35th Annual
Representing and Managing Tax-Exempt Organizations

Thursday & Friday, April 26-27, 2018 • Grand Hyatt Washington • Washington, DC

Up to 14.4 CLE credit hours (based on a 60-minute credit hour), including an optional 1.1 hours of ethics
Up to 17.3 CLE credit hours (based on a 50-minute credit hour), including an optional 1.4 hours of ethics
Up to 17.0 CPE credit hours, including credit in Taxes, Specialized Knowledge, and Regulatory Ethics

Nonprofit Governance
Charitable Advocacy: What Nonprofit Organizations Need to Know

Co-sponsored by Independent Sector and the Council on Foundations

Wednesday, April 25, 2018
Nonprofit Governance
Charitable Advocacy: What Nonprofit Organizations Need to Know

Co-sponsored by Independent Sector and the Council on Foundations

Wednesday, April 25, 2018 | Georgetown University Law Center | Washington, DC

7:30 – 8:05 am
Registration and Continental Breakfast

8:05 – 8:20 am
Introduction and Welcome
Jill C. Castleman, Executive Director, Georgetown Law CLE
Suzanne Friday, Program Co-Chair, Council on Foundations
Allison Grayson, Program Co-Chair, Independent Sector
Celia Roady, Program Co-Chair, Morgan, Lewis & Bockius LLP

8:20 – 9:20 am
Is Charitable Advocacy a Mission Imperative?
Gary D. Bass, Executive Director, The Bauman Foundation
Allison Grayson, Director, Policy Development and Analysis, Independent Sector
Stacey D. Stewart, President, March of Dimes Foundation

9:25 – 10:05 am
Networking Break

10:40 – 10:55 am
Networking Break

10:55 am – 12:10 pm
Issue Advocacy: Special Considerations in an Election Year
David A. Levitt, Adler & Colvin
John P. Pomeranz, Harmon, Curran, Spielberg + Eisenberg, LLP
Eric Rodriguez, Vice President, Office of Research, Advocacy, and Legislation, UnidosUS

12:10 – 1:40 pm
Networking Lunch
Sponsored by the Council on Foundations

1:40 – 2:55 pm
Strategic Advocacy Using Affiliated 501(c)(3) and 501(c)(4) Organizations
Joel Beck-Coon, Senior Counsel, Humanity United
Gene Takagi, NEO Law Group
Nina Ozu Tunceli, Chief Counsel of Government and Public Affairs & Executive Director, Americans for the Arts Action Fund

3:10 – 4:25 pm
Non-Tax Lobbying Laws
William H. Minor, DLA Piper
Susan Hamshner, Senior Attorney, Global Legal Team, The Nature Conservancy

4:30 – 5:30 pm
In-House Roundtable on Effective Charitable Advocacy
Lauren W. Brown, Deputy General Counsel & Director, Washington DC Office, Bill & Melinda Gates Foundation
Neal Denton, Senior Vice President & Chief Government Affairs Officer, YMCA of the USA
Jatrice Martel Gaiter, Executive Vice President of External Affairs, Volunteers of America

5:30 pm
Adjournment

5:30 – 6:15 pm
Wine and Cheese Networking Reception

This program will be available via live webcast (subject to change).
For more information, visit: https://georgetown.inreachce.com/

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The Nonprofit Governance program will be held at Georgetown Law, located at 600 New Jersey Ave., NW.
Thursday, April 26

7:30 - 8:15 am
Registration and Continental Breakfast

8:15 - 8:30 am
Welcome and Introduction
Jill C. Castleman, Executive Director, Georgetown Law CLE
Celia Roady, Program Co-Chair, Morgan, Lewis & Bockius LLP

8:30 - 9:15 am
2018 Message from the Director, Exempt Organizations: Priorities for the Year Ahead
Margaret A. Von Lienen, Director, Exempt Organizations, Tax-Exempt and Government Entities, Internal Revenue Service

9:15 - 10:15 am
Update from the Treasury and IRS: What You Need to Know in 2018
Victoria A. Judson, Associate Chief Counsel, Tax-Exempt and Government Entities, Internal Revenue Service
Elinor C. Ramey, Attorney Advisor, Office of Tax Policy, U.S. Department of the Treasury

10:15 - 10:30 am
Networking Break

10:30 - 11:30 am
A. Charitable Competitions: Opportunities and Challenges for Mission Advancement
Rochele D. Alpert, Morgan, Lewis & Bockius LLP
Joshua J. Mintz, Vice President, General Counsel & Secretary, John D. and Catherine T. MacArthur Foundation

