



**Midwest Association of Student Financial Aid Administrators**

## **President's Annual Report 2006-2007**

**October, 2007**

### ***Maintaining the Access Gateway***



**Vickie Crupper, MASFAA President**

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## *President's Report:*

It is my honor and privilege to report to you on the 2006-2007 activities of the Midwest Association of Financial Aid Administrators. Enclosed you will find information on off of the projects and programs that were completed during this past year, both on the regional and on the state level.

My theme for this past year was "Maintaining the Access Gateway." At each conference I attended, I started my MASFAA and NASFAA updates with a bit of a word play on some very common words that either are spelled similarly but not pronounced similarly (i.e. comb and tomb) or are spelled very differently but pronounced in a similar manner (i.e., go and dough) as a way to remind attendees that while FAFSA's, ISIR's, SAR's, COD, EFT and NSLDS may be common words and easy procedures for us – many who need our advice and assistance find these words and the associated web sites or processes confusing or just not relevant. My two goals were to remind the membership of the need to keep up their legislative pressure for student aid funding so that the gateway to college would remain open and to raise the consciousness of members regarding ethical behavior (who knew that this issue would consume us for the later 2/3rds of this past year?)

This year began with the President-Elect retreat, August 3<sup>rd</sup> and 4<sup>th</sup>, at the Osthoff in Elkhart Lake, Wisconsin. The retreat offered board members an opportunity to receive an overview of the association, learn about our history, review our policies and procedures, participate in a dinner team building exercise and set goals along with others having similar responsibilities to MASFAA. While these were all important to the effectiveness of our team, we also spent a great deal of time discussing the budget for the 2006-2007 year. Membership concerns about MASFAA's growing reserves had been heard loud and clear at the 2005 Annual Meeting, and great strides were taken to address these concerns during the 2005-2006 MASFAA year.

We continued our commitment to address these concerns in the 2006-2007 MASFAA year by;

- Continuing to reimburse 1 NASFAA CORE license per state,
- Continuing the State Representative exchange program,
- Providing Summer Institute at the 2006 fee structure and subsidizing remaining costs from the reserve fund,
- Subsidizing the 2007 Annual Conference registration cost from the reserves,
- Funding the first Leadership Conference at no cost to participating members or their institutions.

This commitment was made before various loan investigations were launched and the potential impact upon donations to the Association could be researched. As a board, we felt that the commitment to the membership needed to be honored for the remainder of the 2006-2007 year and further review would be necessary before determining the 2007-2008 budget.

This year I had the pleasure of presenting the very first MASFAA State Leadership Awards to nine recipients, selected in the 2005-2006 year for sharing their outstanding leadership with both MASFAA and their respective states. I can speak first hand about the leadership and mentoring they have offered to the MASFAA membership and their leadership within the individual states was clear when these awards were presented at the state conferences. The 2005-2006 recipients were:

Illinois	Cheryl Warmann
Indiana	Marvin Smith
Iowa	Susan Ladd
Michigan	Judy Florian
Minnesota	Patty Holycross
Missouri	Leo Hertling
Ohio	Ginny Biada
West Virginia	Karen Lay
Wisconsin	Ernest Monge

I was pleased to be invited to each state association conference and enjoyed the amazing hospitality each association offered. The scenery was always different; from the casino in West Virginia, the Mississippi River in Wisconsin, marvelous

Minneapolis, shopping in Chicago, and serene Iowa, to the botanical garden decked out for Christmas in Fort Wayne, Lake of the Ozarks in Missouri, peaceful Crystal Mountain in Michigan and Kings Island in Ohio. I was asked to provide presentations on Ethics, SAP, Finding the Right Staff Member employee search techniques and to provide MASFAA and NASFAA updates at the conferences and hope that these sessions were beneficial to each of the participants.

MASFAA's 2007 Summer Institute had an all time high number of participants at this year's training program located at Baldwin-Wallace College in Berea, Ohio. 100 members participated in a lively program and still maintain contact with each other with another first; a list serve that is being used by participants to ask questions and bounce ideas off of each other. Pam Fowler's graduation speech was an excellent and inspiring end to this event.

The week following Summer Institute, MASFAA marked another first; the first bi-annual Leadership Development Retreat. 3 MASFAA members from each state within the region were asked to participate and a total of 23 members accepted the invitation. This invitation was extended at no cost to either the participant or their institution and was fully funded from project development funding. Along with 5 members of the executive council, these participants were challenged to stretch their thinking and preconceptions about leadership. Under Terry Everson's direction, the Duluth, Minnesota retreat provided a great environment to encourage group interaction and the setting allowed individual time with a bonus of wonderful weather. (We have been told by insiders that Duluth hasn't had 4 consecutive days of such perfect weather in, well, ever.)

As the MASFAA representative on the NASFAA Board, I attended 3 NASFAA board meetings in Minnesota, South Carolina and Washington, D.C. NASFAA has undergone a number of changes during the past year. NASFAA has physically moved to a new address in Washington D.C. A contract has been signed to significantly upgrade the technological capabilities, including webinar presentations and many of these changes are now underway. And NASFAA will be seeking a new President, only it's second in NASFAA's history. We thank Dallas Martin for his years of service to NASFAA as well as to the state and regional associations and wish him well in his retirement. As a member of the NASFAA Executive Council, I will be a part of the team conducting the interview with the finalist for this position. MASFAA will

be represented through-out the search process by Judy Florian.

I will be participating in a national research project, conducted over the next several months, regarding research in financial aid. This will provide a unique opportunity to provide input into those areas where additional research is badly needed, but rarely if ever done.

This year the MASFAA membership faced a challenge we haven't encountered before; an assault upon our professionalism and integrity from external sources that cared little about the students they purported to serve. State presidents were provided with a MASFAA created PSA to help counter the negative public perception created by media overstatements and the exploitation of the actions of a few individuals and entities. We have also taken steps to ensure that all of our members, both lender affiliated associate members and school associate/ regular members, can participate in MASFAA sponsored events without the appearance of undue influence by any one person or entity. To this end, corporate donors will now be listed alphabetically in all conference materials and donations are now made to the general association rather than to specific events (some of this had been done a number of years ago and served us well during these times, other areas were tightened up a bit.) After the initial aftershocks, MASFAA members reacted in the way we always have, by getting up in the morning and going to work, helping students and concerned family members.

While public confidence may have been slightly shaken, I would like to leave you with a comment made just a few weeks ago to one of our UM colleagues following a financial aid information session. The parent of a potential student took her hand and said four very simple words: "You Give Me Hope." What powerful words and how simply put.

Respectfully submitted,

Vickie M. Crupper  
2006-2007 MASFAA President



### *Past-President's Report:*

#### Summary of activities:

- Attended NASFAA Finance Committee Meeting in Washington, DC (October 20-22, 2006)
- Attended College Board Forum in San Diego, CA (November 9-12, 2006)
- Attended NASFAA Board of Director's Meeting in Minneapolis, MN (November 17-19, 2006)
- Attended Big Ten Financial Aid Director's Meeting in Chicago, IL (February 23-24, 2007)
- Attended ILASFAA Conference in Schaumburg, IL (March 18-20, 2007)
- Attended NASFAA Finance Committee Meeting in Washington, DC (March 23-25, 2007)
- Attended ISFAA Conference in Evansville, IN (April 15-16, 2007)
- Attended NASFAA Board of Director's Meeting in Charlotte, NC (April 20-23, 2007)
- Attended COSUAA Conference in Santa Fe, NM (April 28-May 1, 2007)
- Attended MASFAA Leadership Development Retreat in Duluth, MN (June 19-21, 2007)
- Attended NASFAA CEO Transition Retreat in Washington, DC (July 5, 2007)
- Attended NASFAA Board of Director's Meeting in Washington, DC (July 6-7, 2007)
- Attended NASFAA Conference in Washington, DC (July 8-11, 2007)
- Attended MASFAA Planning Retreat in Grand Rapids, MI (August 10-12, 2007)
- Chaired MASFAA Nominations and Elections Committee
- Chaired MASFAA Association Governance and Planning Committee

Respectfully Submitted,

Daniel Mann



## President-Elect Report

### Summary of Activities:

- Attended NASFAA CEO Selection Retreat 7/5/07
- Attended NASFAA BOD Meeting 7/6-7/07
- Selected Committee Chairs
- Participated in NASFAA Monthly BOD Conference Call 8/3/07
- Conducted the President-Elect's Retreat at the Amway Grand Plaza Hotel in Grand Rapids, MI
- Submitted member volunteers to committee chairs
- Submitted budget request to 06-07 MASFAA board
- Participated in NASFAA Monthly BOD Conference Call 9/7/07
- Attended Local Arrangements Committee meeting in Cincinnati 9/13/07
- Confirmed the following State Association Conference visits:
  - Illinois: 4/11-14/08
  - Indiana: 3/6-8/08
  - Iowa: 11/7-8/07
  - Michigan: 1/27-30/08
  - Minnesota: 5/6-9/08
  - Missouri: 3/16-28/08
  - Ohio: 12/5-7/07
  - West Virginia: 10/24-26/07
- Confirmed SASFA regional visit 2/15-20/08
- Worked with Dick Battig to set up Board Meeting dates
  - January 18-20/08
  - April 11-14/08
  - October 11, 2008
  -

### Activities planned, not yet completed:

- Send letters to the supervisors of 2007-2008 MASFAA elected officers and committee chairs
- Send appreciation letter to Vickie Crupper's supervisor
- Send letters of appreciation to committee members as well as to volunteers who were not selected to participate on committees for the 2007-2008 year.

