

Massachusetts Association of Student Financial Aid Administrators

January 10, 2014 at 10:00 am

Wellesley College

Wellesley, MA

In Attendance: Donna Kendall*, Meredith Barnhart, Jeff Bentley, Aaron Clark-Melcher*, Christina Coviello, Joanne Dashiell*, Vy Doan Callahan, Jennifer English*, Beth Feinberg Keenan, Iris Godes*, Alex Gonzalez*, Meaghan Hardy-Smith*, Katie Kelsall, Carla Minchello, Lynne Myers*, Cathy Nelson*, Kate Rajbhandari, Amy Stewart, Darnell Stowers, Susan Sullivan, Lisa Talbot, Janet Turner, Stephanie Wells

Absent: Michael Albano, Kathy Anderson*, Diana Beaudoin, William Buescher, Karensa DiFonzo, Alexis Fishbone, Ryan Forsythe, Migdalia Gomez, Jeremy Greenhouse*, Christopher Hart, Jennifer Keenan-Jolie, Kelly Morrissey, Kathy Osmond, Christine Padgett, Amy Proietti, Bonnie Quinn*, Lori Seuch

*Voting Members

Meeting Started: 10:15 am

President's Report: Donna Kendall*

- Donna explained the protocol for snow days. If we are meeting at a location that is closed due to snow, the meeting is cancelled. Donna will send an email the day before with a status update and reminder to watch for morning email letting us know whether there will be a meeting.
- Donna announced that the February meeting may be at a location in Worcester. Location is still TBA but she is still trying to hold the meeting in Worcester.
- Donna received a nice letter from Schools on Wheels after they received the donation from the MASFAA Conference and from MASFAA in memory of Tom Threkehld. We made the deadline for donor matching and our donation was matched. The donation totaled \$2,710, of which \$250 was included in Tom's memory. Donna also wrote a note to Tom's brother acknowledging the donation and received a matching donation from Tom's brother.
- Iris and Donna received emails from IGrad requesting participation in a survey and to forward it on to colleagues. After discussing, MASFAA will not forward it officially but those who received the email are welcome to complete the survey. Jeff completed the survey and indicated that it was a standard survey.
- We have been wavering on getting our committee reports to Debbie so Donna reminded everyone to submit a report even if it says that there is nothing new. Highlighted Government Relations report regarding aid hearings. Stephanie and Iris attended hearings and explained that the Department of Education did not express next steps but that the hearings were more to gather information from aid people. Donna recommended that everyone read Stephanie's report which is on the MASFAA website. Jeff went to two hearings and a lot of feedback was given at both. The Department had a total of seven hearings and received a lot of feedback. Jeff thinks something will come out of it but he is not sure what. He will share anything he hears regarding next steps.
- Donna highlighted the newsletter. It was very full but some of the articles did not have authors. She requested that all articles contain the name of the author and if it was written by a committee, list the names of the members. She commented that there is no way to look at it as one document. She requested that we determine a way to have a printable .pdf that you can print with all of the articles. Donna asked about the articles that have links that go to ads or other websites.

She is not sure why our newsletter would have ads. Beth checked online and it was not on her version so Donna will check to see if it is a browser issue.

- One of our vendors, Renee Suryan from SoFi requested permission to use MASFAA logo for a webpage they are developing that provides logos and links to their partners. They want to include associations for a one-stop shop. Katie and Iris questioned the purpose of us being on their webpage. Lynne thinks it seems more like an endorsement. It depends on how their listing the page – their partners, endorsed by, etc. Iris said that as a vendor at our conference we are a partner and would like to see a template before deciding. Lynne said that Holy Cross was on a page and that families thought they had a direct affiliation with the webpage which is not the case. Donna will respond that from our experience, even with a disclaimer, people misunderstand the logo. She will also explain that individuals, not organizations, are members of MASFAA. Joanne explained that vendor membership was not part of the vendor package for the conference. Stephanie explained that MEFA has put MASFAA on its partner highlight page on the MEFA website. The MEFA web article was in the MASFAA newsletter. Donna will let them explain that some of their company employees are MASFAA members and they can list MASFAA but not display the logo. She will also explain that we do not understand how it will advance MASFAA and see if they provide additional information. SoFi does not work with all schools. They work with specific schools that can utilize their method of lending.

