

**Massachusetts Association of Student Financial Aid Administrators  
Executive Council Meeting  
Waltham, MA  
February 15, 2007**

**In attendance:** Sherri Avery, Cathy Kedski, Tony Erwin, Carla Berg, Ina Frye, Pam McCafferty, Shawn Morrissey, Bernie Pekala, Beth Feinberg, Karen Derouin, Jill D'Amico, Lori Seuch, Rob Callahan, Nick Zinser, Mike Ippolito, Cheryl Constantine, Leah Barry, Donna Wood Lozier, Lauren Urbanek, Yvonne Gittens, Anne Marie Juckins, Gail Holt, Paul Lynskey

**Absent:** Jason Burke, Leslie Bembridge, Dave Kelly, Val Harris, Sandra Coswatte, Kim Truong, Joe Lahoud, Duane Quinn, Robin Randall, Shawn Bennett, Elayne Peloquin, Scott McIsaac, Kathy Osmond Martha Savery, Jason Shumaker

**PRESIDENT'S REMARKS**

**Sherri Avery**  
[savery@brandeis.edu](mailto:savery@brandeis.edu)

President Sherri Avery called the meeting to order at 10:18 AM.

Sherri discussed that the LearnStudentAid.org message went to the listserv and is on the website. It has to be publicized every two months.

The KnowHow2Go campaign did not have a conference call in January as was scheduled. There is supposed to be a call in early March.

Sherri updated Executive Council on the result of the conversations regarding endorsing the removal of the drug provision with the Coalition for Higher Education Reform.

The letter in support of HR 5 thanking was sent last week.

Sherri passed around a letter from Crossroads for Kids thanking MASFAA for the donation.

**PRESIDENT-ELECT'S REMARKS**

**Tony Erwin**  
[a.erwin@neu.edu](mailto:a.erwin@neu.edu)

Letters to the Charles Jones Award nominees were sent this week. Committee chair selection is on-going. Tony thanked the Conference Committee for a great first meeting.

**SECRETARY'S REPORT**

**Tony Erwin (Acting)**  
[a.erwin@neu.edu](mailto:a.erwin@neu.edu)

Tony presented the minutes from the January Executive Council meeting. A motion to accept the minutes as amended was offered, seconded and approved unanimously.

## **TREASURER'S REPORT**

**Pam McCafferty**  
[pmccafferty@fsc.edu](mailto:pmccafferty@fsc.edu)

Pam distributed College Goal Sunday budget information and the monthly Treasurer's report.

Sherri discussed the expense for the logo copyright work. It has been booked into Public Relations, but it should be moved to an Executive Council expense, taking the funds from Conference. Yvonne indicated that there is one outstanding bill from the Conference, but that she does not expect it to be presented.

A motion to move \$550 from the Conference budget to Executive Council Misc. to cover the logo trademark was offered, seconded, and approved unanimously.

Pam indicated that we are on track with the insurance policies, and she does not expect an increase in premium.

A motion to approve the Treasurer's report was offered, seconded, and approved unanimously.

Pam discussed some items that might be moved to the Past-Treasurer so make the job of the Treasurer more manageable in the first year. Insurance, tax-exempt status work, tax work with the accountant and investing would be items the Past-Treasurer could continue to manage. Shawn asked if the insurance work should be moved to the Secretary and perhaps not the Past-Treasurer. Sherri would like to think about that and discuss it at a meeting when Shawn Bennett is here. Pam asked if the Past-Treasurer should be allowed to sign checks, which currently they don't. Discussion followed, and Pam will draft a change to the Handbook for the next meeting.

Pam indicated that that budget process will begin soon for next year. Budget requests will be due at the April meeting.

Pam indicated that the current CD that MASFAA has for \$50,000 expires today. She recommends a new six month CD at a rate of 5.1%. Bernie asked if Pam had checked into an online account to perhaps earn a higher rate. Tony responded that in the past we have not moved to this since it would give the Treasurer yet another account to maintain. Sherri said she would like to consider those options for the future and Tony suggested that the Finance Committee can look into this in the Spring.

