



Professional Development Group II, Inc

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24th National

College & University Bursars Conference

For Business Officers, Student
Financial Services Administrators,
Cashiers and Treasury Managers

April 18-21, 2010 • St. Petersburg, FL



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Professional Development Group II, Inc.
 116 S. Madison St., Suite A, Bloomington, IN 47404
 (812) 339-6374 • FAX (812) 339-0138

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College & University

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WHO SHOULD ATTEND/PLEASE ROUTE TO:

Administrators, Bursars, Business Officers, Student
 Financial Services, Controllers, Cashiers, Financial Aid,
 Chief Fiscal Officer, Treasurer, Collections, Accounts
 Receivable, Accounts Payable and Treasury Managers

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*multi-attendee
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see inside for details

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RETURN SERVICE
 REQUESTED

New 3 or 4 Night Hotel Package Option!

(room & tax only)



When times are tough, it's time to go to a PDG conference! Virtually everyone knows that PDG conferences provide creative new ways to operate and innovate, resulting in more efficient use of limited resources and dollars saved!

Yes, there is a cost to attend but there is also the opportunity to return to your school with ideas that will more than pay for the investment required. This year's College and University Bursar's Conference is no different and, in fact, is dedicated toward providing you money-saving ideas.

PDG has brought together some of the brightest minds in higher education to help you and your office accomplish more, to push the envelope, to shift paradigms and several other metaphors! If there ever was a time to increase efficiency, reduce waste and streamline your operations, it's now!

Here are just a few reasons why you and/or a co-worker should attend:

- 30 concurrent sessions, more than any other conference about bursar, business officer, student financial services and treasury management subjects
- Low registration price per session hour
- Practical money-saving ideas
- Positive return on your travel and education dollar investment
- Fantastic new location with lots to do within walking distance
- Networking with a nationwide group of peers from schools all around the U.S.
- Department of Education update
- Inexpensive airfares
- Reaching a broad group of potential suppliers and agencies
- Two great Sunday workshops: Bursar Fundamentals and Leadership Skills
- CPE credit approved agenda

Network with other higher education professionals about projects, software packages, trends, procedures and much more. This year we expect conference attendees from well over 200 private, public, and proprietary colleges, universities, trade and technical schools from throughout the U.S.

Participating exhibitors will include collection agencies, billing servicers, tuition management firms, software houses, hardware companies, credit card companies, e-commerce companies and alternative loan providers.

Faculty & Advisory Group

Brian Barry*Nelnet
Caren Bartholomew Oklahoma State University
Jason BeardProfessional Development Group
Laurie Beets Oklahoma State University
Charmaine Daniels* University of Illinois
Darla Freeborn* Whitworth University
Jim Garrant* Wellesley College
Karen Gorton* University of Rochester
Barry Greenberg* Barry Greenberg Consulting
Ruth Harpool Indiana University
Ron KingNelnet
Ellen Last* Higher One
Mary Marcum* University of Kentucky
Gail McClarnon Department of Education
Rick McClintock Fifth Third Processing Solutions
John McElroy* TouchNet
Ken MileseWise
Ron Scoggins U.S. Department of Veterans Affairs
Kevin SmithCanisius College
Dawn Sparks* Southern Illinois University Edwardsville

*advisory group

Conference Information



HOTEL INFORMATION: The Hilton St. Petersburg Bayfront hotel is located in the waterfront district of downtown St. Petersburg, Florida. There the best of St. Petersburg beckons nearby. World class accommodations along with legendary Hilton hospitality add up to pleasure, pure and simple. As the centerpiece of St. Petersburg, downtown offers some of the finest cultural attractions in Florida, coupled with some of the top businesses in the nation - all conveniently located just outside the front doors. The hotel's address is: 333 First Street South, St. Petersburg, FL 33701-4342.