Respectfully Submitted.

Diane Lambart-Fleming



## *Vice President's Report: (See also Finance)*

### Summary of Activities for Year:

- Updated Policies and Procedures manual.
- Obtained credit cards for President Elect and cancelled card for outgoing Past President.
- Obtained changes in signatories on bank accounts, credit cards, and GoMerchant account.
- Reconciled monthly bank statements.
- Approved and signed contracts for the Baldwin Wallace contract for Summer Institute; drayage contract for 2007 conference; Gateway Arch Riverboats, Scott Burrows, Windows off Washington, and Laidlaw for 2007 conference; and the National Underground Railroad Freedom Center for 2008 conference.
- Assisted President Elect in preparation of 2007-08 budget
- Set conference, summer institute, and symposium registration fees and 2008 dues consistent with Board's desire to keep costs for membership low.
- Researched and obtained Board approval to change fiscal year from January to December beginning in 2008.
- Prepared and disseminated a detailed 2006 conference expense report.
- Supported Bradley Odgen in the timely completion of our 2006 tax return and annual audit.

Respectfully Submitted,

Billie Jo Hamilton  
2005-2007 MASFAA Vice President



*Treasurer's Report:*

Summary of activities:

- Closed a small checking account we used when we had few assets.
- Watching assets since some investments are 'distressed'
- Bills are being paid as received
- Enclosed Profit/Loss and Balance sheet reports for 9-15-07

Activities planned, not yet completed:

- Close out my year in October so Jim can pay bills starting 11-1-07

See Appendix A and B for Balance Sheet and Profit/Loss Statement.

Respectfully Submitted,

Brian Heinemann  
2006-2007 Treasurer



## *Archives*

Committee Chair: Arman Habegger

Summary of activities:

- We have continued to encourage Council members to forward materials to the Archives, and that collection continues to grow slowly. Most materials in the collection have been scanned by the Michigan State University financial aid office staff (some documents are in that process now) and those scanned documents are accessible through the MASFAA website.

Activities planned, not yet completed:

- We will ask the members of the 2006-07 Executive Council to forward pertinent materials to the Archives.



## *Association Governance*

Committee Chair: Dan Mann  
Committee Members: Dick Battig  
Vickie Crupper  
Diane L. Fleming  
Billie Jo Hamilton  
Howard Thomas

The committee was extremely busy and met several times during the year. The following is a summary of activities and issues discussed:

- Reviewed MASFAA governing documents and determined that an individual that is promoted to a new role that includes supervision of the financial aid office is eligible to be a regular member and hold MASFAA office.
- Reviewed MASFAA governing documents and determined that the Association does not have an official color(s). While the Association has traditionally used a shade of blue on our stationery, a decision was made not to establish an official color(s).
- Established a conference logo policy.
- Reviewed and updated the MASFAA Policy and Procedures Manual in January 2007 and October 2007.
- Developed a mission statement for the Association.
- Renamed the Finance Committee to Finance and Audit Committee and updated the committee's duties to include audit responsibilities.
- Reviewed our progress in implementing the goals contained in our Strategic Long-Range Plan.
- Modified our Corporate Support Policy as a result of the NASFAA Code of Conduct. Recommended not to establish a new Diamond corporate support level for donations of \$15,000 or higher.
- Reviewed procedures for tracking MASFAA Lifetime Memberships.
- Updated the MASFAA Past President contact listing.

- Reviewed Leadership Development Retreat presenters and program as a result of the NASFAA Code of Conduct and determined that all expenses should be paid for the presenters.
- Discussed time commitment required for MASFAA President to attend all state conferences and a possible deterrent from getting qualified candidates to run for office. Reconfirmed that MASFAA should be represented at state conferences, but that the current President can choose who represents MASFAA and that the President does not have to attend all state conferences.
- Recommended MASFAA Fiscal Year be changed from November 1-October 31 to January 1-December 31 beginning in 2009 to improve our accounting and to get our revenue and expenses in the same fiscal year. As a transition, there will be a 14 month fiscal year from November 1, 2007 thru December 31, 2008.
- Reviewed duties of the Research Committee and questioned the continued value of the training survey and salary survey. Other committees have been doing research-type of activities that may have been more appropriate for the Research Committee. Recommended that the committee purposes and structure be reviewed and to determine if changes should be made.
- Recommended a by-laws amendment to change membership year from November 1-October 31 to our fiscal year



## *Awards*

Committee Chair: Susan Fischer  
Committee Members: Erin Cain  
Dee Denny  
Ann Franzen-Roha  
Patricia King  
Sue Minzloff  
Lisa Ruch

### Summary of activities:

- met three times on the phone
- encouraged and gathered nominations for various awards
- selected award recipients
- ordered awards, prepared press releases, emailed years of service colleagues
- arranged with newsletter folks to take photos at conference
- worked with local arrangements for names in program
- reviewed and discussed survey results

### Activities planned, not yet completed:

- ship awards and distribute awards at conference
- ship MASFAA State Leadership Awards to Diane Fleming
- send press releases to schools of recipients
- prepare handout with awardees info to be distributed after Tuesday Lunch and mail to awardees and recipients
- review and revise TO DO list for next committee
- pass along additional suggestions to next year's committee



## *Conference Program*

Committee Co-Chairs: Candi Frazier  
JoAnn Ross

Committee Members: Julia Benz  
Ginny Biada  
Cindy Butler  
Pam Engebretson  
DeLores W. Hawkins  
Vicki Saunders  
Lori Vedder  
Kesha Williams  
Jo Woodward

### Summary of activities:

- Program Meeting in St. Louis on January 18 & 19.
- Discussed possible session topics and determined committee assignments to find available speakers
- Program Meeting in Minneapolis on April 12 & 13.
- Made final decision on sessions, completed matrix with sessions.
- Committee members assigned to find moderators and notify presenters of the session and complete session description form.
- Worked closely with Local Arrangements to determine AV and complimentary room assignments for the conference
- Helped with final review of program
- Completed moderator packets



## *Conference Local Arrangements*

Committee Co-Chairs: Pamela W. Fowler  
Leo Hertling

Committee Members:

Laura Archuleta	Linda Knabel	Elizabeth Somers
Marilyn Baker	Robyn LeGrand	Jamie Tobin
Janice Barnes	Nancy Lynch	Barb Ulrich
Diana Daily	Helen Nauman	Laurie Wallace
Ginny D'Angelo	Michelle Purcel	Cari Wickliffe
Yoland Dye	Christine Rethlake	Michelle Wobbe
Melissa Findley	Jay Rhodes	Melinda Wood
Kelly Fleming	Samantha Ruffini	
Kerry Hallahan	Claudia Russell	
Jennifer Hendrickson	Jody Schwartz-Butrick	
Colleen Henegan	Sarah Siener	
Connie Holmes	Michael Smith	

Summary of Activities:

- Conference registration is lagging behind prior year totals. The hotel room block was met (as of the September 14 deadline) and we increased the number of rooms for Saturday night twice. We sent an email to members requesting they cancel any hotel rooms they would not need but none were cancelled. However, as of September 20, 544 members were registered for the conference. This is 84% of the planned number. Our contract with the hotel specifies that we will pay for 600 persons for each meal.
- We will reduce the number of meals for the 45<sup>th</sup> Birthday bash as specified in that contract so we should not take a loss on that event.
- We have 45 exhibitors which are down slightly from prior years.



## *Corporate Support*

Committee Chair: Deona Decker  
Committee Members: Rebecca Hedrick  
Robyn LeGrand  
Christy Miller  
Jim Myers  
Samantha Ruffini  
Claudia Russell  
Courtney Swift

This year the Corporate Support Committee was charged with 3 major goals:

1. Maintain or grow current number of Vendors
2. Generate \$152,500 in total donations
3. Quickly Review and Update Donor recognition in light of the changing environment.

Summary of Activities for Year:

- The committee worked hard this year updating and distributing donor information as delays were caused by the current environment. Donor forms were only able to be updated based on information known at the time. Additional clarification and approvals were needed to be obtained by Vendors as each new vendor indicated support of the association. Many adjustments will be needed as we move into the 2007/08 MASFAA Year. Changes will need to be reviewed and approved to ensure the proper adherence to all federal requirements. We recommend that information be obtained from each state association and those new levels of pricing and recognition for advertising be determined in order to aid in maintaining our level of support as has been experienced in the past. Finally, we will need to evaluate the current budget information to ensure the levels fit under the expectations under the new environment.
- The 2007 MASFAA conference will have 54 vendor spots at the hotel for a total of \$118,500.00. This represents a slight decline over the 58 vendor spots in 2006 and is specifically related to the changes occurring in the industry and several vendors leaving the industry. In addition, we had limited space for the 2007 site which may have affected the number of

vendor spaces utilized. Finally, donations to the organization and advertising were down over \$50,000. Of this approximately \$45,000 is specifically in donations to the association. Many vendors are no longer allowed to donate to associations specifically because of their evaluations of the code of conduct and the attorney general reviews. We will need to expect that this will continue into 2007/08 and beyond.

