

Massachusetts Association of Student Financial Aid Administrators
Executive Council Meeting
College Board, Waltham, MA
September 19, 2008

In attendance: Kathy Anderson, Leah Barry, Susan Beard, Shawn Bennett, Bob Coughlin, Jill Desjean, Tony Erwin, Beth Feinberg, Migdalia Gomez, Gail Holt, Kim Huse, Mike Ippolito, David Janey, Anne Marie Juckins, Lisa Kaiser, Pam McCafferty, Christine McGuire, Shawn Morrissey, Brian Murphy Clinton, Catherine Nelson, Kathy Osmond, Julie Shields-Rutyna, Jason Shumaker, Michael Silvernail, Jered Stewart, Meredith Stover, Susan Sullivan,

Absent: Amanda Abreu, Dadizi Baker-Cummings, Kelley Baran, Jean Berg, Jeremy Greenhouse, Meaghan Hardy Smith, Sheila Hoffstedt, Dave Kelly, Lynne Myers, Ray Nault, Michelle Tufau, Jonathan Wiersma, Donna Wood Lozier

*absent voting members

President Kathy Osmond called the meeting to order at 10:05AM.

PRESIDENT'S REMARKS

Kathy Osmond
kosmond@wellesley.edu

- November ballot question in Massachusetts- legalizing marijuana.
 - Could have implications on financial aid eligibility re: drug conviction.
 - Official MASFAA position relates only to FAFSA in regard to extraneous questions on application.
- Nominating Government Relations Committee members for upcoming Negotiated Rulemaking.
 - Govt. Relations committee member(s) to nominate?
 - There may be 4 negotiated rulemaking committees.
- Idea for getting conference sessions for 2009.
 - Some committees do sessions automatically, some other groups utilize meetings to develop and assign conference session proposals.
 - Idea for getting Executive Council members to conduct sessions at conference. This could help ease the burden of the Conference Committee.
- College Keys Compact
 - College Board initiative to get low income students into college pipeline. Involves various organizations, school districts etc. Look to get low income kids ready for college, and do inventory of what you do and share it with other organizations. No other fin aid organizations have signed on (TERI has).
- Steve Doucette is scheduled for October meeting.
- Bob Bardwell, New England Association for College Admissions Counselors, talking with TERI, MEFA, and want to do a state house day to highlight college counseling. Building coalition and interested in mutual support. Will hand info to PR to get specifics and see how we could help.
- Kathy discussed reaction to President's letter that was sent to members and posted to the web.

PRESIDENT-ELECT'S REMARKS

Gail Holt
gholt@mtholyoke.edu

- MASFAA Awards-Getting Nominations
 - Gail needs award nominations, has received 3 so far but only one from EC members. Please submit nominations online or e-mail Gail.

- Visiting sites for 2009 conference in Springfield and central Massachusetts (Framingham & Leominster). Gail verified that all sites under consideration are in fact within the Commonwealth even though some members have never heard of them.

SECRETARY'S REPORT

Shawn Bennett

shawn_bennett@gse.harvard.edu

- Handbook updates are underway; expect to receive a draft copy for the next EC meeting.
- Shawn to send electronic version of last year's business meeting minutes to Conference Committee for inclusion in the conference program.

⇒ *Motion offered to accept the 8/11/2008 Executive Council meeting minutes as amended offered (Pam), seconded (Susan), and unanimously approved.*

TREASURER'S REPORT

Jill Desjean

jill.desjean@tufts.edu

- Reviewed Treasurer's report.

⇒ *Motion to accept Treasurer's report offered (Susan), seconded (Jason) and unanimously approved.*

