



**Oregon Association of Student Financial Aid Administrators
(OASFAA)
Established June 1, 1968**

**OASFAA Executive Council Meeting 2026-27
Linn-Benton Community College
April 17, 2026**

Attendees (*In person*) Ingrid Baker, Jennifer Birt, Kyna Burgett, Kathy Campbell, Antonio Castellanos, Ashley Coleman, Frankie Everett, Shauna Harper Stevens, Greg Kerr, Leslie Lloyd, Debbie O'Dea, Suzie Petersen, Megan Pickens-Lloyd, Miranda Robertson, Griffin Shaulis, Emory Spence, Carlos Villarroel, Shauna Wing (*Zoom*) Elijah Herr, Erin Rau, Shelly Riehl, Layla Solar, Bryanna Sylwester

Call to order – 10:09 AM

Welcome, introductions, housekeeping

- This meeting will focus on the budget and annual conference planning in addition to hearing reports from officers and committees. The strategic plan will be discussed in the summer.
- Approval of minutes from 1/28/2026
 - o Motion to approve – Kathy Campbell first, Debbie O'Dea second. All approve

Officer reports:

- **Past President**
 - o Completed logistical handoff for WASFAA/NASFAA. Brainstorming with Site Selection. No issues with bank handoff.
- **President**
 - o Met to figure out how increase revenue streams and increase attendance at events. Went to WASFAA meeting.
- **President Elect**
 - o Attended NASFAA's Legislative and Leadership Conference. If there is something they need to be doing, let Eli know.
- **4-year Public VP:**
 - o Has been reading about budget issues across the state – HECC provided 15 million to SOU, 30 million to OSU cascades for buildings, UO has a budget shortfall; a lot of budget talks going on. OIT - \$400K in cuts but enrollment is holding. Many conversations about PLUS loans and graduate level loan changes. With OB3, figuring out how to get the correct answers about loans and there is concern about private loan market. A lot of changes ahead.
 - *ISIR layouts:* A question was asked about how schools are handling this. Banner and Powerfaids are sending out patches – will need to adjust header and import until get patch. Some schools won't have patch until April 30; changes are rolling out April 26. Schools will need to hold ISIRs until patch in place, discussion on how that might work.
- **2-year Public VP:**
 - o Concerns on Fraud, Oregon Promise possibly going way, schedule of reductions for loan and Oregon Opportunity Grant Changes:
 - *Oregon Promise:* It is being reviewed to possibly be rolled into Oregon Opportunity Grant. Breanna volunteered to collect feedback to provide to HECC about the topic. Discussion on OASFAA writing a letter to support Oregon Promise. LCC is working on getting students involved moving forward.
 - *Schedule of Reductions:* At LCC 49% of students are less than full-time. To lose Oregon promise and with implantation of loan changes, it would be devastating. Loan proration will also cause issues for summer starts.

- *Oregon Opportunity Grant* – will have a shared responsibility model starting in 2627. Discussion on the topic: awarding 1-5 credits is a tough model and has an administrative burden. Software companies only have proration for federal funds, not state funds. This year's early cut-off date is also impacting community colleges since decisions to attend are typically delayed.
- **Oregon Promise update from Erin**
 - o There are strategic planning groups agency wide looking at programs to find ways to streamline. One of the ideas brought forward was to roll Oregon Promise into the Oregon Opportunity Grant. All ideas brought forward must be cost neutral. HECC/OSAC is modeling what it would look like for students if programs go away/change.
- **4-year Private VP**
 - o Sent email to sector, no responses. There are concerns about enrollment and private loans with the new limits on Parent PLUS Loan. Learning job as VP. Has ear to the ground for constituents and figuring out how to represent the sector in meetings.
- **Proprietary VP**
 - o Reaching out to their sector and trying to get their sector involved. Same concerns as others with declining enrollment, loans changes. Their cohort default rates are not too terrible but anticipate they will rise with return to repayment. ECMC is still getting a lot of calls from students who think their loans will be forgiven.
- **IDEA Advocate**
 - o Advisory board met on Tuesday. They are continuing to work on newsletters for this calendar year. To boost engagement, they are considering adding a quick quiz at the end of the newsletter and at the conference give some short of prize, such as old OASFAA swag, or a registration discount for getting folks to engage. Main goal is increasing accessibility, putting together accessibility guides for presentations and newsletter. Working on a draft logo for the committee. Working with Jenn to advocate for changes to the ORSAA. Emory will be out for the next 5 weeks, and Rob Keever step in.
 - TO DO: Frankie – will look up click rates for emails
- **Treasurer:**
 - o Uploaded current 25-26 budget. Recently got full access to all accounts. Transition took some time at US Bank. Goal is to have a balanced budget for 2728. This year we will pull around \$19,000 from reserves to cover expenses. Is still fine tuning the 2627 budget, didn't include everyone's full budget ask. Executive Council is where we lose the majority of our funding. Question on Technology and what the expense is? It is our website. Discussion on the website – Washington uses Apricot, may be something we look into in the future as a cost savings measure. We also need to look at ways to make money to offset the EC budget items.
 - o **Discussion on how we could bring in additional funds and reduce expenses:**
 - *Silent Auction at the conference*
 - *Summer Drive in:*
 - Discussion: We have discussed reviving Summer Drive In in the past, but we need someone to take the reins for planning.
 - Session Ideas:
 - o OOG Implementation & Proration
 - o Admissions/Registrar track, Coach/Trio/High School counselor track
 - o OSAC
 - o Schedule of reductions
 - o Legacy provisions and how to track them, packaging and revisions for students who lost legacy in the middle of the year
 - o Preferred lending lists
 - *Co-Chairs:* Carlos and Emory will work on initial details for the event.
 - *Timing:* end of July/early August

