

**Massachusetts Association of Student Financial Aid Administrators**

**Executive Council Meeting**

**March 5th, 2021**

**Zoom Meeting**

**Executive Council: (Voting Members)**

■ Monica Blondin  
■ Ebony Marsala  
■ Kevin DeRuosi  
■ Linna Tran  
Shannon James

■ Beth Feinberg  
Korrine Peterson  
■ Robyn Butterfield  
■ Ben Parson

Ross Glover  
■ Jennifer Sheehy  
■ Dawn Batchelor  
Donna Shelby

**Committees:**

■ Jaron Tucker  
■ Amy Staffier  
 Jennifer Bento-Pinyoun  
 Mike Goodwin  
 Brandon Cipoletta  
■ Monique Howell  
 Melissa Metcalf  
 Julie Lawton

■ Katelyn Ma  
■ Betsy Mayotte  
■ Ellen Anderson  
 Maria Morelli  
 Rob Picariello  
Lisa Talbot  
■ Alia Georges  
 Jonathan Sparling

■ Jeff Bentley  
■ Sarah Bergeron  
■ Lauren Sullivan  
 James McGehee  
■ Tanika Smith  
■ Leanne Zemrok

**Other Attendees:**

**Welcome: Monica Blondin**

*Meeting started at: 10:01*

*Motion to start: Kevin DeRuosi*

*Second: Ben Parsons*

*Motion to approve January minutes: Kevin DeRuosi*

*Second: Dawn Bachelor*

**Executive Council Reports:**

**President: Monica Blondin**

- Reminder email were sent out yesterday for nominations.
- Deadline date for nominations was February 19<sup>th</sup>, however we did not get a ton of nomination.
- Monica mentioned that her and Kevin will reach out to get more nominations.
- Right now, it's a matter of getting people's names to put on the ballot and then sending it out.
  - The website is already set up.

- Monica also mentioned that someone reach out because they were interested in running for a position. However, they were concerned about how next year's will look like.
  - Many may have a sense of going back full time or not in terms of work or staying virtual.
  - A lot of schools are up in the air in terms of what their plan is.
  - This person who was interested did not want to run if the meetings are in-person and not virtual.
- Ebony mentioned that years before, we had a meeting about taking a whole day off work for an hour-long meeting.
  - Virtual meetings will allow more members from all over such as Western Mass to join.
- Monica said that this year the Exec Council Meeting has been a great turnout even with the number of challenges.
- When we send out another email for nominations, Monica will insert that about possible virtual meeting.
- The Exec Council meeting is set for Monday, August 2<sup>nd</sup>.
  - If we want to allow a virtual meeting, we want to have a station with allow the hooks.
  - Let start having these conversations and figuring out what our options may be.

**Past President: Kevin DeRuosi**

- Kevin sent the Strategic Plan this morning.
- Kevin went over the Strategic Plan. See attached MASFAA Strategic Plan FY21-FY23
  - The plan is typically for 3 years. Kevin increased it to 5 years.
    - This will give the Executive Council time to work on the plan.
    - Everyone is good with the 5-year plan.
    - It allows for a longer projection and timeline.
  - Mission Statement changed. Before it was a one sentence.
    - The mission of MASFAA is to effectually serve the interest and needs of its membership and constituents through the coordination of financial aid information, programs and activities. MASFAA is committed to promoting professional preparation, success and appreciation of student financial aid professionals and our partners, and to facilitate communication, advocacy and growth within our field, our institutions, and our communities.
    - The difference between this mission statement and the prime mission statement is it is a little more encompassing outside of just the field of financial aid, you know, with, with talking about, because we do a lot of work for the communities.
    - And we do have other outside partners that we work with very closely, our lenders, local government facilities, community-based organizations, etc.
  - Vision Statement also changed.
    - The vision statement was also kind of beefed up
    - To be recognized as a model for leadership, innovation in financial aid and assisting our members to be prepared to handle the responsibilities of their positions in an informed, professional, and ethical manner, to participate actively in the accomplishment of the Association's mission and goals, and promote opportunities for equity in finding, access to, and success in, postsecondary education pursuits.
  - MASFAA Values were added to the Strategic Plans:
    - Education

