

MEMBERS:

Co-Chair: Kerry Davis Jacob, Wells Fargo

Co-Chair: Dan Forster, Simmons College

Co-Chair: Kathy Osmond, Consultant

Members: PD & T:

Angela Price, TERI

Anne Del Plato, Nelnet

Antonette Tobin, Salter College

Claudine Julien, Roxbury Community College

Jean Berg, Umass Amherst

Jennifer English, Worcester State

Jenny Aguiar, Dean College

Jonathan Sparling, WIT

Julie Lawton, First Marblehead

Karensa MacGregor, Wellesley College

Kristen Hawley-Johnson, Sallie Mae

Lynne Myers, College of the Holy Cross

Maureen Fagan Sallie Mae

Peter Goss, Northern Essex Community College

Sabrina Manini, ASA

Scott Juedes, Wellesley College

Emerging Leaders:

Zach Goodwin, Harvard – Chair

Amy Stewart, Salem State

Dan Rossi, Harvard

Melissa Garner, Emerson

Sabrina Manini, ASA

Just the FACTS:

Kathy Osmond, Chair

Carla Berg, Bentley University

Kimberly Tibbetts, WIT

Martha Savery, MEFA

Meredith Stover, Babson

Robert Coughlin, Harvard Medical School

Tony Erwin – Trainer

PURPOSE:

The Professional Development and Training Committee are planning on a number of timely workshops as needed by the entire 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 will work closely with other committees to maximize training opportunities and minimize expenses for the upcoming year. PD & T in cooperation with Emerging Leaders and Just the Facts will provide comprehensive training for all professional development levels and be the foundations for training events in Massachusetts.

2011-2012 OBJECTIVES:

- Create a diverse and nurturing learning environment for the MASFAA membership
- Effectively merge Emerging Leaders & Just the Facts under the PD & T umbrella
- Effectively manage PD & T 2011-12 budget
- Maintain our commitment to excellence through consistent & relevant training and educational outreach efforts
- Continually seek out feedback from the MASFAA membership (Executive Council, other committee's and the membership at large).
- Take greater advantage of regional and national training resources

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



MONTHLY REPORT: MARCH 2012



MONTHLY REPORT: FEBRUARY 2012



MONTHLY REPORT: JANUARY 2012

- ◆ *Registration is now open for our mid-Winter sessions including: 2 Tax Workshops (Worcester and Wellesley College), 2012 Director's Summit and the 1/24 IM session within JTF. To date the attendance numbers are strong, especially for the Tax Workshops. The IM session filled to capacity (20) in less than 1 week - our events are being well received this year. Presently we have thirty-five registered attendee's for the Director's Summit and will be sending out a final reminder on Monday, January 16th.*
- ◆ *PD & T will also be co-sponsoring a March webinar with AID. The topic is "Unaccompanied Youth & Higher Education" - The organization is, National Association for the Education of Homeless Children and Youth. Their website is: <http://naehcy.org/index.html>. We have approached their national outreach team and are in the process of confirming Christina Dukes as the presenter. David Janey can provide more detail.*
- ◆ *Survey Monkey results for the 11/18th event, "SAP & Verification" are attached to the report email and are also available upon request.*
- ◆ *The May Support Staff training will take place at Dean College - date is still TBD.*
- ◆ *Dan Forster will be the point person for this report and events during my maternity leave (February & March). See everyone in April!*

MONTHLY REPORT: NOVEMBER 2011

- ◆ *We had a great turn out for the SAP & Verification Workshop November 18, 2011. Fifty-eight attendees were on site with another 11 on a wait list. The session was well received and a follow up webinar is tentative for those that were unable to attend (mid-December). We also sent the two PowerPoint decks to all attendee's for their offices use. I will share the survey Monkey evaluations at the next meeting, December 9th, 2011.*
- ◆ *The Tax Workshop and Director's Summit are 90% organized. There will be two workshops: One at Wellesley on January 25 and one at Worcester State College on February 17th, 2012. The first event will be co-sponsored by Wellesley and MASFAA; MASFAA will assume all costs for the WSC event.*
- ◆ *Our calendar of events will be published in the next news letter and will be placed on the listserv for the membership prior to the holiday break. It is below for the Council's review:*

○ Upcoming Calendar of Events:

- January 20, 2012 – **Director's Summit** – a luncheon summit designed to engage broad discussion on relevant topics in higher education. Join us and a special guest speaker (Gail DaMota, COO – Education Finance Council) for a MASFAA first of its kind event!
- January – February 2012 – **Just the Facts** Training; 5 planned sessions throughout the months of January & February.