NOMINATIONS/PAST-PRESIDENT'S REPORT

Tony Erwin

a.erwin@neu.edu

- Policy & Procedures Manual
 - If there is something done differently, update P&P. There will be a call later to update manual.
 - Nominations for next election
 - Tech turned on online nominations system. Nominations are starting to come in, none for President yet.
 - If people don't show on drop down menu on nominations form, they are unpaid. You can either write in or send e-mail to Tony.
 - Will sort out elections with Tech Committee member, calendar has been adjusted because conference is later this year.
 - Committee is being named with goal to involve folks from all segments of the membership:
 - Cathy Kedski, Carla Berg, Scott McIsaac, Val Harris, & Iris Godes to comprise committee.
- ⇒ *Motion to accept Nominations Committee members offered by Susan, seconded by Michael and approved unanimously.*
- Special Committees
 - Strategic planning – some progress made, looked at which questions are appropriate & new draft of questionnaire is ready. Will need a couple folks who can look at survey questions to make sure they are appropriate. Susan and Jason agreed to take a look. Survey will then be ready to post to website. Leah will need some specifics (# and type

of questions) and then she can talk to Noetic about tech specs. Tony will also recommend committee members.

- Ad-hoc committee- forming, issue will be furthered prior to October meeting.
 - Bank account officer information for Eastern Bank is ready to be updated.
 - “White Paper” on Finances
 - Handed out white paper, which is a breakdown of how exhibitor fees are directed to MASFAA business activities. Includes budgeted amounts.
 - Going forward likely will be Treasurer’s responsibility to maintain white paper.
- ⇒ Motioned to accept white paper was offered by Susan, seconded by Shawn B. and unanimously approved.

ARCHIVES COMMITTEE

Shawn Morrissey
smorris@frc.mass.edu

- Handed out a spreadsheet, representing catalog of archived information. Some newsletter date info was difficult to determine due to numbering of the issues.
- If anyone is interested in items, contact Shawn.
- Compiling and cataloging electronic documents.

ASSOCIATE MEMBER AT LARGE

Julie Shields-Rutyna
jshields-rutyna@mefa.org

- Julie noted that the Springsteen reference in our retreat teambuilding exercise was excellent!

COLLEGE GOAL SUNDAY

Gail Holt
gholt@mtholyoke.edu

Julie Shields-Rutyna
jshields-rutyna@mefa.org

Catherine Nelson
cnelson@brandeis.edu

- The Lumina Foundation for Education has accepted the 2008 Massachusetts College Goal Sunday grant report along with payment of the Lumina Continuation Grant 2nd year disbursement of \$15,000. The August 2008 letter from Lumina hails "Massachusetts is one of the most progressive College Goal Sunday programs in the nation. ... As such, Massachusetts is a leader in executing effective strategies that engage the target population." The letter also includes data that compares CGS attendee statistics to Massachusetts state census figures. These figures show our continued success in nearly all target areas. The letter will be attached to the minutes.
- Current sites for 2009 are 28.
- We have begun to hear back from donors, including ASA, MEFA and Citizens Bank. Unfortunately, TERI and Sallie Mae will not be able to make a donation this year. Mass Mutual Insurance (from Springfield, MA) has expressed interest in donating toward the western sites and we are speaking to them about a modified donation. We very well could end up with less income than expenses and will have to use some of the reserves. With the MASFAA donation, that currently brings us to \$55,000 and projected expenses of \$74,000.
- The first call for volunteers will go out via the MASFAA Listserve in early October.
- We will be revising our look this year and modifying the printed materials to be more efficient in printing costs. Instead of printed regional posters, the posters will be generic with a space to write in the local site information. Lesser used languages (Portuguese) will be available for download only (not printed). We will also have a tri-fold brochure instead of a postcard.
- Three students are currently registered to attend.

- CGS will be an exhibitor at the fall MASCA conference and will have a CGS flyer in all the registration packets. 375 counselors are expected.
- College Goal Sunday and Lumina Foundation for Education will be partnering with the YMCA instead of NASFAA as of 2009. The joint letter from Lumina President and CEO, Jaime Merisotis, and NASFAA President, Dr. Phillip Day, will be attached to the minutes. The mission of the YMCA and the existing programs geared toward college access makes this a natural fit. The YMCA is also involved in the KnowHowToGo campaign. In addition, the YMCA is one of the largest youth-serving organizations in the nation. The national support for state CGS programs will continue under the leadership of Marcia Weston and Johnavae Quinn Campbell as employees of the YMCA.
- Info for sponsors can be found on CGS website
- Could have less income for CGS than last year. Looking at total budget of \$75000, budgeted for \$79000. Not all educational prize drawings are claimed. Looks like about \$40-45,000 in donations plus \$15,000 in Lumina funds, so it's possible for CGS to be under funded. Gail said she could cut Castle Group (PR/media) but they are a valuable asset. May be able to cut media campaign from 4 months to 2 months. Another recommendation was to do one education prize drawing that includes all registrants (instead of one prize drawing per site). Gail believes scaling back both the campaign length and prize drawings would be the best steps at this time.
- Gail requested that CGS attachments be added to minutes. Please see attachments at end of minutes.

