



# The Paper Trail

Paul Tyler, Editor

The Ohio Bursars Association  
[www.ohiobursars.org](http://www.ohiobursars.org)

## The President's Corner

By Steve Sherbet  
 University Bursar & Director of Treasury Services  
 Wright State University

As I write this column, Fall Term is upon us- one of our busiest times of the year. If you're like me- enrollment has increased once again at a time when staffing levels have been reduced. We continue to be challenged to process more work with fewer resources or in other words- work smarter, not harder. Sometimes that's easier said than done!

As Bursars we work in challenging, yet exciting times. **Challenging** because we must find ways to maintain or even improve services with limited resources. More than ever before we operate in a "fishbowl environment" where we will be scrutinized by Federal and/or State government, internal and external auditors as well as the general public and each sector will demand a greater level of accountability. **Exciting** because we have a unique opportunity to influence and revolutionize the way services will be delivered to our students. Certainly to be successful, we must bring the skills of leadership, creativity and collaboration to the table. Are you ready to meet this challenge?

One way to be successful is through active participation in the Ohio Bursars Association. This summer your Board of Trustees held a summer retreat at Deer Creek State Park and mapped out an aggressive schedule of activities for the upcoming year. First, the Association's Constitution and Bylaws have been updated to reflect prior

amendments passed by the general membership. We plan to have the bylaws available on the OBA web site in November. Dave Necessary and Georgia Gichenko have worked diligently to update our promotional materials in preparation for our annual membership drive and we will show you these new items at our fall meeting. Paul Tyler is also working to have our membership application available on the web site as well as provide members with the opportunity to submit address, telephone/fax number and email address changes through the web site. We also finalized plans for the "Ohio Bursars Association Scholarship in memory of Nancy Graft". A detailed report regarding how this one-time award will be made will be provided at our fall meeting. In addition, the following "Standing Representative" appointments have been made for this year:

**COHEAO**

Dave Necessary, Univ. Dayton

**OACUBO**

Larry Hoffman, James Rhodes

**OASFAA**

Joe Fries, Student Loan Funding

Our **Fall meeting on October 22** (see agenda elsewhere in the Paper Trail) will offer timely presentations and again OBA will furnish lunch so that we can maximize our time together! Sessions will include a presentation on Graham-Leach-Bliley by David Stocker, Associate General Counsel- Sallie Mae Corporation as well as a panel discussion on 1098-T processing and reporting. In lieu of our normal breakout sessions by institution type, we will feature three roundtable discussions by subject area.

Topic 1 is “*Dear Bursar*” where you will have an opportunity to ask any bursar-related question (within reason!!) to the group. Topic 2 will deal with issues relating to the “*State Attorney General’s Office and Collection Concerns in General*”. Topic 3 will focus on “*How to Prepare and Replace Key People within Bursar Operations*”. Each topic will be discussed twice and each session will last 25 minutes. This will give everyone an opportunity to participate in two of the three topics. Bring your thoughts and issues to these roundtable discussions so that we can find the solutions together!

As you can see I’m fired up and looking forwarding to an exciting, action-packed year. I’m also interested in hearing your ideas on how we can improve OBA as well as better meet your needs. Please email your thoughts and suggestions to me (day or night) to: [steven.sherbet@wright.edu](mailto:steven.sherbet@wright.edu) Here’s hoping your fall term is off to a successful start! See you next month in Columbus at the Embassy Suites!!

## OBA Board of Trustees 2003– 2004

**President:** Steve Sherbet, Bursar, Wright State University,

**President Elect:** Sherry Downs, Bursar, Ohio University

**Past President:** Paul Tyler, Bursar, Baldwin-Wallace College

**Secretary:** Nancy Colman, Bursar, Bowling Green State University

**Treasurer:** Debora Jones, Director of Collections, University of Cincinnati

**Four-Year Public Representative:** Ginny Layton, Bursar, Miami University

**Four-Year Private Representative:** David Necessary, Bursar, University of Dayton

**Two-Year Public Representative:** Larry Hoffman, Controller, James A. Rhodes State College

**Membership Chair:** Georgia Gichenko, Associate Bursar, Cleveland State University

**Associate Member Representative:** Scott Medley, National Accounts Executive, General Revenue Corp.

### From an Outsider’s Viewpoint - Check it Out!!! Doonesbury Strip!

[http://www.doonesbury.com/strip/dailydose/index.html?us\\_full\\_date=20030914](http://www.doonesbury.com/strip/dailydose/index.html?us_full_date=20030914)

Make sure that the date is Sept 14 if the strip does not load properly and you come up with the current date.

## Fall Meeting Oct. 22, 2003

### Board of Trustees Meeting - October 21

(Officers/Trustees Only) 3:00pm- Embassy Suites

**Location:** Embassy Suites, 2700 Corporate Exchange Drive, Columbus, Ohio 43231

### Directions:

The Embassy Suites Hotel is located on the north side of Columbus at the intersection of I-270 and Cleveland Avenue. Take exit #27 Cleveland Avenue off I-270.