B. Update from the State AGs
MODERATOR:
Cindy M. Lott, Director, Nonprofit Management Programs, School of Professional Studies, Columbia University

PANELISTS:
Karen Gano, Assistant Attorney General, Office of the Attorney General George Jepsen, Connecticut
James Sheehan, Director of the Charities Bureau, Office of the New York Attorney General

C. Managing Social Media: Opportunities and Risks
Alfred Ironside, Vice President, Global Communications, Ford Foundation
Marc Johnson, Senior Director & Global Digital Practice Lead, APCO Worldwide
Kenneth T. Monteiro, Vice President, Secretary & General Counsel, Ford Foundation

11:30 am - 12:30 pm
Lunch (on your own)

1:45 - 3:00 pm
CONCURRENT SESSIONS

A. A. Charitable Competitions: Opportunities and Challenges for Mission Advancement

B. Update from the State AGs

C. Managing Social Media: Opportunities and Risks

12:30 - 1:45 pm
1:45 - 3:00 pm
3:00 – 3:15 pm
3:15 – 4:30 pm

Networking Break

Capitol Hill Update: What Are Members and Staffers Focusing on in 2018?
Gordon M. Clay, Senior Legislation Counsel, Joint Committee on Taxation

Additional Congressional Staff to be confirmed

- Explore new Congressional initiatives affecting EOs
- Learn what to expect in 2018 and beyond
- Anticipate legislative issues for EOs moving forward

2018 Update on Key Current Developments from "The Expert"
Bruce R. Hopkins, Bruce R. Hopkins Law Firm, LLC

- Receive an in-depth analysis of key current developments
- Explore what's important in 2018 and why

PROGRAM CHAIR
Celia Roady, Morgan, Lewis & Bockius LLP, Washington, DC

New This Year
- Learn about opportunities and risks in managing social media
- Explore key tax and legal issues with fundraising and crowdfunding on the Internet
- Assess significant investment issues for charities and private foundations
- Navigate how to balance public and private benefit
- Examine key tax and employment issues with shared employees
- Learn how to manage tax and legal compliance for an international workforce
- Analyze key compliance risks in fringe benefit programs
- Review the criteria for establishing relatedness of income from sales and services
- Understand how to manage multi-state tax compliance
- Receive an update on how to design incentive compensation plans for 501(c)(3)s
- Attend new primer sessions on donor-advised funds and supporting organizations

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#GeorgetownTEO
**A. Fundraising and Crowdfunding on the Internet and Social Media**
Courtney Aladro, Chief, Non-profit Organizations/Public Charities Division, Massachusetts Attorney General's Office
Robert A. Wexler, Adler & Colvin
- What works and what doesn’t
- Key tax issues
- State charitable solicitation issues

**B. Challenging Issues with 990 Schedules**
Eve R. Borenstein, BAM Law Office LLC
Stephen M. Clarke, Executive Director, Ernst & Young
Travis L. Patton, Partner, PricewaterhouseCoopers LLP
Review some of the most challenging issues with the Form 990 schedules including:
- calculating public support (Schedule A)
- lobbying by non-electing charities (Schedule C)
- identifying and reporting agency funds (Schedule D)
- reporting excess benefit transactions and business transactions with related parties (Schedule L)
- related party transactions (Schedule R)

**C. Sharing Employees: Key Tax and Employment Issues**
Cynthia M. Lewin, Venable LLP
Catherine E. Livingston, Jones Day
- Tax issues with shared employees
- Structuring secondments
- Documenting sharing arrangements

**3:15 – 4:25 pm CONCURRENT SESSIONS**

**A. Fundraising and Crowdfunding on the Internet and Social Media**
Courtney Aladro, Chief, Non-profit Organizations/Public Charities Division, Massachusetts Attorney General’s Office
Robert A. Wexler, Adler & Colvin
- What works and what doesn’t
- Key tax issues
- State charitable solicitation issues

**B. Challenging Issues with 990 Schedules**
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**4:30 - 5:30 pm CONCURRENT SESSIONS**

**A. Fiscal Sponsorships and the Challenges of Using Intermediaries**
Emily B. Friedman, Associate General Counsel, John D. and Catherine T. MacArthur Foundation
Andrew C. Schulz, General Counsel, New Venture Fund
- Types of fiscal sponsorships
- Fiscal sponsors vs. fiscal agents
- Key risks in intermediary grant arrangements

**B. State Tax Issues for Exempt Organizations**
Donna-Marie Daday, Director, Indirect Tax, PricewaterhouseCoopers, LLP
**9:00 - 10:15 am CONCURRENT SESSIONS**