COMMITTEE TO ENHANCE ETHNIC DIVERSITY

Dadizi Baker-Cummings
dbakercummings@amsa.com

Migdalia Gomez
mgomez@mefa.org

Amy Piantedosi
amy.piantedosi@tufts.edu

- Have a session for conference regarding building bridges to enhance diversity at colleges through financial aid. Sally Donahue from Harvard and Joe Paul Case from Amherst will present.

CONFERENCE COMMITTEE

Lisa Kaiser
lkaiser@edamerica.net

Kelley Baran
kbaran@bentley.edu

Anne Marie Juckins
ajuckins@edfund.org

- 3 meetings left to wrap up outside work.
- 50 sessions in place, schedule in place.
- Friday has FAMS sessions and Dr. Day from NASFAA.
- Inspector General and Direct Loan sessions have been added.
- Need clarification of the conference fees for entire conference and single day rates.
- Gary Gelman, comedian, for Wednesday night's entertainment.
- Speakers Dr. Therrien on Wed., Ms. Countryman on Thursday are confirmed.
- NASFAA speaker has requested room and expenses. Usually NASFAA expense depends on alternating cycle, so we will need to pick up those expenses this year. EASFAA usually covers expenses for one visit to each state each year. Could offer room if needed, but travel expenses should be covered by EASFAA. We receive one complementary room for every 40 reserved at hotel. Working out travel and hotel expenses for speakers.
- Tony to send "electronic" letterhead to Kelley Baran for future use.
- EC members should be ready to meet & greet at newcomer's reception.
- Website looking good. Meaghan should be listed as contact for exhibitor's complementary registrations.
- Charity is receiving some great items as donations.
- EC to donate free conference registration and hotel package to the 2009 conference. Last year there was no determination of where the payment for room would be made from the budget; this may need to be considered if there is no comp. room available for 2008. It was decided that for the 2009 conference EC would only donate a free conference registration, but no hotel room.

- ⇒ Motion offered by Christine to donate a free conference registration for 2009 conference to the conference charity raffle, seconded by Susan and approved with one nay.

DEVELOPMENT

Jason Shumaker

jshumaker@bentley.edu

- Budgeted \$75,000 for exhibitor revenue, looking at about 14 exhibitors this year which would leave us app. \$30-40,000 under budget. Will contact College Board and other software vendors who didn't exhibit last year. Another follow up message is necessary. A. Juckins offered to help with follow up.
- Discussion ensued regarding what steps may need to be taken in order to make conference budget-
 - Eliminate Dinner on Thursday night at conference (two dinner nights are a recent addition and has only been offered since the anniversary conference).
 - Eliminate food at trainings.
 - Fee for training.

EARLY AWARENESS AND OUTREACH COMMITTEE

Jean Berg

jberg@finaid.umass.edu

Kim Huse

k.huse@neu.edu

- First meeting last month, planning Carnival of Learning. Contacted GEAR UP coordinator, who is joining committee. They will find students to attend. Recruiting schools. Going to contact speaker from Northeastern to see if he wants to speak, if not will go back to Harvard speaker. Everything going smoothly.
- Translating Jumpstart publication into Portuguese.

EASFAA

Donna Wood Lozier

dwoodlo@spfldcol.edu

- Trainers- 2 EASFAA trainers, Allene Begley Curto and Michelle Tufau. Looking for one site for "Aspects of Student Eligibility" training. \$60 per packet for training materials, which is part of program cost. Must be EASFAA member to attend training, they are tentatively scheduled for mid-fall, location TBA.