PDG has been able to secure a special room rate of \$155 single/double (plus tax). This rate extends three days before and three days after the event. In order to receive this rate call 800-944-5500 or book online at www.prodev.com/hotels/bursars. Make sure to mention you are attending *PDG's Bursar Conference*. Please make your reservations early in order to avoid disappointment.

ROOM NIGHTS REGISTRATION OPTION: PDG has a great new way to save you time when registering for the event. Book your hotel room through PDG at the conference rate (plus tax). If you pre-pay your room PDG will take care of making your reservation at the hotel for the number of nights you request. This fee only covers room and tax, it does not include incidentals such as room service, phone calls or other room related expenses. You will still be required to place a credit card on file when you arrive at the hotel. A hotel confirmation code will be e-mailed to you three weeks before the conference.

AIRPORT: Hilton St. Petersburg Bayfront is located near three airports. Tampa International Airport is approximately 22 miles, 30 minutes, from the hotel. A Super Shuttle costs about \$25 and a taxi costs about \$40, each one way. The St. Petersburg-Clearwater International Airport is approximately 15 miles, 20 minutes, from the hotel and a taxi costs about \$30 one way. The Albert Whitted Airport is about 1 mile, a 2 minute drive, from the hotel.

RENTAL CAR INFORMATION: PDG has been able to secure a special discount agreement with AVIS. To obtain additional information or to make your reservations, call 800-331-1600 and refer to J097836, or book your car rental online at www.prodev.com/car_rental.

REGISTRATION FEES: The registration fee for *PDG's 24th National College & University Bursars Conference* is \$520 (\$499 for second and third attendees from same organization). The fee includes three breakfasts, two luncheons, one reception, all refreshment breaks and all conference materials. If you plan to have two people attend for only part of the conference, each person must pay the full registration fee. Please note: the conference sessions, luncheons and breakfasts are for registered conference participants only.

Please complete and return the registration form as soon as possible. A check, purchase order or credit card information should accompany the form. You may also register online at www.prodev.com on our secure, credit card safe server. Registration confirmation will be e-mailed within five business days of receipt. If an e-mail is not provided, standard mail will be used. If you do not receive a confirmation, please phone PDG to verify your registration before you depart for the conference. PDG will request payment at registration if your purchase order or payment has not reached our office prior to that time. For additional information, please call us at 812-339-6374 or e-mail us at info@prodev.com.

REFUNDS: Requests for refunds or substitutions will be honored only if notification is received in writing by March 17, 2010. Cancellation or substitution by telephone is not sufficient. (Please notify PDG of substitutions in writing by fax 812-339-0138 or e-mail info@prodevmeetings.com.) Registrants who fail to cancel will not be refunded their registration fee. A \$50 administrative fee will be charged for all cancellations. No refund will be honored after the conference.

CANCELLATIONS & SUBSTITUTIONS: In the event of cancellation or change in hotel or date, registrants will be notified by mail. Professional Development Group II, Inc. will not be responsible for expenses involved with a cancelled conference. PDG reserves the right to substitute speakers without notice.

For other information and full session descriptions, go to: www.prodev.com

Workshop Information

SUNDAY, APRIL 18, 2010

Bursar Fundamentals Workshop

Presented by Barry Greenberg, Barry Greenberg Consulting

PDG presents a unique opportunity. In a single afternoon workshop, you can listen to, participate in and laugh at some of the most significant issues facing the recently appointed or even the seasoned Bursar. Topics such as customer service, internal control, e-commerce, privacy regulations, management, cashiering and collections will be covered. Come prepared to interact with your fellow Bursars - asking for and offering insights into the functioning of the Bursars Office. This is not solely a lecture but an organized discussion among all the participants. Even an experienced Bursar might pick up a nugget or two. Barry worked at Southern Illinois University Edwardsville (SIUE) for nearly 16 years. He was most recently Bursar for SIUE for 8 years. Before that he held the position of Audit Manager for the SIUE and SIU School of Medicine campuses. During his tenure as Bursar, he oversaw SIUE's conversion to E-commerce applications, establishment of a satellite Bursar's Office and adoption of new customer service initiatives. Prior to SIUE Barry worked at AT&T for 22 years in the Accounting, Information Systems and Human Resources departments. In addition, Barry is an adjunct faculty member at Webster University teaching graduate finance classes.

