



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

OASFAA Executive Council Meeting 2025-26
Linn-Benton Community College
April 22, 2025

Attendees: (in-person) Kyra King, Leslie Lloyd, Carlos Villarroel, Shauna Wing, Victoria Mavricakis, Kyna Burgett, Shauna Stevens, Emory Spence, Griffin Shaulis, Kathy Campbell, Johanna Kaye, Ingrid Baker, Debbie O'Dea, Frankie Everett, Karen Ash, (Zoom) Breanna Sylwester, Rob Keever, Jenn Satalino, Suzie Petersen, Layla Solar, Karen Fobert

Call to order - 10:11AM

- Welcome, introductions, housekeeping
- Approval of minutes from 1/28/25
 - Motion to approve – Karen Ash first, Leslie Lloyd second
- Officer/Liaison Reports:
 - Past-President
 - Upcoming year goals are to support president and president-elect as they transition into new roles, working with Carlos on site-selection, and supporting the conference co-chairs
 - Currently wrapping up WASFAA duties
 - Would like membership to start thinking about OASFAA award nominations - planting the seed early as we're working with individuals in our offices. We'd like more submissions this year
 - Who do we know from OASFAA (not necessarily the EC) that are doing things and can be supported and recognized? How can we highlight the work that our colleagues are doing?
 - President
 - New quarterly report templates created, which include addition of strategic plan goals, along with a new report upload format for officer reports.
 - Upcoming year goals are to revitalize the Mentorship Program, and work towards hosting a Hill day or legislative day for OASFAA, emphasising the amount of work that can be done locally (at the state level)
 - Attended NASFAA's Legislative and Leadership conference with Frankie in DC, and will be attending WASFAA annual conference in May and NASFAA annual conference in June
 - President-Elect
 - Attended NASFAA's Legislative and Leadership conference with Debbie in DC
 - Starting to work on idealizing who will fill leadership positions for ballot
 - Goal is to have ballot done by Thanksgiving
 - Corporate Partner Liaison
 - Has reached out to business partners to introduce herself
 - Treasurer
 - Current budget: around \$76,000
 - Income around \$60,000 – expected an income shortfall
 - Transition document has been updated for treasurer-elect
 - One item that we could decrease expenses on is through service charges (ie: credit card service charges)
 - Looking at turning that off
 - Shauna meeting with CPA tomorrow to talk about this credit card piece
 - Would there be tax implications with these service charges?

- Vice Presidents:
- Community College
 - Updates on FSA office in San Francisco
 - GE/FVT reporting issues within the CC sector - some schools weren't able to submit GE/FVT reporting at all
 - Community colleges are receiving a tremendous amount of fraud applications
- Proprietary
 - Not in attendance
- Four Year Public
 - Still learning the role and how to build communications with 4-year public institutions and how to serve in this role
- Independent
 - Upcoming year goal is to further engage schools with OASFAA
 - Email was sent to independent sector constituents.
 - Would like to send more targeted communications and to bring more independent schools to the conference
 - Question posed how can VPs help individual committees
 - Example: support for FA 101/20
- Committee Reports
 - Annual Conference
 - Current year's goal is 120 attendees. Last year's conference brought 111 attendees
 - Call for volunteers was sent to entire membership
 - Goal of 15 committee members
 - We made money on the conference this year! - \$6000
 - WASFAA charges much more than we do for their conference – do we need to increase our prices?
 - *(see conference registration fees section below: New Business > Budget Review Conversation)*
 - Community Partnerships
 - Want to pilot a Google chat for HS counselors (partnering with Oregon Goes to College)
 - Want to improve OASFAA landing page to be a resource for our partners
 - FAQs page for community partners - general questions that we can provide them access to
 - Want to host annual paying for college night in English and Spanish - 3rd language will be offered (stay tuned!)
 - Preparing for virtual night - looking for translators to translate slides
 - Carlos has offered a Vietnamese and Russian/Ukrainian translator from their office at PCC
 - Presented at Trio Conference in Sunriver a couple of weeks ago
 - Felt well attended, considering the current climate, however students and families expressed a lot of concern
 - Reiterated that we will continue to support these families the best we can
 - We want to continue to be transparent with communication
 - FA 101/201
 - Made a profit last year; hoping to do even better this year
 - Looking to do an additional training for HS counselors
 - Where can they fill a gap? Outreach for counselors to better prepare their students
 - Looking for locations: maybe Chemeketa or Roseburg/Grants Pass
 - Requested budget of \$3000
 - What topics do we want to see presented?
 - Send any ideas to Kathy and Kyna

