

MEMBERS:

Tri-Chair: Susan Sullivan (General)
Tri-Chair: Christina Coviello (Leadership Academy)
Tri-Chair: Amy Proietti (Just the Facts)

Members: Ellen Anderson, Allene Begley Curto, Robert Coughlin, Karensa DiFonzo, Maureen Fagan, Hilary Ferrie, Melissa Gardner, Jessica Glaser, Jillian Glaze, Zack Goodwin, Kristin Hawley-Johnson, Jessica Knox, Julie Lawton, Sabrini Mainini, Jessika Mantenuto, Lynne Myers, Lisa Remy, Dan Rossi, Colleen Russo, Lori Such, Merideth Stover, and JTF Faculty:

Teresa Jardon, UMass Lowell
Nicole Cunningham, College of the Holy Cross
Meredith Stover, Babson College
Iris Godes, Dean College
Melissa Holster, Bunker Hill CC
Amy Proietti, Greenfield CC
Bob Coughlin, Harvard Medical School
Kathy Anderson, MGHHP
Meredith Barnhart, MEFA
Liz Enos, Mass Bay CC
Karensa DiFonzo, Wellesley College
Scott Juedes, Wellesley College
Carla Minchello, Bentley College
Michael Albano, Bay Path University
Susan Sullivan, North Shore CC

PURPOSE:

To provide Financial Aid professionals (both MASFSA members and non-member support staff) with the necessary tools, training, and other professional development opportunities to enhance their knowledge in a number of pertinent areas and topics related to financial aid.

2014-2015 OBJECTIVES:

1. Create a calendar of trainings and professional development opportunities for MASFSA members and administrative staff.
2. Create a “save the date” flyer of upcoming events to be distributed at the MASFSA Conference
3. Maintain a list of volunteer speakers and area experts to use as a resource for presentations and for individual questions.
4. Submit articles and information for MASFSA Newsletter or other email updates of training and professional development opportunities outside of MASFSA’s PD&T Committee offerings.
5. Redefine, rename, and expand the Emerging Leaders program.

MONTHLY REPORT: AUGUST 2014

◆ NA

MONTHLY REPORT: SEPTEMBER 2014

JTF:

- We are at 34 registrants for 2014 JTF. Cap is 35 due to space considerations at Wellesley.
- Faculty are in the process of obtaining NASFAA credentials in the topic areas they are covering. Our faculty must be credentialed in order for our students to receive vouchers to sit for the credentialing exams.
- JTF Schedule: 9/23, 9/30, 10/14, 10/21, 10/29

MLA:

- We have 10 nominations for the first cohort
- MLA Schedule for 14/15: 9/25/14, 10/30/14, 12/11/14, 5/14/15 (Wellesley)

◆ MONTHLY REPORT: OCTOBER 2014

- ◆ Halfway through JTF sessions. The students are an excellent, high-energy group!!
- ◆ Presenters are in the process of getting credentialed. They have been sharing tips and tricks with other presenters and will be compiling a list of questions, comments, and concerns for NASFAA.
- ◆ The first Leadership Academy session went well. We are receiving requests from the group for their preferred committee involvement and their book of choice for the review and presentation.

MONTHLY REPORT: NOVEMBER 2014



MONTHLY REPORT: DECEMBER 2014



MONTHLY REPORT: JANUARY 2015

- ◆ Tax Workshop with Jim Briggs is planned for Tuesday, 2/10/15
 - Our initial location fell through so we are looking for a second option for 250 people
- ◆ Leadership Academy had its 3rd session in December, Managing Change. Julie Wickstrom and Katie Kelsall were the presenters. The last session will be held in May.

MONTHLY REPORT: FEBRUARY 2015



MONTHLY REPORT: MARCH 2015

- ◆ The next PD&T committee meeting will be on Friday, 3/27.
- ◆ Due to weather, we were unable to have the tax workshop and we were unable to reschedule. Those who registered were emailed the information packet.

- ◆ We will host a support staff workshop in May and will begin planning that soon.

MONTHLY REPORT: APRIL 2015



MONTHLY REPORT: MAY 2015

- ◆ We will not be hosting a Support Staff workshop this year
- ◆ The last session of this year's Leadership Academy will be on Thursday, 5/14 in Wellesley
- ◆ Since we were unable to reschedule Jim Brigg's Tax workshop in this year, he will consider us pre-paid for next year. In addition, we are hoping to schedule a second date/location for another tax workshop, therefore giving us 2 sessions in early 2016. We plan on using another presenter for the second session
- ◆ We plan on organizing a FISAP workshop for August and possibly a training for individuals interested in helping with the technology committee.