



Oregon Association of Student Financial Aid Administrators (OASFAA)

OASFAA Executive Council Minutes

11/7/2024 at Linn-Benton Community College

Attendees:

Karen Ash, Leslie Lloyd, Debbie O'Dea, Ingrid Baker, Griffin Shaulis, Kyna Burgett, Shauna Stevens, Frankie Everett, Kathy Campbell, Elizabeth Soto, Johanna Kaye, Greg Kerr, Layla Solar, Shauna Wing, Hallie Price-Asadare, Karinda Decker, Karen Forbert, Kyra King, Suzie Peterson, Carlos Villarroel, Erin Rau

Call to order 10:10

Welcome, introductions, housekeeping

Minutes from 7/23/24

Officer/Liaison Reports

- **Past President** - WASFAA IDEA rep and happy that Hallie is also on this board. WASFAA and OASFAA should be collaborating together. WASFAA has a budget for OASFAA. WASFAA training and 6 attended the FAAC exam. Proctoring for the FAAC has changed. Contract is set for the conference. Carlos sent out an email for nominations - send Carlos anyone that you may have. We also need more sessions for the conference.
- **President** - Been working with the IDEA Committee. WASFAA EC Meeting in Portland. Looking to jump start legislative work by using the NASFAA State advocacy toolkit. Looking at weaving in cultures of Oregon into our conference. How does OASFAA weave our culture into our conferences? WASFAA challenges: Volunteer and committee members. WASFAA has moved to co-chairs and that has helped in the heavy lift. WASFAA created a chat feature for the EC to allow those who are part of the EC have an easy connection. One state is stepping away from FA101/201 - now offering the NASFAA credentials instead. If they offer a scholarship for specific events, they ask the recipient to give back (present an idea or create a presentation, or work at the welcome table, etc). WASFAA has sunset their strategic plan. Now using HOSHIN planning - select key people from WASFAA and identified problems to address in the future. WASFAA Future conferences are set for the next 5 years. 2025 - Hawaii (3 for sure going on OASFAA EC, and a few others here and there). 2026 - CA. 2027 - Alaska. 2028 - Idaho. 2029- AZ. Sister Dale Brown Summer Institute - June 10 - 13 in San Diego. WASFAA worked to define membership levels (lifetime membership, honorary membership). Submitted proposal for Presidential Grant funding for \$2,500 - will go towards the annual conference committee, this will help with the WASFAA trainers that are coming in. Suicide prevention walk last month - and a few people joined!
- **President Elect** - Working on ballot for EC for next year. Harder each year to fill the ballot - if you know people, encourage them to reach out to Debbie. Every position is open - please see email from Debbie on October 28. Need help from our current VPs and look for two people who can step into the role of VP in your sector. Looking for at least two people on the ballot for each open position. Ideas for creating interest in EC: Zoom session to learn about positions in OASFAA? If each elected person could send a write up about the position, that could go out as a special email to see about nominations. President from OASFAA send email to directors around Oregon asking for nominations. Could do a video of why we love OASFAA and post that on social media. Send Frankie a 30-60 second video about your position and she can put something together. LinkedIn or Facebook? Who is the admin at LinkedIn? Karen Forbert to look at the LinkedIn access because she works with Anastasia who is the administrator.

- **Vice Presidents**

- For profit - Reached out to Shelly at Sumner to see about running for VP, also reached out to someone in Shauna's office. If you have any connections, reach out to Shauna Wing.
- Four Year - Met with some state representatives the last few months. Chair of HECC on campus and talked through GE and some other challenges. Met with State Rep Zack Hudson and met with Government Relations - and SOU will use those conversations to help push some sort of top FA topics at the state level. Spent some time advocating for FA.
- Private - No updates
- Two year - Not present

Side conversation:

How do we show the value of in OASFAA? What can we do to partner with OSAC to support the proprietary sector? How can we show them value? What does the proprietary sector value? Training at their institutions - maybe if we go to them?

Had Aspire conference and some sessions were put on by NCAN. National College Attainment Network - they help students access education.

- **Corporate Partner Liaison** - Attended WASFAA and Washington ASFAA. Will attend CA next. One proposal from Earnest and Raymond at Sallie Mae will be submitting another proposal request.
- **Treasurer's report** - Not a lot has changed - FA101/201 event brought some activity. Waiting for a check from BEC. Taxes have been filed and sent out to Oregon for the state filing. Received check from WASFAA and is counted in income for this year. Waiting on a few outstanding invoices from FA101/201. One error and will be corrected soon. Investment account is up. Checking account on target for what is expected. Working on insurance renewal. Might add misc income line to account for the WASFAA funds for conference committee.