- Due to the changing environment, the association had limited resources to recognize the support provided. Exhibitors were recognized in the program as well as on signage near the vending area. Donors were also recognized in the conference program and on signage near the vending and general exhibit space. In addition, donors will be recognized via a PowerPoint presentation rotating during all meals during the conference. All notations of donors will be shown in alphabetical order with no notation on the level of support provided by the vendor. Additionally, advertising opportunities existed in conference program or on the MASFAA web site. Several prior opportunities during specific events throughout the year were removed for this year with all donations being represented as general donations to the association.



## *Family Educational Concerns*

Committee Co-Chairs:	Tim Hercules	Cari Wittcliff
Committee Members:	Regina Blackshear	Denise Coleman
	Regina Heard	Shanta James
	Al Pinckney	Jay Rhodes
	Michelle Richard	LaToya Sykes
	Arnold Woods	

### Summary of Activities:

- In conjunction with the January MASFAA Executive Council Meeting, the Council participated in early awareness event on January 19<sup>th</sup>. The Council visited a high need St. Louis city high school promoting awareness and financial aid. Department of Education booklets (Financing education beyond high school) and information regarding College Goal Sunday were handed out to individuals as they entered the gym. During half-time, Tim Hercules (Co-Chair Family Educational Concerns) was able to speak to the crowd sharing financial aid information and encouraging students to attend college.
- The excellent council support may have been a bit overwhelming for such an event; however, the true success was creating the awareness.

### Activities Planned and Not Yet Completed:

- The Reality Store is scheduled for Friday, October 5, 2007 at Fanning Middle School (3417 Grace Avenue, St. Louis, MO 63116). Approx. 200 7<sup>th</sup> and 8<sup>th</sup> grade students will participate in the event.
- The committee has printed signs which may be used from one reality store to the next year after year.



## *Federal Issues*

Committee Chair: Bruce Foote  
Committee Members: Sue Allmon  
Maureen Crump-Phillips  
Roger Eldridge  
Robin Fisher  
Daniel Holt  
Diane Lambart-Fleming  
Ernesto Monge  
John Pogue  
Margaret Rodriguez  
Marvin Smith III  
Lake Tackett

### Summary of Activities:

- Reassumed duties as MASFAA Federal Issues Chair on February 1, 2007
- Established working committee of the following individuals representing nine states.
- Collaborated with Keith Williams, MASFAA Web Services Chair to update the Federal Issues Portal to reflect the new 110<sup>th</sup> Congress
- Monitored legislation and kept MASFAA membership abreast of happenings and direction in Washington.
- Since 2/1/07 have sent out 113 information pieces to the MASFAA membership regarding federal issues.



## *Finance*

Committee Chair: Billie Jo Hamilton, Vice President  
Committee Members: Vickie Crupper, President  
Dan Mann, Past President  
Diane Lambert Fleming, President Elect  
Brian Heinemann, Treasurer  
James Brooks, Treasurer Elect  
Karen Lay, Secretary

### Summary of Activities for Year:

- Updated Policies and Procedures manual.
- Obtained credit cards for President Elect and cancelled card for outgoing Past President.
- Obtained changes in signatories on bank accounts, credit cards, and GoMerchant account.
- Reconciled monthly bank statements.
- Approved and signed contracts for the Baldwin Wallace contract for Summer Institute; drayage contract for 2007 conference; Gateway Arch Riverboats, Scott Burrows, Windows off Washington, and Laidlaw for 2007 conference; and the National Underground Railroad Freedom Center for 2008 conference.
- Assisted President Elect in preparation of 2007-08 budget
- Set conference, summer institute, and symposium registration fees and 2008 dues consistent with Board's desire to keep costs for membership low.
- Researched and obtained Board approval to change fiscal year from January to December beginning in 2008.
- Prepared and disseminated a detailed 2006 conference expense report.
- Supported Bradley Odgen in the timely completion of our 2006 tax return and annual audit.



## *Leadership Development*

Committee Chair:           Howard Thomas

### Summary of Activities:

- During the 2005-06 year, the Association Governance Committee was charged with evaluating and updating MASFAA's Five Year Plan. After a review, it was the committees feeling that it was an appropriate time for MASFAA to do a more through review the Association and create a new Five Year Plan.
- The Association Governance Committee agreed that a Long Range Planning Retreat should be held to discuss the Association and determine where we felt the Association should do in the next five years. To prepare for the retreat, a membership survey was created and sent out to MASFAA members via the MASFAA Website. 242 MASFAA members responded and their responses and comments were summarized in a report and the report was posted to the website.
- The retreat was held at the Osthoff Resort in Wisconsin from July 31<sup>st</sup> to August 2<sup>nd</sup>. Attendees included the Association Governance Committee, and the nine state association presidents. In addition, two experienced MASFAA members not currently active as well as two Outstanding New Professionals were invited. The committee wanted to obtain input from those somewhat removed from association activities as well as from those who are new to the profession. Tara Telfair from the University of Virginia facilitated the retreat. At the conclusion of the retreat, the committee took the comments and observations and a revised Five Year Plan was presented to the Executive Committee.
- The major effort identified at the retreat was a bi-annual leadership

development effort. For the first event, each state president was asked to nominate two leaders from their state who have been active in the state association but not necessarily active in the region. In addition, the Association Governance Committee selected one additional attendee from each state.

- The first MASFAA Leadership Development Retreat was held at the Inn on Lake Superior in Duluth from June 19<sup>th</sup> to June 21<sup>st</sup>. Clark Wold of the Education Assistance Corporation opened the retreat with opening comments after lunch. Terry Everson of Student Loan Express, a frequent presenter in MASFAA, was the trainer. As always, Terry did a superb job of training in four areas: Don't Forget the Basics, Everyday Leadership, Managing Change, and Communication Skills. A total of 22 MASFAA members from the region were able to attend the retreat along with the six members of the Association Governance Committee.

The evaluations completed by those in attendance were extremely favorable, and every one of the participants would recommend the next retreat to colleagues.



## *Membership:*

### Membership Development

Committee Chair: Samantha Ruffini  
Committee Members: Amy Baker  
Nancy Calvert  
Beverly Faga  
Robin Fisher  
Brad Gamble  
John Pogue  
Rick Shipman  
Lake Tackett

### Summary of Activities for Year:

- Became Membership Chair in January when previous Chair resigned.
- Got Membership information from prior chair Mary Jo Smith.
- Tried to attend the second day of January Executive Board meeting in St. Louis but it was cancelled due to bad weather. Not able to attend first day due to training.
- Sent email reminders to non-renewing members in January.
- Responded to requests from members.
- Worked with Technology Committee to fix Retired membership description on conference registration page.
- Membership count was 853 on January 9 and increased to 1379 on September 17.

- Sent membership renewal reminder in September for 2007-2008.

### Membership Database:

Committee Chair:           Christal Williams

### Committee Goals:

- Determine if new ATAC database process meets membership tracking needs.
- Report membership data and statistics to the Executive Council.
- Assist the Membership Services Committee in promoting MASFAA and soliciting new and renewal memberships.

### Summary of Activities for Year:

- The Membership Database Committee completed the following activities this year:
- Updated information in the MASFAA database, i.e. name changes, school updates.
- Sent mass emails as requested by various committees.
- Assisted institutions with inquiries about membership status.
- Confirmed that ATAC is meeting the membership tracking needs.
- Assisted in creating reports as needed for various committees.
- Maintained membership data and statistics.



## *Newsletter*

Committee Chair: Mary Jo Smith  
Committee Members: Val Meyers  
Allison Schmidt  
MASFAA State Representatives

Goals for 2006-2007:

- Create four newsletters during the year, October, January, April, and July.
- Create one photo edition near the end of the activity year.
- Send newsletter to retired members and past presidents
- Produce newsletters in PDF format so they are more print friendly.

Activities/Accomplishments:

- Created and posted 4 newsletters in PDF format for ease of printing.
- Created a photo edition after the summer activities had taken place.



