

**Massachusetts Association of Student Financial Aid Administrators  
Executive Council Meeting  
Stonehill College  
Sept. 22 2006**

**In attendance:** Sherri Avery, Tony Erwin, Cathy Kedski, Pam McCafferty, Michele Kosboth, Carla Berg, Karen Derouin, Ina Frye, Elayne Peloquin, Lori Seuch, Nick Zinser, Martha Savery, Kim Truong, Jamey Palmieri, Yvonne Gittens, Robin Randall, Joyce Lezberg, Jill D'Amico, Kathy Osmond, Dave Kelly, Jason Burke, Mike Ippolito, Leah Barry, , Cheryl Constantine, , Shawn Morrissey, Leslie Bembridge,

**Absent:** Daniel Barkowitz, Sandra Coswatte, Gail Holt, Shawn Bennett, Scott McIsaac, Bernie Pekala, Beth Feinberg, Lauren Urbanek, Jason Shumaker, Rob Callahan, Val Harris Duane Quinn, Paul Lynskey, Donna Wood Lozier, Debbie Moroney

**PRESIDENT'S REMARKS**

**Sherri Avery**

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

Update on co-chairs – Brian Smith stepped down, Joe Lahoud is replacing him. Elvie Reyes has stepped down as well.

Policies and procedures – wants all committees to do a manual for their group. Karen D. has volunteered to coordinate the collection of that. April is the deadline to get it done.

Nominating committee has been formed.

**PRESIDENT-ELECT'S REMARKS**

**Tony Erwin**

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

Call for conference scholarships went out and due Nov. 6<sup>th</sup>. But will probably make it the 13<sup>th</sup> instead. No nominations have come through yet for the awards. Jaime asked when during the Wed. night dinner would the awards be presented. Decided it would be between the dinner and dessert.

Tony is going to get a thank you gift for the woman in the Stonehill fin aid office for all the work she does to set up the meetings on campus.

**SECRETARY'S REPORT**

**Michele Kosboth**

[mkosboth@lasell.edu](mailto:mkosboth@lasell.edu)

Passed around the minutes from last meeting. Minutes were accepted as amended.

Will have the handbook updated for a vote for October's meeting. Regarding the handbook being password protected. Tony is working on that now, further discussion about who should have access to what part ensued. Sherri suggested that the treasurer section be more generic and put the specifics into the treasures policy and procedure manual. Pam will make the updates to that section and give to Michele for the handbook updates.

## **TREASURER'S REPORT**

**Pam McCafferty**

[pmccafferty@fsc.edu](mailto:pmccafferty@fsc.edu)

Passed out copy of the report.

Just got the bill for Jim Briggs from last year's conference. Jaime has to research it a bit, he is charging for the room and meals, but we are pretty sure we covered those costs already.

Need to decide what to do with the reserve from 05-06.

Motion to accept the report was made, seconded and passed.

## **DEVELOPMENT REPORT**

**Carla Berg**

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

Sponsorship has been coming in. Exhibit space will be tight. Will be hunting everyone down for their checks. Ordering the banner soon.

## **NOMINATIONS/Past-President Report**

**Cathy Kedski**

[ckedski@bridgew.edu](mailto:ckedski@bridgew.edu)

Nominations have been coming in. Encouraging everyone to nominate someone. Deadline is Oct. 13<sup>th</sup>, should have slate by the 20<sup>th</sup>. Get bios up by Nov. 7<sup>th</sup>. Voting will begin during conference and open until Dec. 1st. Meet the candidates before lunch on Wed. may not do the whole group. Laptops – Leah, Sean M. and PD& T volunteered their laptops for voting only. A question of coverage in the room came up. Voting will open noon on Wed. Jaime will put this in the program. Times for voting – 12 -5 on Wed, 9-5 Thursday and 9-12 Friday. The candidates will be given a format for their statements.

## **ASSOCIATE MEMBER AT LARGE**

**Lori Seuch**

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

## **Archive Report**

**Shawn Morrisey**

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

**Duane Quinn**

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

Has collected a variety of things so far. Not as much as they had hoped, but moving along. Will be emailing the membership about getting more stuff.

## **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)

Question came up about duplicates in the membership database. People are creating themselves as a new member when they change job etc. and have an obsolete email and can't get in to just change their info

vs. recreating their membership. Leah and Membership will work with Noetic to figure out some solutions and work arounds.

## CONFERENCE COMMITTEE

**Jamey Palmieri**  
[jpalmieri@edfund.org](mailto:jpalmieri@edfund.org)

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

**Yvonne Gittens**  
[ygittens@mit.edu](mailto:ygittens@mit.edu)

161 registered so far. Registration will close Nov. 9<sup>th</sup> at midnight. Jaime asked about a printer for name tags, Shawn M. said he can bring the one he bought for archives. Barb Miller will handle the EASFAA update. Trying to get Jeff Baker for a breakfast presentation.