Committee Reports

- **Annual conference** - Theme - We GLOW - working on a logo. Pacific University students may want to help publish logo. Have a meeting next week with some EC members about food costs. Thinking of food for 80 people. Planning to have dinner off sight for EC and head into Lincoln City. Simply offering coffee, tea, and water at breaks and provide snacks in the bags for registration. Discussion about the president's reception and president's party. Maybe combining the reception and party? Budget for the conference is set at \$30,000. We have 12 sessions currently, with more coming in. WASFAA trainers and credentialing. Sending out another email soon. Charity was announced - Shadow Project. Secured our Key Note - their Bio is in the report that Shauna W sent. Karaoke Contract is confirmed. Still working on the app for the conference agenda. People need to make hotel reservations via phone instead of online due to challenges last year. Carlos handles the scholarships for the conference. Karen A to share WASFAA proposal for grant we received with Shauna. Ford Family Foundation committed to a registration scholarship- go to someone from a rural institution. Offering some credentials - maybe do the FAAC training. Ask those who need to earn recertification points to help with FAAC. We have had some community partners - if someone would like to present on something our community partners would appreciate. For the Future? Could we do a one day drive in with our high school partners. Thinking of training for high school partners.
- **Community Partnership**
- **FA 101/201** - attendance was smaller than we had hoped. Had two good training sessions. Small groups for the 201 - had good conversations. More than half of the presenters were brand new presenters. Pushed annual conference, volunteering, committees, etc. A few attendees asked for a certificate of attendance. How does this work? Ingrid has a template that we could use. Could use our Canva account for event participants. It would be appropriate to give to participants.
- **Legislative** - Started conversations about GE and FTV. Began conversations but then elections happened and some of the conversations fizzled out. Will get together with Karinda and get some names to reach out and get more conversations going.

- **OSAC Update** - 2024-25 FAFSA year - closed the gap for FAFSA rates - up 2.9% over last year. Held Aspire Conferences, career college and college readiness. Working to partner with DHS and creating resources. Oregon OSAA to expand outreach efforts at events. Re-initiated monthly newsletter - sign up on the website. Looking forward to the budget from the governor in January - not expecting any big updates to funding. Erin will submit sessions for the OASFAA conference. No updates on the bill side. Continuation of modernization needs more time and work and funding.
- **IDEA Advisory** - this work is ongoing. Next email is going to focus on native american culture month and trans month. BIG THANK YOU to the committee members. Thinking about conference sessions on neurodivergent - maybe one of our 9 tribes would donate some posters, material that we could provide at the conference. Looking at doing an IDEA Logo? WASFAA did this and it created excitement. Want to do an Oregon Social Justice training - but this is hard to sustain.
- **Archives** - Still working on digitizing the two videos from last meeting. Going through the printed materials. Working on getting the information onto Google Drive.
- **Fund Development** - \$750 annual conference for table, and newsletter. If we were to charge \$1,000 maybe they would then be able to sponsor a meal/break. Doesn't seem that hosting break/meal has been going over well. It may be easier to obtain sponsorship up front for the conference rather than going back and asking for more money. Holly got some quotes for SWAG for annual conference - need to talk to annual conference if corporate partners want to help support SWAG. \$1,200 booth, registration bags, mugs, etc. Cannot find the "Coffee Lady".
- **Technology** - Added WASFAA president as a lifetime member. Updated the pages when there are new chairs. If you have people on your committees make sure they have paid their membership dues. Annual conference page has been updated.
- **Communications** - New person to help with the newsletter - Kyra! There is a good size committee to help as she acclimates.
- **Volunteer Coordinator** - Trying to figure out how to best support OASFAA. Been working on position descriptions. Looking at several areas as to what roles do people serve within the committee. Jenn Satalino has been working with Ingrid to beta test building out position descriptions.
- **Site Selection** - Site selection will have no change for 2026. In 2027 we will need to review things. Would like to make site selection a chair (past president serves in conjunction with the chair), and not just a past-president task. Sell sweatshirts, hats, etc? Sell old SWAG from prior years? If we want to stay at Salishan, we have to find ways to pay for it. Do more events? Summer Drive in? Zoom training - \$20 session and it's just an hour or so. Could the trainers who do the WASFAA Training do the same/similar training at OASFAA.

TO DO:

- Carlos to review bylaws to create a new Site Selection Chair (serving with the past president). Will get back to the EC in the next few weeks. Would like to vote on this at the next meeting.
- Kyra, Karen F and Frankie to look into getting LinkedIn sorted out and working.
- Greg, Susie, Holly to work on a funding schedule for \$750, \$1,000, \$1,200 if they want to have more involvement at the conference (provide SWAG). Report back to EC in the next few weeks.
- Shauna updating P&Ps

New Business

Modern Logo - official adoption? - Ingrid Baker passed out the two logos. Can we make a decision to update to the more modern logo? After discussion we decided that for consistency and accessibility we will move forward with the new logo. Things to be updated: website, powerpoints, letterhead, etc. Frankie will update the website.

Other Business

Conference registration fees - some places charge a service charge. Do we want to increase our prices to help cover credit card processing fees. This may help as last year we spent \$2,400 in credit card processing fees. Shauna will look into what this might mean for charges moving forward.

Next scheduled meeting

January 28, 2025 3 pm at Salishan