

Massachusetts Association of Student Financial Aid Administrators

Annual Retreat, August 9- 10, 2016

Cape Cod Resort and Conference Center, Hyannis MA

Day One

In attendance: ***Sabina Yesmin****, ***Meredith Stover****, Brooke Barbieri, Monica Blondin, Kristin Hmielski, Jill Marr, Shannon Eagan, Ben Parsons, ***Susan Sullivan****, Alexis Guay, Ebony Carter, Jason Marsala, ***Katie Kelsall****, ***Karen Van Dyne****, Nicole Cunningham, Tony Erwin, ***Alex Gonzalez****, ***Sherri Avery****, ***Jim Slattery****, Christa Gilmore, Rosemary Hilliard, Cheryl Constantine, ***Jennifer Muldowney****, Kristi Pierce, ***Stephanie Wells****, ***Shawn Morrissey****, Greg Chick, ***Emir Morais****, Keith Dimilanta

Absent: Ryan Forsythe, Michele Kosboth, Julie Wickstrom, Julie Lawton, Jolene Coakley, ***Jeremy Greenhouse****

Bold italics* = voting member

Meeting started: 10:05 AM

President's Report: ***Shawn Morrissey****

- Shawn welcomed everyone to the retreat, reviewed the two-day agenda.
- Introductions and ice breaker led by Susan.
- Members at large and Executive Council members should not miss more than 2 consecutive meetings, 3 in total. Let Shawn know if you have conflicts.
- For committee chairs, at least one member should be present at monthly Council meetings. If neither can be there, send your updates to Shawn.
- Monthly reports should be updated on the website.
- For committees that can't always meet in person, fine to do phone conference.
- Co-chairs should refer to Handbook to be sure you are covering all the bases for your committee.
- Will try to have Executive Council meetings in a central location – dates and location to follow.
- Executive sessions with elected council members typically take place twice a year for awards and finance/budget review.
- There may be some e-mail communication throughout the year for council related activity.

President-Elect's Report: ***Susan Sullivan****

- Will coordinate MASFAA awards
- Acts as parliamentarian at meetings, assists Shawn in keeping monthly meetings on track as well as any votes

Treasurer's Report: ***Katie Kelsall* (Past Treasurer) and Karen Van Dyne (Treasurer)****

- Review of overall budget and committee budgets – MASFAA is in good position, healthy reserves
- Will send out payment request form – use this for any reimbursement needs throughout the year. Be sure to include any receipts. Also, be sure to use our tax exempt ID number for purchases and contracts – will also include that information with reimbursement form.
- Let her know if you need to use MASFAA credit card for any purchases.
- Can submit for travel reimbursement, including parking, for Executive Council meetings as needed.
- For monthly committee meetings, food costs should not be submitted for reimbursement. It's fine to have a year-end event with food to thank volunteers.
- Technology budget is high due to website expenses.
- Membership is down – goal is to increase that this year to increase revenue.

Comments:

- Jim: if your committee received less funding than you anticipated, let us know – very transparent process. For the new website, voted to expense the cost over 3 years so this will phase out over time.

Past President's Report: **Jim Slattery***

- Website transition continues – more updates to follow later in the meeting with an update from Technology Committee co-chair Greg Chick.
- Major duty as Past President is to put together a slate of candidates for annual election. Has been difficult to secure candidates the past few years, particularly with the role of President.
- Historically, Presidential candidates have provided a statement about their candidacy at the annual MASFAA conference. There has been some feedback that it's a barrier for some – should we continue?

Comments:

- Emir: if you are going to serve as a leader, need to be able to speak in front of colleagues.
- Sherri: there is a low voter turnout typically since many members do not know the candidates so it would be helpful to have nominees for President share their background and goals at the conference. Much higher voter participation in past years when the voting process opened at the conference.
- Sabina: could use printed statements instead?
- Susan: candidates do not always know who they are running against ahead of time – would be less intimidating to know ahead of time.
- Stephanie: video statements could be an option, however, that can be worse than in person for many. Could do something in conjunction with website.
- Jim: agrees that some sort of statement from a Presidential candidate is necessary
- Shawn: Exercise has value, puts a name with a face even though it's difficult to talk about yourself. Will work with Jim to try to have slate of candidates ready for conference this year.
- Shawn: new website does not have a voting option – have we looked into other options? Would be great to have something more innovative to work with phones. Will work with Technology.
- Jim: there are many "off the shelf" products
- Emir: if we increase membership, may be easier to find candidates
- Karen: has experience with public speaking coaching, would be happy to help anyone. This could also be a good conference session or activity for Leadership group.
- Shawn: part of the issue is that members are fully vested with their jobs and families – very understandable.

