



**93rd Annual Meeting and
Professional Development Conference**

***“The New Art of Efficiency:
With Less, Do More”***

April 26-27, 2010

The Ohio State University Student Union



Earn up to 9 CPE credits!

Agenda

Monday, April 26, 2010

8:00 a.m. – 4:00 p.m. – Registration

Location: Performance Hall Foyer, 1st Floor

9:00 a.m. – 4:00 p.m. Vendor Displays

Location: Performance Hall - 1st Floor

10:00 a.m. – 10:50 a.m. – Rebuilding Our Economy: The Prospects for the Ohio and US Economies to do More in 2010

Location: Meeting Rooms 1 & 2 – 1st Floor (1 CPE Credit)

Presenter: Craig Thomas, Vice President and Senior Economist, PNC Financial Services Group

Session Description: Mr. Thomas will discuss the progress and prospects of the economic recovery. This session will include interest rate expectations, and address employment, real estate, and general business conditions at both the regional and national level.

11:00 a.m. – 11:50 a.m. – What Are the Next Trend(s) in Campus Commerce?

Location: Meeting Rooms 1 & 2 – 1st Floor (1 CPE Credit)

Presenters: Matthew Bernstein, Regional Sales Manager, Sallie Mae Business Office Solutions & Dave Swan, Regional Sales Manager TouchNet Information Systems

Session Description: Learn insight to what's new and what's next in Campus Commerce. How will your methods of payment acceptance be changing? How will your constituents expect to interact with your institution? Learn about the newest alternative payment methods as well as the latest trends in POS and other interactive devices. How will all of this evolve in the next 3 to 5 years? Will you be ready for the future? What do you need to be thinking about now, to prepare your campus?

12:00 p.m. – 1:00 p.m. Luncheon Reception with Vendors

Location: Performance Hall – 1st Floor

12:30 p.m. – 12:45 p.m. - University Welcome E. Gordon Gee, President, The Ohio State University

Location: Performance Hall – 1st Floor

E. Gordon Gee, among the most highly experienced and respected university presidents in the nation, returned to The Ohio State University after having served as Chancellor of Vanderbilt University for seven years. Prior to his tenure at Vanderbilt, he was president of Brown University (1998-2000), The Ohio State University (1990-97), the University of Colorado (1985-90), and West Virginia University (1981-85).

Active in a number of national professional and service organizations, Gee served as a Trustee for the Harry S. Truman Scholarship Foundation and as chairman of the Kellogg Commission on the Future of State and Land Grant Universities. He is a member of the National Commission on Writing for America's Families, Schools, and Colleges, founded by the College Board to improve the teaching and learning of writing. He also serves as co-chair of the Association of Public and Land-Grant Universities' Energy Advisory Committee.

Be sure to be present for the early registration raffle drawing for a \$250 VISA gift card! All institutional member registrations received in the OACUBO office by March 19th will be eligible – you must be present to win.

Monday, April 26th continued....

1:00 p.m. – 2:15 p.m. - Concurrent Sessions:

• **Through the Looking Glass 2010: The Year of Consumer Protection**

Location: Meeting Room 1 – 1st Floor (1.5 CPE Credits)

Presenter: Ron King, CPISM, President, CampusGuard

Session Description: When your customers are requested to present personal, financial, medical or other information, do they feel confident you are protecting their records? If you are collecting confidential and sensitive information (CSI) in one form or another, then you know that your customers (students, parents, alumni, and the community) are growing very concerned regarding your ability to keep their information secure. Not reaching pandemic proportions yet – but they certainly are aware of the risks. This presentation explains the latest trends in PCI, Red Flags and NACHA, the added burdens carried by higher education to protect CSI, and how to effect a strategy for compliance that is compatible with your mission.

• **Optimizing Your Procurement Processes**

Location: Meeting Room 2 – 1st Floor (1.5 CPE Credits)

Presenters: Dick Strojinc, Practice Director, Performance Improvement & Dale L. Billet, CPIM, CIRM, CSCP, Director, RSM McGladrey

Session Description: All institutions experience different stages of development. The key to continued improvement is to align all the procurement components of your organization to support the stage you are in and to provide the processes for moving to the next level. Institutions whose procurement components are misaligned may be experiencing some of the following symptoms.

- *Total spend leverage not optimized*
- *Errors and delays in the procurement process*
- *Redundant procurement activities throughout the institution*
- *Inconsistent procurement practices and processes*

This presentation will provide cost effective and timesaving framework for improving and streamlining your procurement operations to facilitate future growth and efficiency.

2:15 p.m.–2:55 p.m. - Refreshment Break & Vendor Displays

Location: Performance Hall – 1st Floor



The NEW Ohio Union!

Monday, April 26th continued....

