AASFAA
ARIZONA ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS

Quarterly Board Meeting
2025-2026 Executive Council
10/08/2025

I. **Roll Call/Attendance (*denotes voting member)**:

President* Josh Edwards **Past President*** Caleb Williams **President-Elect*** Aurie Clifford **Vice President*** Jose Chavira **Secretary*** Esther Cuellar **Treasurer*** David Donderewicz **Treasurer-Elect*** Joelle Blockmon **Rep at Large*** Rebeca Ronstadt-Contreras **Rep at Large*** Katy Francis	**Training Co-Chairs -** Jose Chavira **Communications -** Hillary O'Donnell **Awards & Scholarships -** Karla Gonzalez **Membership -** Kenna Hamilton **Vendor Relations-** Dianne Fulmer **Fiscal Planning & Development-** David Vikander **Awareness & Outreach N/A** **IT/Web -** Melissa Stoddart **Conference Co-Chair -** Wesley Tolliver

Not in attendance: Rebeca Ronstadt-Contreras

Quorum met: Yes

II. Meeting was called to order by President Josh at 10:07am

III. Approval of Minutes from previous meeting (July Board Meeting)

- Past President Caleb motion to approved. President-Elect Auire to second. Previous meeting minutes approved by vote

IV. Old Business - Quick update from Board Members and Chairs/Quarterly Reports

- **Past President**: No update
- **President** Josh:

What do we wish we had the courage to do (looking back in 10 years)?

How can we be smarter as a board/association in 3 years?

- Visioning & Board Suggestions:
- Be more action-oriented
- Develop/maintain a procedure manual
- Improve membership-treasurer collaboration (David)
- Build strategic plan & update roster (Aurie)
- Create a Procedure Manual
- Have a co-chair for each committee with overlap between years so there isn't a brain drain
- In-Person bank meeting during the conference to complete transition of signees, card holders
- Write 1 page description for each EC position
- blog
- Track engagement/click rates (Melissa)
- Explore peer mentoring & sustainability (Karla)
- Create space to share member challenges (Katy)

- Offer bootcamp training for new members (Matthew)
- Regular data reviews and target ways to get members to open emails
- Peer Mentoring
- Strengthen website presence
- Operations calendar
- Publicize membership fee due dates, operations calendar, and strategic plan on our website
- Motion made at 11:06am: Josh to distribute compiled action items via email
- Second made at 11:06am: Aurie
- Call to vote
- Result: Vote passed unanimously at 11:07am

– **Vice President** Jose: No updates

-**President Elect** Aurie:

- Mayors Office of Phoenix contact AASFAA requesting representation at a town hall meeting. Aurie and Jose to serve on this panel
- Workforce pell: AASFAA will be representing this committee

-**Conference Chair** Rachael:

- Dates: Mar 31–Apr 1
- Budget: Under $21,000
- Registration Fees:
    - Early Bird: $200
    - Regular: $300
    - Email vote on conference fees needed – no vote was motioned
- Vendor Fees: No change
- Hotel Blocks:
    - 60 rooms @ $209
    - 50 rooms @ $169 (Aloft)
- Considerations:
    - Group rates
    - 1-day pass options
    - Board member discounts
    - 10 complimentary rooms for board members
- Volunteer email sent – 8 responses received

– **Conference Co-Chair** Wesley: No Updates

– **Rep at Large** Katy: No updates

– **Secretary** Esther: No updates

– **Web/IT** Melissa: Awaiting final plans to launch registration via Google Forms

– **Fiscal Planning and Development** David V:

- Josh motioned to extend conversation by 5 minutes
- Second: Caleb
- Result: Motion passed unanimously
- Explored CD investment options
- Discussed: Chase 5-month CD for $50K

- Melissa asked about interest rate on our Chase Checking and Savings accounts
- Idea was suggested by Wesley to investigate an online banking account with a high yields savings
- Josh Motioned to Postpone Decision on online banking account with high yields savings until end of October at 11:26am
- Motion seconded by Wesley 11:26am
- Discussion followed Wesley's second and Josh's motion was not called to vote
- Aurie motioned at 11:26am to vote on 5-month Chase CD for up to $50,000 in order to have money working for us while we determine online banking options.
- Motion Seconded by Caleb at 11:27am
- Call to Vote
- Result: vote passed unanimously at 11:27am to open 5-month Chase CD at 3.3% for up to $50,000.

  -Spring Conference 2026 – Planning Update
  - Location: Tucson
    - No hotel rooms for Tucson-based attendees
    - Room sharing: 2 per room
  - Projected total Revenue for AASFAA: $44,600
  - Requested $5,000 WASFAA State Presidents fund to send our Treasurer-Elect and President-Elect to 2026 NASFAA Leadership expo
  - Scholarships for conference: Will be available using leftover WASFAA State Presidents Fund from AY2025. Total amount is $850 leftover
  - NASFAA Credentials: $1,000 for Verification and SAP
  - Motion made at 11:37am (Josh): purchase NASFAA credentials Verification and SAP
  - Second made at 11:37am: Esther
  - Call to vote made
  - Result: Vote Passed Unanimously at 11:38am

– **Treasurer** David:

- General overview provided using Statement of Activity and StatementofFinancialPosition quickbook documents.

V. New Business: Removal of Treasurer-Elect

Discussion: President Josh presented a motion to remove Joelle Blockmon from the office of Treasurer-Elect in accordance with Article V, Section 3 of the AASFAA Bylaws, citing non-participation in Board duties from May 2025 through the middle of October 2025. Discussion followed.

Motion: Moved by Josh seconded by Caleb to remove Joelle Blockmon from the position of Treasurer-Elect, effective immediately.

Vote: Approved by majority vote of 6 votes on 10/20/25 at 5:00pm

VI. Meeting Adjourned at **Noon**

- Motion to adjourn made by Josh at 12:01pm
- Motion seconded at 12:02pm by Caleb
- Call to Vote

- Result: Vote Passed Unanimously at 12:02pm