

**EACUBO New York City Metropolitan Area  
Fall Professional Development Workshop  
New School University  
May 14, 2010**

The EACUBO New York City Metropolitan Area Professional Development Program Committee is pleased to present its Spring Workshop on Friday May 14, 2010 at the New School, 55 West 13<sup>th</sup> Street, Lang Student Center 2<sup>nd</sup> Floor NY, NY.

**The link for online registration is included at the end of this brochure. The registration deadline is May 7<sup>th</sup>. For questions regarding registration, please contact Emily Fournier at [efournier@eacubo.org](mailto:efournier@eacubo.org). For questions regarding the program, please contact Howard Buxbaum at [hbuxbaum@drew.edu](mailto:hbuxbaum@drew.edu)**

The program will consist of presentations on: financing sustainability projects; accounting and tax updates; resource optimization; short term cash management; and programs of DASNY and NYSERDA.

This workshop is intended for business and related offices staff at mid and senior levels. The workshop registration fee is \$50, which includes a continental breakfast and lunch. We look forward to another successful event and to seeing you and your colleagues there. Don't miss this opportunity to meet and interact with your peers during this inexpensive one-day program.

**CPE Credits. CPE Credits.** This program provides 5.0 credits.

CPE credits for the sessions in this program are sponsored by the EACUBO APC of New York City Sponsor License 002144 issued by the New York State Education Department. 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. The programs on financing sustainability, resource optimization and maximizing cash yield qualify for 1 CPE credit each under the "Advisory Services" field of study and are "Group-Live" presentations. Should there be a concern with the quality of programming or level of service regarding these sessions, please contact Howard Buxbaum, chair of the EACUBO New York APC at [hbuxbaum@drew.edu](mailto:hbuxbaum@drew.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. Certificates will be mailed after the conference.

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***Registration, continental breakfast and welcome***

**8:30 to 9:00**

***Tax Update***

**9:00 to 10:00**

Tom Lanning of J.H. Cohn will provide an update on matters affecting not-for-profit organizations including the latest on the 990, IRS audit of governance issues, independent contractors, post debt issuance compliance and other recent developments.

**Thomas Lanning, CPA**, is a tax partner in J.H. Cohn's not-for-profit industry practice with over 26 years experience. Tom provides planning and compliance services to diverse not-for-profit and government organizations with a wide variety of tax and business consulting services. Tom is a member of the AICPA and the New York Society of Certified Public Accountants. Tom received his bachelor's degree in accounting from Wagner College and his masters in taxation from Pace University.

***Resource Optimization***

**10:00 to 11:00**

Loren Mann, Huron Consulting Group, will demonstrate an effective, tested approach of using business cases as tools to drive resource optimization. Business cases systematically quantify the cost reduction and revenue enhancement opportunities across an institution's functional areas. The approach incorporates an evaluation of operational impact, risk, and difficulty to implement of any initiative. Taken together, a portfolio of business cases provides a broad, data-supported picture in which university leaders can see the range of their alternatives.

**Loren Mann** is a Director in the Health and Education Consulting Practice of Huron Consulting Group and has more than ten years of experience in the delivery of consulting and strategic business advisory services to academic research, academic medical center, physician practice, pharmaceutical, and Not-For-Profit/ Mission Driven Organizations. Loren has significant experience with operating and capital budget development, strategic analysis and planning, business case development, joint venture analysis, financial due diligence, business valuation, product and service line analysis and assessment, and financial modeling. Loren has an MBA from the Harvard Business School, a MS in Mechanical Engineering from Rensselaer Polytechnic Institute, and a BS in Mechanical Engineering from the University of Illinois. Champaign-Urbana.

***Accounting and Auditing Update***

**11:15 to 12:15**

KPMG LLP will provide an overview of recent accounting and auditing developments that will impact the upcoming audits of colleges and universities. Topics will include items such as the FASB codification, fair value, mergers and acquisitions, single audit, and more.

**Ed Lee** is a Partner in KPMG's Higher Education, Research, and Other Not-for-Profit practice. Ed has over 14 years of experience serving higher education and other not-for-profits in the metro New York Area. Ed is a member of the AICPA, NYSSCPA, Nassau/Suffolk Hospital Council (NSHC), and Hospital Financial Management Association (HFMA). Ed has been a guest speaker or represented KPMG at various meetings of HFMA, NSHC, National Council of University Research Administrators (NCURA) and committees of the NYSSCPA. Ed was recently inducted into the Long Island Business News – 40 Under 40 (Class of 2010).

Ed is a graduate of Long Island University – C.W. Post. He is a member of the Benevolent and Protective Order of Elks and serves as the chair of the Audit and Accounting and Drug Awareness Committees.

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### ***Lunch***

**12:15 to 1:00**

We are pleased to present a lunch time program by the Dormitory Authority of New York and the New York State Energy and Research Development Authority.

The Dormitory Authority of the State of New York (DASNY) and the New York State Energy Research and Development Authority (NYSERDA) are working together to provide higher education institutions with solutions to their energy and financial challenges. There is recognition that colleges and universities are in need of partners to help them maintain their financial health through innovative financing mechanisms and reducing campus-wide energy costs. This brief presentation will highlight how DASNY and NYSERDA can work with your campus to help ensure you meet your bottom line.