## *Nominations and Elections*

Committee Chair: Dan Mann  
Committee Members: Bill Bushaw  
Cindy Butler  
Diane Lambart-Fleming  
Arman Habegger  
Zina Haywood

### Summary of activities:

- The committee solicited nominations, met several times via conference call, exchanged numerous e-mails, and contacted MASFAA members to develop the following slate of candidates.
  - President-Elect: *Billie Jo Hamilton*; Southern Illinois University Carbondale  
*DeLores Hawkins*; Des Moines Area Community College
  - Vice President: *Susan Fischer*; University of Wisconsin-Madison  
*Rick Shipman*; Michigan State University
  - Secretary: *Candi Frazier*; West Virginia University  
*Christal Williams*; Kansas City Art Institute
  - Treasurer-Elect: *Jeff Pethick*; University of Notre Dame  
*Cheryl Warmann*; Oakton Community College
  - Delegate-at-Large: *James Buchanan*; West Virginia State University  
(2 positions) *Jayne Dinse*; S. Central Technical College-Mankato  
*Chuck Knepfle*; Miami University  
*Steve Schuetz*; Ripon College
- The Committee wishes to thank each candidate who agreed to have their name placed on the ballot. The election was held from May 7-21, 2007. A total of 448 ballots were cast and the results were as follows:

- o President-Elect: Billie Jo Hamilton; Southern Illinois University Carbondale (IL)
- o Vice President: Rick Shipman; Michigan State University (MI)
- o Secretary; Candi Frazier; West Virginia University (WV)
- o Treasurer-Elect: Cheryl Warmann; Oakton Community College (IL)
- o Delegate-at-Large:
  - Jayne Dinse; South Central Technical College-Mankato (MN)
  - Steve Schuetz; Ripon College (WI)



## *Pre-Conference Program*

Committee Chair: Debra McKinney  
Committee Members: Triena Bodart  
James Buchanan  
Deborah Duff  
Michelle Richardson  
Steve Schuetz  
Jacki Switzer  
Dawn Weaver

### Summary of Activities

- The 2007 Pre-Conference event will be held on Sunday, October 7, 2007, just prior to the annual conference in St. Louis. The theme of the day is "Gateway Connection: Bringing It Together."
- The committee has been holding regular telephone conference calls over the past several months. Each committee member will be highlighting various programs geared toward under-represented individuals. We have a great variety of programs that will be highlighted.
- Registration is done through the MASFAA web site while registering for the actual conference. As of mid-September we have 53 registrants. Their fee to attend is \$35 and is being handled right with the conference registration. We will be serving a box lunch at a cost of \$26.00 person (covered with the registration fee). Each attendee will be given a note book and 3 ring binder ordered through Successories with the theme of "Together We Can."
- The program will begin at 11:00 am with a welcome from Debra McKinney and Vickie Crupper. Ivan Juzang will then do a one hour presentation on assisting under-represented individuals. During lunch each committee member will highlight several programs serving various populations. We will wrap up with a summary and suggestions on how to take it home.



## *Professional Development*

Committee Chair: Cheryl Warmann  
Committee Members: Stephanie Aman                      Maureen Crump-Phillips  
Michelle Phelps    Gail Rice  
Christal D. Williams

### Summary of activities:

- Selected nine MASFAA Conference Scholarship recipients. Recipients are: Paula Clendenen (IL), Heather Penn (IN), Todd Brown (IA), Shashanta James (MI), Tracy Stokes Hernandez (MN), Valerie Knupp (MN), Jackie Tracy (OH), Janet Trump (WV), Wendy Hilvo (WI).
  - Notified Dick Battig of travel dates so that he could coordinate room arrangements;
  - notified Jim Brooks so that conference registration fee, not MASFAA dues, would be waived.
  - Missouri was the only state that was not represented in the application pool.
  
- Arranged Newcomers Welcome for the annual conference. Activities will include a welcome by Vickie Crupper, MASFAA President, and an ice-breaker game. Welcome MASFAA folios will be provided to newcomers who attend the session.

### Activities planned, not yet completed:

- Update Conference Scholarship application so that it explains that the scholarship covers the conference registration fee and that the individuals selected will share a room with another scholarship recipient. Also add:
  - add travel dates/days, if known.
- Provide updated scholarship form to the incoming Professional Development Chair.



## *Research*

Committee Co-Chairs: Ernesto Monge  
Lloyd Mueller

Summary of activities:

- Had several meetings to discuss how to proceed with staffing project.
- Researched and developed a financial aid staffing survey.
- On line form tested and fine tuned.
- Distributed to MASFAA institutional financial aid directors.

Activities planned, not yet completed:

- Final results will be analyzed and compared to other regional and national models.
- Final results will posted on web site and distributed to MASFAA membership.

See appendix 5 for Survey Questions



*Site Selection:*

Committee Chair: Dick Battig

Summary of activities:

- Assisted with 2007 Annual Conference
- Set up Executive Council Meetings
- Visited 2008 Site in Cincinnati
- Initial site visit to Milwaukee for 2012
- Contacted Indianapolis CVB about 2013

Activities planned, not yet completed:

- Finalize 2012 Conference Site
- Site visit to Indianapolis for 2013



*Summer Institute Program/Site*

Committee Chairs: DeLores Hawkins  
Michiale Schneider

Summary of activities:

- The MASFAA Summer Institute was held on the Baldwin-Wallace campus, June 2-7, 2007 in Berea, Ohio. One hundred and one MASFAA members attended the training...a record!

<b>2007 Summer Institute Management Statistics</b>	
<b>Total Registrants: 101</b>	
<b>43</b>	<b>Single Room</b>
<b>43</b>	<b>Double Room</b>
<b>15</b>	<b>Commuter</b>
<b>80</b>	<b>Membership Fee</b>

- All nine MASFAA states were represented. The attendees comprised members from all sectors. Registrar and business office personnel were represented, as well.
- The faculty, and guest speakers were rated high by the participants for their enthusiasm as well as for the content of their presentations.
- The MASFAA Executive Council was given a copy of the evaluations for review and comment. See appendix 3 for evaluation comments.
- The Membership was kept abreast of events leading up to and during the Summer Institute via the MASFAA Web site and Newsletter.
- The participant's evaluation feedback confirmed that the Summer Institute is affordable and a great value to the membership. Many of

the suggestions made by the participants are under consideration.

- Angelene Harris, Assistant Director, Michigan State University was selected as the Zina Haywood Scholar.
- Site committee members coordinated meal arrangements, room assignments, local printing, room check-in and key deposit, room check-out and key deposit return, miscellaneous heating/plumbing/etc room issues, and coordinated evening activities. Extraordinary effort occurs behind the scenes that is all done by this group of people; who are rarely seen and never appreciated as much as they should be.
- An undertaking such as this could not have been possible without the support of the Association, Summer Institute Site Committee and the Faculty who helped to make it all possible. Special thank you's are extended to:

### **2007 Summer Institute Faculty**

#### Residential Faculty

Earl Dowling

Sue Hebert

Jamie A Malone

Lois Mulbrook

John Parker

#### Guest Faculty/Speakers

Vickie Crupper

Diane Lambert-Fleming

Zina Haywood

Pamela Fowler

#### Summer Institute Site Committee

James Buchanan

Suzanne Fahrer

Durecia Hopkins

Val Kepner

JoAnn Ross



## *Treasurer-Elect*

Reporter: Jim Brooks

### Summary of Activities:

- Processing payments for memberships for 06-07 and 07-08.
- Processing payments for the 2007 conference in St. Louis. These are both checks and credit card payments.
- Processing receipt of contributions to the conference. Most of these are checks. An occasional credit card gift is received.
- Mailing checks to US Bank weekly. They have continued to provide prepaid UPS mailers to expedite the process.



## *Web Services*

Committee Chair: Keith Williams  
Committee Members: Kelvin Jackson

### Summary of Activities:

- Attended MASFAA Leadership Development Retreat (June 19-21) in Duluth, MN
- Had ATAC make numerous changes to the website regarding this year's conference
- Had ATAC make some changes to the Federal Issues Portal based of some good feedback from Bruce Foote
- Had ATAC put a quick link on the homepage regarding conference registration
- Had ATAC change the MASFAA membership applications from 06-07 to 07-08
- Per Deonna, had ATAC update our website to reflect the companies that paid for advertising on our website.
- Work with ATAC to generate a report of MASFAA members that are not subscribed to the MASFAA Listserv
- Worked with Dan and ATAC on the 07-08 Ballot for MASFAA Elections
- At the request of Diane, created a 2007-2008 MASFAA Executive Council listserv
- Worked with ATAC to create electronic voting for amendment to by-laws.
- Other minor wording changes to website based of feedback from members of 06-07 Executive Council

### Activities Planned but not yet Completed:

- If needed, work with ATAC and other council members to alter some of our website wording in regard to "SPONSORS".
- Update MASFAA Leadership section of the website to reflect 2007-2008 Executive Council



## *State News:*

### *Illinois:*

State Representative: Nancy Calvert

#### Summary of Activities:

- My year as President of ILASFAA ended on March 20 at our conference held in Schaumburg, IL. The conference was definitely a highlight of my year as the event went quite well thanks to the efforts of our Executive Vice President/Conference Chair, Mark Holysz and his committee chairs and volunteers. Our theme was Exploring Our Professional Future. We had a record number of participants and very positive feedback from those in attendance. Special recognition was given to the following who received their awards during the conference:
  - Tim Wendt—New Professional
  - Sustained Service: All three of these individuals have devoted a lot time and talent assisting in many capacities for ILASFAA.
    - Doug Carlson
    - Mark Holysz
    - Terri Hare
  - Committee of the Year—Training and Professional Development, chaired by: Michelle Trame and Mary Wright
  - Meritorious Service—Bruce Foote for his efforts as Legislative Issues Chair and other contributions too numerous to mention
  - President’s Award—Janet Ingargiola, CAP Chair (which is our outreach Committee)
- My theme for the year was “Focus on the Future.” During the year I was fortunate to have an extremely talented and hardworking Board

and committee chairs who helped our association focus on our future by developing a new strategic plan.