Entertainment – many contestants for the talent show. Vendor room is almost full. Moderators will be conference committee and exec council members. Donations for the fund raiser are coming in. If you have things to stuff in the conference packets get them to Jaime before Tuesday Nov. 13<sup>th</sup>.

## TECHNOLOGY COMMITTEE

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

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

Leah brought up the issue of password protecting the membership list. You have to be logged in to access the email address of the member, but Tony would like the address to appear under the name of the person rather than having to click on the persons name. We did not ask them to change this, so we want it changed back.

We want the handbook password protected now. Leah will take care of it.

## PUBLIC RELATIONS COMMITTEE

**Mike Ippolito**

Kick off event will be at Jillians again. Sherri mentioned that the attachment was not as useful as it could be. Suggested not using powerpoint as the format. Passed out the logo guidelines from the handbook. Tony pointed out that the logo is not correct on the website.

Final fling – asking for suggestions as to an activity or location. Will put a request in the newsletter and the conference packet.

## PROFESSIONAL DEVELOPMENT AND TRAINING COMMITTEE

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

**Jason Burke**

Jason Burke updated Executive Council on the emerging leaders program. Discussion followed, Public Relations Committee will be working with PD&T. Trying to put together a group of mentors for training in the spring. Sherri looking at using Executive Council as mentors. She will use a portion of the reception she is hosting at the conference to kick off the program on emerging leaders. They might hold two workshops with participants who will be selected based on recommendations. Sherri will announce during the business meeting at the conference the nominees.

## **GRADUATE/PROFESSIONAL CONCERNS COMMITTEE**

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

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

Symposium is being planned. Topics are assistantships, personal finance, international students and info on borrower benefits. Continental breakfast and lunch provided. Being held at BU.

## **NEWSLETTER**

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

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

Has no example for new format. We will see it next week most likely before it is released.

## **EASFAA**

**Donna Woods-Lozier**

Decided not to do the fall training. Fall meeting is in Niagra Falls.

## **GOVERNMENT RELATIONS COMMITTEE**

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

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

Attended the state task force meeting. Passed out notes from that meeting. All of the speakers referenced the importance of need based aid and not exclusive like merit based aid. Discussion of the May 1<sup>st</sup> deadline also took place. Bernie presented ideas regarding forward funding. A student spoke regarding first generation students and loan adversity in certain cultures.

5 point loan program – would like to endorse this plan regarding loan repayment. Lori needs to confirm with the associate members they are good with the plan. Tony questioned why we wouldn't consult with the entire membership, vs. just one part of the membership, or we could just vote on it as exec council. We will go out to the entire membership.

Negotiated rulemaking – will presenting on this topic at the conference. They are suggesting that MASFAA have representation on the committee looking at the new grant programs. Bernie has volunteered to be that person. We have until Nov. 2<sup>nd</sup> to make a suggestion of a person to participate. A motion was made to nominate Bernie, seconded and passed.

## **COMMITTEE ON ENHANCING ETHNIC DIVERSITY**

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

Event is conflicting with another event. Not getting as many RSVP's as expected. Has 35 respondents now. Brainstorming on how to recruit additional participants. Will be covering topics like why college is

important, gaps in access, affordability and FA and what programs there are, role of colleges and what is needed for the future.

Also drafted a non discrimination policy for MASFAA as we have never had one. Suggestions were to change the word employment as we don't really employ people for MASFAA. A suggestion was made to evaluate other state organizations and ask Donna to address it at EASFAA to see what other groups are doing.

### **EARLY AWARENESS AND OUTREACH COMMITTEE**

Jill D'Amico

Debbie Maroney

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

Plea went out for t-shirts. Planning has been on going for the carnival. Confirmed the speaker, transportation for the speaker, now just working on which middle schools will attend. Alejandro Jac-Artiges (Sp?) same speaker from last year. Wrote a book on his immigration to USA. We buy the book and give it to the kids to read ahead of time. He was very successful last year.

College Savings Times will change its name. Has been completely revamped. Will have it translated for about \$300 to Spanish.

### **COLLEGE GOAL SUNDAY**

Gail Holt

Martha Savery

Paul Linskey

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

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

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

Have up to 15 cites. Will be looking for volunteers soon. Gear up program in Chelsea did not get funded this year, so may impact the availability for that site. May use the laptops for voting to also have people sign up as a volunteer for CGS.

### **JUST THE FACTS! TRAINING COMMITTEE**

Daniel Barkowitz

Joyce Lezberg

Robyn Randall

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

Had the train the trainer event. The Regis site is full. Still taking registrations for Springfield. There was concern on the committee that if a person from a clock hour institution should show up that there is not much experience with that represented

### **OLD BUSINESS**

### **NEW BUSINESS**

Steve Doucette from Edward Jones presented today. Update on accounts we have with them. Handed out statements.

Discussed the differences between CD and mutual fund accounts.

Meetings:

Oct. 19<sup>th</sup> Stonehill at the Irish studies room

Dec. 14<sup>th</sup>

May 17<sup>th</sup>

All meetings in spring will be at College Board in Waltham except for May meeting.