



NYSOBBA Annual Conference
Sonesta Resort - White Plains, NY
June 8 – 11, 2025

Sunday - June 8

12:30 p.m. John G. Karrer Annual Golf Tournament

Location: TBD

Alternate Event

Location: TBD

Monday, June 9

8:00 a.m. – 11:30 a.m.

Business Partner Set-up

Location: TBD

Concurrent Sessions

10:00 a.m. -11:30 a.m.

Session I: Bursar Basics

If you are new-ish to the world of Student Accounts, and would like a safe space to ask questions, learn the rationale for the “why” behind industry processes/standards, or simply connect with colleagues who feel as lost as you do on any given day, join us for an engaging discussion about many of the day-to-day operational responsibilities in an office of Student Accounts. All are welcome! You don’t have to be new to benefit from a “refresher”. This session embodies the adage, “there are no dumb questions”!

Presenter: Jacob Kopera, Niagara University

Teresa Major, SUNY Brockport

Location: TBD

Session II: Beyond Bursar Basics

Whether you are a Student Account veteran, or someone who came to their position more recently, “Beyond Bursar Basics” is an opportunity to garner tips and tricks from some veteran leaders, to spark conversation with other attendees through questions like, “how do you do “X”...”, and commiserate with the only people on the planet who can truly understand your frustrations! This is a round-table discussion in which participation from all attendees is welcome and encouraged.

Presenter(s): Kevin Smith or Eileen Tally, Canisius College
Niza Cardona, SUNY New Paltz
Kathy Meloon, University at Buffalo
Audrey Brown, Columbia University
TBD – 2-year Public
Location: TBD

11:30 a.m. – 11:45 a.m.

Welcome/Opening Remarks, NYSOBBA President

Presenter: Audrey Brown (Columbia University)
Location: TBD

11:45 a.m. - 12:30 p.m.

Lunch

Location: TBD

General Session

12:30 p.m. - 2:00 p.m.

Keynote: Your Health is Your Wealth

This lively interactive session will focus on recognizing and embracing strategies to work toward finding your best health, and the benefits doing so can bring to creating and maintaining a positive work-life balance. Tressa Watson, Health & Wellness Specialist, will engage participants in exploring the two sides of the health pendulum - the physical and the mental - and will delve into how you can make minor changes to your daily life that will reap major benefits. Between working eight or more hours each day, organizing and executing family schedules, and the weight our other responsibilities can bring, we're often too exhausted to remember to carve out time to care for ourselves. This session will show you how to incorporate the tenets of the "Your Health is Your Wealth" philosophy in both the workplace and "real" life, and help you discover simple, do-able ways to improve your "health wealth".

Presenter: Tressa Watson, Health & Wellness Specialist, Life Coach and HR Coordinator (Williams & Fudge)

Location: TBD

Concurrent Sessions

2:00 p.m. – 3:00 p.m.

Birds of a Feather – Institution Type

Have you been wanting to ask someone from a like-minded school about a certain process, policy or other topic - - but weren't comfortable putting it on the listserv for others to see (or - let's be

honest - to judge you)? Are you a community college who can't make heads or tails of the SUNY residency policy? A 4-year public wanting to brainstorm regarding ways to mitigate the impact of increased hold thresholds? This session is an opportunity to share thoughts, questions and frustrations in a judgement-free zone – and to develop not only possible solutions, but an invaluable network of loyal colleagues.

Session I: Birds of a Feather – Private

Presenter(s): TBD

Location: TBD

Session II: Birds of a Feather – 2-Year Public

Presenter(s): TBD

Location: TBD

Session III: Birds of a Feather – 4-Year Public

Presenter(s): TBD

Location: TBD

3:00 p.m. - 3:30 p.m.

Refreshments with the Business Partners

Location: TBD

General Session

3:30 p.m. – 4:45 p.m.

Collection Tips and Compliance (Vendor Panel)

We all know that our vendor partners are one of our most valuable resources as we navigate the twists and turns of higher education. They can be a seemingly endless source of regulatory, operational process, and benchmark service assistance. In this Structured Q&A session, our panel of elite collection experts will offer their thoughts surrounding the questions/topics NYSOBBA members submitted previously to the conference Agenda Committee. Panel participants will also share tips & tricks designed to assist campuses in increasing the success of their internal collection efforts.

Presenter: TBD

Location: TBD

General Session

5:00 p.m. – 5:45 p.m.

De-Stress with Tress! Get Energized!

Did a day of workshops cause your get-up-and-go to get-up-and-leave? Get revived before heading out with colleagues for a night on the town! Tressa will restore your energy in a fun, low-impact

session filled with laughter and camaraderie. No skills are necessary to participate – everyone from beginners to experts will enjoy this head-clearing energy boost!

Location: TBD

6:00 p.m.

Dinner on Your Own

Tuesday, June 10

7:00 a.m. - 7:30 a.m.

Sunrise Stretch with Tressa

Have a little too much fun with colleagues last night? Does sleeping in a hotel make you miss your own bed? We've got the solution to make your "good morning" a GREAT morning! Join us as Tressa leads us through a series of low-impact stretches designed to make your mind alert, and your muscles say "Ahhhh... thank you!" Our Sunrise Stretch session will leave you refreshed and ready to tackle the day - - and you'll still have time for a delicious breakfast!

Location: TBD

7:00 a.m. - 8:00 a.m.

Breakfast

Location: TBD

General Session

8:00 a.m. – 9:00 a.m.

