

Massachusetts Association of Student Financial Aid Administrators
Executive Council Meeting
January 30th, 2020
Northeastern University
Dedham, MA

Executive Council: (Voting Members)

- | | | |
|-------------------------------------|--|---------------------------------------|
| ■ Kevin DeRuosi | <input type="checkbox"/> Shannon James | ■ Donna Shelby |
| ■ Monica Blondin | ■ Korinne Peterson | <input type="checkbox"/> Ross Glover |
| ■ Melissa Metcalf | ■ Robyn Butterfield | <input type="checkbox"/> Ebony Carter |
| <input type="checkbox"/> Linna Tran | ■ Ben Parsons | |

Committees:

- | | | | |
|--|---|---|---|
| <input type="checkbox"/> Siobhan Keenan | <input type="checkbox"/> Amy Staffier | <input type="checkbox"/> Jan Combs | <input type="checkbox"/> Jennifer Bento-Pinyoun |
| <input type="checkbox"/> Brandon Cipoletta | ■ Susan Kolls | ■ Jonathan Sparling | ■ Lisa Tablot |
| ■ Betsy Mayotte | <input type="checkbox"/> Thomas Hunt | <input type="checkbox"/> Ina Frye | ■ Beth Feinberg Keenan |
| ■ Sarah Bergeron | <input type="checkbox"/> Dawn Batchelor | ■ Jennifer Sheely | <input type="checkbox"/> Robert Picoriello |
| <input type="checkbox"/> Lauren Sullivan | <input type="checkbox"/> Julie Lawton | <input type="checkbox"/> Michelle Clifton | <input type="checkbox"/> Ramon Soto |
| <input type="checkbox"/> Jaron Tucker | <input type="checkbox"/> Jeff Bentley | <input type="checkbox"/> Kaitlyn Ma | ■ Monique Howell |

Other Attendees:

Meeting started at: 10:15

Motion to start: Ben Parsons

Second: Robyn Butterfield

Welcome: Kevin DeRuosi

- Reviewed Agenda

Executive Council Reports:

Past President: Melissa Metcalf

- Brought plaques
- Found 2 storage units in Newton
 - One near newton and she us renting it abt \$50 a month for \$600 a year
- Unanimous vote to go ahead with that storage unit
- Emails for elections will be sent out
- President elect, treasurer, member at large and grad

- Emails must be sent out to the population seeking nominations
 - If there is any recommendation, please let us know
- Kevin mentioned that he will be sending email out Monday or Tuesday
 - This will be open for 2 weeks
 - The positions will open early march
 - They are invited to a few meetings for the current representatives to mentor them
 - We are trying to get the elections back on track so that we can have the elections back at the conference/November
- Betsy asked if we thought about doing a simple and quick webinar about our experience, team effort, and people can ask questions and promote each chair. This can be recorded as well so people can watch it if can't make webinar.
- Kevin states that we need to do it quickly
 - This must be completed within 1-2 weeks of the nominations going out
- Jen mentioned about getting all committees to get people more involved
- Betsy asked if we should have two
 - One for volunteers and one to talk about the elected positions we are looking for
- Susan mentioned that if we are going with 2 then we are splitting an audience
 - A short and sweet PR video can be sent out with the call for nomination
- EASFAA is having their spring meeting next week
 - On the conference committee - great sessions in Manchester, president reception and then a fisher cat game, rented out rest with food in right field
 - Website is up and running - member clicks - just finished elections

President Elect: Monica Blondin

- Next years conference is at hotel 1620 Plymouth harbor in Plymouth
 - Deposit is paid
 - November 12th and 13th
- 400th anniversary of Plymouth
- August 9th and 10th is the retreat for next year
 - If you are on exec council then please mark your calendars
- Committee co-chairs
 - We have some openings and we did get some suggestions for replacements
 - If you can ask the people you recommended and then let Monica know
 - We want to get those all this in place
- Rolling off
 - AID - 2 co-chairs rolling off
 - FAFSA Day only has Jen rolling off and the other 2 are staying on
 - Communications with Brandon rolling off but Monica will reach out to him to clarify - conference is all set
 - Kevin will be doing EASFAA
 - Ben is rolling off early awareness but Kaitlyn is still staying on

- Betsy is staying on for gov relations
- GPCC Maria is on it until next year
- Financial wellness - Lisa is staying
- PDT - Beth will stay on and looking for more tri-chairs but no one in committee wants to do it

