

## Event Details

### Philadelphia 2010 EACUBO Spring Workshop

Apr 28, 2010 8:15am - Apr 28, 2010 4:00pm  
Event Type: Conference

#### Description

**Philadelphia Region - 2010 EACUBO Spring Workshop**  
**Philadelphia University**  
**4201 Henry Avenue • Philadelphia, PA 19144**

**April 28, 2010**

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| <b><i>Check-in and Registration</i></b> | <b><i>8:15 am to 9:00 am</i></b> |
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| <b><i>“Accounting Update”</i></b> | <b><i>9:00 am to 9:50 am</i></b> |
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Presenter: Kelly Thornton

Kelly is a partner in the Philadelphia office of PricewaterhouseCoopers LLP (PwC) and is responsible for directing and coordinating services to a wide range of clients in the higher education, not-for-profit and healthcare industries. She has been involved in a variety of client industries and sizes, but has focused on the higher education, healthcare and not-for-profit industries since the beginning of her career in Washington DC in 1994 where she was resident until 2006. Kelly assists clients with a variety of business issues, including acquisitions and disposals, joint ventures, debt issuances, compliance audits, internal control reviews and governance issues. Her areas of expertise include compliance audits under OMB Circular A-133. She is a frequent developer and instructor of industry training material within the firm. She is well known and respected in these industries for her direct and clear understanding of related issues and is periodically called upon as a speaker and subject matter expert at various external conferences and seminars, including EACUBO, PICPA, Healthcare Financial Management Association and the American Bar Association.

Course Objective: Update on emerging financial accounting and reporting matters to help you plan for their impact on your organization.

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| <b><i>Video webcast</i></b>  | <b><i>10:00 am to 12:30 pm</i></b> |
| <b><i>“Institute for Global Ethics, Ethical Fitness Seminar”</i></b> |                                    |
| <b><i>15 minute break</i></b>  | <b><i>11:15 am to 11:30 am</i></b> |

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Introduction to the

## **ETHICAL FITNESS® SEMINAR**

**IGE's four-step process for resolving ethical dilemmas**

We recognize that the ethics responsibilities of many leaders in business, government, and nonprofit environments have grown significantly beyond compliance in the last few years to include the mandate for building ethical cultures, where trust can grow and thrive and where employees themselves become the security network for corporate ethics.

The core of IGE's approach to growing ethical cultures is the Ethical Fitness® Seminar (EFS). The EFS is positive, non-threatening, and highly interactive. Participants from the last fifteen years claim greater awareness of ethical issues, higher levels of decision-making confidence, and a high degree of relevance to their job responsibilities. Some have told us that the EFS was a life-changing experience; others say that the impact of their EFS experience has grown over time, rather than diminished. Most are content to share their gratitude for a disciplined way to approach life's very difficult decisions.

The learning objectives for the EFS aimed at corporate organizations include the following:

- Recognizing the importance of ethics—for individuals, for organizations, for the future
- Understanding trust—what is it? What encourages trust? What kills it?
- Tasking leadership with trust—what can leaders do to create a trust environment?
- Defining ethical values—whose values are they? How are they applied in the workplace?
- Analyzing ethical challenges—how can we identify and avoid right-versus-wrong moral temptations, and how can we distinguish them from real right-versus-right ethical dilemmas? Can ethical dilemmas be categorized?
- Resolving dilemmas—which principles best apply?
- What is moral courage and when should I have it?

IGE's work assumes that fundamental, shared values can be discovered and applied. We also assume that individuals and organizations are capable of developing what we call "ethical fitness" – which, like physical fitness, keeps you in mental and moral shape to recognize and address ethical dilemmas. Participants will leave our seminar with the tools and confidence required for resolving ethical dilemmas – equipped to confront issues that face them every day, at work and at home.

**SPEAKER:** Martin L. Taylor

Director, Center for Corporate Ethics; A Division of the Institute for Global Ethics

Martin Taylor joined the Institute for Global Ethics in 1994 to direct the seminar program. Since then, with the help of the IGE staff, clients, and Directors, he has elevated that program to its present status in the Center for Corporate Ethics, offering consulting, education, and research capability to organizations of all kinds, including businesses, non-profits, governments, and the military. He has served on the Ethics Committee for the American Society for Association Executives and as a Senior Fellow for the Ethics Resource Center Fellows. Taylor is a certified Master Trainer for the Institute and has given the Ethical Fitness® Seminar to a wide variety of groups. He speaks on behalf of ethics in the workplace whenever the opportunity arises.

Taylor arrived at IGE after 25 years with Eastman Kodak Company. His early career focused on corporate publishing during which he wrote the multi-million-copy bestseller, *The Joy of Photography*, now in its fourth edition. He received numerous awards for other projects from the Society for Technical Communication and the International Society for Technical Communication.

After fifteen years of producing motivational literature for consumers, Taylor joined an internal venture unit to learn sales and marketing skills, while producing all the company's communications. In 1987, he was selected Employee of the Year, the only time that award was given in the 6 years of the organization's life. Taylor left the venture as Marketing Director and rejoined the main body of the company to direct individual high-technology product marketing projects. His last years were spent managing a \$10MM marketing communications department that spanned two divisions.