Secretary's Report: **Meredith Stover***

- Review of minutes from the May 2016 meeting. No additional updates. Motion was put forward by Alex and seconded by Susan to approve minutes – all voting members in attendance approved.
- Plenty of MASFAA stationery, envelopes, and cards. She will bring a supply each month to meetings but let her know ahead of time if you need a specific supply of anything.
- Moving forward, once the minutes are approved at each meeting, the Secretary will send out an email to membership directing them to the website to review them and announce the next Executive Council meeting and location. This will hopefully help to drive more traffic to the new website.
- In order to more effectively document the winners of MASFAA awards, the Secretary will include in the annual Business Meeting minutes the winners announced at that conference. For the volunteer of the year award, the winner will be included in the retreat minutes (next meeting after year-end event) under Old Business.
- Will pull together edits and updates for MASFAA handbook – email her directly with any updates.

MASFAA Handbook/By-Laws review: **Shawn Morrissey***

Committees and Executive Council members broke out into small groups to review sections of the handbook. All updates will be forwarded to Meredith who will compile them for review at our next meeting.

MASFAA Strategic Plan update: *Shawn Morrissey**

- Typically reviewed and updated every 5 years – are there areas we need to focus on? Main focus to start with will be increasing membership and offering more training events. Jim and Sherri will co-chair an ad hoc committee to get us started.
- Newsletter and communication will be more timely and up to date with new website.
- What other ideas?

Comments:

- Sabina: more social opportunities for interactions with colleagues
- Kristi: looking at data, who have been traditional members and who have not? Why? Very dependent on leadership within offices.
- Susan: some schools cannot support the cost so many members pay for their own membership. Need to convey the value.
- Jim: need to maintain and offer pertinent training
- Jennifer: many conferences/training provide a statement of purpose that helps to demonstrate value, want to grow and develop employees.
- Susan: we should provide talking points for conference and training
- Katie: profiles of MASFAA members and how MASFAA has benefited them
- Monica: promote the idea of “ROI” – have the landing page list out all MASFAA events and highlights from the past year.
- Jim: ways to facilitate exchange of ideas – use of data to drive membership efforts
- Katie: when was the last time we surveyed membership? What do members want that we are not providing?
- Emir: for newer folks in the industry, reach out to schools who have posted positions – how do we connect with them? Need to be careful of privacy issues.
- Rosemary: Welcome Wagon idea for new members. Also, need more high level training – many of our programs are geared to newer members.
- Nicole: agreed that we need more advanced training and appreciates the feedback
- Sabina: Leadership Academy is a great way to gain management tools
- Karen: are there former members still in the field who are no longer members? How do we bring them back?
- Monica: centralized tracking of who attends events would be helpful information
- Susan: are there opportunities for student employees interested in pursuing careers in financial aid? Could we offer them support and mentoring opportunities?
- Keith: similar to NASFAA accreditation opportunities, need to provide better PR about training benefits
- Sherri: market ourselves to neighboring states, especially NH and RI
- Karen: membership opportunities for non-financial aid staff (Student Accounts, Registrar)
- Susan: need to also look at the number of involved members who are willing to be leaders and trainers
- Katie: coming from a school with non-traditional students, would be nice to have opportunities to meet with colleagues with similar populations – perhaps a social event.
- Stephanie: for associate members, training is not always pertinent – maybe some opportunities for those not directly administering aid.
- Sabina: connect with non-profits working with students and families to guide them through the aid process – we could be a resource for them

Theme in conversation: who are our constituents and are they the same as in the past? Still financial aid administrators? Should we expand?