President: Kevin DeRousi

- The strategic plan is almost done
 - He is compiling all work we have done and will bring a draft to the March meeting
 - During the meeting, we can make any tweaks and vote on it at that time
- Just the facts
 - Have we ever thought to put it together 2 times a year?
 - Beth mentioned that we have not considered but it is a matter of time
 - Spring is hard to get out of the office to attend these trainings
 - If there are areas of interest we can look at doing just a one day training
 - Kevin said this came up because people are hired throughout the year and sometimes have to wait like 8 months to go to just the facts
 - Beth mentioned that it doesn't cost that much but it is early January/February
 - Jonathan suggested offering a digital one or record the one in the fall and have it available for anyone
 - Beth is worried about how to host and record
 - Jonathan has recording stuff at MEFA that we can use
 - Susan advised that after it is recorded people can buy the membership and then a new employee packet that includes the training for an additional \$30
 - We can make money that way
 - Lisa thinks that we might have trouble with the trainers being recorded
 - Ben suggested having the trainers available at certain times online to answer any questions that come up when they are watching the trainings
 - Beth - maybe mini-sessions available to refresh for the more seasoned professionals that don't do stuff often
- Monica - pre-conference training - we don't have the conference booked for that right now
 - Do we want to do it again this year? Was it popular?
 - Jonathan mentioned 20 people went to verification and not as many in packaging but still well received.
 - Melissa mentioned that EASFAA has some people we could tap into to do some credentialing.

Treasurer: Shannon James

- Taxes are still being prepared
- Shannon is currently working on tax exempt status

Committee reports

Government relations: Betsy Mayotte

- Last month the chair met with the state advisory committee
 - For more clarity on award letters etc.
 - Equality is state priority so everything else is taking a back seat
 - People were getting backs up especially someone from a CC
 - Betsy explained that our exec council is made up of all schools and there are reps from CC on the board
- Simplifying to access the funds - is what Betsy and Clantha have been working on - really want to make a change but pushback on making any change
- Re-evaluate priorities - 3 federal and 2 state
- After next meeting sending out an email from GRC to see what the membership wants from GRC with publications, events, etc.
 - GRC will tap into the Exec Council for help on that as well
- Public loan forgiveness has some changes coming soon and Betsy will have more information on this
- Robyn suggested having a podcast with the updates from Betsy
- Melissa - doing an off the cuff at the EASFAA conference
- Unanimous support of Betsy doing a podcast

PDT: Beth Feinberg Keenan

- Tax training in December - 100 folks to the first day, and about 40 came to the business advanced day
- Spring – PDT is trying to figure out what to do for training and that will prob be a support staff workshop this year

Technology

- Member clicks is what EASFAA utilize and we need someone to look into a new vendor but it is a lot to take on.

Conference: Jonathan Sparling/Susan Kolls

- Monique, Melissa Metcalf, and Julie Lawton are going to be tri-chairs for next year.
- 63 responses from conference survey
- The biggest complaint is that people couldn't hear during the federal update because people were eating and being loud
- As for the conference sessions, the tax sessions were favorites
- Half of people went to the unconference and 60% of those would recommend that again for next year.
- 94% liked having conference on Thursday/Friday
- 80% rated conference as excellent.

- Mobile app is a little wonky
- Melissa will ask EASFAA what they are using

Early Awareness: Ben Parson

- Carnival of learning is next week
 - Friday the 7th at Southbridge middle school at 10-1PM
- 2 people at Exec council can go
- Monthly conference call last month was just Ben and he was on call for 10 mins by himself.
 - He is nervous about how many people will be there based on this
 - Looking at back up plans to postpone to the fall or later this spring
 - We could give just bags to school (not ideal) or assemble style (not a fan)
- 15-20 volunteers last year not including presenters
- 6 confirmed presenters/booths
- Consider doing Carnival later in Spring?
 - This is harder for Financial Aid professionals and runs up against testing
- Push it to Fall and make this the new change
- 120 students last year so this year 50-60 students because last year was a little chaotic
- Betsy thinks to postpone to Fall, ask ASA for help because this is their sweet spot
 - Ask for help financially and personally
 - Suggested making the event mandatory for the entire committee when they are on
- Monica asked if Ben talked to schools/presenters about these options
 - yes they are all on board
- Kevin also agrees to postpone to the fall to build membership and get more volunteers.
- Carnival will be moved to the Fall!

