

MEMBERS:

Co-Chair: Patricia Reilly, Tufts University

Co-Chair: Donna Kendall, Bentley University

Members:

Baimas-George	Lianna	Financial Aid Advisor	Boston University
Baumel	Rob		Middlesex Community College
Bertrand	Jill		Harvard University
Dorian	Janice	Financial Aid Administrator	Mansfield Beauty Schools
Ellison	Michael	Assoc Dean Admissions and Financial Aid	Amherst College
Fishbone	Alexis	Associate Director	BU Medical Campus
Furey	Brendan	Manager of FFELP Compliance	American Student Assistance
Gedeon	Phylis		University of Massachusetts-Amherst
Goodwin	Zack	Director of Financial Aid	Harvard University Div of Cont Ed
Gronback	Debbie		Harvard University
Hart	Christopher	Sr. Assistant Director for Customer Service	Boston University
Holland	Katie	Assistant Director	University of Massachusetts-Boston
Kendall*	Donna	Executive Director of Enrollment Management and Financial Assistance	Bentley University
Key	Gardner	Assistant Director	Lesley University
Laurent	Dug Jean	Director	North Shore CC
Lawton	Jennifer	Director of Financial Aid	Hampshire College
McArdle*	Oliver	Senior Program Manager	Massachusetts Department of Higher Education
McGuire	Christine	Director of Student Financial Services	Boston University
McLaughlin	Sharon	Consultant	McLaughlin Education Consulting
Monks	Shawn	Financial Aid Officer	New England College of Business
Myers	Lynne	Director of Financial Aid	The College of the Holy Cross
Nault	Ray	Vice President	Higher Education Assistance Group
O'Leary	Eileen		Stonehill College
Osmond	Kathryn	Consultant	
Pekala	Bernie	Director of Student Financial Strategies	Boston College
Reilly	Patty	Director of Financial Aid	Tufts University

Rossi	Dan	Financial Aid Officer	Harvard University Kennedy School of Govt
Russell	Mark	Director of Financial Aid	New England School of Photography
Steer	Mathew	Senior Financial Aid Counselor	Northern Essex Communiy College
Tauhid	Shabeeb		Boston University
Terebesi	Peter	Corporate Director of Financial Aid	Premier Education Group
Vojtisek	Andrea	Financial Aid Counselor	Boston Architectural College
Wells	Stephanie		Massachusetts Educational Financing Authority

PURPOSE:

To review, analyze, and/or evaluate and respond to regulatory, legislative, and programmatic issues, and to assist in the dissemination of information when appropriate. This committee also identifies, considers and develops Association positions on long-range policy issues and serves as a resource for legislators and their aides.

2011-2012 OBJECTIVES:

1. Promote communication between the membership and Massachusetts legislators:
 - a. Connect with key State legislators and administrators, and educate them on behalf of MASFAA members on key issues and concerns in the financial aid community.
 - b. Facilitate communication between State legislators/legislative staff and MASFAA members as needed.
 - c. Increase participation of students and institutions in the State House Day event, with particular emphasis on participation from public colleges and universities.
 - d. Provide information on the MASFAA list-serve and website to alert the membership to important changes in State regulation and legislation as needed.
 - e. Strengthen working relationships with Massachusetts Office of Student Financial Assistance staff.

2. Keep changes in Federal legislation in the forefront of membership awareness:
 - a. Connect with key Federal legislators and administrators, and educate them on behalf of MASFAA members on issues and concerns in the financial aid community.
 - b. Facilitate communication between Congressional staff and MASFAA members as needed.
 - c. Provide training sessions at regional gatherings, the MASFAA Conference, and throughout the year on new Federal regulations and programs, and/or changes in existing programs.

- d. Provide information on the MASFAA list-serve and website to alert the membership to important changes in Federal regulation and legislation as needed.
- e. Compile federal compliance resources for MASFAA members regarding requirements such as loan counseling, consumer disclosures, and Constitution Day.

