



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

**OASFAA Executive Council Meeting 2025-26**  
**Pacific University, Forest Grove, OR**  
**August 5, 2025**

*Attendees: (in-person) Kyra Matthews, Greg Kerr, Holly Johnson, Erin Rau, Stephanie North, Leslie Lloyd, Shauna Wing, Victoria Mavricakis, Kyna Burgett, Shauna Stevens, Griffin Shaulis, Kathy Campbell, Ingrid Baker, Debbie O'Dea, Frankie Everett, Karen Ash, (Zoom) Breanna Sylwester, Rob Kever, Suzie Petersen, Emory Spence*

Call to order - 10:15 AM

- Welcome, introductions, housekeeping
- Approval of minutes from 4/22/25
  - Motion to approve: Karen Ash first, Kathy Campbell second
- Officer/Liaison Reports:
  - Past-President
    - Attended WASFAA EC meeting
    - WASFAA President's Grant application was reviewed and updated
      - WASFAA to provide trainers, but the states to be responsible for the expenses
    - Karen suggested Wild Apricot as possible replacement for Memberclicks
    - Discussed ways to recognize vendors and sponsorships; recognizing them more in newsletters (possibly a spotlight)
    - Working on a call for nominations for OASFAA awards: Distinguished service, unsung heroes, friends of OASFAA, rookie of the year, etc
      - Created a "save the date" for newsletter while trying to create excitement for awards nominations
  - President
    - Current year goal to host various socials around the state
      - Poll was sent out to solicit feedback from membership for happy hours
      - Plan is to keep locations close to the I-5 corridor
    - Would like to provide training for professionals beyond FA administrators
      - Question for the group: Would a track at the OASFAA conference for campus/community partners be valuable?
        - Breanna and Jenn to send this question out to their community partners this month with the goal of getting feedback from them before conference planning gets underway
    - WASFAA annual conference in HI had over 300 attendees
      - Debbie noted: there were not a lot of breakout sessions
    - Attended SDB Summer Institute for faculty training
    - Attended NASFAA National Conference
    - NASFAA sent out a [fiscal strategies survey](#) to get a feel for how states and regions are managing their money
    - Would like feedback on next steps/wrapping up of strategic plan
      - Will have another breakout meeting to discuss
  - President-Elect
    - Approving listserv emails and working on the ballot to try to get it out earlier this year

- Goal for ballot to be out right before Nov meeting
  - Vote to be done before winter breaks
- Frankie wants to help get folks involved in serving with OASFAA - asking EC for staff recommendations
- Corporate Partner Liaison
  - Surveyed corp business partners for a possible increase to sponsorship (\$150 increase) and possibly combining registration with sponsorship
  - Corp partner budgets are set in October - it's helpful to have those dollars set/allocated before then
  - Suzie Petersen had a meeting with some corp partners. Question was asked: Are we going to increase the cost of the conference registration?
    - Once we know the registration costs we can then create those bundled and tiered amounts for our corporate partners
    - They will discuss levels offline and send this out to the EC
  - Partners have shared that they aren't big fans of the tiered sponsorships with the a la carte items
    - They would prefer an increase with registration added
  - Conference Registration / Sponsorship cost ideas discussed:
    - \$1300 = 1 registration + table (website + newsletter adds also included)
    - \$1500 = 1 registration + table + sponsor a break or newcomers session
      - Holly noted: If we go up to \$1500, a la carte would be the best option
      - Greg noted: Maybe should keep this limited to 2 corporate partners (exclusivity)
    - If a vendor can't make it, maybe there is a table set up for them with their stuff there (minus a person)? Maybe \$300/\$500 to have a table set up with their things there.
    - Additional registration listed as an a la carte item
- Treasurer
  - About \$6000 spent so far in 25/26
    - WASFAA reimbursements to show in 25-26 since they came late
    - Memberclicks renewal about \$7000 due in September
    - Tax preparation around \$2000
  - Shauna Wing noticed we have incorrectly budgeted the non-member costs for conference: should be the cost of registration + membership
  - Shauna Stevens has confirmed credit card processing fees can be passed along as long as we aren't earning any interest on those amounts.
    - Shauna S. to reach out to CC processing company to see what we're covering currently on these fees
    - \$2000 per year currently spent on CC processing fees
    - Will add check-out verbiage to pay either by CC or by check (two payment options, one with processing fee, one without). Processing fee will be a percentage transaction; Shauna to add this to verbiage
  - Discussing reserves:
    - With [NASFAA's fiscal strategies survey](#) recently being sent, Shauna S. has looked into our reserves policy
    - Reserves policy: If reserves goals are exceeded, those funds should be available for use in the next fiscal year
    - Need to decide as an organization how we would spend those dollars in the upcoming year. Our goal is to have reserves available to support one full fiscal year minimum without income.
      - Do we change this goal to keep reserves available to be able to support us longer than 1 fiscal year?
      - Do we build a cap above the 12-months operating costs?
      - Consumer price index can be used as a measure to guide the annual review

