

Massachusetts Association of Student Financial Aid Administrators

March 13, 2015 at 10:00 am

College Board

Waltham, MA

In attendance: Kathy Anderson*, Diana Beaudoin*, Ebony Carter, Christina Coviello, Joanne Dashiell*, Kevin Deruosi, Jennifer English*, Beth Feinberg Keenan, Alex Gonzalez*, Jeremy Greenhouse*, Katie Kelsall*, Donna Kendall*, Emir Morais, Cathy Nelson*, Kathy Osmond, Christine Padgett, Wenimo Poweigha, Bonnie Quinn*, Julie Shields-Rutyna, Stephanie Wells

Absent: Michael Albano, Meredith Barnhart, Bill Buescher, Anthony Crowe, Vy Doan Callahan, Josh DeMaio, Roxanne Dumas*, Jennifer Keenan-Jolie, Carla Minchello, Kelly Morrissey, Amy Proietti, Kate Rajbhandari, Colleen Russo*, Jim Slattery*, Amy Stewart, Susan Sullivan, Alcira Zadroga

*Voting Members

Meeting Started: 10:17 am

President's Opening: Kathy Anderson*

- Kathy called the meeting to order and announced next meeting in May, expected to be held in Charlestown, and then the Year-End Event. Thanked Julie and College Board for hosting.

Secretary's Report: Cathy Nelson*

- Minutes from the January meeting were emailed previously.
- Katie motioned to approve January meeting minutes, seconded by Bonnie, Joanne abstained. Ten voted to accept the minutes.

Treasurer's Report: Katie Kelsall*

- Katie and Jim went to NASFAA Leadership conference in Washington, DC. It was a great learning experience. Biggest takeaway was that we are the strongest state association both fiscally and with volunteers.
- May want to think about structure for MASFAA Council because best practices suggest that only Exec Council would be present to discuss items that we vote on and we would have a Treasurer and Treasurer-elect.
- Met with Senator Elizabeth Warren and Representative Katherine Clark staffers to discuss higher education bill. Katie has contact information in case we want either as a keynote for Conference.
- MASFAA is very healthy. We need two years reserves and have over three. We should look at diversifying investments. NASFAA has an investment plan. Kathy A. and Katie were thinking that it may make sense to have our funds with an investment company that handles our type of organization where we can get better service.
- Currently under budget but expect more expenses from Carnival of Learning, meetings and Year-End Event. We have to pay Jim Briggs but we have 12 months to reschedule so next year will be paid already if we hold the session within 12 months. Emailed budget request forms and need committees to submit budget form so that when finance committee meets, they know what is needed by the committees. Kathy A. and Katie expressed we have funds to consider increasing budgets. Encouraged committees to consider expanding what they do and include in budget estimates so that increases can be considered.
- Stephanie was speaking to Anthony who will be submitting budget request and Anthony was asking about submitting request for purchasing items like pens that other committees could use as well because it will cost less to buy in bulk. Beth suggested pens that include the website to bring

people back to MASFAA and the website. Stephanie said they made bookmarks for State House Day that had aid resources and suggested we make one for MASFAA that many committees can use. Kathy A. asked committees to include in budget request if they could use something small like a pen or bookmark so that we can determine aggregate numbers.

Past-President's Report: Donna Kendall*

- We have a slate of candidates which Exec Council will vote on after meeting. Thanked everyone for their efforts securing a slate. She talked to Mike who is getting website ready for voting and she has all but one candidate's statement for the website. Donna will send email letting people know the slate is coming soon and asking them to make sure their login and password work. Kathy asked how long we will keep voting open. Donna was thinking two weeks. Katie asked if we can use Year-End Event to encourage voting, i.e. have a raffle. Kathy liked raffle idea. Beth suggested raffling a free conference registration. Julie suggested gift cards. Alex asked how long it is usually open. Kathy said a few months but that two weeks should be sufficient and liked the raffle idea.

President's Report: Kathy Anderson*

- Updated on progress of website overhaul. She polled other associations about who they use as she corresponded with Noetic. Noetic is unable to increase capabilities of website. ATAC is used by other associations and Mike has reached out to get specs and pricing. Kathy hopes to have pricing by budget meeting. She has reviewed the other state sites that use ATAC and they are nice. Kathy asked for names of other web designers that people are familiar with so she can reach out for specs and pricing. Emir suggested that we make sure that the site is mobile friendly. Ebony suggested reviewing WordPress option as it is very user friendly. Kathy O. uses Drupal. Katie said that we would still need a web design company to use WordPress or Drupal as WordPress and Drupal are what the user would use to update the website.
- Kathy attended OSFA Advisory board meeting and was wondering if MASFAA should take on a role of representing all schools on certain Massachusetts' issues. Jeremy concurred that it may help if MASFAA takes on a role of emphasizing the broader issues like online certification rosters and ineligible letters. Stephanie commented that MEFA receives complaints from families regarding the MASSGrant denial/ineligible letters. Bonnie said the changes they made to be able to submit a portion of the roster was helpful because she did not have to wait until all of her students were in a status that she could certify in order to certify and receive funds. Kathy O. said having an option to submit or save and then later submit would be helpful. Kathy A. asked the sector representatives to reach out to other schools in their sector to get feedback. Jeremy asked if they should speak about both the letters and the certification process. Kathy A. agreed that they should discuss both, as well as, any other issues that schools are having so that we can begin discussions. Joanne suggested that representatives ask about the administrative burden that offices take on regarding number of calls to quantify the additional time aid offices have to put in to clarify the letters sent from OSFA. Alex asked if sector listservs have been created. Kathy A. does not think they are available but recommended that representatives reach out to aid Directors in their sectors. Bonnie indicated that membership should be able to provide a spreadsheet of members and email addresses.