3:00 p.m. – 4:15 p.m. - Concurrent Sessions:

- **Innovative Financing Techniques**

Location: Meeting Room 1 – 1st Floor (1.5 CPE Credits)

Presenters: William T. Conard II and John Caleb Bell, Bricker & Eckler LLP

Session Description: An understanding of how your college or university invests its bond proceeds and maintains records related to Federal Tax and Securities Laws is essential to good decision-making and avoiding pitfalls. Please join William T. Conard II and J. Caleb Bell, two of Bricker & Eckler's Public Finance Group attorneys with representation in Higher Education finance, for a presentation that combines best practices of various investment options with the latest updates on records retention/reporting requirements and continuing disclosure agreements.

- **Risk Management and Compliance**

Location: Meeting Room 2 – 1st Floor (1.5 CPE Credits)

Presenter: David Reyes, CPA, Shareholder, Maloney + Novotny LLC & Pam Lebold, CPA, Audit Director, Maloney + Novotny LLC

Session Description: This session will cover a variety of topics beginning with tax compliance issues relevant to areas such as deferred compensation, 457 plans, 5500 filings and excess benefits. We will also include a discussion on the risk assessment standards and how these standards may have impacted the self assessment processes for Colleges and Universities.

4:30 p.m. – 7:00 p.m. – Cocktail Reception/Logo Item Exchange

Location: Round Room/Foyer – 3rd Floor

We have extended this year's cocktail reception timeframe to accommodate both those driving in to the conference, as well as those staying at the Fairfield Inn! Bring a logo item (not limited to a T-Shirt) for exchange and network with your Ohio colleagues! Additional cocktail reception activities this year are:

- *Comic books – each registrant will receive a comic book with their registration - please bring your comic book to the cocktail reception and have fun comparing and exchanging with your colleagues!*
- *Caricatures - student caricature artists from The Ohio State University's Art Department will be available to immortalize your favorite facial expression to paper!*

7:00 p.m. – 8:00 p.m. – Dinner/Dessert

Location: Cartoon Room – 3rd Floor

Join us for dinner and a very unique, custom dessert cake!

8:00 p.m. – 9:00 p.m. – After-Dinner Entertainment

Location: Round Room – 3rd Floor

“Comics Come to Life” is a theatre in the round presentation of a brand new skit of cartoon characters. This special production, created and performed entirely by the OSU Department of Theatre students, showcases the imagination and artistry of today's thespians. Expect the unexpected.

Tuesday, April 27, 2010

7:30 a.m. – 8:40 a.m. - Breakfast Buffet/Annual Business Meeting

Location: Meeting Rooms 1, 2, & 3 – 1st Floor

Join us for breakfast and another chance to visit with our vendors! Our annual Business Meeting will begin at 8:00 a.m. - You won't want to miss your chance to be present to win our grand prize raffle item!

7:30 a.m. – 11:00 a.m. Vendor Displays

Location: Performance Hall - 1st Floor

We have extended our vendor displays an extra day this year! Be sure to visit our vendors throughout the morning!

8:40 a.m. – 9:00 a.m. Refreshment Break with Vendors

Location: Performance Hall - 1st Floor

9:00 a.m. – 10:40 a.m. – College and University Disaster Planning

Location: Meeting Rooms 1, 2, 3 – 1st Floor (2 CPE credits)

Presenter: Keith Brown, Director of Campus Services, Lorain County Community College

Session Description: Keith Brown will discuss the Arson fire that occurred on our campus January 2009, the lessons learned and how our disaster planning has evolved as a result.

10:40 a.m. – 11:00 a.m. Refreshment Break with Vendors

Location: Performance Hall - 1st Floor

Be sure to complete your “Vendor Dance Card” in your registration packet and turn in at registration by 10:30 a.m. for your chance to win one of three \$50 Visa gift cards to be raffled at 10:35 a.m.! You must be present to win!

11:00 a.m. – 12:40 p.m. – From Grate to Good: Becoming a Great Place To Work

Location: Meeting Rooms 1, 2, 3 – 1st Floor (2 CPE credits)

Presenter: Barbie Tootle, President, Left Field Consulting

Session Description: At a time when we are challenged to do even more with less, managers have never had so many tools at their fingertips – and thumbs – to efficiently organize and track processes and people. We have increased capacity to get things right. The question is: Are we doing the right things?

Barbie Tootle believes that the right things include building and maintaining a positive work environment. You spend a lot of time at work – probably too much. Tools and tips will be offered to improve morale and “lighten up” the workplace. Can we learn anything from those folks at Dunder Mifflin or at Dilbert’s office? Movie mogul of the ‘30s and ‘40s Samuel Goldwyn said “I’ll take 50 percent efficiency to get 100 percent loyalty.” Let’s cultivate teams that are efficient and loyal, productive and pleasant. Sound too good to be true? You can do it. With her high energy program, Tootle can help.

The Ohio State University Student Union
1739 N. High Street
Columbus, Ohio 43210

<http://ohiounion.osu.edu/new/default.aspx>



Parking information:

Visitor parking to the new Ohio Union is located in the South Garage (building 162) directly adjacent to the new Ohio Union. Click on the link below for a map.