A motion to purchase a new six-month CD through Edward Jones Investments for \$50,000 was offered, seconded and approved unanimously.

## **DEVELOPMENT**

**Carla Berg**  
[cberg@bentley.edu](mailto:cberg@bentley.edu)

Carla indicated that she will be working with Sherri and Tony to prepare an early notice for sponsorship for next year.

## **NOMINATIONS/PAST-PRESIDENT'S REPORT**

**Cathy Kedski**  
[ckedski@bridgew.edu](mailto:ckedski@bridgew.edu)

## ASSOCIATE MEMBER AT LARGE

**Lori Seuch**

[lseuch@mefa.org](mailto:lseuch@mefa.org)

## ARCHIVES COMMITTEE

**Shawn Morrissey**

[smorris@frc.mass.edu](mailto:smorris@frc.mass.edu)

**Duane Quinn**

[quinn@amsa.com](mailto:quinn@amsa.com)

Shawn indicated that 140 letters went out this week to members with more than 20 years in aid requesting items for the archives. Shawn indicated that Duane sent an example of archives from the Tri-State association.

## MEMBERSHIP REPORT

**Beth Feinberg**

[b.feinberg@neu.edu](mailto:b.feinberg@neu.edu)

**Leslie Bembridge**

[Leslie.J.Bembridge@citizensbank.com](mailto:Leslie.J.Bembridge@citizensbank.com)

Beth reported that there are currently 903 paid members.

Leah indicated that Technology will be working on the Membership wish list for the next renewal year.

## CONFERENCE COMMITTEE

**Scott McIsaac**

[scott.mcisaac@nelnet.net](mailto:scott.mcisaac@nelnet.net)

**Yvonne Gittens**

[gittens@mit.edu](mailto:gittens@mit.edu)

**Anne Marie Juckins**

[ajuckins@edfund.org](mailto:ajuckins@edfund.org)

Anne Marie reported that the Committee met for the first time on Tuesday. There are sixteen members. Several new members bring experience from other associations. Members were assigned to subcommittees and brainstorming began for themes. Many potential themes are focused around student success. Yvonne reported that the Committee has reached out to the Governor as a potential speaker, but they are not holding out much hope for his participation.

## TECHNOLOGY COMMITTEE

**Leah Barry**

[lbarry@bu.edu](mailto:lbarry@bu.edu)

**Rob Callahan**

[rcallahan@collegeboard.org](mailto:rcallahan@collegeboard.org)

Rob reported that the listserv for the emerging leaders group has been created. All forms that are on the website currently have been set to require a login.

Leah commented that the recent survey regarding the Public Relations event is using a template that will allow us to quickly setup a survey in the future.

## PUBLIC RELATIONS COMMITTEE

**Mike Ippolito**

[mippolit@brandeis.edu](mailto:mippolit@brandeis.edu)

**Joe Lahoud**

[jlahoud@amsa.com](mailto:jlahoud@amsa.com)

Mike indicated that the volunteer placement process is working well. Currently the only committees that are taking new members are Newsletter and CEED. Mike said that the Committee has resolved people who had volunteered and hadn't been contacted.

Mike reported that the logo copyright work is under way and should be finalized in the next few weeks.

Mike said there were about 30 people at the event held recently in Springfield. There is another event planned for Worcester on Thursday, April 12<sup>th</sup>. A save the date notice will be going soon.

A survey has been sent to the membership regarding the Final Fling, giving choices of Fenway Park, The Museum of Science and the Botanical Gardens. The Committee recently toured Fenway to investigate options for holding the event. Joe discussed potentially needing more money if the event is at Fenway. Discussion followed regarding parking at Fenway. Mike asked if there should be a cap on the event to control the budget. Cathy thought it would be good to review the overall budget picture closer to the event to see if we can avoid turning anyone away. Discussion followed, and the event should be limited to 150 people for now. Bernie asked about people being able to purchase tickets for non-members, Mike said Executive Council will have to consider that. Lori thought that since they know they want the State Street room, they should just book it and give a final count closer to the event. If Fenway is selected, the State Street room should be selected based on feedback from Executive Council.

