

The Paper Trail



Paul Tyler, Editor
Bursar, Baldwin-Wallace College

www.ohiobursars.org

**The Ohio Bursars
Association**

The President's Corner

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

Happy New Year! I hope everyone had a chance to relax during the holiday season and enjoy time with family and friends. With the New Year upon us, this is also a great time to take stock of what we were able to accomplish last year and what we hope to accomplish in 2004. Have you set your goals and are you ready to get started?

Looking back at 2003, we can be proud of our Association and the many initiatives that were accomplished. But it's up to us to keep the momentum going. On the Federal level, Title IV Reauthorization will be at the forefront as Congress will determine what programs to continue and at what funding levels. For the moment it appears as if the Federal Perkins Loan program is "safe". However, this can always change as reauthorization moves through the legislative process. As stakeholders in education, we need to stay informed and make our opinions known to our elected officials.

On the national and state level, the economy has improved and it appears that Ohio will not need to make a mid-year budget cut as in past years. While this is good news for public institutions- we are far from being "out of the woods". The "cost of education" continues to be looked at from many different perspectives and the pressure will remain on our institutions to find

more efficient ways to deliver higher education to our constituencies.

To help us meet that challenge, OBA will feature two timely topics at our winter quarter meeting (see full agenda elsewhere in the Paper Trail). Ed Mills, Executive Director from Cleveland State University will discuss the role of "one-stop student services in a web based environment". Ed has extensive experience with the one stop student services model having served as a consultant to higher education prior to joining Cleveland State. The second topic will discuss the impact of Check 21 aka Check Truncation Act recently passed by Congress. Specifically this presentation will discuss how check truncation may impact lockboxes and how check payments can now be processed at a reduced cost.

We will also feature our traditional roundtable discussions where you will have the opportunity to network with your peers and receive the answers to your questions. The following individuals will facilitate the roundtable discussions:

Four Year Public Institutions:

Ginny Layton- Bursar, Miami University

Four Year Private Institutions:

David Necessary- Bursar, University of Dayton

Two-Year Community College:

Larry Hoffman- Controller, James Rhodes

Associate Member Roundtable:

Scott Medley, General Revenue Corporation

Please plan to attend and participate in our discussions. Lunch again will be provided by OBA so take advantage of this low cost networking opportunity! See you next month at the Embassy Suites- Columbus.

Note: I wanted to make everyone aware that Sandy Miesmer, Associate Bursar- Bowling Green State University retired in December 2003. Sandy was a long time member of the Ohio Bursars Association having served on the Board of Trustees as Secretary and Four Year Public Representative. At her retirement party, the OBA presented Sandy with a certificate and letter of appreciation for her many years of service to both OBA and Bowling Green State University. On behalf of OBA, I wanted to acknowledge and thank Sandy for her many years of loyal and dedicated service and to wish her well in her new endeavors. Congratulations Sandy- we will miss you!

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 At-Large Rep.: Georgia Gichenko, Associate Bursar, Cleveland State University

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

Winter Meeting Feb. 3-4, 2004

Board of Trustees Meeting - February 3

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

General Meeting February 4

Open to all members and guests. Registration not required. Lunch is provided. No cost.

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. 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!**

Member Spotlight

Associate Member Representative

Joshua Scott Medley, Regional Account Executive, GRC

Scott has more than 18 years of experience in the student loan industry and student loan collections. He is an award winning trainer and is an ACA certified collector. Scott has held a number of positions at GRC including: Collection Manager, Assistant Contract Administrator for the Department of Education contract, Section Manager, Unit Supervisor, Senior Recovery Specialist, and Recovery Specialist.

In his sales capacity, he is responsible for: new clients in the states of Ohio, Kentucky, Indiana and Michigan. He serves as GRC's regional contact for institutions in the states listed above and also serves as an information and service resource for clients in a four state region.

Scott represents GRC at regional conferences and seminars relating to the educational community and the management of student debt while communicating the needs and expectations of GRC's clients to management and staff at corporate headquarters in Cincinnati, OH. Over the years Scott has been involved with and developed and implemented corporate coaching/mentoring program. In addition, he is the Co-Author of GRC's Recovery Specialist Training curriculum. He developed competency based final exams for GRC's Recovery Specialist training and Quality Leadership curriculum and Programs.

Scott graduated with a degree in Business Administration / Marketing, from Miami University,

Oxford, Ohio. In addition to his membership in the OBA, he is also a member of the following organizations; KASRO, Kentucky Association of Student Receivable Officers, IACUBO, Indiana Association of Colleges and University Business Officers, and ACA, American Collectors Association.

