



# Between Bursars

Editor – Stephanie Blausey  
The University of Toledo

March 2017

Volume 23, Number 1

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## The President's Corner

By: Julie Starkweather  
Bursar  
Tiffin University



**Spring is when you feel like whistling even with a shoe full of slush. -Doug Larson**



Like many animals and plants, I have been very confused about the winter we have had this year. The mild temperatures have meant that the windows have been open in my office in February and I haven't worn my winter coat at all! While I do enjoy a white holiday season, I think I could get used to these types of winters!

For our students, spring is when they look forward to spring break, summer, and for some, graduating and entering the workforce. For me, this spring will result in the end of my term as OBA President. As I reflect on what we have accomplished in the past year, I can honestly say that I feel proud. I planned the spring conference, held the fall meeting, added several new business partners, and

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[www.ohiobursars.org](http://www.ohiobursars.org)

created a survey for the membership. Before taking on this role, I would have never believed I had it in me to plan and accomplish all of these tasks. I've grown so much as a person and I am so thankful for the opportunity. Of course, with a limited office staff, I would not have been able to accomplish anything at all without the help and support of my fellow board members. I would especially like to thank our Past President, Stephanie Blausey and our Treasurer Georgia Gichenko for their help and guidance throughout the year.

Speaking of board members, Teresa Schmidt, President-Elect, is currently busy at work planning our 2017 spring conference in Cincinnati. Like a wise man once said, "spring is nature's way of saying, LET'S PARTY!" This year's conference will celebrate the 40<sup>th</sup> birthday of the OBA!! This conference is sure to be something special; featuring a newly created Wednesday Workshops and a birthday celebration at the National Underground Railroad Freedom Center. Please plan to join us April 5<sup>th</sup> through 7<sup>th</sup> at the Holiday Inn Cincinnati North. If you haven't already done so, please register at [www.ohiobursars.org](http://www.ohiobursars.org).

## 2016 – 2017 Board of Trustees

### President

Julie Starkweather  
Tiffin University

### Four Year Public Representative

Gary Sutton  
Wright State University

### President Elect

Teresa Schmidt  
The University of Cincinnati

### Four Year Private Representative

Tina Mohring  
Defiance College

### Past President

Stephanie Blausey  
The University of Toledo

### Two Year Public Representative

Annetta Keller  
Columbus State Community College

**Treasurer**

Georgia Gichenko  
Lakeland Community College

**Secretary**

Lori Frye  
The Ohio State University

**Webmaster**

Betsy Tierney  
Kent State University

**Membership**

Alison Murphy  
Kent State University

**Business Partner Representative**

Drew Rozzi  
ECSI-Heartland Campus Solutions

## Upcoming Board Positions

The following positions will be available to fill at the 2017 Spring Conference in April:

**President Elect**— shall serve a one-year term and is responsible for planning and hosting the spring conference. Following the one-year term, the President Elect shall assume the role of President for the following year.

**Treasurer**— Responsibilities include overseeing the Association monies; invoicing dues and preparing treasurer's reports for the Association meetings and Board of Trustees meetings. (Two-year term)

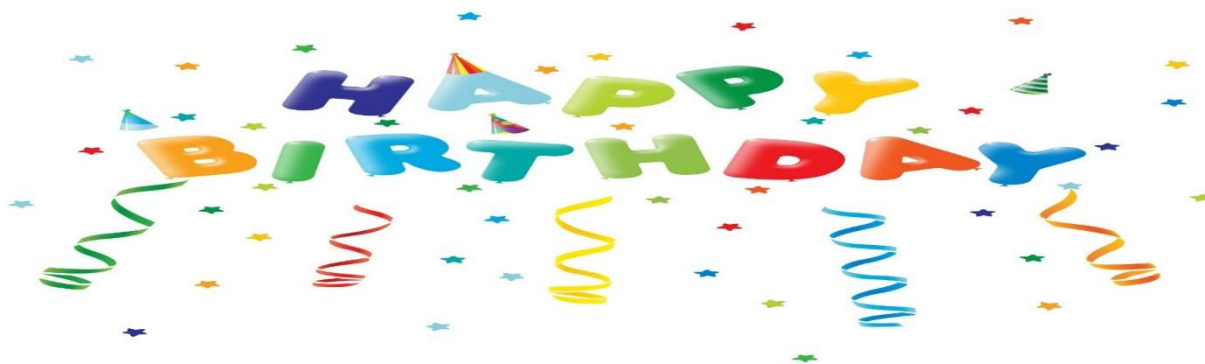
**Two-Year Public Representative**— Responsibilities include facilitating roundtable discussions and assisting in coordinating Regional meetings. (Two-year term)

**Membership-At-Large**— Responsibilities include coordinating an annual membership drive and securing hosts for the regional meetings. (Two-year term)

**Associate Member Representative**— Responsibilities include acting as a liaison to the Board by representing the viewpoints of the Associate members and assisting in the annual associate membership drive. This position is a non-voting member of the Board and serves at the discretion of the President. (One-year term)

# 2017 Spring Conference

April 5-7, 2017  
Cincinnati, Ohio



The Spring Conference is fast approaching..... and registration is open!!! Just visit [www.ohiobursars.org/meetings](http://www.ohiobursars.org/meetings) to register!! Early bird rates through March 15.