- Karen: add in guidance counselors
- Stephanie: should NASFAA be a credential provider? MEFA does limited training for non-profits and counselors.
- Emir: attract key speakers, Ted Kennedy came to one conference

- Jennifer: has seen more resumes from applicants looking to get into financial aid
- Sherri: PPY and shopping sheets – key opportunities
- Karen: Elizabeth Warren would be great – has been invited to GPCC in the past but could not attend.
- Ebony: leverage technology, present to those who cannot come to actual meeting
- Rosemary: more technology training? Not all schools have the resources anymore.
- Tony: relationship between states, regions, and national on business processes to target programs and services. Don't want to create a plan that's on an island.
- Shawn: will take into account past strategic plans
- Jason: If you undertake training, you want something to show for it in terms of certification, etc.
- Katie: new Financial Wellness Committee and upcoming MASFAA conference are good ways to promote MASFAA
- Nicole: NASFAA promotes credentials on their website, maybe do something similar with our training attendees?
- Christa: Not always a clear opportunity to join a committee – how do we better promote that?
- Shawn: have space at the conference for committee tables, more presence on the website for promotion. Need to congratulate ourselves on past events.
- Jill: ribbons on name badges at conference – “ask me about this committee”

More to follow on next steps and the strategic plan at future meetings throughout the year.

Committee Updates

Government Relations: Tony Erwin and Cheryl Constantine

- Thanks to Tony and Cheryl for taking over as co-chairs
- Strategizing for upcoming year:
 - Engage broader membership around advocacy – many members are approaching retirement, need greater experience on how to lobby, advocate for issues.
 - Re-energize association around State House Day – AICUM did not provide us an opportunity for collaboration last year.
 - Regain voice as a partner with MA congressional delegation – used to have more connections with legislators and staff.
- Will include the work and ideas Stephanie has put forth this past year

Comments:

- Emir: ACCESS group now focusing on advocacy to a greater extent, may be a good connection
- Stephanie: members need to understand this committee is not necessarily about politics
- Tony: we can best represent the issues our families and students are experiencing and struggling with
- Shawn: could be some overlap with GPCC, graduate concerns are not always represented. Lots of aid in graduate sector has been cut in recent years.
- Cheryl: disparate impacts on graduate students
- Karen: IBR and Public Service Loan Forgiveness are both opportunities for advocacy – 2 key areas that are in jeopardy.

Early Awareness: Jill Marr and Christa Gilmore

- Issues with participation and committee members -- losing members and not gaining new members
- Fall session will be held in Lawrence, MA.
- Need presenters but need to confirm date before moving forward – GEAR UP working on it.
- Carnival branded backpacks, plan to have both a fall and spring event.

- Middle school focus, carnival theme. Brief presentation on academic topic. Try to get GEAR UP alums to speak as college grads and their experience.

Comments:

- Christa: hard to get students and faculty involved but it can be eye opening for the kids – first exposure to many career options.
- Jill: need active members. Trying to get counselors, hard to make that connection?
- Stephanie: can MEFA help? Upcoming event for MEFA with state Treasurer – kindergarten students in Worcester Public Schools receiving \$50 contribution to UFund to encourage college savings. May be able to tap into Early Awareness.
- Shawn: Should we reach out to membership regarding committees needing members? Will be able to solicit and better promote committees once website is operational.
- Stephanie: promote need for volunteers at conference, maybe mention at the start of each session.
- Kristi: do some committees transition as needed? Is Carnival of Learning the right title?
- Emir: could be opportunities for BU medical students to participate?
- Tony: need to have different levels of volunteering – all day events need more input. Reps at large could act as talent managers – strategic way to target.
- Shawn: need to better about recognizing volunteers at year-end event – perhaps a day of training followed by the event itself? Would be nice to have a bigger audience for Volunteer of the Year award.
- Sabina: gift cards and hand written notes are a nice way to thank volunteers
- Jim: over 100 volunteers this past year so we do have good participation – need to also better engage the volunteers we have.
- Cheryl: maybe a re-introduction and highlight of this committee would help
- Rosemary: we are own best marketers, need to recruit and appreciate the MASFAA experience to our colleagues.
- Stephanie: maybe revisit the purpose statement of each committee?
- Alex: previously, could only be active in one committee – maybe too restrictive?
- Shawn: there was a prior perception that MASFAA had cliques so there were some restrictions placed to prevent that issue so that as many members as possible could join without overlap.
- Susan: committee descriptions need to be updated on website

New website demonstration: Greg Chick

- Huge thank you from Shawn to Greg for all his work in setting up the new site
- Greg provided a demonstration of the new website
- Focus is now on transferring over data before the old site is shut down.
- Should have log in credentials out to members shortly.
- Would like to see more exciting landing pages for committees
- Deciding how to best move forward with changes – ideally, would like co-chairs to have as much power to make changes. Working with Julie Wickstrom to recruit members who will support that initiative.
- Shawn will decide on access issues – need to be careful that we are not overriding someone else
- Lots of possibilities with calendar postings, useful for committee work
- Enhanced reporting capabilities
- Will need secure access for Just the Facts and FAFSA Day.

