

MEMBERS:

Co-Chairs:

James McGehee (Bentley University) – Year 2

Members:

Troy Davis (Springfield College)

Julie Lawton (Cognition Financial)

Alyssa Lombardi (Framingham State University)

Casey Sullivan (Worcester 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.

- 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

Events discussion:

Just the Facts

- Committee members reached out to local schools to determine if space is available to outside groups for in-person events. Schools contacted: Babson, Brandeis, Regis, Bentley, Mass Bay, UMass Medical, Worcester State, Holy Cross, WPI, Lasell, Clark, Assumption. It has been determined in-person is not an option at this time and we will proceed with a virtual format.

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

- Committee members are now reaching out to the community to cover each topic with presenters. PD&T committee members will moderate each session. Assignments TBD.

Leadership Academy

- Not discussed

Tax Workshops

- Workshops will need to go virtual based on JTF search for space.
- Expect that we will share the Business Taxes session with CAPFAA again. Still waiting on dates, which should come shortly.
- General Taxes w/ MASFSAA only. Virtual format was 4 sessions in prior year but per Robert, expect it will be 3 this year. Dates still TBD but likely in December.

Spring Training Event

- Not discussed

MONTHLY REPORT: OCTOBER 2021

Just the Facts

- Good turnout with 25 of 35 registrants

MONTHLY REPORT: NOVEMBER 2021

No Meeting

MONTHLY REPORT: DECEMBER 2021

Just the Facts

- Briefly discussed doing additional virtual sessions but have opted not to push for more given we are going into busy season for FinAid. However, we have access to these materials annually and feel we should utilize them more through PD&T or committee events. Be mindful, credentialing requires in person attendance for the full presentation vs the reduced versions used for JTF.

Leadership Academy

- Not discussed

Tax Workshops

- We have great numbers and reduced session times seems to be more digestible for MASFAA members in a virtual setting.

Spring Training Event

- Not discussed

MONTHLY REPORT: JANUARY 2022

Welcome new member, Casey Sullivan!

Discussed budget. Have historically gone under but given the changes from the pandemic, think it wise to expect funds may now need to be allotted for physical space. Free spaces used in the past may no longer be an option in the same way.

Betsy Mayotte indicated during Executive Council that many MASFAA members have expressed interest in a PSLF webinar. PD&T reached out to set this up virtually for spring as our budget was under utilized for 21-22. May consider hosting similar future opportunities if budget allows.

Just the Facts

- Briefly discussed doing additional virtual sessions but have opted not to push for more given we are going into busy season for FinAid. However, we have access

Leadership Academy

- Kick off for new programming. MLA has been on pause during pandemic. Lauren and Julie will collect and share prior documents and content with the rest of the committee by email, as they have had most experience with the program. Group will review and share thoughts w/in 2 weeks.

Tax Workshops

- We had great turnout, 150 signed on for standard training in the virtual format. James is working with Tech Committee to get the workshop recordings posted on the PD&T Committee site behind the login.

Spring Training Event

- This year is more general mid-level FinAid training. Likely to schedule for June again. Consider topics while researching for MLA topics to avoid cross-over between programs and prior years.

MONTHLY REPORT: FEBRUARY 2022

Events discussion:

Just the Facts

- Not discussed

Leadership Academy

- Full focus on Leadership Academy planning. Discussed prior email chain included a breakdown of past program goals, outcomes, and topics for committee members to review and comment on. Mentorship opportunities popped up again. Team brainstormed ways to incorporate this into MLA. One idea is to have teams of 2 mentors assigned groups of 5-ish program for the year. Will consider this when launching updated programming.
- Have determined 1 year program vs 2 is more suitable given many people may be moving between positions and schools. Plan to go hybrid with 3 in person meetings and 2 virtual. Also want to incorporate attendance at committee meetings and non-conference events in some way. Began tentatively setting curriculum. Dates and space still dependent on pandemic issues but hope we can launch in this format by fall.

Tax Workshops

- Not discussed

Spring Training Event

- Not discussed

MONTHLY REPORT: MARCH 2022

No meeting

MONTHLY REPORT: APRIL 2022

Just the Facts

- Not discussed

Leadership Academy

- Not discussed

Tax Workshops

- Robert Weinerman offered supplemental training on 2021 Tax Code, which was hosted virtually in early April.

Spring Training Event

- Decided on a 2 topic virtual session June 7, 10 – 12:30 title Recentering for a Post-Pandemic Approach to Work
- Presenters Julie Lawton (Cognition Financial) and Melissa Looney (Bentley)
- Aimed at financial aid counselors

MONTHLY REPORT: MAY 2022

Just the Facts

- Not discussed

Leadership Academy

- Not discussed

Tax Workshops

- Not discussed

Spring Training Event

- Confirmed details for virtual presentations. James will moderate.

MONTHLY REPORT: JUNE 2022

Just the Facts

- Group determined ideal dates and format. Looking at late September and October and hybrid (2 in person, 1 virtual).
- Julie and Lauren reaching out to Wellesley and Bentley for space options. Have noted that we may need to be budgeting for the cost of space on University Campuses now. Wellesley has been our go-to as they have offered space with no room charge. Will follow up by email with group.

Leadership Academy

- Group determined ideal dates and format. Looking at an in-person session for the kick off meeting. Likely two more in person and one virtual in addition to other events.
- Julie and Lauren reaching out to Wellesley and Bentley for space options. Have noted that we may need to be budgeting for the cost of space on University Campuses now. Wellesley has been our go-to as they have offered space with no room charge. Will follow up by email with group.

Tax Workshops

- Not discussed

Spring Training Event

- Attendance was good for the event. Expect this training may continue to be offered virtually for the foreseeable future depending on budget constraints.

2022-2023 INFORMATION:

Co-Chair: OPEN for volunteers – Year 1

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