#### Conference topics include:

- Wednesday Workshops—choose from either Collections or Leadership
- Washington Update—presented by Bryan Dickson, NACUBO
- How Millennials Think About Banking—presented by Brian Suponic, BankMobile
- State of Ohio Higher Education Update—presented by Gary Cates, Senior Vice Chancellor
- And many more hot topics!!

Help the OBA celebrate its “40<sup>th</sup> Birthday” at the National Underground Railroad Freedom Center in downtown Cincinnati on Thursday evening. Enjoy the exhibits, reception, dinner buffet and an awesome view of the Cincinnati skyline.

Hotel reservations can be made by calling the **Holiday Inn—Cincinnati North** (5800 Muhlhauser Rd, West Chester, OH 45069) at 513-874-2744. Special OBA room rates of \$129.00 (plus applicable taxes) are available through March 15. Subject to availability after that date.

## Announcement Corner

**Mount Carmel College of Nursing** has a new bursar. Michelle Richards transferred from her previous position at the college to the newly created bursar position on February 20<sup>th</sup>. Michelle will work with Kathy Smith and be responsible for the business office area of Financial Services. You will get a chance to meet Michelle at the April conference.

**The Ohio State University's** Kim Wortkoetter, Associate Bursar-Systems & Training, has been appointed as the Student Financials Team Lead for OSU's upcoming Workday ERP implementation. Workday's cloud-based solution will be implemented across all areas of The Ohio State University.

### **A Workday Announcement**

For several months, Ohio State has partnered with Workday on a new financial management system to standardize and simplify the university's processes and reporting. Impressed with its potential, we conducted a comprehensive evaluation and have since decided to incorporate two other core administrative systems. All three — financial, human resources and student information — will be unified into a single Workday system that will transform the way we do business.

We are pleased to announce that over the next five years the Workday system will replace PeopleSoft, which we initiated almost 20 years ago, and other administrative systems. The official project kick off will occur in March.

Improvements from this initiative will touch every corner of the university. This transformation will allow us to be more agile and mobile in the way we use data and serve our students, faculty and staff. When complete, the comprehensive system will be more consistent and easier to use.

We have asked John Hrusovsky to manage this enterprise project under our direction as executive sponsors. John has overseen the rollout of enterprise management systems here and has broad

experience in implementing Workday at other universities. His experience will help ensure success as we aspire to lead higher education in increasing our operational efficiency.

A project of this magnitude involves extensive collaboration among all the offices that utilize these systems and prompts numerous questions. In coming weeks, you will hear more details about the project kick off, the timeline, the implementation and how this initiative aligns with Ohio State's strategic planning. We will keep you informed throughout the process.

We appreciate your support and extend a special thanks to all who helped evaluate Workday and envision its possibilities.

Sincerely,  
Bruce A. McPheron, PhD  
Executive Vice President and Provost

Geoffrey S. Chatas, MPhil, MBA  
Senior Vice President for Business and Finance and Chief Financial Officer

**Miami University's** Bruce McGee has been promoted to Associate Bursar for Operations, Kim Engel has been promoted to Senior Assistant Bursar for Collections and Mike Dale has retired.

**University of Cincinnati** has successfully implemented PeopleSoft Campus Solutions 9.0 partnering with CASHNet for web payments integrated with PeopleSoft Delegated Access.

## OBA Membership Satisfaction Survey

<https://www.surveymonkey.com/r/BFKR7F2>

**Growth is never by mere chance; it is the result of forces working together.** James Cash Penney

## New Business Partners

### **BankMobile Disbursements**

Brian Suponcic, Associate Director Relationship Management  
115 Munson Street  
New Haven, CT 06511  
[bsuponcic@bankmobile.com](mailto:bsuponcic@bankmobile.com)

### **Account Control Technology, Inc.**

Michael Matkowsky, Regional Account Executive  
[mmatkowsky@accountcontrol.com](mailto:mmatkowsky@accountcontrol.com)  
Lynn Heineman, Senior VP, Sales & Marketing  
21700 Oxnard Street, Suite 1400  
Woodland Hills, CA 91367

### **Flywire by peer Transfer**

### **Wilberforce University**

## New School Member

## Proposed Bylaw Changes(30 Day Rule)

### Article V: Meetings

- A. The Association will hold at least three meetings per year as scheduled by the Board of Trustees. At least one meeting will be scheduled in the fall, winter and spring academic terms. The schedule for the upcoming academic year shall be announced by the spring meeting.