- Legislative
 - Goal to execute/organize some kind of hill visit
 - Local advocacy work and training (state based in Oregon)
 - Question: what is a good date range for Hill visits? When have they been in the past?
 - Full legislative session every other year
 - Next year is a short session (meant to be an emergency session)
 - Kyra suggested education committees and getting in the chairs' ears. Both chairs are new
 - Can we share with OSAC what Susan Degan used to provide, and current OSAC staff help supply the same support?
- IDEA
 - A lot of what we've done so far is organization of advisory board and recruiting new members
 - Question about a potential name change - we don't want to do this unless there is a need to do it
 - Will it become an issue to keep IDEA as the committee/position name?
 - Confirmation that we wouldn't have to change the committee name within bylaws
 - Has been sending out regular newsletters
 - Would like to start posting these on the website (like our quarterly newsletter)
 - Estimated Budget requested for transportation, EC meetings, trainings, creating trainings, bring in keynotes
 - Bringing in 1 IDEA scholarship for the conference this year
 - Emory is also serving on WASFAA IDEA committee
- Archives
 - Continuing to collect reports from last several years to upload to Google Drive
 - Question about getting everything saved to a folder - should they then exist on the website?
 - Frankie has been working Leadership Archives page on website
 - Has been updating the committee reports and uploading them to the website
- Fund Development
 - Feedback received from Holly last year: Corp Partners would like to see some kind of bundle (sponsorship + registration) for the annual conference next year
 - Thinking about a tiered approach again - would we consider increasing the price?
 - Corp partners have to request their funding at the beginning of the fiscal year - by the time the conference comes around their budgets have been set
 - Can we advertise our bundle or costs early so they can request this at the beginning of the fiscal year and they can include it in their budgets?
 - Would corp partners be interested in sponsoring a scholarship or do they want more tangible things?
 - We want to be sure it doesn't interfere with institutions' Codes of Conduct
- Technology
 - Updated website with transitional EC
 - All EC are now back-end admins with Memberclicks
 - Frankie to do some technology trainings with folks
 - E-lists updated – chairs for each committee with get notified when someone sends an email through the listserv within sectors
 - Memberclicks has to update the address at the bottom of the Listserv emails - still UP
 - Planning to watch the technology at this year's annual conference to see if it would be cheaper for us to do it by ourselves (we've done it once before!)
- Communications
 - Sent out a request for summer newsletter content
 - Goal to reach out to non-FA constituents – creating an external facing newsletter/press release – thinking of bigger outreach communications we can provide (currently brainstorming)
- Volunteer Coordinator
 - Communications have been sent to specific groups as well as the entire membership to update volunteer preferences for 2025