Meeting adjourned at 4:55 PM

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Day Two

In attendance: ***Sabina Yesmin****, ***Meredith Stover****, Monica Blondin, Kristin Hmielski, Jill Marr, Shannon Eagan, Ben Parsons, ***Susan Sullivan****, Alexis Guay, Ebony Carter, Jason Marsala, ***Katie Kelsall****, ***Karen Van Dyne****, Nicole Cunningham, ***Alex Gonzalez****, ***Sherri Avery****, ***Jim Slattery****, Christa Gilmore, Rosemary Hilliard, Cheryl Constantine, ***Jennifer Muldowney****, Kristi Pierce, ***Stephanie Wells****, ***Shawn Morrissey****, Greg Chick, ***Emir Morais****, Keith Dimilanta

Absent: Ryan Forsythe, Michele Kosboth, Tony Erwin, Brooke Barbieri, Christina Coviello, Julie Wickstrom, Julie Lawton, Jolene Coakley

Bold italics* = voting member

Meeting started: 9:25 AM

Committee Updates

Conference: Shannon Eagan and Alexis Guay

- Plans are on track for November conference. Olympic theme. Attendee name tags will be gold, silver, and bronze based on years of experience.
- Other possible topics for presentations include MASFAA Jeopardy!, student employment, veterans' issues, and social media.
- Location for 2017 (11/13-11/15) is Cape Cod. Trying to secure locations two years out and alternate locations within the state.

Comments:

- Stephanie: Would be good to have a session on veteran issues? VA usually submits a proposal but did not this year.
- Jill: ASA has content for veterans so that could be a possibility
- Katie: for the night before, opportunity to promote committee membership
- Susan: Check with UMass Lowell on student employment possibility
- Shawn: We should look into 2018 conference location after our 2016 conference.
- Stephanie: Suggested Mass Mutual Center in Springfield as possible location?
- Kristin: constructions issues in the Springfield area due to casino construction – may want to hold off on that area until construction is complete.
- Shawn: Would like to have more of a presence in western MA, at least central MA is more convenient for many.

Membership: Ben Parsons and Jolene Coakley

- Annual membership email has not gone out – waiting for website completion. Otherwise, any new memberships or renewals need to be processed manually.

- 2012-2013 was our best recent year for membership. Increases starting in 2010-2011, peak during 12-13, and back down since that time. At our peak, we had 832 members vs. 720 last year.
- How to increase membership? Some ideas include:
 - Early membership discount – maybe \$40 until a certain point in time?
 - Participation incentive – reward committee membership with a discount on next year’s membership. Leverage for participation but it might be hard for co-chairs if they have to keep track of members.

Comments:

- Katie: likes incentive idea but \$50 is already low – will a discount have an impact?
- Jim: would not harm us in terms of revenue but might be good messaging – we need to reach out to bring members back.
- Shawn: focus on boost in volunteerism, not just membership
- Alex: good motivational tool if we build in committee membership
- Rosemary: cost is not a huge difference – another option would be to enter registered members into a raffle for a conference fee waiver.
- Shannon: just a reminder that Conference Committee members do not pay conference registration fee.
- Susan: could have the raffle be at the year-end event for the next conference so that you are including the maximum number of members instead of an earlier time frame.
- Stephanie: some schools, and non-school members, may help to provide some sort of promotional information/letter from Shawn outlining benefits of membership.
- Shawn: a MASFAA promotional brochure (one-page, fact sheet) could be pulled together to send out to Directors encouraging membership.
- Stephanie: some lender reps cover large territories and may not choose MASFAA over a bigger group? There is also some perception as mentioned on Day One of cliques within MASFAA – hard to gain members if that is a valid perception.
- Shawn: not sure on how other state conferences are set up?
- Stephanie: no complaints about vendor space last year – this year’s space will be even better
- Kristin: suggested vendor highlight session at conference. Noel Levitz does something similar – built into agenda. Nice way to see products with no pressure.
- Susan: continue to highlight to MASFAA membership the segmented representation of schools, as well as associate members, on Executive Council