## **PROFESSIONAL DEVELOPMENT AND TRAINING COMMITTEE**

**Jason Shumaker**

[jasons@mit.edu](mailto:jasons@mit.edu)

**Jason Burke**

[jburke@amsa.com](mailto:jburke@amsa.com)

A written report was submitted:

After lots of deliberation and consultation of weather reports we decided to go forward with the workshop. We had 50 people registered, and once the inclement weather forecast became apparent I actually pulled six additional registrants off the waitlist (we had 12) for a total registration of 56 (anticipating that many would not make the trip).

We were pleasantly surprised to find that 31 people actually made it! Unfortunately three of our presenters were unable to make it due to the weather conditions and child care issues. However, since we had three concurrent session times, we were still able to provide four general sessions to make for a complete workshop. The three sessions we were unable to present were Nina Flood's on "Loans"; Julie Shields-Rutyna's "Need Analysis"; and Shawn Morrissey's "Finaid Technology". But we did have good sessions on "Student Employment 101" by Yale's Matthew Long; "Different Types of Finaid" by Jason Shumaker; "After Loan Exits" by MIT's Eleanor Wolcott, and what ended up being "Telephone and Email etiquette" by Steve Podeszwa of USA Funds. I've attached the agenda for your reference.

The MASFAA emergency phone line worked great. I haven't really had a chance to look over the evaluation forms yet but it seemed to be a positive experience for those attending. The Wellesley College Club was, as usually, very nice.

Chuck Courtemanche is submitting a newsletter update. Unfortunately we didn't get pictures as our planned photographer (Beth Ingle) did not make it.

## **GRADUATE/PROFESSIONAL CONCERNS COMMITTEE**

**Cheryl Constantine**

[cherylc@bu.edu](mailto:cherylc@bu.edu)

**Val Harris**

[harrisv@harvard.edu](mailto:harrisv@harvard.edu)

Cheryl reported that the Committee is planning a new half-day Spring workshop for the second week in May to be held at the Boston University School of Management. The focus will be on legislative affairs and consolidation.

## **NEWSLETTER**

**Lauren Urbanek**  
[lurbanek@newenglandconservatory.edu](mailto:lurbanek@newenglandconservatory.edu)

**David Kelly**  
[dave.kelly@bankofamerica.com](mailto:dave.kelly@bankofamerica.com)

Lauren reported that the Newsletter deadlines have been posted to the website. They are still looking for articles for the next issue. Lauren asked for ideas for the theme issue. Government relations was a popular suggestion.

## **EASFAA**

**Donna Wood Lozier**  
[dwoodlo@spfldcol.edu](mailto:dwoodlo@spfldcol.edu)

Two trainings are being held with EASFAA using the NASFAA Leadership training materials. There are 20 people signed up as of today for the Northeastern location tomorrow.

The next EASFAA Executive Council meeting is March 11-13. Since the meeting is in Washington D.C. there will be some legislative meetings scheduled. Discussion followed regarding the last minute training announcement.

## **COMMITTEE ON ENHANCING ETHNIC DIVERSITY**

**Kimberly Truong**  
[ktuong@bhe.mass.edu](mailto:ktuong@bhe.mass.edu)

**Ina Frye**  
[ifrye@bu.edu](mailto:ifrye@bu.edu)

**Sandra Coswatte**  
[coswatte@lesley.edu](mailto:coswatte@lesley.edu)

Ina reported that they have confirmed almost all members for the IIN. She reported that the diversity presentation won't be held at the Boston Foundation. Tony indicated that he has requested a space at Northeastern based on Kim's request.

## **GOVERNMENT RELATIONS COMMITTEE**

**Bernie Pekala**  
[pekala@bc.edu](mailto:pekala@bc.edu)

**Kathryn Osmond**  
[kosmond@wellesley.edu](mailto:kosmond@wellesley.edu)

Bernie reported on the Sunshine Act. There is a new draft as of last week. Discussion followed, including the topic of MASFAA sponsorship.

Bernie next discussed requests for information that were sent to several Massachusetts schools and lenders from the New York State Attorney General.

Bernie reported on the STAR act which would pass cost savings on for Direct Loan participation to new Direct Loan Schools.