- Have noticed an increase in volunteer interest submissions since moving from the original checkboxes for volunteer preference to a Google form
- 2025 volunteer rosters are ready for chairs to fill in once their committees are formed
- Has reached out for interested volunteers in reviving the Summer Drive-In
 - Last Summer Drive-In was 5+ years ago
 - No bandwidth from the membership to take this on currently, but will revisit for the summer of 2026
- Site Selection
 - We learned at last year's conference that Salishan does count silverware - if we will have 100 heads for a meal, they will give us 100 forks
 - Recognizing need for technology subcommittee within the conference to be revitalized - having an on-site technology committee (to show up early: Monday night or early Tuesday)
 - Someone to set up tables, cords, screens
 - Carlos and Mathijs are going to meet in May to talk about ways we can cut costs - what do we need? Salishan's costs will continue going up.
 - If OASFAA were to pursue a Technology committee, or provide its own A/V services, these are the items we would need:
 - 25 ft HDMI Cable x4
 - 25 ft Power Cable x4
 - 8ft Power Cable x4
 - Projector Table x4
 - Projector Screen x 4 (6ft-8ft)
 - Power Strip x11 (3 for Gallery)
 - Large 10ft Cord Cover x4
 - Medium 5ft Cord Cover x4
 - HDMI Adapters
 - Are there items we can have donated? Could we request sponsored items?
 - Look at bringing in someone through one of our networks (an actual AV person), or we can pull someone from within. Comp room and food?
 - Knowing this person is not attending conference sessions, but is ready to move from room to room to help with AV issues if/when they arise
 - Frankie's friend could help with AV and she already attends the conference – gives us an idea this transition year
 - Borrowing projectors from Ford has been really helpful
 - If we don't have to purchase these, the rest of the items could be an affordable investment
 - Carlos is willing to take on the setup - the setup is a big lift. People who volunteer need to actually be there - same with clean up at the end
 - Having consistent people
 - Writing up detailed procedures and expectations
 - Open to suggestions of other sites
 - University - dorm-style?
 - If we move from Salishan, PDX and Eugene might be the only places that can hold all of those people
 - Changing the venue would potentially cost more
 - At the end of the day, everyone wants Salishan
 - This is our last year of the contract. Carlos to renegotiate a new contract in September.
 - 2026 is set
 - 2027 needs to be negotiated
- Membership
 - Will be going through institutional membership to be sure the people connected to the school are the correct people

- Want to be sure the listservs are connected to the right people
 - Working on some documentation that will help new members to update their information
 - especially being sure they're connected to their correct listserv
- Karen to reach out to Frankie regarding 51 active people listed under "prospect" - want to do some cleanup to connect people to the right institution

Break for Lunch: 12:15PM - 1:00PM

- New Business
 - Kathy Campbell suggested that we sell OASFAA (or finaid) gear
 - Review Conflict of Interest form
 - When Frankie and Debbie were in DC they attended a session that asked about Conflict of Interest Disclosure agreements
 - Idea/context behind form is to protect the organization, ensuring we have no questions of monetary impropriety
 - Everyone on the EC needs to sign this agreement (can take home, sign, and send to Debbie)
 - Will be uploaded to the 25-26 EC Google Drive
 - Will be required annually and added as part of the annual transition meeting
 - Budget review/discussion
 - Tentative FA 101/201 revenue is not a line item yet
 - Service charges
 - Can we pass that along to folks - are there implications? (see Archives section above)
 - Annual Conference registration costs
 - Current registration fees: 3 days; \$385 early, \$400 non-member, \$425 late (+\$35 for non-members)
 - CASFAA: 3 days \$625 early/\$725 late 2 breakfasts, 1 lunch, receptions
 - WFAA 3 days \$225 member/\$270 non-member/(\$150 member attending and also presenting), 2 breakfasts, 2 lunches, reception
 - IASFAA 2 days \$125 member/\$200 non-member 3 meals + reception
 - AASFAA 2 days \$250 early bird member/\$409 non-member, \$350 member/\$429 non-member, \$350 late/\$449 non-member, 5 meals
 - PacFAA 1 day \$130 member/\$180 non-member 1 meal (+ annual membership for 2025)
 - Attached to WASFAA conference this year (piggyback)
 - WASFAA 2.5 days, \$535 early bird members/\$735 non-members, \$735 members/\$935 non-members, 2 meals + reception
 - If we were to increase the conference registration costs, what is our goal?
 - What are we offering that accounts for this?
 - We have so many expenses as an organization - could this help us offset these, not specifically to offset direct conference costs?
 - Keeping money available for operational expenses
 - Would it make more sense to increase membership expenses instead
 - Around \$16,,000 in projected expenses that aren't currently covered in the budget
 - 2025 had 10+ late registrations. Possibly increase late registration fee
 - \$50+ increase for late registrations suggested
 - If we do increase conference costs, we would not want to make it a surprise to the membership – making it a long-term announcement and not wait until later in the cycle
 - Membership dues
 - Current: \$35 individual, \$200 institutional
 - WA: \$45 individual, \$200 institutional

