



OHIO BURSARS ASSOCIATION • EST. 1977

Ohio Bursars Association

Fall 2023 Board Meeting

October 17, 2023

In attendance: Kendel Bashore, Becky Sparks, Scott Medley, Andrea Seward, Cory Gadel, Shannon Hadding, Leigh Jackson, Karen Jones, Tammy Holcomb, Nick Heldman

Not present: Virgil Lloyd

- I. The meeting was called to order at 12:30pm by President, Becky Sparks.
- II. **Old Business:**
 - a. Membership Report – Scott
 - i. Invoiced 60 schools; 39 paid.
 1. Added 1 new school for next year's invoicing
 - ii. Invoiced 27 business partners; 10 paid.
 - iii. Payments up year over year
 - iv. Update website/payment prompts to get people to pay dues first, then be able to register for conference
 - b. Treasurer Update – Andrea
 - i. Fall registration – several had more than 3 register
 1. Budgeted 250 – we have 225
 - ii. Over budget for monthly bank fees (\$50/mo)
 - iii. Update invoices to add OBA ACH info so payments can be made electronically
 1. Give as option on past due notices
 - iv. Remove from list serv if not paid
 - c. Review SU23 board meeting minutes – Kendel
 - i. Provided minutes to board for review
 - ii. A motion was made to approve the Summer 2023 Board Meeting minutes by Leigh Jackson; a second to approve was made by Karen Jones. **The motion carried.**
- III. Fall Conference 2023
 - a. Assignments for conference:
 - i. Introducing speakers
 1. Kendel introduce Scott M.
 2. Scott introduce Joe F.
 3. Shannon introduce Nick H.
 - ii. Registration table – Wednesday – Andrea, Kendel
 1. Direct attendees to QR code for OBA app/agenda

- iii. Panel for discussions – all board members
 - 1. Chunk topics and speak for specific period of time. Take 10 minute break between each topic
 - iv. QR code for app
 - 1. Agenda, conference info
 - v. Nick auditing website
 - IV. Open board positions
 - a. Voted on in spring
 - i. Secretary
 - ii. 4 year public
 - iii. 4 year private
 - iv. President-elect
 - V. Fall business meeting agenda
 - a. Call to order
 - b. Intro of board members
 - c. Kendel SP23 business meeting minutes & vote
 - d. Scott membership report & vote
 - e. Andrea treasurer report & vote
 - f. Quarterly zoom meeting – Nov 15
 - i. Find out from association what topics members want to talk about
 - g. Spring conference update – Shannon
 - i. April 4-5
 - ii. April 3 – board meeting
 - h. Recap hopes and thoughts for the future
 - VI. Updated Budget for year – Becky
 - a. No update to budget, other than increasing bank fee budget
 - VII. New Business:**
 - a. Spring Conference
 - i. How to increase attendance?
 - 1. Beef up presentations – really hit hard with asking schools to present
 - 2. Post-conference survey
 - a. Board meeting about a month after to debrief
 - 3. Board meeting once a quarter
 - ii. Ways to motivate early registration (early bird pricing?)
 - 1. \$300 for 2-day conference
 - a. Early bird - \$250
 - 2. \$200 for 1 day
 - a. Early bird - \$175
 - 3. 30 days to register as early bird
 - a. Before middle/end of February
 - b. Find out from hotel bulk room cutoff
 - c. 35 rooms blocked off?
 - i. 20% either way
 - iii. Agenda ideas?
 - 1. FAFSA simplification and how it affect Bursar Office
 - b. Spring Board Meeting – Becky/Shannon

- c. Ideas for increasing member engagement
 - i. Quarterly zoom meetings – November 15, 2023 – 10:30am
 - ii. Reinstate newsletter?
 - 1. Update app and website
 - iii. Other ideas
 - d. Website and app updates
 - i. Most board members being given access to make changes
 - 1. Treasurer report on Google doc to share with members 24/7
- VIII. **Adjournment**
- a. Meeting adjourned at 3:21pm by Becky
 - i. Motion to adjourn was made by Andrea Seward; a second to approve by Shannon Hadding. **The motion carried.**