

MEMBERS:

Co-Chairs:

Lauren Sullivan (Bentley University) – year 3

James McGehee (Bentley University) – Year 1

Members:

Julie Lawton (Cognition Financial)

Troy Davis (Springfield College)

PURPOSE:

The MASFAA PD&T Committee is responsible for the training needs of MASFAA. Our members create content for all levels of professional development and find dynamic presenters for programs. We can also help MASFAA members get involved in committees as a way to assist in their professional development and support of MASFAA.

The PD&T Committee plans workshops as needed by the MASFAA community. The overall goal of our committee is to be responsive to the training needs of our colleagues. PD&T will work closely with other committees to maximize training opportunities and minimize expenses for the upcoming year. Regular events and series include Just the FACTS!, MASFAA Leadership Academy, annual tax workshops, and support staff and management workshops.

2020-2021 OBJECTIVES:

Pivot to virtual training for the Association for the short-term and assess potential to continue on a more virtual or hybrid format in the long-term. Rebuild membership for the committee and help connect volunteers to other committees.

2020-2021 EVENTS:

- Iron Bridge Resources': Business and Real Estate Tax Returns
- Iron Bridge Resources': FM Verification and Conflicting Information
- Just the FACTS!
- Iron Bridge Resources': Introduction to the 2020 Tax Returns and Changes to the Tax Code

TBD

- Support Staff Spring Training
- Just the FACTS! Extended

MONTHLY REPORT: JULY 2020

No meeting held

MONTHLY REPORT: AUGUST 2020

Event discussion between the Co-chairs and Just the Facts

- Purchase NASFAA Materials
- Webinars – minimize and spread out
 - September 22 and into January?

Leadership Academy

- Conversations with committees – brainstorming sessions 1 hour
- Help with FAFSA day
- Call out for membership and co-chair. Need a blurb about the committee, events, and responsibilities.

Tax Workshops

- Business Taxes Shared w/ CAPFAA – Oct & Nov Dates
- General Taxes w/ MASFSAA only – Dec Dates

MONTHLY REPORT: SEPTEMBER 2020

Roll call for membership. All but the Chairs and one member have dropped off. Most citing their inability to commit 100%. Expect volunteerism is down across the board in COVID times. Hope to recruit through past MLA participants for all committees through direct outreach.

MONTHLY REPORT: OCTOBER 2020

Events discussion:

Tax Training Workshops have been posted and announced to the community. Robert Weinerman from Iron Bridge will also present for the Conference. The Business Tax Training will be shared with CAPFAA.

- Monday, October 26, at 10 AM
- Thursday, October 29, at 10 AM
- Monday, November 2, at 10 AM
- Thursday, November 5, at 10 AM

The General Tax Training will be for MASFSAA members only'

- Monday, December 7
- Wednesday, December 9
- Monday, December 14
- Wednesday, December 16

Just **the FACTS!** We've received the NASFAA Core materials. Credential sessions are only allowable in person. We will operate at a reduced capacity due to timing and lack of manpower using the reduced presentations. Plan for 4 of 5 key web presentations as determined by Chairs to be presented on Wednesday afternoons in December and January. Recruitment for presenters will be done via past MLA cohorts and past JTF presenters.

MASFAA Leadership Academy is highly dependent on networking and revamp has been under discussion. Difficult to move forward at this time but plan to have direct outreach for suggestions on future topics to present on or ways to engage with the group. Possible virtual event to be held in the spring.

MONTHLY REPORT: NOVEMBER 2020

Troy Davis, Director at Springfield College, joins the committee.

Events discussion:

Just **the FACTS!** series implementation:

- We've scheduled five 1.5 hour sessions Wednesdays at 2 pm between 12/9/2020 – 1/27/2021.
- Topics include: COA & Application Process, SAP, Need Analysis, Verification, Pell Grant. Discussed possible later spring sessions for more advanced topics, like DL and R2T4.
- Calls for volunteers from past MLA participants and past presenters yielded 3 volunteers. Other presenters currently include 3 members of the committee. It is suggested and agreed that direct outreach to individuals will yield better results.
- Hope to use MASFAA zoom account but can use Go2Webinar if we do not have a license for the former.

MONTHLY REPORT: DECEMBER 2020

Events discussion:

Just **the FACTS!** Good turnout for session 1, about 35 participants. Moderate for session 2, about 20 participants. The latter may be due to the snow as schools may still have called for snow days despite being virtual. Little participation, even for questions at the end but this is not surprising.

MONTHLY REPORT: JANUARY 2021

Events discussion:

Just **the FACTS!** We are almost halfway through. Participation remains at about 15 - 20. Had questions about testing and certificates. We haven't been able to track attendance, nor have we been as strict as in prior years but agreed that bringing back certificates should be a priority. Should consider threshold for qualification.

Tax Training Workshops: In trying to post trainings ourselves, discovered new site can't handle the upload. Files are too large. Robert provided instructions to access the recordings, which have been added behind the log in on the PD&T committee page. He will monitor this. Trainings must be behind log in and not downloadable per his policy. Recommend at next EC that MASFAA might look into youtube channel for future posting.

Also received another new Iron Bridge training opportunity (included with price already paid) on 2020 taxes. We'll announce how to access old recordings when we announce new tax training. Dates will be 2/26 and 3/3, 1 hr sessions.

Spring Training: Committee was unable to hold training in May 2020 due to pandemic. Will look to schedule something virtually. This cycle will be for support staff, likely virtual, May/June. Committee members will consider topics for next meeting. Plan will be to cover 2 – 3 topics over 1 – 2 hours.

MONTHLY REPORT: FEBRUARY 2021

Events discussion:

Just **the FACTS!** Participation dropped to one-quarter of sign-ups for final session due to error with intended listserv. Highlights the fact that participants are not marking their calendars. As was the same link for all January sessions, this could be easily remedied if we have an option to add all participants to the webinar link that sends an outlook/calendar update and/or advising that they take a minute to update their own calendars during session 1.

MONTHLY REPORT: MARCH 2021

MONTHLY REPORT: APRIL 2021

MONTHLY REPORT: MAY 2021

MONTHLY REPORT: JUNE 2021

2021-2022 INFORMATION:

Co-Chair: Lauren Sullivan (Bentley University) – year 4

Co-Chair: James McGehee (Bentley University) – Year 2

Co-Chair: OPEN – Year 1