GOVERNMENT RELATIONS COMMITTEE

Lynne Myers

lmyers@holycross.edu

Christine McGuire

chmcguir@bu.edu

- Terry Hartle came and received feedback on reauthorization act. Regional hearing starting this week to get concerns on legislation. Need to negotiate Title IV, but need feedback on non-Title IV issues. Lots to sort through.
 - Asked that MASFAA come up with five points we are concerned about, and then submit detailed policy for review of each one.
 - Narrowed down list to 5 issues, will have something to review soon via e-mail:
 1. Disclosure of estimated net price for first time freshman and calculator estimating merit and need based awards.
 2. Title X- private loans, brand new. Applying FFEL rules to private loans (sort of). Many questions regarding responsibilities and we can't negotiate on it.

3. Disclosing alumni career placements after graduation.
 4. Peer to peer file sharing- tech. limitations. Michael offered opinion that we have no relation to this issue. Christine agreed, but committee vote does not. There are concerns about intertwined issues that could be tied to aid through PPA, etc. On a point such as this, we have no expertise; it should probably be taken up by appropriate offices on campus and may need to be brought to the proper people's attention.
 5. Title VI- international education- polling for areas of greatest need and reporting progress. Another difficult issue for us to speak to.
- There are a few other issues at hand, but they do not have a financial aid slant; except for a text book piece which aims to make access to text book pricing information.
 - Various concerns were voiced about other issues, such as VA Benefit changes and unsubsidized loan changes, Pell cap on # of semesters, ACG/Smart changes (award year vs. acad. year)
 - Christine's proposal will be to send out e-mail with response deadline. EC members must respond immediately for vote. Consensus is to focus on financial aid related issues. Gail suggested we consider the scope of how many institutions are affected by each issue.
 - Kathy reiterated that she hopes for a Govt. Relations committee member to be on neg reg committees
 - Michael brought up verbiage of CCRAA in regard to Public Service Loan Forgiveness, a semicolon was removed that changes the meaning of what types of jobs are included (either all 501 c3 employees regardless of role, or just roles that are listed). The semicolon is the key. Fear and respect the semicolon.

GRADUATE/PROFESSIONAL CONCERNS COMMITTEE

Amanda Abreu
a.abreu@neu.edu

Sheila Hoffstedt
sheila.hoffstedt@tufts.edu

Brian Murphy Clinton
b.murphyclinton@neu.edu

- Met for first time last week. Preparing for the conference and Dec. 11 grad aid symposium. Planning to have it at BU School of Management. Access Group conference is always the Tuesday, Wednesday Thursday prior to Thanksgiving for future MASFAA conference planning.
- Another year where MASFAA and Access conferences conflict. This has historically been true but we will try to work around dates for 2009.

JUST THE FACTS! TRAINING COMMITTEE

Meredith Stover
stoverm@babson.edu

Bob Coughlin
robert_coughlin@hms.harvard.edu

- Train the Trainers has occurred; registration is open- limiting slots to 2 per school but will fill open slots. Training being held at Mt. Holyoke.
- Kathy will make appearance at training. If anyone wants a mention contact Meredith or Bob. Shawn M. can give them committee brochure.

MEMBERSHIP REPORT

Beth Feinberg
b.feinberg@neu.edu

Meaghan Smith
hardyme@bc.edu

- Update on numbers
 - 444 members, 322 are schools, 114 vendors, 8 other (as of 9/21/2007 there were 628 paid members to date-417 schools, 145 vendors, 66 non-affiliated)
 - 63 new members- 43 schools 18 vendors 2 other

- 145 non paid members, some are vendors who may no longer be employed at this time. Anyone who has lost their job can still be member (as consultant) if they want to remain as part of the Association.
- David suggested optional secondary e-mail address.
- There are still a number of unpaid EC members. Pay now. Committee members need to be paid also. Send committee member list to Beth by Wednesday.

NEWSLETTER

David Kelly

dave.kelly@bankofamerica.com

Raymond Nault

naultjr_raymond@wheatonma.edu

- Fall edition is almost done, 6 articles for edition. Not too late to submit articles.
- Had two tries at conference calls with two other members but no luck. If you know of anyone who wants to be on committee please encourage them.
- Articles by committees- please feel free to submit them to let the membership what you've been up to!
- Publishing Dates:
Fall- 9/26
Conference- 11/28
Winter- 2/13
Spring 4/17
Summer 6/26
Submission deadlines normally one week prior.