The President is expected to sign a bill today that increases a maximum Pell by \$260. Bernie commented on the President's proposed budget that would eliminate SEOG and Perkins. He then discussed the negotiated rulemaking teams.

Bernie reported that the Committee has met with Dr. Clantha Carrigan McCurdy to come to some understanding on funding.

## **EARLY AWARENESS AND OUTREACH COMMITTEE**

**Jill D'Amico**

[jdamico@amsa.com](mailto:jdamico@amsa.com)

**Jean Berg**

[jberg@finaid.umass.edu](mailto:jberg@finaid.umass.edu)

They had to reschedule a recent meeting. Jill indicated that they have several Committee members who have not participated that she will be letting them know they are no longer on the Committee.

## **COLLEGE GOAL SUNDAY**

**Gail Holt**

[gholt@mtholyoke.edu](mailto:gholt@mtholyoke.edu)

**Martha Savery**

[Martha\\_savery@nelliemae.com](mailto:Martha_savery@nelliemae.com)

**Paul Lynskey**

[plynskey@mefa.org](mailto:plynskey@mefa.org)

Year three for College Goal Sunday was definitely a charm. To date, nearly 1800 families have been served by Massachusetts College Goal Sunday. For 2007, the total number of families served was 1000. This is a 50% increase over 2006 (with 663 families and over 1000 attendees). For a second consecutive year, we saw increases in promotions, media coverage, participation of site coordinators, etc. Worcester (150 families) and Springfield (total of 165 families) doubled the prior year attendance. We again had three sites with both English and Spanish presentations. Framingham was a predominantly web-based site.

Two new high school sites were added in Framingham and Malden and Community College sites were added in Boston (Charlestown) and Holyoke. All four new sites made a strong impact. The two sites in the greater Springfield area more than doubled attendance from last year. Worcester changed their building location to utilize a larger space and it was a good thing, since their attendance increased 61%. Three sites experienced a modest (4-13) decrease in number of families, one stayed the same and twelve saw increases. Another big winner was Pittsfield that increased 166% (15 to 40 families). This is very positive for this area of the state.

Boston was the only site that decreased dramatically this year (68.5%). In 2005, Boston had 2 families (@NU), in 2006 Boston had 70 families (@BPL), and in 2007 Boston had 22 families (@BPL). Promotions in the Boston area were increased from 2005 and 2006. Efforts included 'Save the Date' cards distributed to all BPS students (4500) in August 2006, distribution of posters and cards by ACCESS to all 36 BPS High Schools in January 2007, and the Boston Public Library had 1000 flyers and cards to distribute, along with 50 posters. In addition, TERI distributed 2300 bilingual flyers in January 2007 as part of their Financial Aid Campaign mailing to low-income families state-wide. Pine Manor and ROCA were the same. We added a new site for the Boston area based on perceived need, in Charlestown. This site had 24 families in 2007, but the 24 from Charlestown and the 22 from Boston (BPL), equal 46 which is still less than the 70 from 2006. It will be necessary for the steering committee to review the overall attendance in the Greater Boston Area and make adjustments as necessary.

The total number of volunteers was 220 compared to 182 last year. The majority of volunteers came from MASFAA, but also included EOC representatives, community-based organizations, high school staff, students, family and friends. Next year we plan to ask a question on the volunteer registration that gathers that information specifically. We also continue to have volunteer support from the EOC's.

Promotional efforts continued strong in year three and definitely increased the awareness about College Goal Sunday. Beginning in September, Guidance Counselors across the state were introduced to the event through Guidance Workshops conducted by The College Board and then again in December when MEFA held their statewide trainings. Parents were also advised of College Goal Sunday during the financial aid workshops conducted by MEFA throughout the state and through their Parent Assistance Services emails, sent to over 6500 parents. In addition, ASA hosted the CGS Hotline (877-4-CGS-MAS) and helped callers answer questions about the event, find locations and register online.