- CA: \$75 individual, \$300 institutional
- ID: \$75 individual
- AK: \$40 individual
- AZ: \$35 individual, \$110 - \$150 institutional (scaled per size)
- HI: \$35 individual
- Did shifting to Institutional membership hurt OASFAA by reducing membership revenue?
 - Idea proposed of institutional memberships being tiered according to the number of members in the office
- Can we look at schools that have institutional memberships that we would lose money on going down to institutional memberships?
- Support of increasing late conference registration and our membership rates
 - Would be looking at renewals of March 2026
 - Current late registration is \$400 (after early bird), \$425 on-site (+\$35 as non-member)
 - It would be helpful to know what it's going to cost ahead of time for directors' budget request for the following year
 - Could we have a basic schedule (just bullet points) available early to help drive registrations?
 - Sometimes the mapped out schedule is required for budget approval
 - Plan to have late registration and membership dues finalized in August
- We can increase the rate for job advertisements now – currently \$45, could charge a lot more
- Discounted rate for non-FA memberships - better valuation for them?
 - Concern for charging our communities
 - Want to continue offering services to them and to be partners
 - Wouldn't want the fee to be a hindrance in supporting our students
- Debbie to connect with Layla about dues increases
 - For now let's avoid going the tiered route (would require a vote of the entire membership)
 - Will have numbers before August meeting
- Bringing ideas to the entire membership – what do member institutions need from OASFAA?
 - Can VPs send an email to directors? Debbie to draft language.
 - Seeking feedback from the sectors
 - "We're facing some shortfalls..."
- What grants are available for non-profits like ourselves?
 - Aspire has helped with grant writing
 - Capacity Grant - organizations that serve students
 - Would the community partnership committee count?
 - College Access Grant - Bill 2997 through HECC
 - Community based organizations that served underserved/represented students
 - Donations from large corporations? Ellucian?
 - Carlos willing to take this idea on
- Other Business
 - Strategic plan – fifth and final year
 - Has been difficult to maintain as we're all volunteers and leadership cycles out almost every year
 - The group that finalized the plan is not the same group implementing the plan
 - Final report needs to be put out to membership
 - What is our end-goal with our strategic plan?
 - It would be helpful to see what we are doing that's in alignment with our strategic plan

- It's important that it continues to feel valuable
 - Suggestion that we review/audit the strategic plan sections at the annual final EC meeting at Salishan
 - Keep sections / eliminate sections?
 - How do we keep it working for us?
 - Next Scheduled Meeting: Tuesday, August 5th, Pacific University, Forest Grove, OR
- OSAC Updates
 - OOG has started awarding
 - Budgets are finalized end of session - OSAC has to actively request funds
 - Approved most programs to award at current service level funding
 - OOG is being awarded on a new formula
 - Every tier and sector has a base amount with a tuition differential
 - Estimated COAs were used to calculate
 - Every tier saw an increase
 - Over 41,000 students awarded so far through 2 batches
 - Big increase in FAFSA and ORSAA filing
 - OOG awarding might be a little slow as they push out the date
 - CSL awarding in the next 1-2 weeks
 - Class sizes keep breaking records
 - New students get awarded for Promise first, then renewals
 - Some staffing changes in the OSAC office
 - Modernization is still on pause
 - System will not be changing for this award cycle

2:09PM – Meeting Adjourned: Emory Spence motioned to adjourn, Karen Ash second.