Secretary's Report: Cathy Nelson*

- Minutes from November meeting were emailed previously.
- There were no corrections to November minutes.
- Lynne motioned to approve the November meeting minutes, seconded by Aaron, unanimous in favor, 0 abstained.

Past President's Report: Iris Godes*

- Iris explained that election was launched and email has been sent to notify MASFAA members. Requested that everyone encourage colleagues to vote. Iris has not heard of any problems. Technology Committee tested every aspect of the voting process and it seems to be successful. She thanked the Technology Committee for their hard work.
- Iris asked if she should she send weekly email until Feb 4th. Everyone agreed on a weekly reminder. She explained that the challenges putting together the slate were not for the positions she expected. It has been an interesting process but we have a great slate.
- Iris explained that MASFAA Council has discussed timing of elections and that this timing ended up being one of our options, so we are testing one of our ideas. Candidates for President speak at the conference but voting opens later. Alex asked if we have data of how many people usually vote in the first week. We do not have an idea of how many people vote by date. Iris will look to see how many members voted last year. We have 756 total members right now so we will see how many people will vote to see if tying it to conference matters.
- Iris is on NASFAA training committee and she would like to know if there are particular topics that would be beneficial to include. Susan said she could share the PD&T survey results with Iris. Iris would like to know all topics that our offices would find useful.

Treasurer's Report: Jennifer English*

- Jennifer passed out reports and indicated that check deposits and debits are up-to-date as of yesterday.
- She asked if conference has any remaining expenses. Kate explained that there will be a few more small expenses. Jennifer announced kudos to Conference and Early Awareness Committees because they were under budget. Susan explained that Wellesley College will pay half of tax

workshop and they need invoice. Jennifer and Carla will work on creating an invoice and will provide it to Susan and Karensa.

Technology Report: Amy Stewart

- Amy confirmed Iris' announcement that voting was launched. Amy explained they had hoped to finish the testing before holidays but testing finished and voting is up.

Conference Committee Report: Kate Rajbhandari and Lisa Talbot

- Kate explained that they have not met since conference but will meet soon to start planning next year.
- They reviewed evaluations.
 - 160 evaluation submitted online
 - 383 session evaluations on 28 concurrent sessions
 - 65 were paper
 - Remainder were submitted electronically
- They feel positive about online session evaluations continuing. Used google survey which seemed to work well but due to a few comments, they will use to try to improve ease of use.
- Average rating for sessions was 4.37 out of five so mostly positive experiences. Vast majority of responses were excellent and good. Highlights were the general sessions; keynote and additional 4th general session also received great feedback. Concurrent sessions were well received but received comments requesting more technical trainings. Conference Committee will try to get more NASFAA trainers for next year. Really interested in talking more about enrollment management topics. They have a few subject areas to work on for next year. People liked the ramped up communications surrounding the conference and liked the revamped agenda book. People do not seem to use the QR code. Had problems with general sessions and meal space and food/service was not as good as it has been in past years.
- We may be considering moving locations for next year. Talking to Lowell Conference Center and the Sheraton in Framingham. They are not having success in Boston because they do not have our dates available.
- The charity was really successful this year and we received feedback that we should develop partnership with this charity.
- Kate explained that we had a really high number of attendees; estimated over 425 and additional 26 registered on site. Iris asked if encouraging early registration reduced the number registering on site but we do not have the number.
- Lisa gave kudos to Greg on the Technology Committee for getting everything done so quickly.
- Kate explained that they tried the 'birds of a feather' tables and they were not well attended but they were well appreciated by those who attended. Susan said she moderated the Banner table and there were not a lot of attendees but it was a great group. Amy attended the PeopleSoft table and felt it was a great way to connect with others even if it is for re-connecting later. Iris recommended including veterans and non-traditional students as topics as she has received requests for sessions/committees, etc. addressing these topics. Stephanie requested that we offer panel discussion from Government Relations as a general session because it is so well attended and educational.
- Alex asked if we have ever considered looking for sites further ahead (i.e. two years in advance). Kate explained that we used to but ended up missing out on lower costs when the downturn in the economy but that they are now trying to get back to committing to venues further in advance.