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***Lunch Break and Networking***

***12:30 to 1:30 pm***

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***Video webcast continues  
"Institute for Global Ethics, Ethical Fitness Seminar"***

***1:30 pm to 2:45 pm***

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Presenter: Robert W. Friz

Rob is a Partner at PricewaterhouseCoopers in the National Tax Services (NTS) Exempt Organizations Tax Services (EOTS) Practice, and serves as the leader of the U.S. Healthcare Providers, Higher Education, and Nonprofit Sector Tax Practice. In this role, Rob's practice focuses on providing advice regarding tax and business issues associated with tax-exempt educational and healthcare organizations, as well as their related for-profit and joint venture entities. He has expertise and experience with mergers and acquisitions, unrelated business taxable income, intermediate sanctions, obtaining exempt status, compensation, charitable contributions, fundraising, reporting requirements, lobbying, controversy resolution, as well as general tax compliance matters. A frequent speaker on tax related matters, Rob has spoken at the Exempt Organization Committee program for the American Bar Association Section of Taxation, the American Health Lawyers Tax Issues for Healthcare Organizations and Annual Meeting programs, the Healthcare Financial Management Association (HFMA) Annual National Institute, the National Association of College and University Business Officers (NACUBO) program, and the Tax Institute for Colleges and Universities program. He has served as the Event Chairperson and as a speaker for the Philadelphia Region HFMA Tax and Financial Update program. Rob has also served as a faculty member of the Pennsylvania Bar Institute's Annual Health Law Institute and as a speaker on various tax topics for the Penn State Tax Conference.

Course Objectives: Provide an update on emerging tax and compliance matters impacting higher education. Specific examples will provide helpful highlights throughout the discussion.

**Continuing Professional Education (CPE) credits:**

EACUBO is pleased to be able to offer up to 4 CPE credits in the Behavioral Ethics field of study for those participating in the EACUBO-sponsored webcast portion only. EACUBO APC Philadelphia is pleased to be able to offer 1CPE credit in Accounting and Audit and 1 CPE credit in Tax for the other sessions.

EACUBO is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing education on the National Registry of CPE sponsors. State boards of accountancy have the final authority on the acceptance of individual course of CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37210-2417. Web site: [www.nasba.org](http://www.nasba.org)

The APC webcast qualifies for 4 CPE's in "Behavioral Ethics" field of study and is a "Group-Live" presentation. EACUBO strives to provide the best quality programming to all its members and the higher education industry. Should there be a concern with the quality of programming or level of service, please contact Randy Gentzler, EACUBO Program Prefect (call 215-951-2966 or email [gentzlerr@philau.edu](mailto:gentzlerr@philau.edu)).

CPE credits for the sessions on accounting and tax are sponsored by EACUBO APC Philadelphia – PA Sponsor ID PX-13414-L. The Accounting Update session qualifies for 1 CPE credit in the "Accounting" field of study and is a "Group-Live" presentation. The Tax Update session qualifies for 1 CPE credit in the "Tax" field of study and is a "Group-Live" presentation. Should there be a concern with the quality of programming or level of service regarding these sessions, please contact Stephen Lightcap, chair of the EACUBO Philadelphia APC (call 610-902-8275 or email [slightcap@cabrini.edu](mailto:slightcap@cabrini.edu)).

The learning objectives for attendees of this professional development workshop are the introduction or enhancement of critical technical and management skills that are targeted to higher education business administrative professionals at the **Intermediate Level**. Prerequisites: No prerequisites, Preparation: No advanced preparation is required, however a minimum 1-2 years of experience as a professional in higher education or a related private industry is recommended. For specific information regarding EACUBO's CPE program including our refund policy this program please visit [www.eacubo.org](http://www.eacubo.org).

**Advanced** – Learning activity level most useful for individuals with mastery of the particular topic. This level focuses on the development of in-depth knowledge, a variety of skills, or a broader range of applications. Advanced level programs are often appropriate for seasoned professionals within organizations; however, they may also be beneficial for other professionals with specialized knowledge in a subject area.

**Intermediate** – Learning activity level that builds on a basic program, most appropriate for professionals with detailed knowledge in an area. Such persons are often at a mid-level within the organization, with operational and/or supervisory responsibilities.

**Basic** – Learning activity level most beneficial to professionals new to a skill or an attribute. These individuals are often at the staff or entry level in organizations, although such programs may also benefit a seasoned professional with limited exposure to the area.

**Individuals desiring CPE credit must sign in at the registration table and complete the CPE Reporting Form before leaving the conference. Participants must complete the electronic evaluation and request their CPE certificate for the webcast session by going on-line to: [www.eacubo.org](http://www.eacubo.org). CPE certificates for the accounting and tax sessions will be issued at the end of the conference.**

## **All Registrations Must Be On-line:**

Registration fee is \$60 and includes continental breakfast and lunch. Register on-line using Visa, Mastercard or American Express at [www.eacubo.org](http://www.eacubo.org). For additional help, contact Emily Fournier at [efournier@eacubo.org](mailto:efournier@eacubo.org).

Driving directions to Philadelphia University: <http://www.philau.edu/directions/>

Philadelphia University campus map: <http://www.philau.edu/unimap/staticmap.htm>

Parking will be at the Ravenhill Athletic Field (#25 on the map).

The conference will be in the Kanbar Campus Center (#21 on the map) in the performance space. Follow directional signs.

Registration ends on 04/28/2010.