Scott and his wife, of 10 years, Julie, reside in Cincinnati and have a daughter, Carley age 9 and Son, Michael age 3.

Editors Notes:

Winter 2003 Meeting

No registration required and a Free Lunch.

Great group! Visit and network with us. We would like to see you all at our Winter meeting 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.

WINTER MEETING AGENDA

Winter Meeting Feb. 4, 2004

Location:

Embassy Suites
2700 Corporate Exchange Drive
Columbus, Ohio 43231

Location 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.

Note: A limited number of special room rates are available on Tuesday evening, February 3. 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!

February 3

Board of Trustees Meeting

(Officers/Trustees Only)

3:00pm- Embassy Suites

February 4th 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

COHEAO Report- Dave Necessary

OACUBO Report- Larry Hoffman

OASFAA Report- Joe Fries

OBA Web site update- Paul Tyler

Old Business:

Report on OBA Scholarship in memory of Nancy Graft- Steve Sherbet

Update on State Attorney General's collection activity initiative

Other old business

New Business:

Membership Report- Georgia Gichenko

Spring 2004 Conference- Sherry Downs

Other new business

10:30am – 10:45am Morning Break

10:45am – 11:45am **The Role of One Stop Student**

Services in a Web based environment

Presenter- Ed Mills- Executive Director, Cleveland State University

Noon – 1:00pm Lunch provided by OBA

1:00pm – 2:15pm **The implications of ACH Check**

Conversion and Check 21 on Fee Payment Processing".

Presenter- Barbara Volkov, Managing Partner- Deposit Express

2:15pm – 3:00pm **Roundtable Discussions**

Four Year Public Institution Roundtable

Facilitator- Ginny Layton- Bursar, Miami University

Four Year Private Institution Roundtable

Facilitator- Dave Necessary- Bursar, Univ. of Dayton

Two Year Community College Roundtable

Facilitator- Larry Hoffman- Controller, James A. Rhodes State College

3:00pm Adjourn

Spring Conference News

Conference Material will be mailed directly to all members. A copy of the brochure will be

available on the OBA website as soon as it is published.

Dates:

Mon., Apr. 12- Wed., Apr. 14, 2004

Location: Ohio University Inn
740-593-6661

Hotel Reservations

www.ouinn.com

\$98 per night plus tax

Registration Fees:

	Member	Non-Member
Both Days	\$100	\$150
Tues. Only	\$75	\$100
Wed. Only	\$50	\$75
Golf Scramble (Monday)	ADD \$50	

Non-Member who joins OBA \$135

Above registration fees do not include ACA Seminar Fees.

Agenda Topics:

Public Relations Workshop
with Mel Helitzer
How to Handle Difficult People
Fairness in the Workplace
Treasury Classics
ACH/Check Truncation
Bankruptcy
Creative Tuition Plans/Cost
Cutting Measures
Benchmarking

ACA Training Seminar:

This is a new, special event that has been added for the convenience of the OBA membership.

Date: Monday April 12, 2004

ACA Registration 8:00AM

ACA Seminar 9:00AM to 5:00PM

Lunch Provided

Location: Ohio University Inn
740-593-6661

Hotel Reservations

www.ouinn.com

\$98 per night plus tax

ACA Seminar Registration Fee-

In Addition to Conference Fees:

\$75 per person for OBA members,
\$100 for non-members.

Topics Covered:

Student Loan Programs
Higher Education Receivables
Industry Processes
Unique Student Loan Debt
Management Options
Final Collection Options
Personal Planning

Member Spotlight

President-Elect

**Sherri Downs, Bursar,
Ohio University**

Sherri graduated from Ohio University with a bachelor's degree in Accounting and became a CPA in November 1990.

Since then she has been employed as a: Staff Auditor, Ernst & Young, Treasurer, for the Trimble Local School District in Athens County, an Assistant Bursar, Ohio University (2 years 4/98 to 8/00) and was promoted to Bursar of Ohio University in August 2000. In addition to her regular job at OU, she also has a tax practice on the side. She has been doing that since 1990. She is a member of the Trimble Local Board of Education.

Sherri and her husband Chris and four children: Tabitha (18), Lauren (13), Kelcie (11) and Brett (8) live in Jacksonville.

In her 'spare' time Sherri follows the many hobbies listed: Reading, cross-stitch, spending time with family, sports (football, basketball, softball, baseball, volleyball, wrestling)? I don't play, but I'm a very active spectator!! Building a house!!!