Leadership Skills Workshop

Darla Freeborn, Whitworth University

You have a "problem personality" on your team. It's creating conflict and lowering morale in the office. What will you do to fix it? Or will you look the other way and hope it fixes itself? Whether you are a Bursar overseeing a team or you are a member of that team, acquiring/improving your leadership skills will give you the ability to participate in creating a successful working environment. Having good leadership skills not only helps improve morale and helps to create an office of happy humans, but will assist in improving performance as well. This workshop is designed to help you build skills that will improve your performance as both a leader and a team member. Come prepared to interact, share and have some fun as we look at leadership skills/styles and what it takes to be a better leader, how to build a successful team, how to improve relationships between team members as well as other offices, handling performance evaluations both as a manager and as the employee, goal setting, conflict resolution and handling those difficult disciplinary situations.



About PDG:



Professional Development Group was founded in 1986. Each year we host the National Student Loan/Receivables Collection Conference, the National P-Cards on Campus Conference and the National College and University Bursars Conference for Business Officers, Student Financial Services Administrators, Cashiers and Treasury Managers. In addition, PDG offers a variety of consulting, meeting planning, seminar, webinar and association management services.

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Sunday - April 18, 2010

12:00 - 1:00 pm	Workshop Registration	
1:00 - 6:00 pm	Bursar Fundamentals <i>Barry Greenberg, Barry Greenberg Consulting</i> Fee: \$99 See full workshop description on other side.	Leadership Skills <i>Darla Freeborn, Whitworth University</i> Fee: \$99 See full workshop description on other side.
4:00 - 6:00 pm	General Conference Registration	
6:00 - 7:30 pm	Welcome Reception	

Monday - April 19, 2010

7:15 - 8:15 am	Registration & Breakfast	
8:15 - 8:45 am	Opening General Remarks <i>Jason Beard, Professional Development Group</i>	
8:45 - 9:15 am	General Session: PDG's First Annual Best Practices Award - Money Saving Tips	
9:15 - 9:30 am	Transition Break	
9:30 - 10:30 am	Financial Literacy for Students <i>Charmaine Daniels, University of Illinois</i>	Staying Legal and Still Getting the Most out of In-House Collection <i>Darla Freeborn, Whitworth University</i>
10:30 - 11:00 am	Networking Break	
11:00 am - 12:00 pm	Merchant Services 101 <i>Rick McClintock, Fifth Third Processing Solutions</i>	Using Project Management Techniques to Streamline Operations <i>Ellen Last, Higher One</i>
12:00 - 1:00 pm	Luncheon	
1:00 - 2:00 pm	Going to School Under the GI Bill <i>Ron Scoggins, Lead Education Liaison Representative for U.S. Department of Veterans Affairs</i>	Do You Have an Innie or an Outtie? (Payment Plan, That Is!) <i>Charmaine Daniels, University of Illinois and Laurie Beets, Oklahoma State University</i>
2:00 - 2:30 pm	Networking Break	
2:30 - 3:30 pm	Accelerating Collections: What's Next in Electronic Deposit Solutions <i>Ruth Harpool, Indiana University</i>	Using a Financial Ombud to Influence Recruitment and Retention <i>Mary Marcum, University of Kentucky</i>
3:30 - 3:45 pm	Transition Break	
3:45 - 4:45 pm	General Session: Fun With FERPA <i>Barry Greenberg, Barry Greenberg Consulting</i>	ACH - NACHA Rules and Procedures Update <i>Ken Miles, eWise</i>

