

**Massachusetts Association of Student Financial Aid Administrators  
Executive Council Meeting  
Easton, MA  
May 17, 2007**

**In attendance:** Sherri Avery, Carla Berg, Jason Burke, Ina Frye, Tony Erwin, Pam McCafferty, Karen Derouin, Jill D'Amico, Cathy Kedski, Mike Ippolito, Leah Barry, Val Harris, Joe Lahoud, Jean Berg, Susan Beard, Donna Wood Lozier, Leslie Bembridge, Beth Feinberg, Dave Kelly, Kathy Osmond, Jason Shumaker, Lori Seuch Gail Holt, Paul Lynskey, Anne Marie Juckins, Shawn Bennett, Nick Zinser, Elayne Peloquin, Bernie Pekala

**Absent:** Rob Callahan, Cheryl Constantine, Sandra Coswatte, Kim Truong, Duane Quinn, Scott McIsaac, Yvonne Gittens, Lauren Urbanek, Dee Ludwick, Bob Coughlin

**PRESIDENT'S REMARKS**

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

President Sherri Avery called the meeting to order at 2:04 PM.

Sherri indicated that the meeting today will be abbreviated so that the 07-08 budget can be reviewed.

Sherri reported that she received a copy of a letter from Scott Jewell that PASFAA sent to the Pennsylvania Attorney General. Scott suggested that MASFAA send something similar to the Massachusetts Attorney General. Val indicated that at the recent Graduate and Professional Concerns Committee event some attendees felt that MASFAA wasn't being vocal enough on the current issues. Sherri responded that MASFAA had adopted the NASFAA code of conduct. Those principles have now been updated to be more prominent on the website. MASFAA will also be adding the statement to the membership renewal process. Tony commented that a letter to the Massachusetts Attorney General might make some MASFAA members feel better, but that in his opinion won't likely change any plans or investigation from by the AG. Leah indicated that NASFAA is currently revising the code of conduct and we should be on the lookout for those changes. Sherri indicated that the current newsletter has information about what MASFAA is doing on this event. It may have come out after the GPCC event, so people weren't aware of what MASFAA had done. Cathy made the suggestion that Sherri send her newsletter article to the listserv.

Sherri next discussed that she received feedback from a member regarding the Final Fling asking if MASFAA should clarify the invitation to make it clear that it is a MASFAA event, and not a vendor event. Kathy thinks that a message should go out indicating that the Fling is a meeting, and there is official MASFAA business. Discussion followed regarding possible language.

Lori thinks that based on the feedback she received from the sponsors, no major changes are needed to MASFAA's sponsorship program. She recommends complete transparency in our relationship with sponsors.

Sherri would like to have an Executive Council only meeting on June 27 from 1-4 to further discuss sponsorship. She will invite the future EC members/officers as well.

## **PRESIDENT-ELECT'S REMARKS**

**Tony Erwin**

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

Tony reported that he has signed the contract with the Cape Codder Resort and Spa for the August 2007 and 2008 Executive Council retreats, as well as for the November 2008 conference. The retreat for this year will be August 13 and 14 at the Cape Codder.

Also, Tony reported that he will be working with Shawn Bennett to order supplies for 07-08 and that he will be asking Steve Culp to “freshen up” the look of the letterhead.

## **SECRETARY'S REPORT**

**Tony Erwin (Acting)**

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

Tony presented the minutes from the April 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. Pam reviewed the current activity.

Kathy indicated that Government Relations will not be spending their budget this year. Their idea of having an event on preferred lenders can't be arranged for this year.

Tony asked a question about the net worth report. The amount in the checking account seems too high. Pam provided a correction to the checking figure. Sherri asked if Pam had a sense of what might be added to reserves at the end of the year. Pam thought about \$30,000 would be left unspent.

Motion to accept the Treasurer's report as amended offered, seconded and approved unanimously.

Pam next distributed and reviewed budget projections. A motion to accept the fiscal year 2008 budget was offered, seconded and approved unanimously. The budget includes an increase for the 2007 conference registration to \$210 for full attendance, and \$105 per day.