Financial Wellness: Lisa Talbot/Sarah Bergeron

- They are working on a podcast for Spring
 - Finding a tech/platform for this right now
- Webinars aren't working for them right now
 - Technology issues with both of those so moving away from all webinars for the time
- Boston builds credit which is housed at BHCC
 - When students go to the one stop they go to this group that helps them with all questions, building credit, etc.
 - Also including a COA standpoint for a professional financial aid and these are the 2 that would be included in the podcast
- Kevin suggested using a student to do the editing and recording and use space on a campus
- 15-20 members that are very active

GPCC

- About half of the presenters lined up for the symposium March 6th at Northeastern.

AID: Jaron Tucker's Update

- The symposium will be held in June
 - They will vote on what Friday date
- AID will have a panel discussion about challenges students face with ethnic issues
 - They are looking for a diverse panel
 - Any suggestions on people for the panel?

Development – Donna (see MASFAA Development Report)

- Summary
 - Invitations sent to 45 prospects
 - Conference commitment forms were received
 - 30 Vendors, 9 more than last year
 - Well Fargo dropped out
 - \$35,100
 - Puzzle Vendor game awarded 3 winners
 - Budget is \$2,000 and actual is about \$1,900
- Biggest complaint was the disjointed of up/down of vendor areas
- Keep cost the same - only one complaint about how expensive it was

Membership: Jen Sheely

- 619 as of yesterday
- Checks are going to Dawn

FAFSA Day

- Events:
 - 25 sites have held events
 - 2 sites have upcoming events
 - Whitman-Hanson Regional High School (Jan.30)
 - North Shore Community College (Feb. 19)
 - Currently 759 student/family registrations
 - Currently 156 volunteer registrants
- Registration rosters sent out to site coordinators every Wednesday
- FAFSA Day events are promoted on social via Twitter and Facebook
- We continue to provide helpdesk support
 - Phone line answered by MEFA College Planning Team, on average 19 calls/week
 - Emails answered by Jan, on average 10-15 per/week
- Jan will be rolling off the FAFSA Day committee this year; Amy and Jennifer will stay on and be on the lookout for a new tri-chair

New/Old Business -

- Upcoming events

- Reach out to Ebony about where she is on planning a social event for sometimes in February
- MASCA (Bob) contacted Kevin about forging a partnership between MASFAA and MASCA (mass school counselors association)
 - There is not a lot of information out there for school counselors about Financial Aid
 - There is not much they can offer us but we could do a lot for them
 - They could be associate members and look into a liaison in different sectors of the state to be the contact person
 - Looking for ideas on how this partnership would work
 - Kevin suggested that we plan this out and not look into this for a year
 - Jonathan said that MASCA has a conference every year and they are always looking for proposals. Vendors have done them in the past but it would be a great show of support if Financial Aid professionals would volunteer to do that.
 - Susan also mentioned that MASS Bursars was told they need to come to the table to be associate members with a little white paper to propose to the committee and she would think MASCA would need to go that route as well
- New website inquiry
 - Member clicks and wild apricot
 - They are built for associations - polling, voting, event management already part of the platform.
 - Digital cheetah has been ok for the past few years
 - We are going to start exploring. Looking for 2 volunteers for an RFI to look into this/help.
 - Come up with a list of what we need it to do
 - Jonathan and Sarah are going to put together an RFI of what we need
 - Monica is pulling a committee together once we have the inquiries done to review the information. Pull in Morissey/Kathy Anderson/Slattery as they were in on the last turnover of all of this.
- Committee structures
 - Combining certain committees to utilize the volunteers as some are only busy a few months a year and some are more natural i.e. combining membership with conference.
 - Monica revisited combining membership with technology
 - Kevin advised to bring your thoughts to next month's meeting about what you think would make the most sense
 - Susan is not looking at combining but maybe having a liaison to a specific committee and then report back and provide leadership.
 - Kevin will look into the bi-laws and maybe changing them to state there is a committee participation part of the job - i.e 2 year public doesn't do much more than vote
- Grapevine - maybe start adding bits of information that they have heard coming down work related - that anyone wants to share.
- Let Kevin or Monica know if you want anything added to the agenda

- February meeting is cancelled - next meeting at Umass Dartmouth in March.

Motion to end meeting: Robyn Butterfield

Second: Ben Parson

End time 1:00PM