GPCC's Report: Janet Turner

- Janet indicated that the formal announcement for the Symposium registration will go out Tuesday. It will be February 7 at the same location as last year; Harvard Graduate School of Education.
- Sessions are set and they have a lot of great speakers. They have topics that will apply to undergraduate folks if schools would like to send undergrad folks.

Government Relations' Report: Stephanie Wells

- Stephanie has draft of the resource guide that they will be giving to legislators soon.
- Stephanie explained that they are working on template archive. Their next meeting is in a couple of weeks and then they will then send to MASFAA listserv.
- On February 24 from 1 to 4, Speaker DeLeo will kick off State House Day. Last year we had Governor Patrick. State House Day will have the same agenda as last year.
- Stephanie indicated that they will have iPads available for students to look up their legislators if not known in advance. We will have guest speaker to talk about importance of higher education and how to speak to legislators. Asking every school to have students there. Planning to reach out to students who are interested in school democrat/republican groups to increase attendance. It is on a Monday this year so hoping for increased attendance. They selected date based on when they think the most people will be in the State House. Cookies will again be provided by Newbury College and AICUM will be paying for the food. They will take pictures and write up article for MASFAA Newsletter. Bookmarks from MASFAA with state agencies contact information will be provided.

Exhibitor Update: Jeff Bentley

- Jeff said feedback was better this year. Same venue so people knew what to expect and he explained that it would be last year at this venue. Still receiving feedback that cost is higher than other states. He thinks that we may get pushback as national conferences are costing less than Massachusetts.

PD&T Report: Christina Coviello and Susan Sullivan

- Susan explained that their survey resulted in 55 responses. Prefer trainings in Worcester and on Fridays. Tuesday's roundtable is being cancelled/postponed due to lack of attendees. Christina heard that is was on the same day as another event that Directors are attending.
- The tax workshop is over budget. Committee felt a nominal fee would not be bad to request. They need \$250 total to cover cost but then have no other funds left for other trainings. Iris does not like charging as our biggest benefit of membership is free trainings. We need to address whether we are going to give PD&T a big enough budget to include Jim Briggs or are we going to find someone else to present the tax workshop. Amy explained that the Technology Committee is under budget and will have \$250 left from their budget. Meaghan asked if he is charging for travel. Susan and Christina said it looks like he is and Meaghan said BC is also paying for his travel. BU is also hiring him and may also be paying for travel. Christina will look into it. For next year, if considering Jim Briggs, MASFAA will discuss/negotiate with the colleges in the area where he also presents. Jennifer explained that having a nominal fee for trainings is difficult for schools and that later we will be discussing membership fees. Beth asked if we could have a fee for non-members if Jim is so popular and asking Jim for itemization/breakdown of travel expenses if everyone is paying. Beth also knows a great tax person for future years. Jeff suggested increasing membership fee at the time of membership registration for members who plan to attend the workshop. Lynne thinks we should look at different presenters. Susan said the Committee will look for alternatives for 2015. For this year, Iris suggested looking at the budget, as we are under budget in other areas, we should be able to cover the tax workshop and still provide other trainings.