2011-2012 MASFAA GOALS:

- Advance the Art and Science of our Profession
 - with students, families, on and off-campus colleagues, faculty and administration, elected and governmental officials
- Increase engagement of members
- Continued commitment to high quality, cost effective training and professional development
- Update the Association's Strategic Plan

MONTHLY REPORT: MAY 2012

- ◆ The GRC did not meet in April and had no committee activities during this period. The committee will be meeting, likely via conference call, on Friday, May 11. Topics to be discussed include proposals for GRC sessions at the fall MASFAA conference, and preliminary planning for goals for the 2012-2013 year.
- ◆ Donna Kendall has agreed to serve as a GRC co-chair again next year, and Chris Hart from BU will join her as co-chair.

MONTHLY REPORT: MARCH 2012

1. State House Day on Tuesday, February 28 was a great success. Record number of schools and students attended, and the response from legislators was very positive. The GRC supplied bookmarks, and sent several email reminders to members. On the day of the event, GRC member served as guides throughout the State House as needed.

The committee will be collecting feedback from members on how improve the event in future years.

1. Web Updates: The committee continues to improve and organize the resources on the GCR website. It was decided not to update "Guide to Massachusetts Financial Aid" which is way out of date. We will put in our archives to be available if needed for a future event.

2. NASFAA Task force on the Standardization of Award Letters: Eileen O'Leary is on this task force, which met recently. The GRC members in general agreed to with proposals which might come up with common definitions, and some standardized requirements about how an award is shown in an award letter. The members, however, were not in favor of lots of extraneous information being added to an award letter, such as graduation rates, default rates, etc. Eileen will follow up with the committee on the workings of the Task Force.
3. The committee has begun brainstorming on proposed conference sessions for the Fall 2012 Conference



MONTHLY REPORT: FEBRUARY 2012

- ◆ The Committee last met on January 13 at BU.
- ◆ **State House Day:** Rob Carron from AICUM attended our January meeting to coordinate the planning of State House Day on February 28, from 11:00-2:00 in the Great Hall. Newbury College will make the cookies and AICUM staff will arrange for wrapping and transportation. AICUM has also arranged to have box lunched available for the students after they do their visits.

AICUM will send email announcements to all AICUM members, and then the GRC/Bernie will send announcements to all MASFAA members, including a template of an email that can be used to encourage students to attend. GRC will do further follow up/outreach as needed.

We will encourage GRC members to attend, even if their school is not present to act as guides.

Standardization of Award Letters: Eileen O'Leary is serving on the NASFAA task force regarding the standardization of award letters. She encouraged members to complete the NASFAA survey, and will send an email out to MASFAA members about this. GRC members expressed concerns regarding the amount and type of information that is being proposed for inclusion in the standard award letter.

GRC Web pages: We continue to review and update the GRC website. Ollie McArdle will follow up with our MASFAA tech liaison to make the suggested updates to the resources section. Patty Reilly will talk with Zack Goodwin about possible updates to the "Guide" on our site.

Our next meeting will be held at 2:00 at Wellesley College on February 10.

MONTHLY REPORT: JANUARY 2012

The committee last met on December 9th at Quinsigamond Community College.

StateHouse Day

Plans are underway for Statehouse Day (tentatively set for March 1, 2012), a joint effort between AICUM and MASFAA. Stephanie Wells, the GRC liaison with AICUM for this event, recently met with AICUM staff to discuss an action plan. There is a lot of effort that goes into this event and since AICUM has a small staff, MASFAA members and the GRC can really make a difference in the outcome and success of this event by contributing some extra time and talent.

AICUM is planning to get Newbury College to bake the cookies as they have in the past. They could use help from the GRC in picking up and packaging the cookies the day before the event. AICUM also asked for GRC volunteers to help with guiding students to the appropriate legislative offices. This may also mean accompanying students while they visit with legislators and their staff. Our experience has been that most students are shy at first, but if a college staff member does the initial greeting/introduction and explains why they are there, the students are become comfortable launching into their stories.

The GRC also plans to reach out to as many aid professionals as possible with personal invitations to get involved in the event. When that call to action e-mail comes from AICUM, the thought of organizing a field trip to the Statehouse for students is overwhelming—especially at a busy time of year. It's so easy to just hit the delete key. But, if we can offer tips and advice for recruiting students and transporting them to Boston, it might not seem as daunting and we could get more participants.