EASFAA: Shawn Morrissey*

- For this year, he will serve as EASFAA representative. Most EASFAA reps are state presidents and we do not have a volunteer this year to serve in this role.
- Can review year to year – there may be interest in this role from others in the future.
- EASFAA rep is not a voting member of MASFAA Executive Council but is a voting member of EASFAA’s Executive Council – so it is an important opportunity for us.

Financial Wellness: Monica Blondin and Kristin Hmielski

- 2 meetings so far, April at Elms College and May at WPI, have also had conference calls.
- Good response in terms of volunteers, broke out into 2 subgroups: Resources on the Web and Training/Conference.
- Submitted 4 session proposals for conference – 2 were accepted. One will be on protecting personal information and one will be a panel of colleges who have financial literacy programs.
- Lots of good ideas, will commit to specific goals for 16-17.
- Thinking about symposium idea for April, financial literacy month.
- Looking at community partners who might help with the mission.

- Will provide a “toolbox” of resources, free vs. paid, books, articles, etc. Interviews with experts in the field, possible mentoring opportunities.

Comments:

- Shawn: Lots of progress in a short period of time! Thanks to Monica and Kristin for bringing committee to MASFAA. Likes the idea of a symposium/niche day event – good for membership.
- Monica: knows of a comedian who incorporates financial well-being; could be a great speaker
- Cheryl: suggested ACCESS group as another opportunity (in addition to GPCC)
- Katie: April date for symposium might be hard – lots going on in financial aid offices at that time
- Shawn: if the symposium was earlier in the year, it might help schools focus on setting up programs.

Graduate and Professional Concerns: Brooke Barbieri and Rosemary Hilliard

- Problems with presenters and snow for the Symposium the past couple of years – planned panel of 3 presenters went down to 1
- For now, continuing with February timeframe – 2/3/17 at Harvard. No charge for space. May need to consider moving date in future years due to weather.
- Moving forward, will have back-up plans for any panelists. If presenters are coming from a distance, may consider offering to pay for hotel.
- Noticing that more committee members prefer to call into meetings – hard to accomplish as much.
- Will continue to try and reach out to Elizabeth Warren as possible speaker?

Comments:

- Emir: 15 active members which is great
- Shawn: if we can't get Elizabeth Warren for GPCC, maybe we should work around her schedule? Maybe consider presenting her with Edward Kennedy Award based on her commitment to financial wellness? Could be a one-day event. Given that she has been an advocate for students, loans and financial aid issues, seems like it would be a good fit for her in terms of a speaking engagement.
- Kristin: once we have membership data, that might help support our request to her
- Karen: maybe provide estimates of loan volume as well
- Stephanie: Depending on event, may want to include students as well
- Shawn: Susan will move forward with initiative

Professional Development and Training: Nicole Cunningham and Julie Lawton

- Nicole Cunningham and Julie Lawton are the new co-chairs.
- 9 members, upcoming committee meeting.
- Just the Facts training will begin 9/28 and continue on Wednesdays in October. Location is Wellesley College.
- Confirming with NASFAA regarding CORE materials and credentialing – do we need to be credentialed to use the materials? May only be required for attendees to receive a waiver of cost to take the test.
- Looking for nominations for Leadership Academy. First date is 9/29.
- Planning for tax workshops. With PPY, not sure if we should move up the date? Possible dates are 12/9 in the Worcester area and 1/26 in MetroWest location.
- Hopeful to add other types of training. Possible topics are verification, PPY, and round table discussions.

Comments:

- Greg: how are nominations handled for Leadership Academy? May be able to set up on website.
- Sabina: in the past, it was an email and supervisor attached the nomination

- Shawn: good participation in past years? Yes, typically a core group of 12, lose some due to job transitions, etc.