- Diversity
  - Access
  - Integrity
  - Professionalism
- The five values encompass the mission and vision statement.
- Kevin asked if there is anything lacking in our values? Or additional values that we feel should be included.
  - Everyone is good!
- Strategic goals
  - To continue to develop and strengthen the Association in the following areas”
    - Membership
    - Communication
    - Professional Development
    - Finances
    - Advocacy
  - All these goals were talked about while building the new plan.
- Membership – how to increase numbers and participation.
  - Increase active membership by 15% and volunteer engagement by 25% over the next five years.
  - Exploring membership prices.
  - Reaching out to other associations in higher education.
  - Discount membership.
  - More collaboration.
  - Promote benefits associated with being involved with MASFAA.
  - Serving the financial aid communities using social media, newsletters, and direct marketing.
  - In the last year, we got a lot better with communication!
- Kevin mentioned that we can talk more about membership discounts later.
  - Ebony said that the discount can be for those chairing a committee or participating in something.
- Training and development
  - The goal is to continue to assess members need to improve and develop training programs through regular assessment, current offerings and use of technology.
  - Developing website, utilizing the purchased webinars, creating a library of recording.
  - Continue to increase attendance at the annual conference.
  - Having different tracks of development.
  - Sending out a survey once or twice a year to ask people what information they need or what they would like us to provide or continued to provide.
  - Last year, we offered membership scholarship and we can continue to do so moving forward
- Kevin asked Any ideas, suggestions, comments, additions anyone would like to see that.
- Communication
  - Being able to communicate effectively is perhaps the most important of all life skills. It’s what enables us to pass information to other people.
  - Goal is develop a plan to engage the financial community for comprehensive timely communications.
  - Kevin mentioned that we are doing a great job at this.

- A lot better than five years ago and a whole lot better than 10 years ago.
  - Communication committee works very closely with technology and membership.
    - We may want to have a discussion where we have the three of them working together as one committee.
- The goal was to develop a stronger social media presence, I added direct marketing strategy and framework.
  - We can explore a later date or at the retreat.
    - Figure out costs and how we would actually work it out.
- We need an archivist.
  - MASFAA items are everywhere.
  - We have a storage unit. We just need to put all the bins there.
  - We're going to get a truck or van to move all of the stuff from everyone's office.
    - MASFAA has a lot of history!
  - We need somebody to organize and curate all of this.
- Advocacy
  - Advocacy is about educating decisions, decision makers about the impact of public policy decisions, etc.
  - The goal is to provide resources and updates for members to empower them to advocate for themselves, students, and post-secondary institutions through education of the public at large.
  - Internal, regional, and national legislative involvement is a big goal.
  - Basically, to get out there and advocate for financial aid
    - Advocate for our students and get the message spread beyond our own financial aid offices and in higher education.
    - Utilize the Government Relations Committee to discuss hot legislative issues.
- Finances
  - A solid financial foundation takes care of you now while supporting our goals.
  - Not only to maintain but grow the financial stability of the association through financial planning assessment of our investment and expenditures, including the biannual review of reserves, annual operating budgets and investment strategies.
  - Develop a financial model that acknowledges the support necessary to fulfill the initiatives.
  - To utilize reserves to make appropriate capital investments.
    - For example, the webinar delivery platform, conference scholarships to assist our members, NASFAA credentialing etc.
  - Explore membership fees.
- Betsy mentioned that we need to use the right language.
  - Example, the support part. She mentioned we should not support policies that MASFAA may not agree with.
  - Kevin will send it out for people to review and discuss about the language.

**President Elect: Ebony Marsala**

- No updates
- Only update is to reach out to the committee.

**Treasurer: Beth Feinberg/Shannon**

- No updates
- Beth mentioned all checks have been processed.
  - If there is a check missing, let her know.
- When you are requesting an invoice to be paid or with a check, please remember that Beth needs to have a check request document filled out.
  - This is a way for record keeping.
- All the checks for membership have been updated.
- Jeff said membership work will bill us.
  - Beth – Can we do this quarterly?
  - Jeff will ask.

**Committee reports****FAFSA Day: Amy, Jen, and Mike**

- The committee is done!
- We are meeting next week for a wrap up.
- Monica mentioned the recording for English and Spanish were helpful.
- Amy mentioned that there is an email about requiring FAFSA for graduation.
  - This is something that might not happen.

**Access, Inclusion, & Diversity Committee: Jaron Tucker, Tanika Smith**

- March 19<sup>th</sup> is the COVID Panel.
  - Amy and Ebony volunteered
  - Ellen - Associate Director of Harvard Design
  - The committee also have a few high school student and college students.
  - There will be a personal touch of how their community have an impact from COVID.
  - 2-5 PM
  - Flyers were created.
  - The event has been submitted.
  - There will be a lot of promotions about the event.
  - Jaron is finalizing the list of questions and talking points.
- Jeff mentioned that they will set up the event today and this will be added to the monthly newsletter.

**Development Committee: Donna Shelby**

- No updates

**Early Awareness and Outreach Committee: Katelyn Ma**

- No updates
- By the next meeting, there will be a game plan.
  - Katelyn will do a lot of outreach.

**Financial Education & Wellness Committee: Lisa and Alia**

- The committee is working regularly.
- Game of life type of stimulations activity that some other organizations have organized this past year.

