

**MEMBERS:**

Co-Chair: *Jennifer English, Worcester State College*

Co-Chair: *Kerry Davis Jacob, Wells Fargo EFS*

Members: *Jenny Aguiar, Dean College*

*Amy Stewart, Salem State University*

*Ann Marie Cameron-Thompson, Kaplan Career Institute*

*Anne-Marie Caruso, Wentworth Institute of Technology*

*Carla Berg, Bentley University*

*Dan Forster, Simmons College*

*Ebony Carter, Northeastern University*

*Heather Mores, consultant*

*Jen Keene-Crouse, Fitchburg State University*

*Jennifer Muldowney, Bay State College*

*Joanne Dashiell, MEFA*

*Jonathan Sparling, WPI*

*Karen Boutin, Northeastern University*

*Karensa MacGregor, Wellesley College*

*Kathy Anderson, MEFA*

*Katie Fleuriel, Benjamin Franklin Institute of Techn*

*Kristi Pierce, TERI*

*Kristin Hawley-Johnson, Sallie Mae*

*Lori Moore, Access Group, Inc.*

*Maureen Fagen, Sallie Mae*

*Michele Kosboth, Lasell College*

*Sabrina Mainini, American Student Assistance*

*Tina Sasseville, UMass Medical School*

*Zachary Goodwin, Harvard University, Div of Cont Ed*

*Dave Kelly (Newsletter Contacts), Boston University*

*Aaron Clark (Technology Contact), Northeastern University*

*David Janey (CEED Liason), Boston University*

**PURPOSE:**

*The Professional Development and Training Committee is planning on a number of timely workshops as needed by the MASFAA Community. With budgets tightening across the board, one overall goal of our committee is to be responsive to the training needs of our colleagues. PD&T is also planning on collaborating with other committees to maximize training opportunities and minimize expenses.*

**2010-2011 MASFAA GOALS:**

- **Sharpen the focus of the Association on serving students**

- **Increase engagement of members**
- **Continue commitment to high quality, cost effective training and professional development**
- **Update the Association's strategic plan**

#### 2010-2011 OBJECTIVES:

Please review suggested objectives and action items discussed at the retreat for applicability to your committee and add any other objectives/action items your committee plans to pursue this year.

#### MONTHLY REPORT: MAY 2011

- **April 1, 2011(face-to-face): J.English, K.Davis-Jacob, M.Fagan, C.Berg, M.Kosboth (by phone): K.MacGregor, K.Hawley-Johnson, D.Forster, S.Manini, D.Janey, K.Anderson**
- Tax Workshop – for next year we want to talk with Boston-area schools to see if we can partner/split costs for an eastern training, and have a western training
- Emerging Leaders – Dan Forster and Sabrina Manini presented. Was an excellent day. Next EL Day will be May 27<sup>th</sup>.
- Cost-of-Attendance Workshop – after polling the offices of committee members it was determined that this would best be presented in late fall. Maybe put it forward as a conference session
- Support Staff Workshop – in the works. 2 locations (WSU and Lasell, Simmons or Wellesley?) on the same day, May 24<sup>th</sup>. Discussed possible schedules and presenters.
- Next meeting not scheduled.

#### MONTHLY REPORT: MARCH 2011

- No meeting in February
- Tax Workshop –The workshop was held on Friday, February 18<sup>th</sup> at Bentley University. 127 people attended. Jim Briggs was an excellent speaker and provided a great presentation and workbook
- Emerging Leaders – The first EL workshop for this year was held on February 11<sup>th</sup>
- Next meeting scheduled for April 1<sup>st</sup> at Lasell

#### MONTHLY REPORT: FEBRUARY 2011

- No meeting in January or early February
- Tax Workshop – event registration is proceeding. The workshop will be held on Friday, February 18<sup>th</sup> at Bentley University. As of February 10<sup>th</sup> there are 148 registrations posted on the new registration website. As a related topic, the new registration software was a breeze to use (with the instructions provided on the handout) and we anticipate it being a great new tool.
- Special Topic Workshop (1) – Cultural Bias. We are partnering with CEED to put this together. Aiming for March 25<sup>th</sup> at Lasell. ½ day training.

- Emerging Leaders – First workshop on February 11th

**MONTHLY REPORT: JANUARY 2011**

- ***December 20, 2010 (face-to-face): J. English, C. Berg, J. Keene-Crouse, Jonathan Sparling, K. Fleuriel, M. Fagan***
- Federal Methodology/Professional Judgment Workshop were a success. Eastern Training was at Northeastern on December 7<sup>th</sup> and had 27 attendees. Western Training was at Westfield State College on December 8<sup>th</sup> and had 11 attendees. Julie Shields-Rutyna and Joanne Dashiell presented Federal Methodology in both locations. Dan Forster and Carla Berg presented Professional Judgment at Northeastern and Dan Forster presented PJ at Westfield. We discussed possible changes to the workshop locations for the future – ideas included a single location a little further to the west or having the western workshop every other year.
- Tax Workshop – planning is proceeding. It is scheduled with Jim Briggs for February 18<sup>th</sup>. A Save-the-date has been posted on the MASFAA website. We are discussing locations that can hold @ 150 people. Currently we are scheduled at Wellesley, but we are worried that Wellesley’s facilities cannot accommodate a large enough group. Simulcasting was discussed, and we will have to research what is needed and whether it is allowed within Jim’s contract. We would like to discuss the option of charging a small fee to cover the cost of a more suitable accommodation.
- Special Topic Workshop (1) – Cultural Bias. Katie and Jen K-C are exploring presenters, and working with CEED. Aiming for March 25<sup>th</sup> at Lasell. ½ day training.
- Special Topic Workshop (2) - The NASFAA COA Training. Carla, Kristin and Jonathan will organize. Aiming for May 6<sup>th</sup>. Researching presenters and training.
- Support Staff Workshop – 2 locations discussed, but maybe on same day. Looking at May 24<sup>th</sup>. Due to discussion of last year’s workshop we want to include a “gripe” session to allow support staff to see how similar their issues are.
- Emerging Leaders – great group of nominees. Next phone meeting scheduled for December 21<sup>st</sup>.
  - 18 nominations and we’re planning on accepting everyone
  - Conversation about requirements for graduation, including attending at least 3 out of 4 events to get their certificate
  - Follow up w/grads discussed (collect where-are-you-now info, include them in future EL panels)
  - 1<sup>st</sup> workshop planned for February 11<sup>th</sup> at Wellesley
  - 2<sup>nd</sup> workshop will be in May
- Next meeting scheduled for Friday, February 4<sup>th</sup> from 10:00 am to noon at Lasell College.

