

NYSOBBA 39th Annual Conference
Hyatt Regency Hotel and Conference Center, Buffalo NY
June 12-15, 2016

Sunday, June 12, 2016

- 9:30am** **John G. Karrer Annual Golf Tournament**
Buffalo Tournament Club, 6432 Genesee Street, Lancaster NY 14086
Join your colleagues for a round of golf and help support the John Karrer Memorial Scholarship Fund. All skill levels are welcomed and encouraged to participate. Players should be at the course by 9:30am sharp on Sunday.
- 2:00pm- 5:00pm** **Conference Registration Opens**
Mezzanine Level
- 2:00pm- 5:00pm** **Business Partner Set-up**
Location: Grand Ballroom
- 5:30pm- 7:30pm** **Welcome Reception/Golf Awards**
Location: Naval Park - Canal Side
Our welcome reception will be held on the Fantail of the USS Little Rock, located in the Buffalo and Erie County Naval & Military Park. Transportation Options- free shuttle located at the entrance of the hotel, free NFTA train on Main Street, short 6 block walk up Main Street.

Monday, June 13, 2016

- 7:30am- 8:30am** **NYSOBBA Board Meeting**
Location: Niagara
- 7:30am- 8:30am** **Breakfast with Business Partners**
Location: Grand Ballroom
- 8:00am- 5:00pm** **Conference Registration**
Mezzanine Level
- 8:30am- 8:45am** **Welcome/Opening Remarks**
Renee Behnke, NYSOBBA President
Location: Grand Ballroom
- 8:45am- 10:00am** **Keynote Speaker - Defying Gravity: Living & Working Wholeheartedly**
Presenter: Nels Ross, CEO, In Jest Inc.
Location: Grand Ballroom

About the program... Employing his diverse talents and contagious playfulness, Nels helps people understand how humor and play can serve as effective tools to reduce stress and enhance joy, health, and productivity. Participants will be inspired and equipped to get more “smileage” out of work and life through interactive demonstrations and activities as well as practical resources.

About the presenter... Nels Ross is a performer, speaker, and “Chief Executive Oddball” of In Jest Inc.. Working solo and with others, he provides gravity-defying shows, keynotes, and more for organizations and events in North America and abroad. When he is not uplifting others, Nels enjoys life with his wife and five kids in western New York.

10:00am- 10:30am Refreshment and Networking Break with Business Partners

Location: Grand Ballroom

10:30am- 11:45am Concurrent Sessions

“Timing, Consistency, and are YOU in compliance?”

Presenter: John Meyer, Heartland ECSI
James Jones, Reliant Capital

Location: Regency Ballroom

Breaking down A/R management and what a school can do to increase cash flow – TODAY!

Money Matter on Campus

Presenter: Betsy Burton-Strunk, Refund Management Higher One

Location: Delaware

This session will focus on a study called Money Matters on Campus, a survey examining the financial attitudes and behaviors of college students from across the United States. Over the four years of the study, respondents showed continually decreased plans for responsible financial behaviors-including paying back student loans. Similar to findings in previous reports, money management experience was shown to have positive effects on knowledge and behavior, underscoring the need for young adults to be provided with opportunities to gain financial experience such as managing a bank account before or very early into their college experience.

12:00pm- 1:15pm Lunch with Business Partners

Location: Grand Ballroom

General Membership Meeting, Elections and Awards

1:15pm- 2:15pm It’s Their World, and Welcome to it!: Understanding and Marketing to Millennials

Presenter: Dr. Dawn Meza-Soufleris

Associate VP for Student Engagement, Rochester Institute of Technology

Location: Grand Ballroom

As the largest generation in history infiltrates the workforce, Generation Y brings a spirit to the workplace that is unparalleled. Coddled, structured, team-focused and diverse, their innovative spirit, quick boredom and desire for flexibility within their careers often leave their Baby Boomer and Gen X employers bewildered. How do we advise managers of this young generation to rein in their

creativity, longing for diversity and “can do” attitudes? How do we capitalize on their entrepreneurial spirit and electronic literacy? How should companies change their marketing strategies to reach this generation? This workshop will provide participants with an in-depth understanding regarding millennials, how they view education and the workplace, their impact on consumerism and best practices for fostering their innovative approach to the world and understand what the next group, Gen Z, has in store!

2:30pm- 3:30pm Concurrent Sessions

FERPA Training

Presenter: Riane F. Lafferty, Bond, Schoeneck & King PLLC
Michael E. Hickey, Bond, Schoeneck & King PLLC

Location: Regency Ballroom

This session will provide a comprehensive overview of the Family Educational Rights and Privacy Act (FERPA) with a focus on those FERPA issues particularly affecting bursars and business administrators of higher education institutions. The presentation will include practical examples, hypothetical scenarios, and a question and answer period to address any more specific FERPA-related questions you may have.

Creating a Veteran Friendly Campus

Presenter: Benjamin L. Randle Jr, Director, Veteran Affairs at D'Youville College
Benjamin L. Randle III (Trey), Asst Director, Veteran Affairs at NYC

Location: Delaware

Learn how D'Youville College has consistently ranked in the top 5 nationally as a Military Friendly, Best for Vets Campus. With a 95% retention rate, 98% graduation rate and 100% placement rate, the D'Youville Veterans Outreach & Support Services (VOSS) Center assists more than 500 veteran and military aligned students in their academic careers and professional aspirations

3:30pm- 4:00pm Refreshment and Networking Break with Business Partners

Location: Grand Ballroom

4:00pm- 5:30pm Concurrent Sessions

NACUBO Initiatives and the New Cash Management Rules

Presenter: Anne Gross, VP Regulatory Affairs NACUBO

Location: Regency Ballroom

Get an update on current projects underway at NACUBO designed to help you do your job and contribute to your institution's and your student's success.