PROFESSIONAL DEVELOPMENT AND TRAINING COMMITTEE

Kathy Anderson

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Michelle Tufau

mtufau@wellesley.edu

Jonathan Wiersma

jonathan.wiersma@gmail.com

- Held FISAP training event, with good success.

PUBLIC RELATIONS COMMITTEE

Mike Ippolito

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Jered Stewart

jstewart@edfund.org

- Brochure- Shawn M. will send electronic copy of old brochure, Kathy asked that it be updated & revised for review at next meeting. Audience intended to be anyone outside of financial aid (state house, other professional orgs.)
- Handed out volunteer list, make sure you contact volunteers regarding a place on your committee.
- Pam had idea of having a business card at least for President and those who do a fair amount of contact outside the Association.

TECHNOLOGY COMMITTEE

Leah Barry

lbarry@bu.edu

Jeremy Greenhouse

jgreenhouse@amsa.com

- Working with Conference, Just the Facts and President Group for nominations.
- All committees will hear from your liaisons this week for updates to website, etc. Jeremy back next week.
- Bring events to October meeting to be added to calendar!

OLD BUSINESS

- Gail brought up resource guide- would it be appropriate to use as resource for other events and trainings? Issue about how to pay for it. It would be best for Happy Frog to do printing, because their rates are very reasonable.
- Reminder to co-chairs that they can add to their committee or remove members if they are non-responsive or uncooperative.

NEW BUSINESS

- Next meeting on October 17, tentatively at Wellesley.
- Introduced Mike Bartini, new president of NE Regional Office at College Board. He said welcome and thanks for using the CB facility.

Review of Upcoming Meetings

Meeting dates for 2008-09

10/17- 10am, Wellesley
11/18- 2pm, Cape Codder, Hyannis
12/12- 10am, Wellesley
1/9- 10am, TBD
2/13- 10am, TBD
3/13- 10am, TBD
5/14- 10am finance committee, EC afterwards, appreciation dinner, TBD
6/18- year end workshop, TBD

⇒ *A motion to adjourn was offered by Pam, seconded by Susan and approved unanimously at 2:05PM.*

During a wild April storm in 1934, a wind gust of 231 miles per hour pushed across the summit of Mount Washington. This wind speed still stands as the all-time surface wind speed record. Source: [Mt. Washington Observatory](#)

ATTACHMENTS

1. Letter to College Goal Sunday Volunteers & Supporters
2. Lumina Grant Report Approval

September 16, 2008



Dear College Goal Sunday Volunteer Leaders:

Since its small beginning in 1990, College Goal Sunday has grown into a formidable charitable initiative. This past year alone, it helped more than 30,000 students and families across 37 states complete the universally required federal financial aid form (FAFSA). Annual evaluations tell the story of a program that volunteers – many of whom are NASFAA members -- take pride in providing and that beneficiaries appreciate as helpful and effective.

The growth in the program has relied on the collaborative efforts of scores of organizations and the goodwill of hundreds of volunteers. The actors have sometimes shifted roles to accommodate the program and their own needs. As a result, the program has been supported by many benefactors and has been able to grow and adjust with the times.

This letter is to let you know that the program is preparing to gear up for 2009 even as it undergoes one more evolutionary shift in its administrative structure. For the past several years, the National Association of Student Financial Aid Administrators (NASFAA) has assisted lead funder, Lumina Foundation for Education, in administering the program. The results have been impressive: CGS has expanded its volunteer network from 18 to 37 states, and more are in the pipeline.

Based on that success in building the volunteer network, CGS appears poised to reach out to many more families who need help qualifying for financial aid. To that end, the national YMCA organization has expressed interest in helping to increase the outreach of CGS through its expansive network of facilities and programs across the nation. The national YMCA has many avenues to reach one of our target populations -- low-income, disadvantaged students. The YMCA can reach these students in their early years, before they decide whether they will pursue a postsecondary education.