Technology Committee: Greg Chick and Julie Wickstrom

- Julie Wickstrom is new co-chair
- Primary focus has been getting new website up and running

Comments:

- Stephanie: posting forms on website – is there a cutover date? Not a set date but soon – probably does not make sense to post to current site – check with Greg.
- Katie: no recent payment to Noetic? We probably owe them an additional payment for their services. Short term contract, open-ended until transition is complete.

Access, Inclusion, and Diversity: Ebony Carter and Jason Marsala

- Planning for profiles in aid, as well as highlighting partner offices on campus that promote ideals of AID. Rotate profiles on website. Keep it simple - 10 questions, interview style. Hope to have a couple of profiles ready to go once website is up and running.
- For MASFAA membership information, we collect ethnicity data but not gender data – should we update? Would be good to share who we are. Send Shawn any items we should include for data on membership.
- Planning for a few events with guest speakers:
 - Transgender 101 – 2 hours, how it relates to higher education and financial aid. Possible October date at NU.
 - Roadblock: Diversity within Offices
 - Women in Higher Ed panel – talk about their path and networking opportunities

Comments:

- Shawn: Don't be held back based on budget – can adjust if needed, want to accommodate as many events as possible.
- Emir: for membership data, need an option for “other” or “prefer not to disclose”.
- Rosemary: Diversity training – has the name of a good presenter if there is interest.
- Karen: could also provide resources – has colleagues who have transitioned.

FAFSA Day: Keith Dimilanta, Kristi Pierce, Ryan Forsythe

- Good number of sites so far. Planning for 33 events at 31 sites. 2 new sites, 2 old sites dropped out.
- Recognition sent to last year's schools thanking them for hosting an event.
- Will open up registration once website is up and running. Set up is similar to conference so it should straightforward.
- Do we know more about schools' plans regarding PPY? Should we consider a survey?

Comments:

- Meredith: recent letter from the U.S. Department of Education to colleges encouraging them not to move up priority deadlines to earlier timeframes.
- Shawn: could send out survey to members. Cheryl and Stephanie will work on a draft for future review.
- Alex: should survey just go to directors?
- Katie: FAFSA sends out reminder emails for renewals – still planning to do that?

Communications: Michelle Kosboth

- Michelle Kosboth is new co-chair for committee, Shawn is looking for a co-chair if anyone has a suggestion.

- Shawn has been in touch with prior co-chairs to make sure any data is transferred to new site.
- Social media policy? Facebook, Twitter, LinkedIn – where do we focus?

Comments:

- Emir: are we still using WordPress for web updates? No, WordPress functionality will go away. Need to have recent updates if we want to be portrayed as active. How many social media sites should we be active in? LinkedIn is the most professional.
- Rosemary: if we want to have a social media presence, need to pick one and keep it up to date. Should get rid of empty accounts, does not give good impression of association.
- Stephanie: will this committee take on social media postings?
- Shawn: need to continue conversation with Michelle and committee members. Social media presence will be helpful in promoting website.
- Jim: Have our primary focus be on website, use LinkedIn as a supplement.
- Sabina: will need active committee members if they are going to take on social media postings
- Rosemary: regardless of decision, social media is best utilized based on purpose. What is goal of social media and what is the best platform for MASFAA?
- Chery: where does ownership lie?
- Shawn: does anyone have connections with social media experts?
- Stephanie: will check in with MEFA to see if there is interest to join committee. Regardless of Communications Committee, we all need to be responsible for timely postings related to our areas within MASFAA.
- Shawn: more content, fewer email messages.

New Business:

Shawn reviewed calendar for 16-17 meeting times:

- **September: 9/23, October: 10/21, November: 11/16** (Wednesday at conference), **December 16** (*tentative, have not always met in December*), **January: 1/20, February: 2/17, March: 3/24, May: 5/19**, June: year-end event TBD.
- Holding a date for December, no meeting scheduled for April due to time of year with financial aid.
- UMass Medical Worcester – September location.
- Time is 10:00 – 2:00. Lunch is provided.

Old Business:

Lisa Talbot was the recipient of the 2016 Volunteer of the Year Award presented at the MASFAA year-end event in June. Thank you and congrats to Lisa!

Let Susan know about co-chair ideas, Jim on potential candidates for next year.

Karen motioned to adjourn, Katie, seconded. All in favor to adjourn at 12:05 PM.

Respectfully submitted,

Meredith Stover