This year's increased media campaign included television interviews on CBS 4's CENTO and New England Cable News' mid-day news. Radio interviews were conducted on over a dozen radio shows and print articles appeared in over two and a half dozen newspapers. The video PSA created for last year's campaign aired on about a dozen stations and a radio PSA was added this year to air on a dozen and a half radio stations. About a dozen calendar listings rounded out the media coverage for College Goal Sunday. The media campaign was run by The Castle Group who made approximately 700 or more calls on behalf of CGS.

Promotional materials were not changed as dramatically as 2006, but were refined to more clearly communicate the CGS goal. New flyers were added, geared toward nontraditional students. Both flyer versions were available in English, Spanish and Portuguese. We will continue to consider adding other languages (but need to have interpreters available in those languages).

Over 15,000 postcards were distributed, along with over 1500 posters, 5,000 English flyers, 5,000 Spanish flyers, 1000 Portuguese flyers, and over 2,000 Nontraditional flyers (English/Spanish). In addition, 45 individual requests for materials to distribute were made through the website totaling a few thousand promotional pieces.

MEFA continued as a vital partner, reaching out to 30,000 parents who attended their financial aid nights, 200 guidance counselors learned about CGS at statewide trainings and 600 guidance counselors received emails with a link to CGS and 6500 parents got an email with a link to CGS. As an example, on Wednesday, January 24<sup>th</sup>, an email was sent to 6500 parents to promote CGS solely and linked to the CGS website. This day only, the website had 1005 sessions, to be followed by 500-600+ sessions/day on Thursday and Friday.

ASA hosted the hotline and they received increased traffic as well. Over 34 days this year that ASA answered the hotline, they took a total of 180 calls. This is compared to 134 calls over 25 days for 2006 and 27 calls over 28 days for 2005. 38 calls were taken on January 28, 2007 (event day). Calls came in for general questions, directions, frequently asked questions and registration.

Online registrations were over 450 compared to 390 online registrations last year. In terms of other online activity, for the month of January 2007 alone, the average number of sessions per day was 234, compared to January 2006, which was 160 sessions per day. The increase was 46%. See the CGS Web Stats Summary that was distributed for additional details.

We will be selecting and notifying all 17 Educational Prize Drawing winners. They will also be posted on the website shortly.

Some fun quotes from College Goal Sunday include:

"Our numbers were way up - we definitely need more [volunteers]. The ones we had were very helpful. I think you need to stress that attendance was way up that [volunteers] will be busy helping families. In the past many felt frustrated by the lack of attendees."

"Thank you for this chance to spend [today] helping - anything for the kids!"

"The effectiveness and organization of CGS was excellent. It was helpful to students and parents alike."

"It was amazingly helpful! Turned the tide for me - really, really great!"

"I received all the help that I needed. You guys made me see that filling out the FAFSA is not as hard as it seems. Thank you!"

"The helpers in blue shirts were very nice and helpful. Without them I believe people would have been very confused. Thank you!"

"This was perfect - presentation, on the spot questions answered and other room for questions. Presentation was clear and very informative."

"Excellent program. Thank you so much for taking time out of your personal time for us parents. Certainly relieved some stress of the whole financial aid process."

"I am really happy for the help I got on College Sunday. You folks are doing a very good job."

What's next for College Goal Sunday?

Paul will be attending a national CGS meeting/training at the end of the month in Florida. We will then have a strategic planning meeting to discuss 2008. Our goal is to continue with the selective number of title sponsors on the promotional materials. We will also assess the cost/benefit of the PR fee and will be working to either negotiate this down or make other arrangements.

Although 2007 was the third and final year of the 3-yr Lumina Grant, other states (including \$50,000 to Maine to continue CGS support for 2007-2009) have applied and received a continuation grant. We will explore this as an option along with other possibilities for continued funding.

We will continue working on increasing promotions and visibility to the target population (low-income, first generation). Last year, MA was among the top 5 states nationwide reaching the target population. It is not yet determined if our increase in attendees were predominantly in these areas or other areas. We will continue to review site locations and assess whether additional sites can and should be added. A final grant report is due to Lumina in the coming months and another forum will take place around the NASFAA Conference.