- A game where students move and figuring out about their finances and what choices to make with their resources.
- Marriot College in New York has done this.
- Non-profit arm of WellsFargo has a free curriculum for schools who want to implement this in a virtual setting.
  - They are still outreaching and figuring out what direction to go with this program.

**Government Relations Committee: Betsy Mayotte, Ellen Anderson**

- Betsy mentioned that they are still outreaching and reintroducing MASFAA.
  - She was able to get some calls through.
- Betsy mentioned that the state budget proposals are out.
  - Everything appears from a funding perspective to be stagnant.
    - Stagnant is better than we expected.
- Becker College is closing.
  - We can offer to create some collateral for them to offer the students.
    - Understanding how physical discharges work and transferring credits
    - Petition to Teach Out
  - This would be something that we would want to offer as a communication portal.
  - To select and help them find a Teach Out program if that is what they need.
  - Teach out – When a school closes, they have already built their closing for some time.
    - They work out with the state.
    - Usually the state's involved, as well as creditors and they work out with others.
    - They work out situations where a school will agree to take all the credits, or most of the credits of the students.
    - This is supposed to make things easier on the students.
- Betsy will reach out.
- Betsy has been working with CFPB - the Consumer Finance Protection Bureau, on a project that they're building to help families figure out how to pay for school without taking on a lot of debt.
  - They have listening sessions.
    - They're essentially focus groups, and what they're looking for in particular for this round are parents and grandparents that end up borrowing Parent Plus loans and private loans.
  - Betsy has been trying to help them find people to participate in these groups.
    - Older consumers are a lot more hesitant to share their stories than younger people.
  - They were going to host February but ideally, they want at least 12 people per session.
  - Send an email out?
    - People might be able to get in contact with families who are in those positions that they sit in those focus groups.
- Monica asked Betsy to send out the information to the entire council about CFPB.

**Graduate and Professional Concerns Committee: Rob and Maria – Ebony Reporting**

- GPCC are confirmed for their first webinar which will focus on Public Loan Service Forgiveness with Betsy
- They are waiting for a few members to confirm their preference for the date.
- 3/25 or 3/26

- They will connect with technology to get an invitation out to members.

#### **Membership & Technology Committee: Jeff and Sarah**

- No updates
- We can put GPCC's event on the monthly newsletter.
- 481 paid member and 493 past dues.
  - They are in the process of making certain numbers active.
- In the next couple of weeks, they will be sending nasty grams to schools who have not signed up.

#### **Professional Development & Training Committee: Lauren**

- No updates
- Right now, they are potentially working on Just a Facts extension
- The committee needs a new chair.
  - A mass email for more people to join?

#### **Communications: Leanne Zemrok**

- Leanne has the newsletter ready, but she is waiting on a couple of things.
  - Outside vendors
- Leanne will start posting events and share on our Facebook page.
- The newsletter will go out this afternoon or Monday.
  - She will put a small blurb about MASFAA nomination.
  - Should we also post about meeting being virtual?
    - Ebony said priorities is increasing membership.
    - Virtual opportunities going forward.

#### **EASFAA: Kevin DeRuosi**

- Save of the date of conference is May 17-19<sup>th</sup>.
- The Tuesday Trainings have been amazing!
- Meetings are every three months and minutes are sent out a few days after.
- EASFAA is going virtual net year.
- If anyone has any proposal for conference, please submit one. The deadline is next Friday.

#### **Conference Committee: Monique, Julie, Melissa**

- No updates
- The tri-chair will stay on
- We still have the booking for August retreat and November conference in Plymouth.

#### **Members at Large: Jen**

- Student Loan session
  - Over 100 people registered and 81 attended.
- Year End Event
  - Two options
    - First: Networking event on a virtual setting.
      - Spatial chat
      - Platforms where you can create little aviator, walk around, and chat.
    - Second: Host a panel about continuing to offer a virtual student service model.

- Kevin – What if we do both?
- Next meeting, Members at Large will work to build out what they are going with.

### **Closing**

- Kevin will complete the strategic plan and we will vote on it.

### **Amy**

- With the Appropriations Act and all the changes that are happening, Amy delves into the law and calculate the changes based on real students in her system.
  - A lot of students have been scammed.
  - Amy has done a presentation about this.
  - There are a lot of income adjustments that are quite difference.
  - EFC changes
- Should this be a part of the conference or separate panel?
- Ben mentioned that this topic will appear better with directors, associate directors, etc.
  - This hot topic is more for higher level.
- Kevin also said this should be at the end of the year.
  - This can assist with increasing membership if we target directors and associate directors.
  - The value of a membership at MASFAA

*Motion to end meeting: Ben*

*Second: Kevin*

End time: 11:24AM