- Conference contract is only signed through 2026 conference - if we were to move away from Salishan these reserves would need to be available to cover those costs
  - Our costs have gone up significantly year over year, cutting into our reserves - however we haven't had to pull money out of our reserves in a long time. Year over year earnings have been strong - money has been recouped at a steady rate
  - If we have a less-than reserves policy amount annually, EC reviews expenditures and creates a corrective course of action for the next year
  - Reserves funds need to be made available to membership if we are exceeding our 12-months policy. EC ultimately gets to decide what is done with the access funds.
    - Scholarships would be a smart way to use these funds to get folks involved as we continue to grow the association
      - Idea for a full ride scholarship (including hotel)
  - Want to work towards a point where we are balancing the budget each year - not using the reserves in any way (currently using for scholarship)
  - Ford FF will have final budget approved in Nov - would like to offer a scholarship or drink tickets for OASFAA sponsorship
    - Ford will be upgrading projectors - might be donating their projectors to OASFAA
    - Would need to submit a grant request
- Vice Presidents:
  - Community College
    - Reached out to FA directors to query staff training needs for FA 101/201, areas of concern (cohort default rates, loan proration, workforce Pell)
    - Kathy created some materials after Reconciliation Bill to help provide guidance
      - Biggest concern is having to prorate loans - in a CC, more than half of borrowers are part time
      - Workforce Pell - trying to manage the expectations around this
    - Budget issues in CCs - trying to get positions approved, keep employees
    - Kathy has noticed ED is starting to resume contact with institutions
  - Proprietary
    - Primary concerns with new legislation are 90/10 rule and loan prorations
    - Trying to figure out how to stretch new loan aggregates to cover borrower-based loans
  - Four Year Public
    - Debbie to set up a meeting with 4-year publics
    - Shares similar concerns as other institutions
  - Independent
    - Johanna unable to attend today
    - Sent emails out to gauge interest in FAAC training in Oregon (more than likely in the Salem area)
      - WASFAA and OASFAA will send information out for interested folks to sign up
- Committee Reports
  - Annual Conference
    - Budgeted goal of 100
    - Scholarship decisions to be made earlier this year - this will help us budget out headcount earlier
    - Every committee has at least one new committee member who hasn't volunteered previously
    - July 14th first meeting was held - subcommittees were able to meet
      - Charity sub- committee unable to attend
    - Charity Ideas:
      - Charity related to wildfires/disaster relief
      - Legal aid for immigration
      - Feedback to keep charity closer to Lincoln City (possibly Lincoln County)
        - Local food drive

- Could we connect to school district to find a food pantry program
  - Lincoln Juvenile Justice System (OASFAA has a connection)
  - Karen Ash to send list of Lincoln County connections to conference committee
- Next meeting in September
- Theme Discussion:
  - **Goonies/Pirates**
  - OASFAA-ween
  - Red carpet / movie theater
  - Under the Sea
  - The Office
- Budget Discussion:
  - EC dinner was moved to EC budget
- Community Partnerships
  - Virtual HS night 10/8 in 3 languages (English, Spanish, Russian). Working on getting volunteers and translators
  - Jenn is working on communication for community partners to gauge if they would be interested in attending conference or other training opportunities
- FA 101/201
  - Kathy and Kyna want to increase committee members
    - Seeking presenters - this is a pretty easy way to present (wanting newbies!)
  - Looking at 2 sites - North and South parts of state
  - Dates at the end of October (22, 23, 24)
    - Goal to not have conflicting training happening at the same time (WASFAA, etc)
  - Ingrid to put out call for volunteers
    - Will include position descriptions in email call
- Legislative
  - No recent activity
  - During the last meeting we'd discussed a previously sent OASFAA newsletter or legislative update - can we offer something with state-based updates? (Susan Degan used to offer this with Oregon legislator)
    - Kyra is on a call with FSA every two weeks - could we condense this into headlines? Griffin and Kyra to partner on this
  - Frankie created a legislative listserv on the OASFAA Online site - folks can opt-in or opt-out
    - Griffin and Kyra to write up a blurb in newsletter or an email to general listserv to advertise new listserv
- IDEA
  - Trying to brainstorm digital speakers for conference and/or FA 101/201
  - Debbie gives appreciation for consistent IDEA newsletter - relevant, thoughtful, and timely
  - Advisory Board has lost some members this year (3 people lost)
    - Emory is seeking additional members - Greg Kerr has volunteered on the spot!
  - Question to the group: Do we want to update the style guide for OASFAA?
    - Logo has already been updated
    - Do we want to look at additional brand recognition?
    - Logos/Graphics/Stationary currently exists on page. New logo has been added but other areas haven't been updated in a while
- Archives
  - OASFAA's Google email account is where a lot of things are stored
  - Shauna archiving old reports
- Technology
  - Webhosting domain is good to go until August 2026
  - Frankie has added PowerPoints for annual conference
  - Frankie has been adding WASFAA events to our website to help funnel their events through us