- We held our bi-annual leadership retreat in June and then asked the attendees to attend a mini-reunion the day before our November Board meeting. The attendees were invited to stay at the conference hotel and attend the Board Meeting the next day. We have had a number of these new “leaders” come forward to serve on committees, chair committees and even run for an office.
- The year marked the start of dividing our extra long state into two and presenting two Mid-term Workshops. These workshops have become very popular for training of staff in our financial aid offices. The cost is low—this year it is \$25 per person. The workshop is 1.5 days and is packed with several sessions on everything from learning to read a FAFSA/SAR; to preparing a budget; to receiving a federal update, etc. The membership had asked that the workshops be held in both a north and south location to allow for easier transportation to and from the workshop. This would allow more people to attend. Consequently we had a record number of attendees.
- Our College Awareness and Preparedness (CAP) Committee secured a new grant from Lumina. They held several successful presentation training sessions for financial aid administrators and experienced a 50% increase in College Goal events as well as participating in over 60 other CAP events.
- Our Diversity Committee took an active role in participating with the Conference Committees and with CAP to increase awareness of diversity in our association and in assisting the underrepresented and disadvantaged students we serve. They participated in Sallie Mae’s Bus Tour and through his efforts, Chair, Michael Shields, was able to garner membership from the Chicago City Colleges who had not been ILASFAA members for quite some time.
- While I saw the beginning of the ethics issues, it was nothing compared

to what has been dealt with during this current year. Our Board did decide that we would not bar any vendor from exhibiting at our conference whose business would benefit student financial aid. We also encouraged our vendors to use scholarships as their door prizes instead of individual gifts.

- Our state Guarantee Agency saw the retirement of a long-time friend and student advocate, Larry Matecjka. In December, we met Larry's replacement, Andy Davis and encouraged a continued relationship between the agency and our association.
- I do have to report that I probably hold the record for running off secretaries. I didn't think I was too hard on them but did manage to go through two during the year. I am, however, happy to report that both took jobs outside the educational institution world and are still active in our association.
- During my year as Past-President I will be responsible for updating the Policies and Procedures Manual which, given all that has happened, will probably take some time. I will also be soliciting, soon, names of members who wish to run for an office.
- It has been rewarding to serve on the MASFAA Board and meet the leaders of other state associations. I "stole" several ideas from other states and also found comfort in knowing that we all deal with the same issues.



***Indiana:***

State Representative: JoAnn Laugel

Summary of Activities:

- During the fall of 2006, ten sites hosted high school counselor workshops that provided information for over 650 high school guidance counselors. 50 financial aid professionals volunteered as presenters.
- Indiana Winter Conference was held December 10-12 in Ft. Wayne. MASFAA President Vickie Crupper attended along with approximately 185 others.
- JoAnn Laugel was elected president-elect for 2006-07 to replace Dianne Mickey who took a position with the U. S. Department of Education.
- The election of 2007-08 officers was held. New officers include: Kathy Purvis, IUPUI, president-elect; Marcia Osman, Purdue, secretary; Marty Mehringer, Indiana Business College, delegate at large; Cortney Swift, Notre Dame, delegate at large.
- 2007 Leadership Symposium was held February 22-23 at Rose-Hulman Institute of Technology. 11 newer members attended and were trained by 6 experienced members.
- 263 high school financial aid nights were conducted from December through February with 14,195 people in attendance. This was an increase of 2.3% in sites offered and an increase of 8.3% in attendance over the 2005-06 year.
- College Goal Sunday was held at 35 sites across Indiana on February 11, 2007. 422 volunteers helped over 1230 students and 2800 parents and family members with the FAFSA. The number of FAFSA on the Web applications completed increase 32% from the previous year as the number of sites offering electronic processing continues to go up.
- JoAnn Laugel and Kathy Purvis attended the NASFAA Leadership

Conference from March 4-6 in Washington, D.C.

- A white paper titled "Position Paper Regarding State of Indiana Financial Aid Programs" developed by the Governmental Relations committee was presented to the State Student Assistance Commission in March.
- Indiana Spring Conference was held April 15-17 at Casino Aztar in Evansville. There were about 190 people in attendance.
- 2007-08 Executive Committee and Committee chairs' planning retreat was held June 11-12 in Evansville.



*Iowa:*

State Representative: Robin Fisher

Summary of Activities:

- I am going to start the year-end review with MASFAA 2006. Due to IASFAA hosting MASFAA, we did not have our normal fall conference in November. We did sponsor a one-day NASFAA training event free of charge to all paid members following a DOE training on ACG/SMART. This is the first time we did not charge the membership for NASFAA Training.
- December saw our winter Executive Council Retreat where we basically checked on our goal progress and worked on Spring projects. We hosted a Drive In Workshop for upper level staff in February in conjunction with our Visit the Hill Day.
- March arrived, as did our Spring Conference. During the conference we had Larry Z from NASFAA speak on the Loan Investigations and also hosted our MASFAA President.
- Since the April MASFAA Executive Council meeting, IASFAA has been mainly working on planning of activities for the upcoming year. The state's annual spring conference in March saw a changing of the elected officers and the formation of a new executive council. During April, our Community Outreach committee also hosted a Make High School Count Event at a Des Moines Boys and Girls Club. Due to Robin Fisher's move from regular to associate member status in May, she had to give up her position as Past-President. At this point, we have not felt the need to replace the position.
- In June, the new executive council had its annual 2-day annual retreat where we discussed all of our plans for the upcoming year. We spent a

good part of the time reviewing our current bylaws and policy/procedure manual to update items as needed. There was also a lengthy discussion on ways to maintain and increase membership, including a look at student membership. Of course, the retreat was not complete without discussion on all of the student loan codes of conduct and how they may impact the association. We also had some demonstrations on parliamentary procedure.

- During the annual NASFAA conference, Iowa won the NASFAA Award for Service to Students, Parents and Families for the work our Community Outreach Committee did in revamping a college awareness planning brochure and providing it both in English and Spanish. An IASFAA member dinner was also hosted "Dutch Treat Style" at the conference for approximately 14 members.
- In August and early September our Community Outreach and Leadership Symposium committees have been working diligently on their fall events. The Leadership Symposium convenes ever other year in Iowa with the focus of turning 12-15 IASFAA members into future leaders. This year we have included a service component in the symposium with the help of Community Outreach. The Symposium will conduct a small scale Reality Store event for about 95 freshmen on September 20<sup>th</sup> as a part of their first 3-day event. Community Outreach was glad to use this as a trial run for their main Reality Store event to be held September 28<sup>th</sup>. This event will be for about 300 junior high students. 2007 marks the first year that IASFAA has conducted the Reality Store program after being inspired by the MASFAA Reality Store in Des Moines last fall.

Activities Planned, not yet completed:

- In addition to the 2 Reality Store Events and the first portion of Leadership Symposium, we are currently working on a couple of other projects. The fall conference is in its final stages of being planned and is set for November 7-9 in Coralville. We will also be hosting Diane Fleming as MASFAA President and Kathy Purvis as MASFAA president exchange during this conference. At each conference, our Mentoring Task Force

usually has a breakfast for newcomers. This year we are hosting a continental breakfast for newcomers for a half-hour and incorporating it with a committee fair with the hope that new members can learn more about committee involvement. After the first half-hour, we plan to open the event to all members with a goal of getting both segments more involved. Traditionally, our Professional Development Committee also plans NASFAA Training the day prior to the fall conference.

- The IASFAA Federal and State Issues committee is in the process of working on federal position papers. From what I can tell, we have not had position papers since the late 1980's. In addition, this committee has decided to break away from a consortium with the admission counselor organization in Iowa and host our own legislative day. We did this because we felt the issues being represented prior dealt more with the guidance community and the day was always after the legislatures first funnel date for bills. According to the committee, we already have legislators coming to visit our group and we are scheduled before the first funnel.
- This fall our School Relations committee is presenting our guidance counselor workshop in a new format. In the past, we had utilized the Iowa Communications Network with counselors joining a broadcast from 30+ sites in Iowa. It was quite an undertaking to set up each site each year and then find that people who had RSVP'd for a particular site never showed up. This year we are using webinar technology to present this workshop allowing guidance counselors to view this from the comfort of their offices.
- Currently, our Associate Members Committee is working on a survey for the associate members asking about what codes of conduct they are required to follow and what they are and are not able to do for the association. We hope to utilize the results of this survey to move forward in some areas of the association such as exhibition at conferences and philanthropy.