### **Proposed:**

- A. The Association will hold at least two meetings per year as scheduled by the Board of Trustees. At least one meeting will be scheduled in the fall and spring academic terms. The schedule for the upcoming academic year shall be announced by the spring meeting.

A vote on the proposed changes will occur at the Business Meeting on Friday, April 7, 2017.

## Regional Meeting Recap

### **Southwest Regional Meeting – Xavier University**

Clare Bunning

Fellow OBA members gathered Thursday, February 9<sup>th</sup> at Xavier University's Cintas Center for the Southwest Winter Regional Conference. This conference was made possible by the generosity of the sponsor for the event, Reliant Capital Solutions. The regional would not have been what it was without the help of Scott Medley and Christy Egler.

Threats of snow the eve of the conference did not come to pass and the roadways were clear, which brought the conference planners cheer. Highlights of the regional include a student panel where OBA members were so impressed with the students representing Xavier that job offers and adoption requests were made! The panel was a chance for OBA members to have a discussion with Xavier students regarding how students prefer to be communicated with as well as how they handle their bursar accounts. OBA members enjoyed lunch at Xavier's cafeteria. However, to much dismay the Pizza ATM was down for service that day. Return trips will have to be made. Meeting attendees got the chance to share their most harrowing tales of students and parents attempting to defraud their institution. It was a great chance to hear about how other universities and business partners handle instances of fraud. The regional ended with a fascinating talk regarding diversity and inclusion from Xavier's Director of Diversity and Inclusion, Dr. Taj Smith. A standout moment was when Taj asked all present to read their company's and university's mission statement to examine how and if diversity is expressed in the words of the mission statement. It was an exercise that can be beneficial and reflective for everyone. The exercise gave us all a chance to reflect on how we can celebrate and integrate diversity and inclusion into the work that we do and the customers we interact with on a daily basis. It was a special day of treats, great discussion, and comradery. Capital University, Miami University, Union Institute and University, University of Cincinnati, and Xavier University were represented at the conference. We had business partners represented from Delev and Associates, General Revenue Corporation, and Reliant Capital Solutions.



## **Central Regional Meeting-The Ohio State University**

Lori Frye

We had thirty one attendees, including five schools and six vendors. I received eleven completed surveys about the conference, all positive and asking for more information on some of the topics discussed. Everyone seemed to get something to take back with them as far as available resources. I've received some requests to put colleges and OSU staff in contact for additional assistance with the Financial Wellness Program and the Student Legal Program.

Out of the four presentations, Student Legal Issues, Communication between departments, Fraud, how it affects all of us and Financial Wellness resources and actions, the topics opened up some very interesting dialogue, especially the legal issues and fraud. Attendees were given an option of round tables or not and it was a big "no" for round tables.

Everyone seemed to have a very comfortable experience and the Q and A's for each part of the day were excellent. Lunch was very casual and folks were sharing ideas throughout.

In the future, additional topics to dive deeper into would be fraud for consumers; including how to protect oneself and legal issues students have to deal with during their education years.



## OBA Listserv Terms and Conditions

Thanks for being part of our Listserv community. To ensure the best possible experience for all Listserv members, we have established some basic guidelines for participation. We will periodically send this document out to the section lists as a friendly reminder for experienced users and to assist newer users with listserv operations. The guidelines will also be posted on the OBA website.

By using the Discussion Forum e-mail list, you agree that you have read and will follow the guidelines set for these peer discussion groups. You also agree to reserve list discussions for topics best suited to the medium. This is a great way to solicit the advice of your peers, benefit from their experience, and participate in an ongoing conversation.

Please take a moment to acquaint yourself with these important guidelines. In order to preserve a climate that encourages both civil and fruitful dialogue, the Ohio Bursar Association (OBA) reserves the right to suspend or terminate membership on all lists for members who violate these terms. If you do not accept these guidelines, please unsubscribe from the list by following the directions at the bottom of the listserv message.