NASFAA will continue in a cooperative role with CGS. We anticipate that the CGS staff – Marcia Weston and Johnavae Quinn Campbell – will continue to manage the program, but as employees of the YMCA. They will continue to serve as liaison with all of the state-based CGS programs. Lumina plans to continue as a major funder of the program.

A partnership with the YMCA makes sense at many levels. The Y has already committed itself to college access through its Black and Minority Achievers programs and through its involvement in KnowHowToGo, a pre-college access awareness program cosponsored by ACE, Lumina and the Ad Council. In addition, the Y, as one of the largest youth-serving organizations in the nation, is committed to using its vast network of facilities and personnel to community outreach. The Y is eager to partner with CGS and to cooperate with NASFAA to expand the program's reach and effectiveness. Although the YMCA's full involvement in the program will not become evident until the 2009-2010 academic year, the coming year will provide that bridge to the future.

Volunteers from the financial-aid community remain the lifeblood of CGS, and they will continue to be the backbone of the program. You have our sincere thanks for that support and our hope that you will be energized by the opportunity to expand the reach of CGS and other college access efforts in the coming years.

A handwritten signature in black ink, appearing to read "J. P. Merisotis".

Jamie P. Merisotis
President and CEO
Lumina Foundation for Education, Inc.

A handwritten signature in black ink, appearing to read "Dr. Philip R. Day".

Dr. Philip R. Day
President
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Jeanna L. Keller
Program Manager
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August 18, 2008

Ms. Gail W. Holt
Senior Associate Director, Client Services
Student Financial Services
Mount Holyoke College
50 College Street
South Hadley, MA 01075

Reference log no.: 5270 - Please refer to this number when corresponding.

Dear Ms. Holt:

Congratulations on your very successful College Goal Sunday event, despite all the weather related challenges! I was particularly impressed with the ways that you are learning to streamline the planning and coordination of the event. You are also making excellent and creative use of new media technology to communicate and promote College Goal Sunday. We appreciate all the hard work and effort that goes into the program.

Marcia Weston and Johnavae Quinn reviewed your reports and had the following comments:

Massachusetts is one of the most progressive College Goal Sunday programs in the nation. They have a very strong volunteer network of college access providers and partners. Gail Holt and the Massachusetts task force recognize the expertise available through their volunteers and integrate these skill sets in their college access marketing campaigns brilliantly. As such, Massachusetts is a leader in executing effective strategies that engage the target population. I am sure that by focusing on bilingual sites and volunteers, Massachusetts is sure to reach more of the Hispanic population in the state. Good job!

Listed as a postscript are the tables of comparative data between the College Goal Sunday attendees and the American Community Surveys data for Massachusetts.

This letter will serve to approve your 2008 reports as submitted and to notify you that we will be issuing the second payment of \$15,000 on Friday, August 22, 2008. You may expect to receive the check within 10 days of that date.

Thank you for all your efforts on behalf of the students of Massachusetts. Best wishes for the continued success of your program.

Sincerely,



Jeanna L. Keller

JLK/gaa

P.S.

The data comparisons between the Massachusetts College Goal Sunday program and the American Community Survey are as follows:

RACE		White only	Black	Hispanic	Asian/PI	AI/NA	Multiracial
Mass	State (%)	72.8	7.4	11.2	5.6	0.3	2.7
	CGS (%)	64.0	12.8	10.9	7.2	0.5	4.5

INCOME		Under \$20k	\$20-40k	\$40-60k	Over \$60k
Mass	State (%)	14.6	13.7	11.8	59.9
	CGS (%)	13.1	20.9	16.9	49.2

PARENTAL EDUCATION		High School or Less	Some College and Associate's	Bachelor's or Higher
Mass	State (%)	38.3	24.2	37.5
	CGS (%)	30.4	28.1	41.5

Outreach efforts and partner support continue to result in positive outcomes for the Massachusetts College Goal Sunday program. Already their strongest target population, Massachusetts College Goal Sunday increased their number of Black participants by another 1 percent in the race category. They also did very well reaching Asian/Pacific Islander, American Indian/Native American and Multiracial target groups. With regards to the Hispanic population, I recommend contacting the College Goal Sunday National Network for Hispanic families contact person Juan Garcia to discuss other ways to continue to reach the Hispanic population.