PD&T Report: Christina Coviello

- Tax Workshop was cancelled and they did not receive negative feedback because they emailed Jim Brigg's materials. Jim Briggs has been paid for next year.
- Holding Support Staff Workshop and final Leadership Academy in May. Katie learned at NASFAA that another state has a mentor program for all new members that sounded like a good idea. Kathy O. suggested that Just the Facts serves that need with their listserv as participants

have been using it to ask questions. Kathy O. suggested reinstating the new member reception at the conference.

Conference Report: Kevin Deruosi

- Conference committee was not able to have a wrap-up meeting, so they had conference call. They have eight out of ten returning members and two new possible members from MASFAA registration. One-hundred and sixty conference attendees responded to survey. Majority liked it being held on Thursday and Friday. Half would prefer conference in Boston, the other half want central Massachusetts. We do not currently have a location but are looking at several options. Kevin asked if we thought that people would attend a conference held on Monday and Tuesday. Consensus was that people may prefer certain timing over others, but they will attend regardless of the days of the week. Joanne reminded everyone that when it was on the Cape, most people did stay over and there was more a sense of comradery as people from different schools socialized. Kevin asked if conference had a mission statement. Julie remembers that at the retreat, conference would have their goals which they would then use to derive a theme. Jeremy asked about feedback for Lowell. Kevin said that like all conferences, negative feedback was about food and parking. Katie suggested the Marriott in Kendall Square. Jeremy asked about Worcester but feedback was that we have looked at places in Worcester but the locations cannot handle both the large space needed for meals and separate meeting rooms.

EASFAA: Kathy Osmond

- Announced EASFAA conference agenda is posted on their website. Conference is at Hyatt Regency in Newport, RI on Goat Island, May 19th – 22nd. Both the first and last days are pretty light but it is a full conference with a strong agenda and many speakers from Massachusetts covering a wide array of topics. Encouraged people to have colleagues consider going as it is a drivable distance and beautiful location. EASFAA is holding a run for epilepsy and they are developing challenges. It is a virtual race and you have multiple ways to run/walk.

Government Relations: Stephanie Wells

- Stephanie spoke about State House Day. Great event. Numbers down due to weather but it was still a packed room. She will put together pictures and an article for the newsletter and blog. AICUM does much of the organization for State House Day and MASFAA organizes the students and the famous cookies. One hundred and fifty students from over 30 colleges attended. AICUM provided lunch and had speakers: Speaker of the House, Rep. Robert DeLeo and Rep. Evandro Carvalho from Dorchester, a first generation college student who put himself through college provided inspiration. Senator Michael Moore and Rep. Sannicandro from the Massachusetts committee on higher education also spoke.
- Currently looking at a budget with a \$9.6 million line item for scholarship which is a \$3 million increase from last year. Legislature is looking for further increases.
- Working on state house training for legislators and their staff. Hoping to have someone from the graduate aid community present on loan repayment and consolidation for the staffers as they had a lot of questions about these topics the last time they held the training.
- Bernie Pekala and Stephanie are presenting a session at EASFAA regarding working with the government.

GPCC: Emir Morais and Christine Padgett

- Christine explained that the symposium addressing real life issues for today's graduate students was held at the Harvard School of Education. Due to weather they had public transportation and parking issues but still had 55 attendees. Bob Coughlin spoke on advocacy for financial aid, encouraged people to advocate on Capitol Hill, and said that NASFAA would assist in

introductions. Thanked Ebony for putting together amazing panel of students that was well received. Emir received feedback from one of his students who was on the panel that he appreciated that the financial aid professionals wanted to hear directly from students. Katie confirmed that NASFAA really does want to accompany financial aid professionals visiting Capitol Hill. Kathy A. explained that they do prepare you and provide you with statistics. Most likely you will meet with a staffer but they do listen.

Early Awareness Report: Beth Feinberg Keenan and Wenimo Poweigha

- Wenimo announced next event will be held Thursday, April 16th at East Boson Public Academy, Umana. They are coordinating sessions, presenter and volunteers. Requested that anyone interested in volunteering contact him. Stephanie asked if they want the AID buttons for the students. She thinks they have 70, which is plenty for the students. Volunteers are provided with lunch.

Old Business:

- Alex confirmed Year-End Event will be held at the Northeastern Alumni Center, Thursday, June 11th. We cannot have the space until 6:00 pm. There are other locations at Northeastern that we can have before 6:00 pm but not on the 11th. They are still looking at other options but are primarily focusing on the Northeastern Alumni Center because it has free parking and a central Boston location. Alex asked if we thought the 6:00 pm start time would be an issue. Feedback was that for many offices, it may be a welcomed change as staff does not have to leave early. Emir suggested that we use it as a recruitment tool and encourage financial aid professionals who are not MASFAA members to attend or bring guests that they want to get involved in MASFAA. Kathy is thinking we can craft the email announcement or subsequent email messages to encourage attendance especially of people who may consider becoming active committee members. Joanne suggested that we rebrand the event from a Year-End Event to a kick-off for next year to generate more interest. Ebony suggested each committee create a buck slip to provide to attendees to explain function and goals of committee.

New Business:

- Kathy A. described the budget process and requested submission of budget forms. Encouraged committees to think about wants and goals and list everything they may require. Requests in by April 24th so we have it for our May meeting.
- Kathy A. explained that updating the website is still main goal and hopes to have solid progress for next meeting. Revenue is strong. Will consider line item for transportation allowance to reimburse MASFAA Council.

Jennifer E. motioned to adjourn, Alex seconded, unanimous in favor to adjourn at 12:31 pm.