***Michigan:***

State Representative: Richard Shipman

Summary of Activities:

- Like many state associations, we spent considerable time this year discussing our policies for membership, conference exhibiting, and sponsorship fees. A number of changes were made to bring us into alignment with recommendations from NASFAA and examples set by MASFAA.
- We held a very successful biennial Leadership Retreat; our incoming President, Jo Cassar, has pledged a reunion
- Michigan had record-setting participation in College Goal Sunday
- I established a new ad hoc committee charged with Humor that has been effective in lifting MSFAA member spirits from time to time by sharing stories that could only come from financial aid offices

**Chronology**

- Presented with Diane Fleming on general financial aid topic at the Promoting the Publics event
- Attended the "Politics of Inclusion" Conference at UNC-Chapel Hill and participated as a panelist
- Attended NCHelp Legislative Issues Conference in Washington, DC; spoke with Kennedy's and Enzi's staffers
- Attended MASFAA Conference in Des Moines, IA
- Worked with MI Guaranty Agency to plan the 2<sup>nd</sup> & 3<sup>rd</sup> Default Prevention Symposia which now have concluded
- Participated in conference call with FSA to talk about progress and plans for the MI Default Prevention Task Force
- Participated in conference call with National Educational Loan Forum

coordinators to finalize draft white paper

- MSFAA Winter Training Conference was held in Dearborn, MI
- Our College Goal Sunday event set a new record for attendance
- Attended College Board National Forum in San Diego, CA; presented on "On-Line FA Services" & served as panelist for "Diverse Perspectives on Student Financial Aid"
- Chaired financial literacy task force for academic officials at MSU; we have begun work on 2007-08 seminar series
- Gave the federal update for the annual Michigan High School Counselor Video Workshop and will again this year
- Attended College Board CSSAC meetings in New York City in December, 2006, and May, 2007
- "Financial Aid Primer" was published by NACUBO in Student Centered Financial Services; presented the paper at their 3/07 conference in San Diego
- MSFAA Executive Board reviewed its statement of ethics
- Attended the Big Ten FA Director Meeting in Chicago, IL
- Attended College Board Midwest Forum in Chicago, IL, and presented on "Professional Judgment"
- Hosted MSFAA Leadership Retreat in Augusta, MI (big thanks to Judy Florian)
- Attended College Board Colloquium 2008 Planning meeting in New York City
- Hosted MSFAA Summer Conference at Crystal Mountain, MI
- Attended NASFAA Conference in Washington, DC
- Participated in MASFAA 2008 President's Retreat in Grand Rapids, MI



***Minnesota:***

State Representative: John Pogue

Summary of Activities:

- It was an interesting year to say the least. We had two very successful conferences. During the Fall conference we were enlightened and entertained by Verbal Judo with W. Lee Fjelstad. Inspired by Jim "The Rookie" Morris. Reminded of what it takes to be a human being by Jack van der Geest, a Holocaust survivor.
- During the Spring Conference we were challenged by Billy Mills, 1964 Olympic Gold Medalist, to never give up on kids and their dreams, asked to hold on to our own dreams by Vince "Invincible" Papapale and asked to remember to laugh and take care of ourselves by Dedra Stanton.
- We were all concerned about what would happen with all of the legal issues confronting us and all of our members. The damage to our profession is substantial and will take years to recover. Worse yet was the second guessing of ourselves.
- We were saddened by the lose of one of our own as a result of the I-35 bridge collapse.

*Through all of this we have persevered.*

- Spring Conference is also where we changed our Executive Council. The new state president is Scott Roehlke, Dakota County Technical College, Vice President is Lois Larson, Century College, President-Elect is Kathy Ruby, St. Olaf College, Secretary, Christi Dickey, MN State Community and Technical College-Fergus Falls Campus, Treasurer, Sandy Goman, College of St. Scholastica, Treasurer-Elect, Judy Robeck, Riverland Community

College. The Past-President is, John Pogue, Inver Hills Community College.

- The Sector Representatives are: Deb Pusari, University of Minnesota, Private for Profit, Jeff Aalbers, McNally Smith College of Music, Private NonProfit Jon Erickson, College of St. Scholastica, State Universities, Dave Vikander, Southwest Minnesota State University, Two Year Public, Beth Diekmann, Rochester Community and Technical College, Associate Member, LuGail Hamel, TCF Bank.

All in all it was a very good year!



***Missouri:***

State Representative: Brad Gamble

Summary of activities:

- Attended MASFAP program committee meetings April 20 and July 20<sup>th</sup>.
- Attended Test of Leadership Meeting with Spellings in Kansas City on June 5<sup>th</sup>.
- Presented at MASFAP Summer Institute on June 15<sup>th</sup> at College of the Ozarks.
- Executive board meeting was held June 27<sup>th</sup> at Columbia, MO. The usual committee reports were presented with time reserved to discuss the latest code of conduct issues. One highlight of the meeting was the unveiling of the new WUZ UP web site to be used by high school counselors. A great deal of time was spent discussing finances for the association since lender support will be greatly reduced in the future. A task force was appointed to look at the financial health of the association and recommend changes to allow for our continued existence.

Activities planned, not yet completed:

- MASFAP Decentralized Training October
- Missouri hosts MASFAA October 7-10 in St. Louis
- MASFAP fall conference 40<sup>th</sup> anniversary November 4-6 at Lake of the Ozarks
- MASFAP leadership retreat November 6-7 at Lake of the Ozarks



*Ohio:*

State Representative: Amy Baker

Summary of Activities:

- Amy Baker and Claudia Wenzel attended the OCAN conference in September 2006 in an effort to continue our connection with our partners.
- Our Winter Conference was held December 12-15 in Columbus. The theme was "Discover the Treasure" and the agenda included NASFAA training and Department of Ed Default prevention sessions as well as needs analysis training.
- February 11, 2007 marked our 5<sup>th</sup> annual College Goal Sunday Event with 35 sites.
- The NASFAA Leadership Conference in Washington DC was attended by Amy Baker and Debralee Divers
- The Spring Conference was held at Kings Island Resort May 15-18. With the theme "Making the Connection", the agenda included entertaining and informative sessions, the annual Golf Outing and a casino night. Vickie Crupper was able to join us as well.
- Spring conference marked the beginning of new leadership. The election results were announced and the 0708 officers are:

President:	Amy Baker, Stark State College
President-Elect:	Betsy Johnson, Owens Community College
Past-President:	Claudia Wenzel, John Carroll University
VP for Training:	Kim Nash-Yore, Cuyahoga Community
VP for Conference:	Ann Marie Gruber, Lakeland Community
Secretary:	Amanda McPherson, Zane State College

Treasurer:	Debralee Divers, BGSU Firelands
Treasurer-Elect:	Scott Lehman, Stark State College
NE Regional Rep:	Tammi Sawyer, University of Akron
NW Regional Rep:	Gail Houtz, Bowling Green State Univ.
SE Regional Rep:	Jeseca MacDonald, Central Ohio Tech.
SW Regional Rep:	Laura Cruse, College of Mount St. Joseph

- A planning retreat for 0708 executive committee in June set in motion plans and goals for the upcoming year.



*West Virginia:*

State Representative: Lake Tackett

Summary of activities:

- Celebrated WVASFAA's Fortieth Anniversary at the Spring Conference in March.
- Transition meeting was held June 15<sup>th</sup> at Alderson-Broaddus University where the gavel was passed from Lake Tackett to Brian Weingart.
- Four \$500 scholarships were awarded to WV high school students planning to attend WV post-secondary institutions.
- For the 2007-08 year we have eliminated tiers/levels of sponsorship. We are charging a flat fee of \$2,000, which is intended to eliminate any question of favoritism among sponsors. Booth placement will be done in random manner.

Activities planned, not yet completed:

- Our Fall Conference is planned from October 24<sup>th</sup> – 26<sup>th</sup> at Snowshoe Mountain Resort. We will be running session tracks for different experience/institutional needs. We are very excited that we will have three special visitors for the conference, Diane Fleming, Pam Fowler, and Betsy Johnson. The weather at Snowshoe can be a little unpredictable but at least after this summer's heat, it should be refreshing.



*Wisconsin:*

State Representative: Bev Faga

Summary of activities:

- We had our spring meeting at LaCrosse, Wednesday, April 25<sup>th</sup> – Friday, April 27<sup>th</sup>. The climate at the meeting was one of caution brought on by all the publicity about the school/lender situation.
- Vickie was at our spring meeting, and tried to give us some encouraging words at a time of gloom and doom. We held a Town Hall meeting so that people could vent about the experiences they were having on their campus'. The meeting was open to members and associate members.
- We were also very pleased to have our state exchange IASFAA President, Aaron Steffens, at our meeting.
- We had our Awards Luncheon on Thursday.
- US Congressman, Ron Kind was the keynote speaker on Friday morning.
- The President of WASFAA hands over the gavel to the new incoming President at the Spring meeting, so I handed over the gavel to Sara Beth Holman, and became Past President.
- It was a privilege to be WASFAA's President this past year, and working with, and getting know the people at MASFAA.



## Delegate At Large Comments:

### *Karen Kopp:*

- Participated on Site Committee for Summer Institute
- Worked with Pre-Conference Committee
- Anticipating great reviews of Pre-Conference.

### *Colby Sellers:*

- Attended all MASFAA Executive Board meetings.
- As liaison between the Board and the Awards Committee, participated in all committee meetings and assisted in nomination, collection of information and selection process.
- Attended MASFAA Annual Conference in Des Moines.
- See appendix 4

### *Arnold Woods:*

- Kept abreast of all activities assigned this position and reported all scheduled events and activities completed in a timely manner.
- The Reality Store project was a success and informational material passed on to the new chairs for next year.



