

OREGON CREDIT UNIONS

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Q2 2024 Meeting Notes

Oregon Governmental Affairs Committee Q2 2024 Meeting Notes – April 10, 2024 Advantis Credit Union

Co-Chairs Jason Werts and Matt Stephenson welcomed Committee members to the Q2 meeting of the 2024 Oregon Governmental Affairs Committee and introduced guests.

The meeting began by welcoming District 3 Congressional Candidate, Gresham City Councilor, Eddy Morales.

State Legislative & Political Strategy

Pam gave an update on State Legislative & Political Strategy. We discussed the wrap-up of the 2024 legislative session. Members received a copy of the report in March. The State Issues Working Group will begin their work in May, and we are still requesting credit unions to participate. Pam also gave an update on the implementation of SB3 with the Department of Education.

In Stacie's absence, the Chairs review the PAC report included in the meeting packet. Oregon credit unions continue to excel in state and federal PAC fundraising although since 2020 our annual fundraising numbers continue to decline.

OR Shared Prosperity Initiative Update

In late 2022, a group of credit unions came together to discuss our collective work in serving underserved, low-income Oregonians. The group set goals of undertaking joint efforts to engage in research, analysis, and idea sharing to enhance, promote, and further credit union service to underserved groups and communities. These efforts are referred to as the Shared Prosperity Initiative (SPI). Scott Mulkins, SVP of Analytics and Enterprise Risk, Rogue Credit Union & Pilot Project CUs presented the first data report from the group's endeavors. The Pilot Credit Unions include:

Advantis Community CU
Consolidated Community CU
OnPoint Community CU
Point West CU
Rivermark Community CU
Rogue Community CU
GoWest Credit Union Association, Facilitator

Federal Issues

John Trull provided an update on the actions taken by CFPB related to overdraft fees and the Association's response to date. John asked for feedback from the Committee and asked what steps credit unions have taken to prepare for potential messaging on the issue. Members discussed their approaches to ensuring that reporting is accurate and community engagement is emphasized.

John stressed the importance of being prepared in the event it becomes an issue in Oregon.

Ryan provided an update on the Federal Issues Work Group recommendations. Jim moved to approve federal issues recommendations. Jeremy G. seconded the motion. Motion carried.

Ryan provided an update on federal legislation, including recently released data privacy legislation. He updated the Committee on election engagement with candidates in the GoWest region.

The meeting continued by welcoming District 3 Congressional Candidate, Former Multnomah County Commissioner, Susheela Jayapal. Rep. Maxine Dexter was not available for our meeting, but a small group of credit union leaders are meeting with her in the next couple weeks.



The meeting concluded with a networking lunch followed by an informational meeting related to credit unions and IOLTA Accounts.

Participants:

Heather	Billings	OCCU
Kevin	Cole	Mid Oregon CU
Nathan	Cox	InRoads CU
Larry	Ellifritz	Consolidated Community CU
Erik	Fedler	Central Willamette CU
Kyle	Frick	Mid Oregon CU
Heather	Friend	Embold CU

Aaron	Goff	Embold CU
Mark	Gonzalez	NW Priority CU
Laura	Hansen	Rogue CU
Melva	Mackey	TwinStar CU
Jen	McMurray	Advantis CU
Wendy Beth	Oliver	OnPoint Community CU
Chad	Olney	Pacific Crest FCU
Ken	Olson	Old West FCU
Justin	Olson	Forrit CU
Chylon	Pappas	First Tech FCU
Ken	Riedel	Unitus Community CU
Jason	Werts	Advantis CU
Matt	Stephensen	Rogue CU

GoWest Staff:

Troy Stang, President & CEO
Jennifer Wagner, Chief Advocacy Officer
Ryan Fitzgerald, SVP, Advocacy
Pam Leavitt, SVP, Grassroots/Political Programs
Jordan Beyer, AVP, Grassroots Engagement
John Trull, VP Regulatory Advocacy
Maddie Robertson, Director, Federal Legislative Affairs
Gracie Nelson, Manager, Regulatory Affairs
Chris Kemm, AVP, Political Engagement