**Special Note:** A limited number of special room rates are available on Tuesday evening, October 21. Rate is \$109.00 plus applicable taxes.

To reserve a room, call 1-614-890-8600 and ask for the Ohio Bursars Association Special Rate!

## October 22 Agenda

9:00am – 9:45am Continental Breakfast

9:45am – 10:30am Business Meeting

President’s Welcome

Secretary’s Report- Nancy Colman

Treasurer’s Report- Deb Jones

Spring 2003 Conference Wrap up

COHEAO Report- Dave Necessary

OACUBO Report- Larry Hoffman

OASFAA Report- Joe Fries

### **Old Business:**

OBA Scholarship in memory of Nancy

Graft- Dave Necessary

Website update- Paul Tyler

Other old business

### **New Business:**

Presentation of Proposed Amendments

& additions to Constitution & Bylaws

Membership Report- Georgia Gichenko

Winter 2004 Meeting

Spring 2004 Conference

Other new business

**10:30am – 10:45am** Morning Break

**10:45am - 12:15pm**

Presentation on Graham-Leach-Bliley

Act by David Stocker, Associate General

Counsel- Sallie Mae Corporation

**12:15pm – 1:15pm**

Lunch provided by OBA

**1:15pm – 2:30pm**

Panel Presentation on 1098-T processing and reporting

Panelists: Robin Adams- WSU, Nancy Colman- BGSU  
Ginny Layton- Miami of Ohio, Dave Necessary- UD

## Fall Meeting Agenda, Continued---

### 2:30pm – 3:30pm

3 roundtable breakout sessions by topics  
Topic 1- “Dear Bursar”  
Topic 2- State AG’s Office/Collections  
Topic 3- How to prepare and replace  
key people within the Bursar’s Office  
3:30pm Adjourn

## **Proposed OBA By-Law Changes**

The membership will be asked to vote on the following proposals at the Fall, 2003 meeting as presented by the Board of Trustees.  
Please review these proposals and be prepared to vote or discuss at the meeting.

### **Article VI**

#### **Officers, Section D-Duties of Officers**

##### **Subsections D7a, D7f, D7f1, D7f2**

Proposed:- Change Past President from Non-voting to Voting position. With Addition of Membership-At-Large Representative, board is 8 members and a voting tie (4-4) is possible without this change. Change eliminates that possibility.

Recommendation: Yes Vote

### **Article VII**

#### **Board of Trustees, Section B-Organization and Rules**

##### **Subsections B1, B3, B4**

Proposed: Adding responsibility for Web Site to Past-President’s Duties. This is in addition and in concert with publication of the Paper Trails.

Recommendation: Yes Vote

### **Article IX**

#### **Rules of Order, Section C- Board of Trustees Quorum**

Proposed: Change majority vote on the Board of Trustees from 4 to 5 as well as change the quorum requirements from 4 to 5 voting members in order to conduct official business.

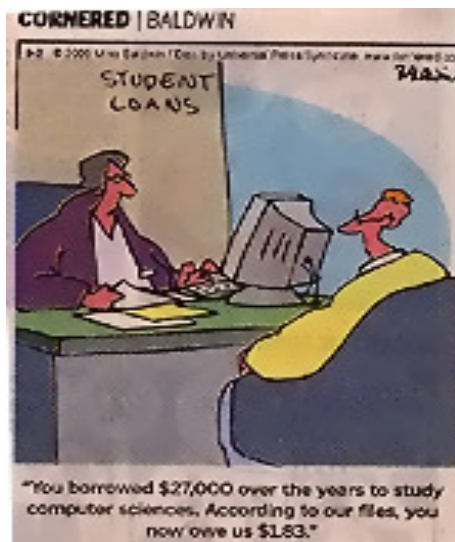
Recommendation: Yes Vote

### **Winter OBA Meeting**

February 4, 2004 at the Embassy Suites North

Board of Trustees Meeting Feb 3, 2004

## *The New Student Loan?*



### Editors Notes:

#### **Fall & Winter 2003 Meetings**

No registration required and a Free Lunch. Go figure!

We would like to see you all at our Fall and Winter meetings this year at the Embassy Suites North, Columbus, Ohio.

Networking with your colleagues from throughout the state is a great way to learn and share. This is your organization and we need your presence, your participation and your perspiration. Let’s keep it happening! Bring a colleague from a school that is not currently a member of the OBA. Show them what we are about.

It is important that each of you make sure that our Treasurer, Deb Jones, has a complete and accurate e-mail address so that you will be able to receive the Paper Trails Newsletter and other important notices that the OBA may have.

### **Spring OBA Conference**

April 12-14, 2004

Hosted by Ohio University, Athens, Ohio  
Sherry Downs, Bursar