Then review the Department of Education's recent revision of the cash management rules for Title IV programs and make sure you are ready—most of the requirements take effect July 1.

Bursar Fundamentals

Presenter: Susan Kirwan, Director of Student Accounts at Binghamton University

Location: Delaware

This session is designed for those new to the business office, student financial services, or the higher education workplace, or those who just want a refresher on the core responsibilities of the student accounts area.

5:30pm Open Night to Explore Buffalo

Tuesday, June 14, 2016

7:30am- 8:30am Breakfast with Business Partners

Location: Grand Ballroom

8:00am- 5:00pm Conference Registration

Mezzanine Level

8:30am- 8:45am Morning Announcements

Renee Behnke, NYSOBBA President

Location: Grand Ballroom

8:45am- 10:00am Federal Update

Presenter: Wes Huffman, Senior Legislative Associate at Washington Partners LLC

Location: Grand Ballroom

Description: This session will offer information on what to expect from Washington in 2016 and beyond. It will focus on the efforts of the Department of Education, CFPB, FCC, and other federal agencies impacting higher education policy, particularly campus-based federal services. The discussion will also address what to expect in the remainder of the 114th Congress and what the elections could mean for the Executive Branch and the next Congress.

10:00am- 10:30am Refreshment and Networking Break with Business Partners

Location: Grand Ballroom

10:30am- 12:00pm 1098T Challenges

Presenter: Anne Gross, VP Regulatory Affairs NACUBO

Location: Grand Ballroom

Just when one problem gets resolved, a new challenge with 1098-T reporting pops up. With fines for missing or incorrect taxpayer identification numbers resolved, now schools that have been reporting amounts billed in Box 2 need to transition to amounts paid in Box 1. Explore the history of the education tax credits and IRS tuition reporting requirements, including the legislative changes enacted in 2015.

12:00pm- 1:15pm Lunch with Business Partners

Location: Grand Ballroom

General Membership Meeting, Elections and Awards

1:15pm- 2:15pm Concurrent Sessions

Campus Security

Presenter: Gary Everett, Public Safety Director, Retired Canisius College

Keith J. Bova, Director of Security at D'Youville College

Location: Regency Ballroom

This session teaches participants what to do the first 3 minutes of a critical incident- before the police arrive. The RAIN (Respond-Assess-Isolate-Notify) course is established and supported by the Community Safety Institute.

Perkins Update

Presenter: Maria Livolsi - Director, SUNY SLSC and President COHEAO

Location: Delaware

Description: A comprehensive discussion of current issues related to the new legislation and efforts underway for Reauthorization of the Perkins Loan Program.

2:30pm- 3:30pm Concurrent Sessions

Income Driven Repayment Plans & Public Service Loan Forgiveness

Presenter: BJ Rezill, Director of Financial Aid at the University of Rochester

Location: Regency Ballroom

This session is an overview of the more recent Income Driven Repayment plans, an overview of Public Service Loan Forgiveness, and then some detail on how the Income Drive plans work well with Public Service Loan Forgiveness.

EMV On Campus Post Liability Shift

Presenter: Don Smith, VP, Payments Product Manager -CASHNet

Location: Delaware

Description: EMV has been top of mind for issuing banks, merchants and consumers in the U.S. for over a year. Last October, the card brands implemented a liability shift in an attempt to encourage merchants to make the necessary adjustments to their software and hardware to facilitate a successful roll out in the U.S. Join us as we provide an update on the EMV implementation, including an examination of the unintended consequences and what your campus can do to mitigate the risks. We'll help you answer questions from your peers and prepare or refine your campus' EMV strategy.

3:30pm- 4:00pm Refreshment and Networking Break with Business Partners

Location: Grand Ballroom

4:00pm- 4:30pm Business Partner meeting with Associate Rep.

Location: GrandBallroom

Exhibitor Breakdown by 10pm

4:00pm- 5:00pm Concurrent Sessions

Policy and Procedures Manual (creating and maintaining one)

Presenter: Joe Weglarz, Executive Director of Student Financial Services, Marist College

Lisa Boyes, Director of Student Accounts, Marist College

Stefanie Cusano, Asst Director of Student Accounts, Marist College

Location: Regency Ballroom

The session will cover why an office must have a P & P Manual, how to create a P & P Manual, and how to update and maintain the manual

“Standing At The Intersection of IRS Street and Bursars Avenue”

Presenter: Steven Hoffman, The Tax Translator, MT, CFP, EA

Location: Delaware

Are you waiting for the light to change? In this session Bursars will see the collisions that can happen at this intersection. The IRS has a traffic cam at this intersection and is looking at the:

1. Reporting of cash payments in excess of 10K
2. 1098T reporting
3. Taxable Scholarships

In this session you'll learn the rules of the road and how to drive safely with the IRS.

6:00pm- 7:00pm Cocktail Reception

Location: Sun Garden Cocktail Lounge-Mezzanine Level

7:00pm- 10:30pm Banquet Dinner

Location: Regency Ballroom

Ahoy Maties! Anchors Away! Please join us for a night of Nautical Fare...dinner and dancing...
Enjoy sounds of the “Boomer Daddy’s” as they softly play through dinner and then batten down the hatches, shake a leg and get underway on the dance floor!
Don’t forget to wear your RED, WHITE and BLUE

Wednesday, June 15, 2016

8:00am- 9:00am Breakfast

Location: Grand Ballroom

9:00am- 10:30am

Trending/Best Practices Roundtable Discussion

Presenter: Roundtable Discussion Facilitated by NYSOBBA Board Members

Location: Regency Ballroom

11:00am- 12:00pm Board Meeting