

MEMBERS:

Co-Chairs:

James McGehee (Bentley University) – Year 2

Members:

Troy Davis (Springfield College)

Julie Lawton (Cognition Financial)

Alyssa Lombardi (Framingham State University)

Lauren Sullivan (Bentley University)

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.

2021-2022 OBJECTIVES:

Continue to hone PD&T opportunities for virtual and hybrid formats for the long-term. Support Association in rebuilding membership for the committee and connecting volunteers to other committees. Reevaluate Leadership Academy format and most effective approach to encourage volunteerism through PD&T.

2021-2022 EVENTS:

- Just the FACTS!
- Iron Bridge Resources': 2020 Tax Training
- General Spring Training

MONTHLY REPORT: JULY 2021

Welcome new member, Alyssa Lombardi!

MONTHLY REPORT: AUGUST 2021

Just received budget for the year.

Events discussion:

Just the Facts

- James (Chair) will purchase NASFAA materials for JTF.
- Will be held weekly starting October 7. Discussed whether sessions can be held in person given the Delta variant. Committee members doing outreach to approximately a dozen schools to determine if any are allowing outside visitors/events.
- If in person, will spread 9 topics over 2 days. If virtual, will spread 6 topics over 4 days with possibility of additional topics later in the year.

In-Person proposed schedule:

Date	Topic(s)
10/7	Application Process, Student Eligibility, Verification
10/21	Need Analysis, COA, Packaging and Aid Notification
10/28	Direct Loan Program, Pell, SAP

Virtual proposed schedule:

Date	Topic(s)
10/7	Application Process & Student Eligibility
10/21	Verification
10/28	Need Analysis
11/4	COA & Packaging and Aid Notification

Possible virtual additions:

Date	Topic(s)
Dec/Jan	DL & Pell
Dec/Jan	Satisfactory Academic Progress

Leadership Academy

- Not discussed

Tax Workshops

- Research on in person vs virtual will determine how tax trainings are also held.

MASFAA Annual Committee Report: PD&T Committee 2021-2022

- Expect that we will share the Business Taxes session with CAPFAA again. Dates TBD.
- General Taxes w/ MASFSAA only. Dates TBD.

Spring Training Event

- Not discussed

MONTHLY REPORT: SEPTEMBER 2021

MONTHLY REPORT: OCTOBER 2021

MONTHLY REPORT: NOVEMBER 2021

MONTHLY REPORT: DECEMBER 2021

MONTHLY REPORT: JANUARY 2022

MONTHLY REPORT: FEBRUARY 2022

MONTHLY REPORT: MARCH 2022

MONTHLY REPORT: APRIL 2022

MONTHLY REPORT: MAY 2022

MONTHLY REPORT: JUNE 2022

2022-2023 INFORMATION:

Co-Chair: OPEN – Year 1

Co-Chair: OPEN – Year 1