- Conversation about a possible move away from Memberclicks - reminder that we will need membership database cleaned up if we were to transition away
  - 488 active accounts - many deactivated accounts
  - Frankie held a Memberclicks training last week - has been recorded
  - Minutes area of website to be updated - request to check back through individual minutes and send to Frankie
- Fund Development
  - Discussed conference registration costs bundled with sponsorship earlier in corporate partner liaison discussion
- Communications
  - Summer newsletter is almost complete
  - New members to communications committee
  - Greg Kerr question about LinkedIn account - do we need to create a new LinkedIn for OASFAA?
    - Jess and Anastacia are the owners/managers of one of the accounts. Debbie to reach out to Anastacia. Can we get the login owned by the archives email address so we don't lose access to these accounts?
    - Associations have been posting more - this could be a good way to reach a larger population
    - Greg question to group: How as an organisation do we better access social networking sites?
- Membership
  - Not in attendance. Debbie and Frankie to touch base with co-chairs
  - Reminder from Frankie to check to be sure that committee members are actually active members of OASFAA
- Volunteer Coordinator
  - Working with committee chairs to fill any volunteer needs
  - Request to committee chairs to write up short blurbs for position descriptions to help advertise vacant positions
- Site Selection
  - Not in attendance
- OSAC Liaison
  - Legislative session is wrapped up and brought a lot of changes:
    - Oregon Teachers Scholars program criteria has changed. Application reopen until 8/15
    - Workshop drop-in this coming Monday at noon for folks who need help completing application
    - FAFSA or ORSAA need to be submitted by the 8/15 date as well
  - OSAC to hire a new OOG administrator - Kyra has moved into a new position (closes 8/12)
  - SAI limit \$18,000 for (Oregon Promise). Will have a 5/1 filing deadline for this year.
  - A lot of work has been put into modernizing systems - and now the project is unable to be completed
    - OSAC is looking at what they can do with current system
  - ONGSTA screens have been updated - more streamlined and ADA compliant
    - Actively hitting SAVE is no longer required; application will now save as you go

Break for Lunch: 12:45PM - 1:45PM

- New Business
  - Membership Fees
    - During 4/22/25 meeting, we discussed needing a "why" if we're going to change dues. If we're trying to offset conference revenue loss, we shouldn't put that on the entire membership. What is the end goal? Is there a specific gap we're trying to fill?

- Fee structure was last changed in 2018 (estimate) when we introduced institutional memberships. Our current fees are fairly standard for state dues across the country. Creating a tiered membership fee structure was discouraged.
- Kathy Campbell suggests that we increase institutional membership versus individual memberships
- Frankie pulled institutional data in April - almost half of schools have less than 10 members. About 12 schools would be affected by an increase in institutional dues
- Agreement from Holly and Greg that a membership dues increase + sponsorship increase could be hard for corporate partners
- We aren't in a position where we need to increase both membership and conference registration fees at the same time.
- We should start doing some projections for future years' finances. How far down do we want to spend down the reserves? How do we remain fiscally strong?
- Conference Registration Fees
  - Acknowledgement that we need to start making money off of the events that we put on
  - We learned after last year that Salishan can be flexible with us in creating new menu options. We don't know that we would find something cheaper elsewhere if we chose a different event venue for annual conference.
  - Last year we dipped about \$12,000 into reserves for conference
  - We bring in about \$8-10K per year in revenue as an organization - eventually we will have spent those reserves down
  - Agreed upon conference sponsorship rates for corporate partners:
    - \$1200 (table + 1 registration, all existing advertising)
    - Addition of \$500 table w/o sponsor at the table (no attendance)
      - They would responsible to ship their materials there and ship them home
    - Option for \$500 to sponsor a break or reception (limited number of 2)
    - Increase in fees needs a quorum of voters to approve
      - Motion to approve: Frankie; Karen seconded to approve; none opposed
  - Agreed upon conference registration rates:
    - \$385 - early bird, member (no change)
    - \$435 - late, member (\$35 increase from 2024)
    - \$420 - early bird, non-member (no change)
    - \$470 - late, non-member (\$35 increase from 2024)
    - On-site registration option to be removed
  - Late registration to be increased by \$50 from early bird for both member and non-member (essentially implementing a \$50 late fee)
    - Motion to approve: Shauna Stevens, Frankie Everett seconded motion; no further discussion
- Strategic Plan
  - Debbie has been working on drafting the final report to be presented in the Business Meeting in the conference. Question to group: How have we implemented the things we've said we're going to do?
  - Debbie wants to pull together current EC members who were part of developing the strategic plan to touch on what we have accomplished and how we have accomplished those things?
  - Do we have enough information to do the final report or should we create a 1-year extension to continue working on these things next year? After discussion, we've found we are in our final year of the strategic plan. Frankie to deliver a final report as president next year (2026)
- Request from AASFAA Member (Arizona)
  - They are working on their doctorate and sent an ask out to membership to get information on financial aid employability
  - Debbie to forward this out to membership

- NEXT MEETING
  - Early November
  - Virtual
  - Discussion to include Virtual Diversity Training as an EC in this meeting
    - Karen Ash has a contact that could be a good trainer

3:07PM – Meeting Adjourned: Karen Ash motioned to adjourn, Frankie Everett second.