## **DEVELOPMENT**

**Carla Berg**

[cberg@bentley.edu](mailto:cberg@bentley.edu)

Carla reported that Tony has updated the sponsorship letter. The mailing will go out shortly after the final Executive Council meeting in June.

## NOMINATIONS/PAST-PRESIDENT'S REPORT

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

Cathy thanked everyone for their hard work.

## 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)

## 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)

There are 912 paid members. Some recent additions have been moved to the 07-08 year. They will be using the Newsletter to remind people to pay when they sign up. 06-07 members will stay active until 9/1, when membership will switch over to the 07-08 year. Pam will coordinate moving the income for the late members to 07-08.

## 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)

Annie reported that the Committee will be sending an email next week with the dates, location, costs, etc. They will also be soliciting session proposals soon. Julie Wickstrom is the new Technology liaison to the Conference Committee. They are working on speakers. The conference logo has been selected, and was displayed.

## TECHNOLOGY COMMITTEE

**Leah Barry**  
[lbarry@bu.edu](mailto:lbarry@bu.edu)

**Rob Callahan**  
[rcallahan@collegeboard.org](mailto:rcallahan@collegeboard.org)

They are up to date with requested changes to the website.

## **PUBLIC RELATIONS COMMITTEE**

**Mike Ippolito**  
[mippolit@brandeis.edu](mailto:mippolit@brandeis.edu)

**Joe Lahoud**  
[jlahoud@amsa.com](mailto:jlahoud@amsa.com)

The Committee held a successful event in Worcester last week,; 35-40 people attended. The Final Fling invitation has been sent. Planning is well underway. There are several people signed up already and some are planning on bringing guests. They are still collecting committee member names for the Final Fling. There is space for 200 people. They are budgeted for 150 members.

## **PROFESSIONAL DEVELOPMENT AND TRAINING COMMITTEE**

**Jason Shumaker**  
[jasons@mit.edu](mailto:jasons@mit.edu)

**Jason Burke**  
[jburke@amsa.com](mailto:jburke@amsa.com)

Jason Burke will be submitting a newsletter article on the emerging leaders program. The next event is on Tuesday. The topics will include leadership in times of change presented by Gina Laroche, who has been hired to speak for the event. Betsy Mayotte is doing a session on government relations, Daniel Barkowitz is doing his session on the three “Rs” and Nick Zinser is doing a technology session. .

The annual novice workshop is coming up in early June and will be held at the Wellesley College Club. There are already 14 people registered. The presenters are still being finalized.

## **GRADUATE/PROFESSIONAL CONCERNS COMMITTEE**

**Cheryl Constantine**  
[cherylc@bu.edu](mailto:cherylc@bu.edu)

**Val Harris**  
[harrisv@harvard.edu](mailto:harrisv@harvard.edu)

Val reported 41 people attended their recent Spring event. Val thanked the Government Relations Committee, and in particular Christine McGuire for presenting.

Elayne summarized a conversation that occurred at the event regarding the current political climate. Some people want a public response from MASFAA affirming the positive impact of the profession. Shawn Bennett indicated that he and Elayne represented Executive Council at the event and filled people in on MASFAA’s activities in this area. Shawn commented that suggested those with concerns step up to take a more active role in responding to the recent challenges to the financial aid profession.

## **NEWSLETTER**

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

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

Dave reported that the Spring edition is out. The Committee is meeting next week to work on the Summer edition. The submission deadline is around June 8<sup>th</sup>. They are still looking for articles.

## EASFAA

**Donna Wood Lozier**

[dwoodlo@spfldcol.edu](mailto:dwoodlo@spfldcol.edu)

Donna reported that the EASFAA conference is coming up next week. She asked for copies of any pictures people take at the EASFAA conference. Donna reported that there will be no state gift this year as has been the custom in the past.