- January 24th, 2012 – **Institutional Methodology** overview – held within the JTF sessions, but open to the MASFAA Membership
- January 25th and February 17th, 2012 – **Tax Workshop** (Boston and Worcester locations)
- Late February/early March – **MASFAA Special Topic webinar** – “Supporting Unaccompanied Homeless Youth in Higher Education” – Proposes speaker Christina Dukes, National Center for Homeless Education - more details to follow
- April 2012 – **Emerging Leaders**
- May 2012 – **Support Staff Workshop; TBD** (topics to be included: open to suggestion).

MONTHLY REPORT: OCTOBER 2011

- ◆ *Report was given verbally at Exec Council Meeting held prior to Conference, November 1, 2011.*

MONTHLY REPORT: SEPTEMBER 2011

- ◆ PD & T September Report ~ respectfully submitted, Kerry Davis Jacob

The first PD & T meeting was held at Wellesley College on September 13th. Our main goal at this meeting was to create a framework & schedule for the year. Our **tentative** schedule of events is below and will be posted to the membership within the next few days:

- FISAP Workshop: August 19th, 2011 at Wellesley College – complete
- MASFAA Conference: November 2 & 3rd, PD & T session on COA (2010 NASFAA training module)
- Fall training (full day session) – November 18th, 2011 at Wellesley College – “Digging Deeper into SAP & Verification”
- Director’s Summit – January 5th or 6th – “A Conversation with...” luncheon with guest speaker
- Just the Facts program – January & February 2012, Wellesley College
- IM workshop – held within the JTF program, but open to the entire membership – IM on January 17th
- Tax Workshop – February 2012
- Special Topic session – March (webinar?) – possible topics: Social Media on Campus (privacy issues?), Identity Theft (we have some Bank contacts that work with local FBI to present), Financial Literacy, Possible program in conjunction with the GPCC Committee, Customer Service...
- Emerging Leaders workshop – April 2012
- Support Staff Workshop – May 2012 – topics TBD
- End of Year event (June 2012) TBD

Our next meeting is Thursday, October 20th at Simmons College. We hope to have confirmed our fall presenter at this meeting; Anita Olivencia | Training Officer| U.S. Department of Education, Boston, MA will be our trainer for the day; just awaiting final approval from the Boston DOE office.

- ◆ Just the Facts September Report ~ Submitted by, Kathryn Osmond

Just the Facts now have all of the instructor slots filled and the space at Wellesley College confirmed. On October 18, a small Logistics Group is meeting at Babson College to discuss the many details that go into the programming. It includes 2 JTF veterans, the new co-chair, and some new members who will become veterans.

An update of the web description of Just the Facts has been done. It lists the committee members and instructors for the 2011-2012.

Jan Coombs will continue as Registrar of JTF and Julie Wickstrom will help with the two listservs, one for instructors and students and one for just instructors.

Material, CORE and individual assignments and PowerPoint's will be distributed on-line.

We are trying to get space at Wellesley College on November 15 for Train the Trainers.

MONTHLY REPORT: AUGUST 2011

- ◆ PD & T Report ~ respectfully submitted, Kerry Davis Jacob

The first fall 2011 event occurred on Friday, August 19th at Wellesley College. This year's annual FISAP training was held earlier this year and attendance was low at only nine registered MASFAA members. As a suggestion to the PD & T Committee next year we may be better served to hold this event every other year while in the off years presenting a special topic for the membership or simply holding a webinar on any changes planned for the FISAP. We solicited feedback from the attendees and a few comments are listed below:

- It worked out great that only a small group attended. Each participant was able to ask a question. Thanks for your help!
- Extremely informative session! Thank you to Eileen and Bernie for sharing your knowledge with the group!!
- Excellent location & training!

Our kick-off meeting for PD & T will be held September 13th at Wellesley College. Subsequent meetings will likely be held at Lasell College. We will review the Executive Council Retreat, plan our fall schedule & topics as well as incorporate the efforts of JTF and Emerging Leaders into the core PD & T schedule.

- ◆ Just the Facts August Report ~ Submitted by, Kathryn Osmond

With the great assistance of Bob Coughlin and Meredith Stover, Just the Facts is off the ground. I have a list of the modules and presenters from last year and have communicated with the presenters and the new volunteers to JTF.

The CORE NASFAA module will cost \$500. It is actually cheaper to buy the whole module than pieces of it.

The schedule will break down into 5 days as in last year's program. The difference will be that the program will start the second week of January and extend into early February. For a fall program, planning must start in the spring. There is too much coordination involved to start in late summer. January is obviously not optimal due to the start of second semester, always a busy time, and the prospect of bad weather. One advantage is that we can promote the program at the Fall Conference. However, I think that the "cons" outweigh the "pros" to a January start date and propose that we commence planning this spring for next fall.

Since the module is expensive (\$500), we might also think about offering the full program every other year with perhaps a day-long overview session in the out years.