Appendix 1: Balance Sheet

MASFAA  
Balance Sheet  
As of September 15, 2007

	Total
ASSETS	
Current Assets	
Bank Accounts	
Atlantic Southern CD 9/06	50,000.00
Capital One Bank CD 11/06- Bank	50,000.00
First American Cash Account	8,400.62
Franklin Investment Account	370,808.72
LaSalle Bank CD 2/07	50,000.00
LaSalle Bk Midwest CD 5/07	50,000.00
U.S. Bank Checking #754819993	153,583.06
Total Bank Accounts	\$732,792.40
Total Current Assets	\$732,792.40
TOTAL ASSETS	\$732,792.40
LIABILITIES AND EQUITY	
Liabilities	
Current Liabilities	
Other Current Liabilities	
Prepaid Membership Dues	15,030.00
Total Other Current Liabilities	\$15,030.00
Total Current Liabilities	\$15,030.00
Total Liabilities	\$15,030.00
Equity	

Opening Bal Equity	50.00
Retained Earnings	800,032.31
Net Income	-82,319.91
Total Equity	\$717,762.40
TOTAL LIABILITIES AND EQUITY	\$732,792.40

Saturday, Sep 15, 2007 10:47:02 AM PDT GMT-7 - Cash Basis

This report was created using QuickBooks Online.



Appendix 2: Profit & Loss Statement

MASFAA  
 Profit & Loss  
 November 1, 2006 - September 15, 2007

	<b>Total</b>
Income	
Advertising-Conference Program	9,900.00
Advertising-Web Site	1,000.00
Conference Exhib. Promotions	36,000.00
Conference Registration	63,280.00
Conference Sponsorship	32,125.00
General Sponsorship	12,000.00
Interest/Dividend Income	15,945.33
Membership Dues	64,445.00
Miscellaneous Revenue	-5,651.10
Special Workshop Fees	595.00
Summer Institute Registration Fees	28,125.30
Total Income	\$257,764.53
Expenses	
Administrative Expenses	-21.19
Audit Expense	6,983.06
Electronic Commerce	3,770.96
General	494.30
Income Taxes	-2,393.97
Insurance	4,082.00
Meals	334.14

Postage	273.41
Supplies	87.72
Travel	778.75
Total Administrative Expenses	14,389.18
Annual Conference	
General	12,483.74
Honorariums	3,027.00
Lodging	705.54
Meals	116,186.66
Meeting Rooms	3,000.00
Postage	78.00
Printing	10,422.80
Supplies	8,114.91
Travel	3,834.44
Total Annual Conference	157,853.09
Annual Conference-Program Comm.	
Lodging	3,359.35
Meals	2,057.12
Meeting Rooms	91.16
Printing	6.78
Travel	4,068.16
Total Annual Conference-Program Comm.	9,582.57
Annual Conference-Site Comm.	
Lodging	706.67
Meals	1,298.72
Supplies	41.99
Travel	1,716.36
Total Annual Conference-Site Comm.	3,763.74
Association Governance	
Meals	20.91
Total Association Governance	20.91

Awards Committee	
General	200.00
Total Awards Committee	200.00
Conference Scholarships	
Conference Registration Fee	175.00
Lodging	110.88
Total Conference Scholarships	285.88
Corporate Support	
General	1,500.00
Total Corporate Support	1,500.00
Executive Council	
General	-153.01
Lodging	13,120.55
Meals	15,532.61
Printing	20.34
Telephone	16.84
Travel	21,666.10
Total Executive Council	50,203.43
Family Concerns Committee	
Lodging	161.28
Meals	323.41
Postage	173.78
Travel	522.90
Total Family Concerns Committee	1,181.37
Finance Committee	
Postage	0.00
Total Finance Committee	0.00
History and Archives Committee	
Archivist Fee	500.00
Meals	5.88
Travel	69.75

Total History and Archives Committee	575.63
NASFAA	
General	522.96
Lodging	3,933.08
Meals	689.03
Travel	2,727.22
Total NASFAA	7,872.29
NASFAA Core Materials	1,850.00
Nominations/Elections Committee	
General	400.00
Total Nominations/Elections Committee	400.00
Pre-Conference	125.64
President Elect's Retreat	
Lodging	43.24
Meals	2,971.29
Printing	6.00
Supplies	14.83
Travel	6,708.67
Total President Elect's Retreat	9,744.03
Professional Development Committee	
Meals	21.38
Total Professional Development Committee	21.38
Project Development	
General	23,551.30
Total Project Development	23,551.30
Research Committee	
General	225.00
Travel	77.43
Total Research Committee	302.43
Site Selection Committee	
Meals	79.76

Travel	1,733.31
Total Site Selection Committee	1,813.07
State President Exchange	
Meals	109.79
Travel	695.55
Total State President Exchange	805.34
Summer Institute	
General	445.00
Lodging	17,499.89
Meals	17,068.09
Meeting Rooms	3,125.00
Printing	5,144.85
Supplies	3,461.13
Travel	4,251.80
Total Summer Institute	50,995.76
Uncategorized Expenses	107.40
Web Site	2,940.00
Total Expenses	\$340,084.44
Net Income	\$ -82,319.91

Saturday, Sep 15, 2007 10:44:12 AM PDT GMT-7 - Cash Basis

This report was created using QuickBooks Online.



### Appendix 3: 2007 Summer Institute Evaluation/Comments:

- Would be nice to be at a hotel/conference center. Sandstone Room too cold
- Great conference. I am amazed at how this really filled in the gaps of FA knowledge that I had. This will be a must-see experience for any new future staff (once I get to a director position ☺ )
- Have desperate groups for (Direct Loans vs. FLEP Loans) & (Non-Standard Year vs. Standard Year) & (Credit Hours vs. Clock Hours)
- Breakout sessions, a few more breaks in between sessions, a change in training rooms
- Long! days—great info. More interactive sessions would have been better like customer service & capstone. Don't start Saturday—go longer Thursday. Better info before it starts. All in all fantastic job—I learned a TON!! I love Jamie!
- Perhaps a little more info about walk-able destinations in the area would be helpful. Also, scheduling during the week instead of the weekend would be nice. Having a wireless mike for instructors would have been nice. It was a little hard to hear at times. I can understand the reason for staying in the dorms, but I wasn't crazy about that aspect of the week.
- I enjoyed my time at summer institute. I believe that I learned a lot, but I believe that I would have benefited more from more hands-on training in verification (tax examples). I loved the capstone, EFC calc and R2T4 training. Keep up the GREAT work!!

- The meeting rooms and dormitories were completely freezing the whole time. We were sitting for too long being lectured and the dynamic needs to be changed up. I love you Jamie!
- I enjoyed the conference immensely. The information that was provided will be a valuable resource for my future career endeavors. One suggestion would be to scrap the “energizers” and replace them with a group skit.
- More interactive presentations
- Being new in financial aid, I had many questions—this training was super helpful. Thank you.
- Everything was fantastic! I believe the faculty are the best in the nation. Great networking with people. One thing that would have been nice is to have an optional group thing on the night that was on our own for those that were here by themselves. Everything about this was great! Good job! Great food!
- Break up into smaller groups and more sessions around in different rooms. There is a lot of information to cover but it can be difficult to maintain complete attention sitting in the same large room for that many hours.
- Break-up into smaller groups with more interactive projects.
- It would be nice if there could be break out sessions so we could attend the information session that pertain to us.
- Both dorms and conference room was way too cold! We needed more breaks. We should not have started on Saturday, instead we should have done Sun-Thurs staying at a nearby MOTEL would have been a lot cheaper and warmer. Next conference we should do it at Chicago.

- Great info at conference. I think one single thing that would improve the conference exponentially would be the meeting rooms. It was hard to hear and see at times with a full room. I realize you use what you have on campus but I think you could have break-out sessions and rotate faculty for more interactive discussions/more focused learning. You could do general sessions as well. Interactive and team activities are great. You guys were great and we are appreciative of everything! Just offering suggestions.
- More interactive sessions
- Everything was well organized. You could see all the hard work that the team put in!! The only recommendation would be to organize the capstone a little better! It is the best money the college has ever spent on me! Thank you!
- Everybody done a great job!! Continue to make Summer Institute a informative and wonderful experience.
- More interactive or open forum sessions
- Loved it! Motivational, inspirational & packed with tools we need to succeed in helping our students! Thanks!
- Wonderful faculty and facilities, as well as hospitality by the staff at B-W. Thanks for all your hard work and the great job.
- Great info—we had a great time making new friends and building network. Especially enjoyed Pam Fowler and thanks to DeLores—we appreciate your hard work with your team and Michiale’s site team.

- Thank you for the preconference information regarding the rooms, needing additional towels, hangers, etc, I was impressed with the facilities, the coolness isn't unique; almost every facility seems cool these days—remind participants they will be returning home with a big binder and other materials to allow luggage room. Thank you all for doing a good job!
- For those of us without a vehicle, a map of the area would have been nice so we knew which way to walk for shops/restaurants/movies/etc
- 30 min breaks. More relating to real situations. Less cold in room. Use more incandescent lights
- Great graduation speaker ☺ Don't start until Sunday night or Monday morning. Before conference, ask attendees about their lifestyle. Have more active people on separate floors than less active people. Each person should have their own room. It was challenging sharing a shower w/ 2 girls. Overall, I had fun even though I am still overwhelmed.
- Great job! The food was wonderful, the site was good and the information was very valuable to me. Thanks! Would be better if it was only during the week like M-F or Sun-F.
- A warmer room with a view would be lovely. Strength of presenters and their dedication to serving the students was impressive. The subject matter was appropriate, though basic, and I would have appreciated more depth. In program materials, it might be wise to advertise as a basic beginner's course though I learned a good bit. I was disappointed with the Capstone Project. Though much cost was incurred printing and copying materials, it would have seemed prudent to copy the information sheet and EFC calculation sheet. It was difficult to scribble on an already used sheet. I was prepared to work on a comprehensive project for a good length of time. Please beef it up for next year. Overall this experience was tremendous. I take from the Summer Institute a renewed enthusiasm for serving students at my school. Thank you. How about a Summer Institute Level 2 for the mid-knowledge financial aid professional?

