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**Minutes of the Oregon 529 Savings Board**  
**May 16, 2024**

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Members Present: Dr. Robin Holmes-Sullivan  
Brett Turner  
Treasurer Tobias Read, Chair

Network Staff: Ashley Daigle, Strategy and Program Director  
Kasey Krifka, Marketing and Communications Director  
Caitlen Laue, Operations Director  
Ryan Mann, Executive Director  
Renzo Meza, Outreach Manager  
Missy Simpson, Program Coordinator  
Stephanie Swetland, Plan Specialist  
John Valley, Policy and Outreach Director

Others Present: Ryan Fitzgerald, Sellwood Consulting  
Kevin Raymond, Sellwood Consulting  
Doug Magnolia, Vestwell  
Matt Konopinski, Vestwell  
Sinan Basagic, Vestwell  
KC Anderson, Thesis  
Soohyang Lee, AKF Consulting  
Peter Rector, Oregon State Treasury  
Annie Gregori, Oregon State Treasury  
Sara Bayes, Oregon State Treasury

The meeting was called to order at 1:05 pm by Treasurer Read.

**Agenda Item 1 - Review and approval of the February 22, 2024, Board Minutes (ACTION ITEM)**

**MOTION:** Board Member Brett Turner moved to approve the February 22, 2024, Board minutes, seconded by Board Member President Holmes-Sullivan. The minutes were approved by a 3/0 vote.

**Agenda Item 2 – Board Member Report (INFORMATION ITEM)**

There were no Board Member reports.

**Agenda Item 3 - Executive Director's Report (INFORMATION ITEM)**

Ryan Mann, Executive Director, reported to the Board that the filming of all the video testimonials have been completed. There were 15 interviews that took place over three days. These videos are part of the marketing strategy to have people see videos of real people saving in the Oregon College Savings Plan and the Oregon ABLE Plan. The interviewees were from across Oregon, including Ontario, Klamath Falls, the South Coast, and Central Oregon. Work on the revamped website for

the Oregon College Savings Plan has also been completed and is now live and includes 14 different languages as an option, making the website more accessible.

**Agenda Item 4 – 2024 Security Strategy (INFORMATION ITEM)**

Matthew Konopinski, Vestwell, gave a presentation on the 2024 security strategy for OregonSaves, which included the cybersecurity landscape, risk focused security, and the security tooling and utilities being used. A copy of the 2024 Security Strategy presentation is part of the records for this Board meeting.

**Agenda Item 5 – Quarterly Data Report (INFORMATION ITEM)**

Ryan Fitzgerald, Sellwood, gave an update on the program data report, which included the program overview, newly opened accounts versus peers, and newly opened accounts by county. A copy of Mr. Fitzgerald’s presentation is part of the records for this Board meeting.

**Agenda Item 6 – OCSP & ABLE Update (INFORMATION ITEM)**

Doug Magnolia, Vestwell, highlighted the platform and user experience improvements that were made the last calendar year. A copy of Mr. Magnolia’s presentation is part of the records for this Board meeting.

**Agenda Item 7 – Communications Update (INFORMATION ITEM)**

Kasey Krifka, Marketing and Communications Director gave an overview on Q4 marketing, which consisted of the strategy and campaign overview, a lookback of 2023, and a preview of the 2024 marketing plan. A copy of the Marketing Overview for Q4 is part of the records for this Board meeting.

**Agenda Item 8 – Investment Performance Report (INFORMATION ITEM)**

Kevin Raymond, Sellwood Consulting, gave an overview of the US market and Ryan Fitzgerald updated the Board on the investment options offered in all three plans. A copy of the Investment Performance report is part of the records for this Board meeting.

**PUBLIC COMMENT:**

There was no public comment.

The meeting was adjourned at 3:18 pm