- *Location:*
 - o Somewhere in Portland (PCC?), invite Washington to attend.
 - o Location with 2-3 rooms and one shared location for lunch
- *Future OASFAA branded Merchandise Store* (see last page of notes)
- *EC Meetings:*
 - *Discussion:* We discussed how to reduced costs for the EC budget. CASFAA only has voting members come to in person meetings, everyone else dials in via Zoom to save on mileage/lunch costs. Instead of purchasing checks in the future, we could reimburse via Zelle. We could be mindful of mileage reimbursements. Can mileage be reimbursed through your school, can people opt out, more carpooling, don't provide lunch? No decision, but items to consider.
- *Raising Membership Dues:*
 - *Discussion.* Last year we talked about raising membership dues but decided not to increase. Items discussed were:
 - o *Institutional Membership:* Should we bump up institutional membership dues or get rid of it. Are we losing money with institutional membership? Could we implement tiered institutional membership – base rate plus increase for additional members. It was brought up that PCC has many members across campus to get more interest in the conference and additional training.
 - o *Associate Memberships:* several states have a membership for corporate partners – Arizona is \$35 individual , \$110 Corporate Partner, \$150 institutional membership.
 - *By-Law Change:*
 - o It was proposed that we institute affiliate membership fee of \$100
 - o Motion to Approve: Greg Kerr first, Emory Spence second, all approved
 - o This will need to be approved by the membership by vote either by ballot or at any business meeting held during an event open to the entire membership.
- *Newsletters:*
 - More consistent newsletters – \$100 per newsletter for CP adds
- *Remote training:*
 - *Discussion:* We generally discussed how we can get creative with providing training at a cost, while also not competing with WASFAAs training committee. As an EC we need to recruit people from our institutions to show up. We have trouble recruiting for sessions at conferences, how do we build value? It was decided to organize something by the end of May. With the changes coming, July may be too late. We discussed holding the training in person or via Zoom, and with the budget as is, it needs to be on Zoom. It is hard to do something in person if it is not at least half a day. We will start with a webinar and see how successful it is – honor system for each person buying their own “seat” at the webinar and not sharing across the institution.
 - *Session Ideas:*
 - o Legacy provisions: What happens when you lose legacy mid-year, setting up a meaningful conversation about how colleagues are implementing these changes.
 - o Opportunities for sector meetings, how do we loop in registrar's office/other offices to know all the rules. How do we talk about

- weeks of instructions across the institution. How do we create community and creative problem solving and how do we get campus partners involved?
 - o Cash management – Bursar Office
 - o AO office topic
 - *Leaders:* Eli & Leslie
 - o Debbie will send out a survey – EC needs to send out to their institutions, VP's will send to their sectors
 - *Corporate Partner Sessions:*
 - *Discussion:* We could look at charging Corporate Partners to host a webinar for membership. Rosemary, Holly and Kim might participate. With plus loans and private loans, it might be needed. We would promote the session if they paid OASFAA.
 - *Marketing position for OASFAA – community building*
 - Collaborate with other associations to get credibility between AO/RO/BA and OASFAA

Committee Reports:

- **Legislative:** Shauna Wing and Griffin met to discuss goals for next year. Thinking about a summer drive in legislative advocacy training. Met with Emory to talk about ORSAA access for mixed status families. Question on if the EC can advocate on behalf of this issue? They will put together a summary and send to EC for review before sending it out. OSAC and HECC Are looking into expanding ORSAA for mixed status families- need to make sure that all students can still access programs if they make the changes. For example, for Oregon Promise a student must file FAFSA if they are able to file FAFSA. Changes would go into effect for 2728 if approved.
 - o TO DO Griffin and Shauna wing will draft a letter to support Oregon promise and send to the EC before sending to HECC/OSAC.
- **Annual Conference:**
 - o Survey – feedback from 2026 Conference
 - *Sessions:* No negative feedback, but some sessions were really full and need to move into general sessions. Finaidlandia (Kathy's session) was full. Financial Aid updates should be general sessions. Favorite session was Shantelle's session – something that is both FA and relational
 - *Credential:* Having to choose between credentialing and other sessions was tough. There was discussion on making the credential earlier/later. WASFAA has credential session as a half day the morning of the conference starting. There was consensus around moving the credential, possibly moving it to Wednesday morning and partly during the newcomer's session, or offering the credential the month after the conference and charging for it.
 - *Food:* Keep bacon
 - *Keynote:* They keynote has been similar the last few years and it would be great to bring in something new. WASFAA is working with a Tribe for something new. Consensus is to remove keynote and replace with something new. This will still be the conference committee's responsibility
 - *Technology* – How did that go? General feedback was that as presenter, it was better to have OASFAA do it, felt very well supported. Longhouse support was tricky, but Salishan does take care of that one.
 - o *2027 Conference:* will be back at Salishan, working on forming the committee. Plan to do everything earlier, including finding presenters for sessions that are needed and sending out call for proposals earlier.
 - o *2028 Conference:*
 - *Overview:* Washington approached OASFAA about merging the Oregon/Washington Annual conference. The co-chairs love the idea. Washington

holds their conference in the fall, OASFAA in February. One organization would need to compromise and hold it in October 2027 or January/February 2028. Washington EC was excited about combining but would like to have the conference in October due to Washington Grant reporting being due in January. Washington typically has about 125 attendees, Oregon 100. Budget for Washington is \$50K, OR \$45K. Nevada and Arizona have combined in the past and Idaho is combining this year.

- *History:* Historically, Summer drive in was the Oregon and Washington conference
- *Pros:* speakers we haven't heard from – good collaboration between two states. Larger budget/more opportunities
- *Cons:* travel would be tougher for SO participants
- *Other Events:* Open to combining other events as well such as summer drive in/FA 101-201.
- *Discussion:* biggest concern is that if it is held in Portland, none of our Portland colleagues could stay. Division of duties and the split of corporate partner fees would need to be determined. We could incorporate a FAFSA filing event if it was held in October. Hotels in the PDX area are typically \$199-\$229 per night plus parking. Salishan is \$139 per night. Rates in the fall could be higher. There is a Veterans conference in the fall. October is harder to get a WASFAA and NASFAA representation (NASFAA once every 5 years get a representative). FSA trainers are only going to multistate trainings. Overall it seems like we may want to try to combine a smaller training first, we like the idea of sharing expenses, engagement. With this model, someone has to move and one state will end up missing one year's conference in lieu of a combined event. We do like the idea of inviting each organization to each other's events even if we don't combine. There is a risk to moving our events around. Discussion around a survey of the membership or EC to see where we want to go. Could we hold it at a Casino? Possibly, but that may not be available to George Fox and or State employees. OHSU could only send people if it was in Portland. There was discussion around being honest about our budget forecast, a joint conference may eventually be the only way we could have a conference. There was discussion about what the goal of the conference is? Is it to make money? Having a goal or purpose can help direct the decision. There are concerns about having two events in 2027. WASFAA will be holding their conference in Anchorage in 2027.
- *Decision:* Connect with Washington to let them know we want to start small with a summer drive in combo in 2027 or 2028 and invite Washington to our conference, no partnership at least for 2027
- *Possible Session:* Robert Weimerman – Tax professional. If we pay for his room the would speak at conference.
- o **Site Selection:** Nothing new to report, will work on next Salishan contract including getting pricing options for one and two years.
- o **Archives:** Work continues on finding old reports and will plan to get those added to the website by end of year. Can provide the password to the Archives Google Drive if anyone needs it. Also happy to upload documents to the Google Drive, just sent to Shauna Harper Stevens.
- o **Communications:** Spent a lot of time reviewing P&P's. Would like to put more out on Facebook and create an Instagram. Frankie suggested restarting quarterly newsletters. Next newsletter will be out end of April, beginning of May. Suzie will email Corporate Partners for ads. Possible new content is having committee's put info about their committees in the newsletter.
- o **Community Partnerships:** No new business
- o **FA101/201:** Tried to have Sothern Oregon location last year, not as well attended. Put out a survey after last year's training. Finding ways to make the sessions more interactive.