Tuesday - April 20, 2010

7:15 - 8:15 am	Registration & Breakfast	
8:15 - 8:30 am	Opening General Remarks <i>Jason Beard, Professional Development Group</i>	
8:30 - 10:00 am	General Session: Department of Education Update <i>Gail McClaron, Department of Education</i>	
10:00 - 10:30 am	Networking Break	
10:30 - 11:30 am	Where's My Refund? <i>Charmaine Daniels, University of Illinois</i>	Payment Trends and Merchant Fees <i>John McElroy, TouchNet</i>
11:30 am - 12:30 pm	Luncheon	
12:30 - 1:30 pm	From Orientation to Graduation: Communicating with Your Students <i>Ellen Last, Higher One</i>	Internal Controls Your Student Account Office Cannot Live Without <i>Laurie Beets, Oklahoma State University</i>
1:30 - 1:45 pm	Transition Break	
1:45 - 2:45 pm	Cashiering and Departmental Deposits <i>Darla Freeborn, Whitworth University</i>	Doing More with Less <i>Mary Marcum, University of Kentucky</i>
2:45 - 3:15 pm	Networking Break	
3:15 - 4:15 pm	Payments Fraud Risk Management: Processing Information; Not Paper <i>Ruth Harpool, Indiana University</i>	PCI Compliance Outside of the Bursar's Office <i>Caren Bartholomew, Oklahoma State University</i>
3:15 - 4:15 pm		Implementing an Enterprise Commerce Management System <i>Kevin Smith, Camisius College</i>

Wednesday - April 21, 2010

8:15 - 9:00 am	Breakfast	
9:00 - 9:15 am	Opening General Remarks <i>Jason Beard, Professional Development Group</i>	
9:15 - 10:45 am	General Session: Last But Not Least Roundtable Discussion	
10:45 am	Conference Concludes	

GREEN STATEMENT: In an effort to reduce waste and decrease the use of paper products at the meeting, there will be no paper copies of session presentations or handouts at the event. One week before the conference, you will be provided with a web link to the available presentations. At that time, please review them and print the ones you'd like to have at the conference. The presentations will be available online for 6 months after the event.

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Return this form along with your registration fee to:

Professional Development Group II, Inc.
PO Box 99, Bloomington, IN 47402

Fax: 812-339-0138 • **Phone:** 812-339-6374 • Register online at: www.prodev.com

Personal Information

Attendee #1: Name _____ Title _____

E-mail _____ Phone _____

Attendee #2: Name _____ Title _____

E-mail _____ Phone _____

Attendee #3: Name _____ Title _____

E-mail _____ Phone _____

School/University: _____

Address _____

City _____ State _____ Zip+4 _____

Special needs? _____

Institution Information

My school is: Public Private Proprietary

Number of students: Full Time _____ Part Time _____

Student software used by your institution: _____

Have you attended this conference before? Yes No

How did you hear about us? Direct Mail Internet Coworker Other _____

Conference Fee Information

Conference: \$520 Attendee #1 \$499 Attendee #2 \$499 Attendee #3 \$ _____

Sunday workshop: (*may register for workshop independent of conference*) \$99 \$ _____

Please indicate who will attend each workshop: Bursar Fundamentals Leadership Skills

Unable to attend but will purchase presentation materials: \$150 \$ _____

Hotel package: (*room and tax only*) \$521 for 3 nights \$695 for 4 nights \$ _____

Total \$ _____

Payment Information

Method of payment: Check **Charge my:** Visa MasterCard American Express

Card Number _____ CVC Code* _____

Expiration Date _____ Signature _____

PDG's Federal Tax Identification Number: 20-1758459. Make check payable to: Professional Development Group II, Inc. No refunds will be made for cancellations after March 17, 2010. Substitutions may be made with written notification to PDG by fax at 812-339-0138. Please call 812-339-6374 or e-mail at info@prodevmeetings.com for additional information.

*CVC Code: The 3-digit code that is typically located on the back of your card, inside the signature area.