AICUM also plans to extend the event past the usual 1 pm so that the day can include a de-brief of the student visits and experiences. They plan to provide boxed lunches for the participants.

AICUM has three regional meetings scheduled for January 18, 19, and 20 for college aid directors and government relations staff where plans for the event will be finalized. We will have several GRC committee members at these meetings.

GRC Page on MASFAA Web Site

In an effort to keep the information on the GRC web page fresh and relevant, the committee reviewed the links currently on the site and identified several new links that would be helpful resources for MASFAA members. We also plan to re-organize the links so that it's easier to find information. Federal links will be separate from state links, for example. We also plan to include some reference documents on lobbying guidelines, both state and federal. Bernie recently updated the RFI template documents and then received very good feedback from the lending community. So, another round of updates will be done soon.

NASFAA Task Force on Award Notification and Consumer Information

Committee members feel that GRC and MASFAA should take an active role in providing ideas and feedback to this newly-created task force. Since our own Eileen O'Leary is on the task force, we will start by asking Eileen's advice on how we might be of help in the process.

MONTHLY REPORT: NOVEMBER 2011

- ◆ The GRC Committee reviewed the GRC presentations from the conference, thanks the presenters, and talked about how the presentations went, and how to improve. The PowerPoint will be added to our website
- ◆ Planning began for State House Day. Stephanie Wells will coordinate with AICUM. MASFAA will again pay for cookies and produce bookmarks. Date TBD

- ◆ We continue to update our website. Revised RFI templates have been added, and we will continue to add content. Chris Hart wrote an article for the newsletter which highlights the resources available there.
- ◆ The committee is looking into legislative advocacy software packages, designed to encourage and facilitate communication of our members with state and/or federal legislators. CapWhiz costs \$2200/yr and Rally Congress costs \$1800/yr. Congress.org is a free website which performs a similar function. We will put a link on our website to Congress.org, and possibly send out an email to the membership if/when an issue arises.
- ◆ The Committee continues to talk about the line between advocacy and lobbying, especially in regard to Mass Lobbying laws.

MONTHLY REPORT: SEPTEMBER 2011

- ◆ GRC committee members discussed our goals and objectives for the year (which are based on last year's goals and objectives). Some of our objectives sound like they could be construed as lobbying. We will investigate the recent, more stringent, MA lobbying rules and research the topic in general to make sure our activities either aren't lobbying, or if they are lobbying, follow the current rules. Some revisions are in process and will be discussed at our next meeting.
- ◆ Chris Hart and Lianna Baimas-George, both from BU, volunteered to be the GRC liaisons to the MASFAA Communications Committee for this year.
- ◆ The GRC is sponsoring two sessions at the conference. One is on Consumer Information--the impact of recent legislation and best practices for presenting consumer information based on the new requirements. Session presenters are Chris Hart from BU and Dan Rossi from Harvard Kennedy School of Government. The other session is a legislative update and is a collaboration between Scott Buchanan (VP of Government Relations at Sallie Mae) and the GRC. Scott will present on hot topics in Washington, and a panel of aid professionals, convened by the GRC, will respond to each topic. The panel's focus will be to address how planned legislation might affect their institution and/or students. Panel representation includes the private undergraduate sector, the graduate sector, and the public community college sector.
- ◆ We plan to partner again with AICUM on the annual MA State House Day, which will be held late winter/early spring. GRC member Stephanie Wells, MEFA, will take the lead on this collaboration.
- ◆ The committee also plans to investigate the purchase and use of legislative feedback software to see if it would be a good tool for increasing interaction between MASFAA members and state/federal legislators. This initiative needs to be combined with our research on the lobbying topic to insure that we are in compliance with all lobbying rules and restrictions.
- ◆ Our next meeting is on October 14th at 2 pm in room 210 of the Wang Center at Wellesley College.

MONTHLY REPORT: AUGUST 2011

No activities to report. The first GRC meeting will be held on September 9, 2011.