## The Rules

- Do not "flame," challenge or attack others. The discussions on the lists are meant to stimulate conversation, not to create contention. Flaming includes the making of derogatory comments, ridicule, excessive sarcasm and innuendo. Let others have their say, just as you have yours.
- Use caution when discussing items. Information posted on the lists is available for all to see, and comments are subject to libel, slander, and antitrust laws.
- Do not post commercial messages on any listserv. Contact people directly with product and service information if you believe it would help them.
- All defamatory, abusive, profane, threatening, offensive, or illegal materials or language are strictly prohibited. Do not post anything in a listserv message that you would not want the world to see or that you would not want anyone to know came from you.
- Please note carefully all items listed in the disclaimer and legal rules below, particularly regarding the copyright ownership of information posted to the list.
- Remember that the OBA and other e-mail list participants have the right to reproduce postings to this listserv.
- Do not distribute any SPAM, solicitation, jokes, chain letters, petitions for signatures or letters relating to pyramid schemes, missing persons or once-in-a-lifetime deals.
- Send your message only to the most appropriate list(s). Do not spam several lists with the same message.
- Do not use the listserv to invite the entire list to join your social network (Facebook, Myspace, LinkedIn, etc). You may invite individuals to join your network but may not invite the entire list.

## Listserv Etiquette

- Include a signature tag on all messages. Include your name, affiliation, location, and e-mail address.
- State concisely and clearly the topic of your comments in the subject line. This allows members to respond more appropriately to your posting and makes it easier for members to search the archives by subject.

- Include only the relevant portions of the original message in your reply. Delete any header information, and put your response before the original posting.
- Only send a message to the entire list when it contains information that benefits everyone.
- Send messages such as "thanks for the information" or "me, too" to individuals--not to the entire list. Do this by using your e-mail application's forwarding option and typing in or cutting and pasting in the e-mail address of the individual to whom you want to respond.
- Do not send administrative messages, such as "remove me from the list", through the listserv. To unsubscribe from the list, follow the directions at the bottom of the listserv email message.
- Warn other list subscribers of lengthy messages either in the subject line or at the beginning of the message body with a line that says "Long Message."
- When using an Auto Reply message for times you are out of the office, please be sure to "Create a Rule" (this is easily done with Microsoft Outlook's Out of Office Assistant) that would prohibit sending the message to the list.

#### **Disclaimer and Legal Rules**

This list is provided as a service of the Ohio Bursar Association. OBA accepts no responsibility for the opinions and information posted on this site by others. OBA disclaims all warranties with regard to information posted on this site, whether posted by OBA or any third party; this disclaimer includes all implied warranties of merchantability and fitness. In no event shall OBA be liable for any special, indirect, or consequential damages or any damages whatsoever resulting from loss of use, data, or profits, arising out of or in connection with the use or performance of any information posted on this site.

Do not post any defamatory, abusive, profane, threatening, offensive, or illegal materials. Do not post any information or other material protected by copyright without the permission of the copyright owner. By posting material, the posting party warrants and represents that he or she owns the copyright with respect to such material or has received permission from the copyright owner. In addition, the posting party grants OBA and users of this list the nonexclusive right and license to display, copy, publish, distribute, transmit, print, and use such information or other material.

By using the OBA listserv, subscribers agree to indemnify defend and hold harmless the OBA, its committees and sections, its subsidiaries, affiliates, officers and agents from and against all losses, claims, demands, causes of action, liabilities, expenses, including reasonable attorney's fees and costs arising from any claims arising out of or resulting from any breach of these guidelines by the user or any omission or act taken by the user.

OBA does not actively monitor the site for inappropriate postings. However, in the event that any inappropriate posting is brought to OBA's attention (by OBA member or otherwise), OBA reserves the right to take all appropriate action in response. OBA reserves the right to terminate access to any user who does not abide by these guidelines.

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## Upcoming Professional Development Opportunities

### **COHEAO-Coalition of Higher Education Assistance Organizations**

Annual conference

[www.coheao.com](http://www.coheao.com)

### **PDG's 31st Annual National College and University-Professional Development Group**

Bursar's SFS Conference

April 23 – April 26, 2017

Ponte Vedra Beach, FL

[www.prodev.com](http://www.prodev.com)

### **OACUBO-Ohio Association of College and University Business Officers**

Annual Meeting

April 27, 2017

### **SACUBO-Southern Association of College and University Business Officers**

Annual Meeting

April 30-May 2, 2017

**NASFAA-National Association of Student Financial Aid Administrators**

2017 Conference

June 26-29, 2017

San Diego, CA

[www.nasfaa.org](http://www.nasfaa.org)

**Ellucian Live**

Annual Conference

March 19- March 22, 2017

**KASRO-Kentucky Association of Student Receivable Officers**

Spring Conference

May 2017

**OBUG-Ohio Banner Users Group**

Annual Meeting

May 2017

**OASFAA-Ohio Association of Student Financial Aid Administrators**

Spring Conference

May 17-May 19, 2017

**NACUBO**

2017 Annual Meeting

July 29 – August 1, 2017

Minneapolis, MN

[www.nacubo.org](http://www.nacubo.org)