## COMMITTEE ON ENHANCING ETHNIC DIVERSITY

**Kimberly Truong**

[ktruong@bhe.mass.edu](mailto:ktruong@bhe.mass.edu)

**Ina Frye**

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

**Sandra Coswatte**

[coswatte@lesley.edu](mailto:coswatte@lesley.edu)

Ina reported that the Committee has an event coming up on June 12 at Northeastern. Not that many people signed up at this point. Several people in attendance commented that they didn't receive the notice to the listserv. The Committee will send a reminder.

## GOVERNMENT RELATIONS COMMITTEE

**Bernie Pekala**

[pekala@bc.edu](mailto:pekala@bc.edu)

**Kathryn Osmond**

[kosmond@wellesley.edu](mailto:kosmond@wellesley.edu)

Kathy and Bernie reported that a planned conversation on preferred lenders has fallen through. The Committee did not get any positive response from potential speakers. Kathy discussed some of the improvements in the Sunshine Act since the first draft. Bernie provided some information for the STAR, Sunshine, SLATE, and SAL programs.

Kathy discussed a good document published by ACE that can help schools document their procedures regarding lenders. She has suggested that Rich Doherty of AICUM post it to the MASFAA list.

Donna asked how many people in aid offices are getting questions regarding preferred lenders. Generally, most school people in the room said little to none. Paul reported he has been fielding a lot of questions from parents of high school juniors regarding preferred lenders. Some discussion followed.

## 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)

The paper mailing for the June 8<sup>th</sup> Journey event has been sent. There are 8 or so people registered at this point. The online order form for the *Jumpstart your College Savings* publication (formerly the *College Savings Times*) is working. They are working on updates to their page on the website. Jill needs the banner, which appears to be missing. The last time anyone remembers seeing it is at the conference.

## COLLEGE GOAL SUNDAY

**Gail Holt**  
[gholt@mtholyoke.edu](mailto:gholt@mtholyoke.edu)

**Paul Lynskey**  
[plynskey@mefa.org](mailto:plynskey@mefa.org)

**Catherine Nelson**  
[cnelson@brandeis.edu](mailto:cnelson@brandeis.edu)

The 3<sup>rd</sup> and final Lumina Grant Report is being finalized and plans to be submitted shortly. The Continuation Grant Application will also be submitted soon.

The final expenditure figure for 2007 is just shy of \$111,500, including direct support from Lumina, Sponsors and in-kind contributions. With 975 students served in 2007, this represents a cost of about \$114 per student. We should hear this summer how this figure compares nationally.

The survey data has been tallied. 87% of completed surveys stated they could not have completed the FAFSA or as well without the help of CGS. 94% said the help was worth the effort of coming. 42% said they learned of CGS through school only, 16% learned of CGS through the media only and an additional 25% learned of CGS through both. This underscores the value of the most significant portions of CGS activities. For 93% of respondents, they were first-time applicants. 82% hoped to enroll in 4-yr programs. 62% were first generation, 37% minority and 64% had family incomes less than \$60,000. Overall, 68% met one or more of the target population categories. These stats are consistent with 2006. There were not dramatic shifts.

From the volunteer surveys, 94% would volunteer again and 94% felt their participation was very helpful and necessary. 93% felt the numbers of volunteers was about right or adequate.

We will receive the national summary evaluation in late summer or early fall.

Gail will be sending around the final statistics to Executive Council and they will be posted in the final issue of the Newsletter.

Gail was happy to report that nothing in the Sunshine Act indicates lenders won't be able to provide charitable gifts, so she sees no decline in support for College Goal Sunday.

## JUST THE FACTS! TRAINING COMMITTEE

**Dee Ludwick**  
[dee.ludwick@regiscollege.edu](mailto:dee.ludwick@regiscollege.edu)

**Bob Coughlin**  
[robert\\_coughlin@hms.harvard.edu](mailto:robert_coughlin@hms.harvard.edu)

**Susan Beard**  
[sbeard@wheatonma.edu](mailto:sbeard@wheatonma.edu)

## OLD BUSINESS

Karen said she is waiting on some items for the policies and procedures manual.

## NEW BUSINESS

No new business.

A motion to adjourn was offered, seconded and approved unanimously at 4:58 P.M.