**MONTHLY REPORT: DECEMBER 2010**

- ◆ ***November 12, 2010 (face-to-face): J. English, C. Berg, H. Mores, J. Keene-Crouse, Jonathan Sparling, K. Anderson, K. Fleuriel, K. Hawley-Johnson, M. Kosboth***

- Federal Methodology/Professional Judgment Workshop is moving forward. Eastern Training is at Northeastern on December 7<sup>th</sup>, Western Training is at Westfield State College on December 8<sup>th</sup>.
- Tax Workshop – planning is proceeding. We are discussing number of days and locations. We would prefer a single day, but need a large location. Wellesley is our first choice (but is it large enough?), Lasell is also in the running. Katie Fleuriel will take over registration. Kathy Anderson volunteered to assist and Karensa MacGregor is pegged to help out as she is at Wellesley.
- Special Topic Workshop (1) – Cultural Bias topic brought up at Conference. Katie and Jen K-C will organize. Aim for March 18<sup>th</sup> or 25<sup>th</sup> at Lasell. ½ day training. Looking at different presenters (Professor from Gordon College, Professor at NSCC, Diversity Committee at Bentley)
- Special Topic Workshop (2) - The NASFAA COA Training is a good possibility for the subject. Carla, Kristin and Jonathan will organize. Aiming for May 6<sup>th</sup>. Will try to hook up with GPCC???
- Support Staff Workshop – 2 locations discussed, but maybe on same day. Looking at May 24<sup>th</sup>. Due to discussion of last year’s workshop we want to include a “gripe” session to allow support staff to see how similar their issues are.
- Carla Berg has volunteered to coordinate with the Communications Committee
- Emerging Leaders – great group of nominees (thanks to Christine for highlighting the program at the conference). Next phone meeting scheduled for December 21<sup>st</sup>.
- Next meeting scheduled for Monday, December 20<sup>th</sup> from 1:00 pm to 3:00 pm at Lasell College.

#### MONTHLY REPORT: NOVEMBER 2010

##### ◆ *No meeting*

- We are working with the Just the Facts committee by managing registration for the Institutional Methodology training on November 9<sup>th</sup>. The email went to the listserv on Wednesday, October 27<sup>th</sup>, and we had received 10 registrations by the end of the first day.
- Planning for the December Workshop combining Federal Methodology, expected changes for the 11/12 FAFSA and the web application, and Professional Judgment is moving along smartly. Maureen Fagan is working with Ebony Carter to secure a location at Northeastern, and Kristen Johnson is working to secure a location at Westfield State. We hope to have the eastern training on December 7<sup>th</sup> and the western training on December 8<sup>th</sup>. Sabrina Manini is helping to coordinate presenters
- Emerging Leaders had their first conference call on October 21<sup>st</sup>. Announcements for nominations will go out to the listserv soon, and should be due on November 12<sup>th</sup>. Joanne Dashiell is working with the conference committee to get stars on name tags and a table for taking nominations. Christine has agreed to make an announcement regarding the nomination request and acknowledging EL graduates.
- Next meeting scheduled for November 12<sup>th</sup>.

#### MONTHLY REPORT: OCTOBER 2010

- ◆ *October 6, 2010 (face-to-face):* J.English, K. Davis Jacob, D. Forster, J. Keene-Crouse, K. Hawley-Johnson, M. Fagan, M. Kosboth, S. Mainini, D. Janey

- **Report:** We had our first face-to-face meeting on 10/06/10 at Lasell College. We put together a rough idea of what the training year would look like, including the Tax Workshop in February, a Special Topic in March/April, and Support Staff Training after graduation.
- We discussed the changes to the Need Analysis Training and how the Just the Facts/IM Training would alter our traditional program. We are still planning on holding two training days in early December that will now include Federal Methodology, expected changes for the 11/12 FAFSA and the web application, and Professional Judgment. 2 sub-groups are now going ahead with the planning for an East and West workshop.
- Emerging Leaders has not had their first meeting yet. Information will be forthcoming.
- We discussed the importance of each event having a “reporter” who would write up a small article for the newsletter after each event.
- Next meeting scheduled for November 12<sup>th</sup>.

#### MONTHLY REPORT: SEPTEMBER 2010

##### ◆ *9/10/10 FISAP Workshop*

- **Report:** Bernie Pekala and Eileen O’Leary presented at our annual FISAP workshop. 11 attendees at Stonehill College. Great feedback. Example:

"Hi Kerry,  
Just wanted to say thank you for planning the FISAP workshop. It really was informative and I came away thinking it was something I could do. Prior to the session it was a big unknown, but Bernie and Eileen made it all seem very approachable." Ken Hayes