Updates and Trends in the Collection of Student Debt

The landscape surrounding student debt collection continues to evolve with ongoing changes in case law, federal and state regulations, and institutional policies. It's critical for colleges, universities, and their collection partners to stay current on developments that impact the recovery of student loans and other receivables. This session will explore key legal, regulatory, and industry trends shaping collection practices today. Attendees will gain insights into the most pressing challenges and opportunities in student debt recovery and learn how to adapt financial services strategies to remain compliant and effective.

Presenter: Chad Echols, Partner, Frost Echols, LLC*

**Special thanks to Williams & Fudge for their generous sponsorship of Mr. Echols' appearance*

Location: TBD

9:00 a.m. – 9:15 a.m.

Refreshments with Business Partners

Location: TBD

Revolving Topical Discussion

9:15 a.m. – 10:45 a.m.

Musical Topics (*Vendor Experts*)

*****SESSION OVERVIEW IN THE PROCESS OF BEING DRAFTED*****

Presenters: TBD

Location: TBD

General Session

10:45 a.m. – 11:45 a.m.

HESC – Structured Q&A

TAP... Excelsior... APTS... Merit Scholarships... Certifications... It's enough to make your head spin! Never fear! Lisa Simpson, HESC's Director of Colleges and Universities Relations, is here to help! In this Structured Q&A session, Lisa will offer her thoughts surrounding the questions/topics NYSOBBA members submitted previously to the conference Agenda Committee, ranging from training opportunities to HESC website tips & tricks. Lisa will also provide any relevant program changes/updates that may stem from the upcoming budget season.

Presenter: Lisa Simpson (HESC Director of Colleges and Universities Relations)

Location: TBD

11:45 a.m. – 12:00 p.m.

De-Stress with Tress! *Office Chair Workout!*

It's the workout you've been waiting for... you don't even have to get out of your chair! Tressa will lead us through exercises designed to fit into our workday; you'll learn how to safely stretch your muscles from the comfort of your desk chair when you return to the office! These techniques will help prevent achy backs, leg cramps, and more – all while making you feel refreshed and ready to tackle your day! No skills are necessary to participate – everyone from beginners to experts will benefit from this momentum infusion! Even better? You don't need to wear workout clothes!

Location: TBD

12:00 a.m. -1:00 p.m.

Lunch and Business Meeting

Location: TBD

Concurrent Sessions

1:00 p.m. – 2:00 p.m.

Session I: Veteran’s Administration (VA) Updates

Presenter: Ilana Finkelman, VetSuccess on Campus Counselor, Nassau & Suffolk County Community Colleges

Location: TBD

Session II: Protecting What’s Important... You!

Presenter: Kelly Loss, Bursar and Safety/Security Coordinator, Trocaire College

Location: TBD

2:00 p.m. – 2:30 p.m.

Refreshments with Business Partners

Location: TBD

General Session

2:30 p.m. – 3:30 p.m.

Birds of a Feather – Student System

Student software systems can be ALMOST as frustrating for Student Accounts as students who say “Nobody told me...”, or “My mom said...”! This session offers the chance for attendees to break-out according to their school’s student information system. The round-table format encourages participants to talk about how their system’s baseline processes work – or don’t work – for them, share little-known system features they discovered that have resulted in streamlined workflow or improved student service, discuss how they have incorporated system functionality into their collection efforts, and more! Have you developed a work-around for a baseline process that wasn’t giving you what you needed? Come prepared to share your system victories – your insight may help others find their own solution! Are you at the end of your rope with your system’s limitations? Someone else may have already solved the same problem! This fun and lively discussion could lead to solutions to make your everyday life easier - - and at the very least, remind you that you are not alone!

Session I: Birds of a Feather – Ellucian/Banner

Presenter(s): TBD

Location: TBD

Session II: Birds of a Feather – Peoplesoft

Presenter(s): TBD

Location: TBD

Session III: Birds of a Feather – Ellucian/Colleague

Presenter(s): TBD

Location: TBD

Session IV: Birds of a Feather – Other Software Systems

Presenter(s): TBD

Location: TBD

General Session

3:30 p.m. – 5:00 p.m.

E-Commerce Tips & Tricks (Vendor Panel)

We all know that our vendor partners are one of our most valuable resources as we navigate the twists and turns of higher education. They can be a seemingly endless source of regulatory, operational process, and benchmark service assistance. In this Structured Q&A session, our panel of elite e-Commerce and Banking experts will offer their thoughts surrounding the questions/topics NYSOBBA members submitted previously to the conference Agenda Committee. Panel participants will also share tips & tricks designed to assist campuses in utilizing e-Commerce options to their greatest benefit

Presenter: TBD

Location: TBD

5:00 p.m. – 5:15 p.m.

De-Stress with Tress! *Afternoon Jolt!*

Join us for 15 energy-packed minutes designed to revive and refresh you as we move into the end of the day! No skills are necessary to participate – everyone from beginners to experts will benefit from this momentum infusion! Even better? You don't need to wear workout clothes!

Location: TBD

6:00 p.m. - 7:00 p.m.

Cocktail Reception

Location: TBD

7:00 p.m. - 10:00 p.m.

Banquet Dinner and Entertainment (*Raffle & Give-Away Winners Announced*)

Location: TBD

Wednesday, June 11

8:00 a.m. - 9:00 a.m.

Breakfast

Location: TBD

General Session

9:00 a.m. - 10:00 a.m.

Regulatory Updates

Presenter: Karen Reddick, COHEAO President
Maria Livolsi, COHEAO Vice-President

Location: TBD

10:00 a.m.

Conference Wrap-Up