- Starting on Saturday is very awkward. Sunday check-in, to me, would be much better. What about having 3 or 4 different classes going on at the same time, dividing students into those particular classes, then rotating after each class. That might elevate the “sitting in the same seat” syndrome.
- It was A LOT of information, but it was/is VERY useful!! I thought everything was great.
- Make the conference 1 day shorter. Start on Sunday. Do capstone reports right after the groups work on them. On pre-conference information, include suggestion to leave room for binder and briefcase in suitcase, especially for those that are flying.
- Training was good, food was good, the room was freezing!! That was very distracting and made it hard to focus.
- Enjoyed everyone and everything. Room temp was not very pleasant, the group projects were “great”. I would like to have more exercises to work on. “D” was great! Have Earl to keep coming back. (Breaks, have five minute breaks every half hour to break mentally to keep everyone more focus.)
- Everything was great. The instructors were knowledgeable, accessible, and always willing to help. They never acted like we asked a silly question. The conference room could have been warmer but I know you can’t control that. I would rate this as one of the best conferences I have attended. DeLores is AWESOME!
- More interaction. More examples, more practical application, smaller groups for activities. Capstone does not need to include hand calculations of EFC. Capstone could have a file review (citizenship, selective service) awarding and a PJ. Break binder up into two chunks so it is not so large. Graduation was great, guest speaker Pam was great. Activities were fun and bending, but groups could have been a bit

smaller. Handheld mike to pass around when people are speaking/questions. Thank you! You were not kidding about it being cold in here!

- Space heaters in the classroom. Training was good and thorough. The faculty were knowledgeable and friendly and the site group did a good job of taking care of us.
- Suggestions: Turn down lights during if using powerpoint. Do not start on Saturday/Sunday. Temperature—very cold in this room! 3 girls to a bathroom is tough! More meals on our own, not dorm food. Good reference materials! Thank you!
- More exercises to really work on the subj.
- I enjoyed it. Suggestions: Have a list of “things to do” not just for Tuesday night. Other sessions on ethics (just to break it up). Different format so participants can move around. This was well worth the time away from home.
- Print on both sides of PAPER. Have direction to downtown places to eat and things to do for those w/o cars. Give ideas for night on our own. Break out groups for those who have been in the field over a year. Bring someone in that was not a Director but a FAO Counseling someone on our level.
- Overall, I think the training was excellent! Perhaps next time you could try alternating between PowerPoint presentations and group sessions more often. Also, more examples (in-depth) would have been very useful to those who are incredibly new to Financial Aid. I would have liked to learn more about taxes w/ regard to verification. I really enjoyed the training and made contacts. Great job!!
- More interactive (not just powerpoint/sit and listen). Have worksheet for cornerstone project. Faculty were talking in the back during presentations—made it difficult to hear. Great job! FYI, (name withheld),

whether you intended it or not, you came across as very aloof and d unhappy the whole week. Have the training run Mon-Friday.

- Capstone needs to be a bit more organized—tax form pre-filled out, financial info on a sheet, break into groups to begin with. More hands on if possible. Reading from PowerPoints defeats the purpose of personal interaction. Jamie did an awesome job—interesting, energetic and hands-on—awesome teaching style. Thanks to all for their hard work. Break out sessions would have been a definite plus.
- Consider moving the training to a hotel. We are too old to share a room with people and use the bathroom with other people. Also capstone should be one day. No one wants to come back after graduation. That's unheard of. That's why most of the class was gone. Jamie was great she should present after lunch rather than first in the morning so she can keep people up during the day. Also add more interactive things. That includes moving interactive things to the 1<sup>st</sup> or 2<sup>nd</sup> day so people get an opportunity to meet each other. Additionally, the meeting room was cold. I know there's nothing you can do about it but I had to mention it because that's what you mention on a training evaluation. Overall I did learn a lot. Met some good folks and hopefully will be in financial aid for a long time. P.S. What's the total population in this city? Gosh I didn't see anybody, no people cutting grass, cutting hedges, nothing Scary . . . Are these pod people? One more thing, please double side the power point presentations in the book so the binder is not so big. Also no faculty stories at the end.
- Separate bathrooms would help—having Jamie in the am and right after lunch would keep anyone from going to sleep—all materials already in binder or at least hold-punched to put in binder. Overall—good and useful training!
- Thanks for this opportunity!

- Fantastic! I truly feel that I'm taking so much information back to my office! All presenters were very approachable, patient, and understanding—qualities that I haven't seen in presenters at other conferences!
- More info early on outside services



## Appendix 4: Considerations for 2007-2008 Board

*Delegates At Large:*

### Let's Try Fairness for a Change (Colby Sellers)

As President Kennedy once so stylishly drawled in the way only he could "Life is not fair (fay ah)". So the professional nature of the administration of financial aid has long been misunderstood and often devalued by the public at large, our colleagues in other administrative areas and those in positions of authority at our institutions. Obstacles to change include indifference from those in authority, competition for scarce resources with other areas and refusal by entrenched civil service to acknowledge the professional nature of the work (in Illinois the financial aid advisor series has not changed since it was first written in 1969). Consider the generally higher level of job classifications, salary and benefits accorded to those in admissions, registrar and, significantly, human resources in comparison with comparable positions in many financial aid offices as evidence of this lack of professional regard.

An objective review begs the following questions:

- Why do so many schools neglect an area of such importance in attracting and retaining students?
- Why not pay more attention to an area responsible millions of dollars in revenue with the attendant risk of audit findings and potential loss of resources desperately needed to recruit and retain students?
- Why wait to provide the support needed until after there is a problem?
- Why are financial aid offices held to higher standards of performance than other administrative areas, despite the lack of support?
- Why are financial aid offices expected to assist other areas, such as recruitment functions for admissions, without consideration for the time such activities take away from already overburdened staff?
- What is the rationale for assigning review of high school transcripts to the financial aid office rather than to admissions?

Raising such questions is not meant to denigrate our professional colleagues.

Never the less I believe a reasonable person would admit that the work performed by financial aid professionals is at least as complicated and as significant as that performed by any other administrative area. Consider the time required to train new staff, particularly those without prior experience in financial aid. Most supervisors allow at least a year to gain a basic understanding of financial aid administration and several years to fully grasp the entire financial aid process. And one must also account for frequent, abrupt and sometimes irrational changes which require continual training and retraining of ourselves and of our staffs.

Very few who have not worked in financial aid grasp the breadth and depth of responsibility assumed by the staff of the financial aid office. Those outside the profession may compare our work to the distribution of welfare, rather than the multi-faceted conglomeration of administrative, fiscal and counseling skills demanded by complicated and often contradictory federal, state, private and institutional regulations.

And yes, we are all too frequently our own worst enemies as we dutifully acquiesce to each new responsibility without additional help, salary or recognition of extra time necessary to get the job done. We are indeed enablers in this respect. Why should a supervisor feel the need provide additional resources to an area that functions so well with minimal support – other than because it would be right and proper to do so?

The magnitude of the task of gaining recognition for our profession should not be underestimated but I think it's worth the effort.

Delegate-at-Large: Arnold Woods

Increase budget for the Family Educational Concerns Committee. See also recommendations made by this committee.

*Awards:*

- insist on each state have representation on this committee
- consider a 15 year recognition to encourage the "new" folks

- discuss improving process for selection of State Leadership Award recipients
- discuss ways to increase and improve nomination process

Recommended action items for the Council:

- create 15 year award with recognition item to be determined by 2007-08 committee

*Family Educational Concerns Committee:*

- The changes affecting lender/school/association relationships have created some difficulty for conducting the Reality Store.
- Would it best serve the Family Educational Concerns Committee and MASFAA to have a separate Reality Store Committee or a sub-committee of the Family Educational Concerns Committee? This may then enable additional activities outside the Reality Store event for the FECC to manage.

*Newsletter:*

- Continue to produce the newsletter electronically in PDF format.
- Consider producing a newsletter more often for shorter and more readable newsletters.
- Make article assignments for specific topics.
- Consider whether to allow advertising from our associate members.
- Consider whether to allow associate members to contribute articles for future newsletters.

## Appendix 5: Research 52006-2007 Survey Instrument



### MASFAA WEB Staffing Levels Survey

#### Financial Aid Staffing Levels

1. Indicate your type of school

- Public two year
- Public four year
- Private two year
- Private four year
- Proprietary two year
- Proprietary four year

---

2. Size of your student body

---

3. Number of financial aid recipients

---

4. Amount of financial aid administered in the 2006-07 school year

---

5. Number of administrative staff

---

6. Number of support staff

---

--Submit Survey--

Reset Survey

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