- Thinking about having different tracks – Admissions/Scholarships/Social Services – be thinking if you want to present something. Will try to publish dates earlier, received some feedback that receiving the dates earlier would be helpful.
- o **Fund Development:** Will help get corporate partner support for webinars and newsletters. Discussion on changing corporate partnership levels for 2027? Decided to keep it the same for 2027.
 - o **Membership:** 595 individuals listed, 454 active. 14 institutions have 5 or less members. Will find institutional versus individual membership accounts. Project is to clean up membership report.
 - o **Mentorship:** Finalizing the application for mentors and mentees. Securing mentors first then adding in mentees. Not trying to make it a regimented program, it will be fluid. Would like to add EC members to come and talk about volunteering and would like EC to keep eyes open for possible mentors. Mentee app will also be coming out in May. July-December is the aim for the first cycle.
 - o **OSAC Update:**
 - *Oregon Opportunity Grant* – 3/15/26 Cutoff, with SAI of 8K. It is very unlikely to be pushed out much further
 - *Oregon Promise Grant* – likely have an SAI limit, will finalize in July. There is discussion on Oregon Promise Grant rolling up to Oregon Opportunity Grant. Assuming Oregon Promise Grant stays intact, push to remove prior credits from the credit count. Right now, can receive Oregon Promise Grant for up to 90 credits and that includes credits earned in High School, want to remove High School credits from that.
 - *ONGSTA* – Credit limit is tied to sector – Community College 90 credits, 4-year term is 180 credits, 4-year semester 120 credits. Trying to re-write to be tied to degree program instead of type of school attending, especially with community colleges starting to offer 4-year degrees.
 - *Workforce Pell:* There is a work group for workforce Pell. In the long term, OOG is working to align with workforce Pell
 - o **Technology:** Nothing new, working on the same items as usual. Fixed everyone's access to the website.
 - o **Volunteer:** Fielding requests from committees. Sent an email after conference to recruit volunteers. We had 69 volunteers last year
 - o **Other business:**
 - *Fraud:* LCC bought a 3rd party software, ID Pal, to stop people at the admissions entry (so far has only missed one person). Followed COCC's protocol and have \$25 deposit. Kathy will get cost and send to Frankie to send out to the EC. Clackamas is using SAFE, it took about a year to launch. Met with Oregon Attorney General and asked them to provide a product to assist with Fraud detection. The Department of Ed will be utilizing a real time identity fraud detection capability within the FAFSA form.
 - *OASFAA Branded Store:* Greg showed WASFAA's branded store. Everything is branded and it is a net \$0 cost to OASFAA. We can set it up as a fundraiser where we get 10% back. After discussion, decided to move forward. Greg will set it up.
 - Policy's and procedures – need to be updated on the website.

To dos:

- o Frankie: Look up click rates for emails/newsletters from IDEAA
- o Leslie: Send out final budget to vote by May 1
- o Carlos/Emory: Begin Work on Summer Drive In
- o By-Law Change:
 - It was proposed that we institute affiliate membership fee of \$100
 - Motion to Approve: Greg Kerr first, Emory Spence second, all approved

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- o Leslie/Eli: Work on a remote training opportunity for late May/early June.
- o Griffin/Shaina Wing: Draft a letter to support Oregon promise and send to the EC before sending to HECC/OSAC.
- o Annual Conference:
 - Conference co-chairs: Research how Idaho and Nevada handle revenue sharing and duties division for their joint conference to inform potential Oregon-Washington collaboration
 - Conference co-chairs: Contact Molly (WASFAA president) to schedule a Zoom meeting to discuss potential collaboration on smaller events (e.g., Summer Drive-In) before considering a full joint conference
 - Carlos: Get pricing information from Salishan for both one-year and two-year contracts for 2027 conference
 - Develop survey for membership about conference location preferences
 - Begin planning for 2027 conference including call for proposals earlier than previous year
- o Megan/Communications: Send newsletter by early May 1 and schedule meeting with membership chairs to discuss newsletter content
- o Kathy/Kyna: Publish future FA 101/201 dates earlier to avoid scheduling conflicts
- o Update website with policies and procedures that were approved in January
- o Ingrid: Send updated committee rosters to Volunteer coordinator
- o Kathy: Find out cost of IDPal fraud prevention software and share with Frankie
- o Greg; create OASFAA swag store and research requirements for setting up swag store as fundraiser including any required paperwork
- o Ingrid: Send high-res version of OASFAA logo to Greg for swag store setup
- o All: Submit conflict of interest disclosure forms from those who haven't submitted them
- Considerations for the Future:
 - o How do we reduce costs overall and how to do we reduce costs for EC Meetings/Budget
 - o Review options for hosting Corporate Partner presentations via Zoom. OASFAA would charge for the option to present to larger membership.

2:50 PM – Meeting Adjourned: Debbie O'Dea motioned to adjourn, Emory Spence second.