over the coming months we will be completing the grant report for this year and doing advance work on enhancements for 2009. The big item is more online sites.
- Christopher Penn, of the Financial Aid Podcast, said, “[College Goal Sunday is] an opportunity that doesn’t come along very often, the chance to make a direct, concrete, positive difference in many lives in just a few hours, so when it comes around, I’m happy to step up and see just what I can do. I always leave College Goal Sunday with a renewed sense of optimism and energy about being in the financial aid world. The past year wasn’t necessarily a great one for financial aid professionals in the media, but just one afternoon can brush all of that away and remind you that our profession is a worthy one, and the work that we do can immediately change lives for the better.”

JUST THE FACTS! TRAINING COMMITTEE

Dee Ludwick

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Bob Coughlin

robert_coughlin@hms.harvard.edu

Susan Beard

sbeard@wheatonma.edu

- No new updates. Pending issues are how many/where to do sessions in fall.

OLD BUSINESS

- Revisit NASFAA state award submission, granted extension to March 7 to submit for this year.

NEW BUSINESS

Next meeting 4/18, 10am at College Board in Waltham.

⇒ *A motion to adjourn was offered, seconded and approved unanimously at 2:25PM.*

The US spent over \$49 billion on corrections [prison] last year, an increase six times the rate of higher education spending. 1 in every 100 Americans are in jail, more than any other country in the world.

Source: [Pew Center on the States](#)