**Chuck Samul** is Director Client Outreach for the Dormitory Authority of the State of New York (DASNY). Since June of 2007 Chuck has directed the Authority's efforts to identify and develop new business opportunities for both the Public Finance and Construction Management Divisions.

**Clararose Voigt** is an Assistant Project Manager based in NYSERDA's New York City Office. Her main focus is promoting energy efficiency in Con Edison and Orange & Rockland utility territories through NYSERDA's Commercial & Industrial programs. Ms. Voigt manages study and implementation projects in the C&I sectors as well as the statewide FlexTech Program (PON1746). She is also the downstate contact for NYSERDA's Focus on Colleges and Universities.

**Elliot Easton** is the Program Coordinator for the NYSERDA Focus on Colleges and Universities Program and the Project Director for Sustainability at Einhorn, Yaffee, Prescott. Prior to joining EYP, Elliot was the Energy Procurement Manager for the sixty-four campus State University of New York System.

### ***Strategies for Maximizing Cash Yield in a Low Rate Environment***

**1:00 to 2:00**

Graystone consulting will discuss the history of cash management, safety in short term investing, issues in today's market and strategies for maximizing cash yield.

**David Rosenthal** specializes in institutional investment management advisory services and in providing consulting services to college endowments, corporate pension Plans, charitable organizations and insurance companies.

Graystone Consulting is one of the largest and most experienced investment consulting firms in the industry. Established in 1974 as The Consulting Group, a division of EF Hutton, Graystone is the 4<sup>th</sup> largest institutional consultancy in the country.

David sits on the Endowment and Foundations Committee of the Association of Professional Investment Consultants and he is a member of the Investment Management Consultants Association.

David was awarded a B.A. from Franklin & Marshall College and a J.D. from Southwestern University School of Law.

### ***Financing Sustainability***

**2:00 to 3:00**

Jim Thoma will provide a roadmap of how to convert green goals into green results by deploying optimal energy project financing solutions. His presentation will include an overview of the financing options available to colleges and universities to facilitate the implementation energy efficiency, renewable energy, distributed energy and other sustainability initiatives. He will also highlight tax policies and other incentive regimes that can be combined with creative financing to further enable institutions to reduce their carbon

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footprint, control utility costs and achieve positive environmental and economic results.

**Jim Thoma** is a co-founder and Managing Director of Green Campus Partners LLC (“GCP”) with responsibility for the company’s business development, strategic planning, marketing and capital markets activities. GCP is an energy project development and merchant banking business that enables its clients to achieve their sustainability objectives while capitalizing on opportunities to improve enterprise value and social responsibility by implementing energy efficiency, renewable energy and distributed generation projects. GCP utilizes a unique co-development business model to collaborate with clients and contractors in the development, financing, ownership and operation of energy projects serving institutional clients with energy intensive facilities. Jim received his bachelors degree from the University of Vermont.

The registration fee is \$50 per person (includes continental breakfast and lunch).

### **Directions to New School University, 55 West 13<sup>th</sup> Street, Lang Student Center, 2<sup>nd</sup> Floor NY, NY**

#### **BY SUBWAY**

New School buildings in Greenwich Village are accessible by a variety of subway lines. You may take:

The 4, 5, 6, N, R, Q, W, or L trains to 14th Street and Union Square.

The A, C, E, and F trains to West 4th Street and 6th Avenue.

The 1, 9, 2 or 3 trains to 14th Street and 7th Avenue.

The PATH train from New Jersey stops at 9th Street and 6th Avenue.

From Grand Central Station:       Take subway 4,5 or 6 to Union Square station (14<sup>th</sup> St). .

Taxi cab is around \$8

From Penn Station:                Take A line to 14<sup>th</sup> Street. Change to L and go to 6<sup>th</sup> Avenue

#### **By CAR**

From: Westchester, Connecticut and points north of New York City

Take the Saw Mill River Parkway to the Henry Hudson Parkway south (downtown) and continue to the West Side Highway (which becomes 12th Avenue/West Street); exit left at 14th Street.

From: Points north of New York City via I-95

Take I-95 to the Triborough Bridge. Follow the FDR Drive south (downtown). Exit at 14th Street.

From: New Jersey and points west of New York City

From the George Washington Bridge: take the Henry Hudson Parkway south and proceed as directed above.

From: Long Island and points east of New York City

Take the Long Island Expressway (I-95) west to the Midtown Tunnel. From the Tunnel follow signs to 34th

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Street and the FDR Drive. Take the Drive south to the 15th Street exit and continue south to 11th Street.

### NEARBY GARAGES

The Brevoort Parking Corporation, 20 East 9th Street  
The Brevoort Garage, 21 East 12th Street  
East 12th Street Garage Corporation, 17 East 12th Street

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### **EACUBO NYC Metropolitan Area Professional Development Committee**

Howard Buxbaum, Chair	VP for Finance	Drew University
Julie Andersen	VP for Finance	Jewish Theological Seminary
Craig Becker	VP for Finance	New School University
Mary Bowlowski	Controller	New Jersey City University
Keith Borge	Controller	College of New Rochelle
David Klein	Controller	Sarah Lawrence College
Frank Nuara	VP for Finance and Administration	Bank Street College
Charles O'Mara	Sr. VP for Finance and Admin.	Culinary Institute of America
Jeanne Plecenik	Vice President for Business Affairs	Marist College

Please contact Howard Buxbaum at [hbuxbaum@drew.edu](mailto:hbuxbaum@drew.edu) if you have any questions.