Web stats for [www.masscollegegoalsunday.org](http://www.masscollegegoalsunday.org)

#### Sessions by Month

<u>Month</u>	<u>Sessions/Day</u>	<u>Total Sessions</u>
Aug-06	33.60	1,025
Sept-06	40.07	1,202
Oct-06	44.10	1,367
Nov-06	46.70	1,401
Dec-06	73.10	2,266
Jan-07	234.58	7,272

(Single day high of 1,005 on 1/24/07 when MEFA sent email on CGS to 6,500 parents)

#### Page Requests by Month

<u>Month</u>	<u>Pages/Day</u>	<u>Total Pages</u>
Aug-06	73.94	2,292
Sept-06	88.53	2,656
Oct-06	118.68	3,679
Nov-06	116.20	3,486
Dec-06	196.23	6,083
Jan-07	963.39	29,865

#### Referrals

<u>Referring Domain</u>	<u>Sessions</u>	<u>% of Total</u>
No referral	11,732	80.73%
Google	445	3.06%

Middlesex.mass.edu	296	2.04%
MASFAA.org	281	1.93%
Mail.yahoo.com	203	1.40%
View.exacttarget.com	145	1.00%
MEFA.org	117	.81%
Search.yahoo.com	83	.57%
Webmail.aol.com	79	.54%
Search.msn.com	77	.53%
CollegeGoalSundayUSA.org	76	.52%
WBZ.com	69	.47%
Mailcenter.comcast.net	67	.46%
Mailcenter2.comcast.net	63	.43%
WBZ1030.com	47	.32%
Mail.charter.net	47	.32%
K12.ma.us	40	.28%
Netmail.verizon.net	38	.26%
Masscollegegoalsunday.org.	31	.21%
Mailcenter3.comcast.net	27	.19%
<b>Total email -</b>	<b>564</b>	<b>3.88%</b>

### Google Entries

<u>Search</u>	<u>Sessions</u>	<u>% of Total</u>
<a href="http://www.masscollegegoalsunday.org">www.masscollegegoalsunday.org</a>	36	8.18%
College Goal Sunday	36	8.18%
Massachusetts College Goal Sunday	33	7.50%
Mass College Goal Sunday	25	5.68%
Masscollegegoalsunday.org	17	3.86%
College Goal Sunday MA	17	3.86%
College Goal Sunday Massachusetts	17	3.86%
Ma College Goal Sunday	14	3.18%
Masscollegegoalsunday	14	3.18%

Others: massachusetts `college bound`, high school counselor`s role in the financial aid application process, worried about attending college flyer, worried about college tuition? Flyer, additional assistance springfield massachusetts funding local aid, college goal sunday and volunteers, massachusetts low income college programs aid, counselor suggested college education major, college goals fliers, college goal sunday material, high paying career without going to college Massachusetts, volunteer college student january, 2007 ma state college, `financial aid awareness month Massachusetts, college goal sunday campaign, help with college financial aid process Massachusetts.

Paul commented that with so many MASFAA volunteers, CGS is now the second largest MASFAA event. The partnerships with GEAR UP and TRIO programs, as well as the high schools will have lasting benefits. Paul indicated that there will be a meeting in March to come up with strategy for the future.

Discussion followed regarding success stories and possible ways to promote participation and thank people. One idea was to use the Conference to do that.

## JUST THE FACTS! TRAINING COMMITTEE

**Robin Randall**

[rrandall@wheatoncollege.edu](mailto:rrandall@wheatoncollege.edu)

## OLD BUSINESS

Karen reminded everyone that she is still collecting information for the policies and procedures. She is hoping to wrap this project up by April. Sherri reminded officers that they need to submit their procedures as well.

Meeting Schedule:

March: No meeting

April 12 at the College Board Regional Office

May 17 at Stonehill College

June: To be announced.

## **NEW BUSINESS**

Sherri reported on a message that was sent to the MASFAA listserv asking people to not reply to the whole list. This concerned many people, since we want to encourage not discourage discussions.

Gail distributed information that is currently posted about the listserv and a proposal for new language. Tony would like to add to the proposed language the prohibited uses.

Cathy asked about the FSA internship scholarship process. Sherri is following up on that with Shawn Bennett.

A motion to adjourn was offered, seconded and approved unanimously at 1:42 P.M.