- They want to have February/March training for Community College folks and possible topics will be discussed at next Community College Directors meeting. They hope to bring back support workshop for May and provide mid-level training in June. They will be discussing Emerging Leaders soon. Christina asked if we think there is an inequity in providing lunch for Holy Cross attendees but not Wellesley. Consensus was that it was fine as long as we notify the registrants in advance. Registration will go out on Tuesday and they will email registrants about lunch being or not being available.
- Donna asked PD&T to develop proposal for additional needs.
- Iris motioned to allow PD&T to overspend budget by \$250 for tax workshop, seconded by Meaghan, unanimous in favor, one abstained.
- Susan and Christina handed out proposal for changes to Emerging Leaders program. Begin calling it the Leadership Academy and combining it as a sub-committee and adding a tri-chair to PD&T that would focus on Leadership Academy.
- Some sessions would be for Leadership Academy participants only but some workshops will be open to all MASFAA members. Katie mentioned that it would be good to let people know that certain topics are geared toward certain aid folks (i.e. new/all). Lynne also liked that many topics are applicable to those who have been in aid. Stephanie expressed that they were also applicable to those in MASFAA who are not in aid offices. Iris asked if opening the topics to non-Academy attendees will lessen the bond between Academy members but Susan thinks that the other sessions will still encourage that bond. Joanne asked if exposing them to MASFAA Council meetings would be positive and Susan agreed that they were thinking of having it as a requirement. Katie suggested that Academy members could meet before each session that was open to all members. Christina agreed that they had discussed that as well. Amy asked about two year commitment and asked if there would only be a new group every two years. Susan and Christina explained that it would be four topics each year and there would be a new cohort each year. Joanne asked about the nomination form and they explained that a sheet explaining the benefits will be provided with nomination forms. They would roll out the revamped program in September. Discussed model that tri-chairs of PD&T would have specific focus but still be tri-chairs for PD&T.
- Donna said we need to share with Kathy A. to make sure it works for her term as she will be selecting/filling tri-chairs.

FAFSA Day Massachusetts' Report: Meredith Barnhart

- Meredith explained that they were holding a meeting later at Wellesley College to distribute materials to site coordinators and one next week at Mt. Wachusett Community College.
- Meredith requested that we all colleagues to volunteer. They are also encouraging attendees to register. Two sites- Pioneer Valley and Nantucket will have webinars and volunteers will be available on phone and chat for questions.
- Meredith announced that Senator Elizabeth Warren is now the honorary chairwoman for FAFSA Day. On Tuesday, January 21 at 10:00 am, event site TBD, the official announcement will take place. Katie Abell and Senator Warren would like all to attend. Senator Warren will be there to speak and receive title of honorary chairwoman of FAFSA Day. Meredith thinks that event will be an hour
- Beth asked how you volunteer for webinar sites and Meredith said they will send an email requesting volunteers. Jennifer asked about ordering promotional materials which can be ordered on-line.
- Iris suggested they contact the state legislator that is involved with FAFSA Day and notify him of Warren event.

Strategic Topic of the Month: Donna Kendall*

- Membership fees – Donna checked a dozen or so websites and Kentucky was the lowest at \$20 and highest was \$75. Benefits vary. New York was \$25 but you join a region; each additional region would be another \$25. We have been at \$50 for years. Susan explained that we have a lot of expertise for aid trainings but need dynamic trainers for the soft-skills. Lynne also agreed that we should discuss membership fee so that we can provide the best trainings possible. Joanne asked if we have ever considered institution membership. Donna said that other states were individual. Iris asked if we can send survey asking members if they would consider higher fee and give reasons for the increase (i.e. technology, trainings). Lynne remembers that we did have a survey and that those who responded had a negative reaction. Jennifer agreed that survey would just solicit negative feedback. Lynne thinks that the responsibility of Exec Council is to make those decisions. Christina said that you either charge everyone a little more or you begin charging per event. Alex suggested two types of membership basic and premium; premium would cost more but allow access to trainings. Katie thinks \$50 is pretty small fee and thinks that if you highlight the reasons for an increase, people will still become members and it may encourage increased participation. Amy highlighted that per event fees can add up depending on how many events a member attends and it would be easier to increase overall fee nominally. Meaghan explained that when they increased the conference fee and explained reason to members, they did not get push back from the members. Vy asked if we have ever considered having a discount for those who register for more than one year and higher fee for those who register per year.
- Membership Drive – Donna explained that we are preparing something to reach out to schools that have members to increase membership and something to schools that do not have members to find out why their staff has not become members. She requested feedback on how to prepare/approach. Iris thinks spring timing for membership is good for campuses but that if we are encouraging an increase in membership, the drive should be earlier so schools can request an increase in budget. If received later, they may not have the budget. Meaghan suggested sector reps could help reach out to the schools in their sector.

Old Business:

- None

New Business:

- None

Lynne motioned to adjourn, Iris seconded, unanimous vote to adjourn.

Meeting Adjourned: 1:06 pm