MEMBERS:

Chairs: Christina Coviello

Members: Susan Sullivan, Karensa DiFonzo, Maureen Fagan, Kristin Hawley-Johnson, Meredith Stover, Lynne Myers, Somaly Heang, and JTF Faculty:
Nicole Cunningham, College of the Holy Cross
Meredith Stover, Babson College
Iris Godes, Dean College
Melissa Holster, Bunker Hill CC
Kathy Anderson, MGHIHP
Stephanie Wells, MEFA
Scott Wallace-Juedes, Wellesley College
Carla Minchello, Bentley College
Michael Albano, Wesleyan University
Susan Sullivan, North Shore CC
Anthony Crowe, Berklee College of Music

PURPOSE:

To provide Financial Aid professionals (both MASFAA 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.

2015-2016 OBJECTIVES:

1. Create a calendar of trainings and professional development opportunities for MASFAA members and administrative staff.
2. Try a new speaker for the annual tax workshop.

2015-2016 MASFAA GOALS:

- Advance the Art and Science of our Profession
  - with students, families, on and off-campus colleagues, faculty and administration, elected and governmental officials

- Increase engagement of members

- Continued commitment to high quality, cost effective training and professional development

- Update the Association's Strategic Plan
MONTHLY REPORT: JUNE 2016


MONTHLY REPORT: MAY 2016

- Support Staff Workshop, Thursday, 5/12 @ Wellesley
  - We have 25 people registered for the workshop
  - Candice Garabedian from UMASS Lowell will present on managing Student Employees
  - Susan Kolls from Northeastern will present on customer service issues such as dealing with difficult people and communication
  - Lunch will be provided
- The final session of the Leadership Academy (for the year as well as the final session for the first cohort) will be at Wellesley College on Thursday, 6/16 in the afternoon, right before the year-end event
  - The speaker will be Mike Boutin from MGH IHP to present on Diversity and Managing Across Difference
- We are looking for new chairs for all three sectors of PD&T: Generalist, Just the Facts, and Leadership Academy

MONTHLY REPORT: APRIL 2016

- None

MONTHLY REPORT: MARCH 2016

- The PDT& committee met on Friday, 3/11 to recap JTF, the Tax Workshops, and the three previous sessions of the Leadership Academy.
- Will email the listserv and last year’s JTF presenters about earning credentials – NASFAA wants all presenters on a certain day to have all credentials for that day, and is willing to pay for our presenters.
- Support Staff workshop, tentatively 5/12 (if we can move MLA to 6/16 with year-end event)
  - We need presenters on Managing Student workers, empathy/dealing with difficult people, and a federal update??
- The final MLA topic is Diversity/Managing Across difference, possible date 6/16
  - Somaly has a contact at Babson who may be able do to a workshop on Diversity

MONTHLY REPORT: FEBRUARY 2016

- Tax Workshops
  - Hosted 2 tax workshops with Robert Weinerman from Iron Bridge.
  - The Worcester location was at Clark University on 1/20
    - We had 54 registered and 45 attended
  - The Greater Boston location was at Wellesley College on 1/26
    - We had 84 registered and 76 attended
- Leadership Academy
• One more session planned for late spring (possibly moving to June to coordinate with the year-end event)

◆ Other Workshops
  • Hope to plan a support staff workshop for May
  • Planning a committee meeting for March

MONTHLY REPORT: JANUARY 2016

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MONTHLY REPORT: DECEMBER 2015

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MONTHLY REPORT: NOVEMBER 2015

◆ Just the Facts
  • Successfully completed the 5-week Just the Facts training
  • 31 people participated
  • The first 4 sessions were at Wellesley College and the final session was held at Boston University
  • Thank you to all of the presenters
  • For next year, NASFAA wants all instructors on a given day to have the credentials for the day. NASFAA is willing to provide free vouchers for our instructors next year, so if anyone is interested, let PD&T know

◆ Leadership Academy
  • We started the second cohort this fall, with 7 new participants
  • We have 8 returning participants from the first cohort
  • We successfully ran the first and second sessions
    • The 1st session was on 9/24/15 for a discussion on Career Development and Goal Setting
      • Christina Coviello facilitated a workshop on Goal Setting, then we had a panel with Michele Kosboth and Meredith Stover, and after lunch Jim Slattery facilitated a strategic planning discussion
    • The 2nd session on 10/29/15 was presented by Julie Wickstrom and covered Professional Writing and Effective Communication
  • There are two more sessions planned: Conflict Management and Team Building/Problem Solving (12/3/15) and Diversity/Managing Across Difference (5/12/16)

◆ Tax Workshops
  • Robert Weinerman Tuesday 1/26/16: ½-day FM and ½-day IM, Boston-area location
  • Jim Briggs Friday 1/15/16

◆ Support Staff Workshop
  • We hope to plan a support staff workshop for the late spring
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