<http://www.osu.edu/map/building.php?area=oval&building=162>

Parking garage exit vouchers will be provided and are available upon request at the OACUBO annual meeting registration area. One parking exist voucher per car per day (for Monday and Tuesday) are available; however, for those staying at the Fairfield Inn that need to check in to the hotel on Monday afternoon and return to the Union for the Monday evening events, an additional exit voucher will be provided to you – please be sure to request this additional parking voucher.

Directions:

Directions to Ohio Union from the North:

Take I-71 South to the 17th Avenue exit. At the top of the exit ramp, turn right onto 17th Avenue. Stay on 17th Avenue until it dead-ends at Summit Street (in a “T” intersection). Turn left onto Summit Street, then turn right at the first traffic light onto 15th Avenue. Stay on 15th Avenue until it dead-ends at N. High Street. Turn left onto N. High Street. On your right side, you will see two adjacent Ohio Union parking garages. Visitors may park in the **South** garage for access to the Ohio Union. The North garage is not open to visitors. The Ohio Union is located at 1739 N. High Street, on the corner of 12th Avenue and N. High Street.

Directions to Ohio Union from the South:

Take I-71 North to the 17th Avenue exit. At the top of the exit ramp, turn left onto 17th Avenue. Stay on 17th Avenue until it dead-ends at Summit Street (in a “T” intersection). Turn left onto Summit Street, then turn right at the first traffic light onto 15th Avenue. Stay on 15th Avenue until it dead-ends at N. High Street. Turn left onto N. High Street. On your right side, you will see two adjacent Ohio Union parking garages. Visitors may park in the **South** garage for access to the Ohio Union. The North garage is not open to visitors. The Ohio Union is located at 1739 N. High Street, on the corner of 12th Avenue and N. High Street.

Directions to Ohio Union from the West:

Take I-70 East to I-71 North. Stay on I-71 North to the 17th Avenue exit. At the top of the exit ramp, turn left onto 17th Avenue. Stay on 17th Avenue until it dead-ends at Summit Street (in a “T” intersection). Turn left onto Summit Street, then turn right at the first traffic light onto 15th Avenue. Stay on 15th Avenue until it dead-ends at N. High Street. Turn left onto N. High Street. On your right side, you will see two adjacent Ohio Union parking garages. Visitors may park in the **South** garage for access to the Ohio Union. The North garage is not open to visitors. The Ohio Union is located at 1739 N. High Street, on the corner of 12th Avenue and N. High Street.

Directions to Ohio Union from the East:

Take I-70 West to I-71 North. Stay on I-71 North to the 17th Avenue exit. At the top of the exit ramp, turn left onto 17th Avenue. Stay on 17th Avenue until it dead-ends at Summit Street (in a “T” intersection). Turn left onto Summit Street, then turn right at the first traffic light onto 15th Avenue. Stay on 15th Avenue until it dead-ends at N. High Street. Turn left onto N. High Street. On your right side, you will see two adjacent Ohio Union parking garages. Visitors may park in the **South** garage for access to the Ohio Union. The North garage is not open to visitors. The Ohio Union is located at 1739 N. High Street, on the corner of 12th Avenue and N. High Street.

Annual Meeting Hotel Information



Fairfield Inn & Suites-OSU
3031 Olentangy River Road
Columbus, Ohio 43202
614-267-1111

<http://www.marriott.com/hotels/travel/cmhsu-fairfield-inn-and-suites-columbus-osu/>

OACUBO has reserved a room block at The Fairfield Inn & Suites-OSU, just two miles from the Ohio State Student Union. Call 800-228-2800 or 800-701-4485 for hotel reservations by April 1, 2010, and be sure to mention that you are with OACUBO (group code OACOACA) to receive the discounted room rate of \$104 per night. A limited number of rooms are available for the nights of April 25 and 26. Complimentary onsite parking is available.

Directions from Ohio Union to Fairfield Inn:

Exit the Ohio Union South garage on the College Avenue side (the west side) and turn right on College Avenue. Continue on College Avenue until W. Woodruff Ave. Turn right on W. Woodruff and then immediately turn left on N. High Street. At the next traffic light, turn left on W. Lane Avenue. Stay on W. Lane Avenue over the Olentangy River bridge, then turn right on Olentangy River Road. At the third traffic light, turn left onto Harley Drive. The Fairfield Inn will be on your right.

You may also exit the Ohio Union South garage on the High Street side (the east side), but you will be making a left turn onto High Street without the benefit of a traffic light.

Both College Avenue and High Street have significant pedestrian traffic. Please be aware of the many crosswalks in the area.

Directions from Fairfield Inn to Ohio Union:

From the hotel, turn right on Olentangy River Road. At the third traffic light, turn left on W. Lane Avenue and continue to N. High Street. Turn right on N. High Street and continue through the 15th Avenue intersection. On your right side, you will see the Ohio Union South Parking Garage.