**A. Hot UBIT Topics**
Virginia C. Gross, Polsinelli PC
James K. Hasson Jr., Hasson Law Group, LLP
- Recent developments
- Commerciality and UBIT
- Current audit issues

**B. Church Tax Update**
April L. Davenport, Associate General Counsel, Presbyterian Mission Agency
Matthew Giuliano, Assistant General Counsel, United States Conference of Catholic Bishops
- Update on Constitutional challenge to minister housing allowance
- Recent legal developments impacting religious organizations
- Religious organization concepts and definitions in the tax law

**C. Managing Complex Grantmaking Issues**
Erica Guyer, Associate General Counsel, The Rockefeller Foundation
Elizabeth Peters, General Counsel & Corporate Secretary, William and Flora Hewlett Foundation
Douglas N. Varley, Caplin & Drysdale
- Earmarking: a trap for the unwary
- Key expenditure responsibility issues
- International grantmaking challenges

**10:15 - 10:30 am Networking Break**

**10:30 -11:40 am CONCURRENT SESSIONS**

**A. Navigating Choices for Charitable Business Formation**
Brinda Ganguly, Managing Director of the Catalyst Funds, Living Cities
Tomer J. Inbar, Patterson Belknap Webb & Tyler LLP
- Pros and cons of alternative structures
- Matching tax and liability considerations
- Special issues for private foundation owners and investors

**B. Legal Ethics for EO Practitioners**
Bethany Bridgham, Acting General Counsel, American University
Andras Kosaras, Arnold & Porter Kaye Scholer LLP
- ABA Canons of Ethics
- Joint representation
- Maintaining attorney-client privilege
- Ethical issues for in-house counsel
C. Income from Sales and Services: Related or Not
Laura M. Damerville, Assistant General Counsel, Smithsonian Institution
Kimberly Enye, Morgan, Lewis & Bockius LLP
- Criteria for establishing relatedness
- What works and what doesn’t
- Tracking and allocating expenses for related and unrelated activities

11:40 - 12:00 pm
Boxed Lunch Distribution

12:00 - 1:10 pm
CONCURRENT SESSIONS
A. Key Investment Issues for Charities and Private Foundations
Jennifer Maimone-Medwick, Corporate Counsel, Simons Foundation
David A. Shevlin, Simpson Thacher & Bartlett LLP
- Complex tax and legal issues in private equity investments
- Using on-shore and offshore blockers
- Reporting requirements

B. Navigating Private Benefit Issues
Hillary Bounds, Lead Counsel, Chan Zuckerberg Initiative
Edward Diener, General Counsel, Skoll Foundation
John E. Tyler, General Counsel & Corporate Secretary, Ewing Marion Kauffman Foundation
- Balancing public and private benefit
- When is private benefit too much?
- Case studies of what works and what doesn’t

C. General Counsel Panel 2018
Ricardo A. Castro, General Counsel, International Rescue Committee
Katherine Karl, General Counsel & Chief Legal Officer, The Humane Society of the United States
- Legal risk management
- Navigating board conflict
- Choosing and managing outside counsel relationships

1:15 - 2:30 pm
CONCURRENT SESSIONS
A. Challenging Equity PRI Issues
Keith Matthews, Deputy General Counsel, Bill & Melinda Gates Foundation
Paul C. McCoy, Morgan, Lewis & Bockius LLP
- Negotiating withdrawal rights
- Pros and cons of having a board seat
- Special issues with fund investments

B. Current Issues for Noncharitable Exempt Organizations
Matt R. Elkin, Morgan, Lewis & Bockius LLP
Jeffrey J. Schragg, BDO US, LLP
- Recent IRS developments
- State 990 disclosure issues
- Special concerns for membership organizations

2:30 - 2:45 pm
Networking Break

2:45 - 3:55 pm
CONCURRENT SESSIONS
A. Fringe Benefits Update: Key Compliance Risks
D. Greg Goller, Managing Director, Exempt Organizations Tax Practice, KPMG LLP
Suzanne R. McDowell, Steptoe and Johnson
- What benefits are taxable – and not
- Challenging travel and expense reimbursement issues
- Key areas of risk

B. Managing Tax and Legal Compliance for an International Workforce
Colette Haider, Senior Counsel, Ford Foundation
Marcy Hirschfeld, Resident Counsel, Ford Foundation
Timothy A.A. Stiles, Global Chair, International Development Assistance Services, KPMG LLP
- U.S. tax issues for U.S. nationals working abroad
- In-country tax compliance for foreign office staff
- Legal and employment issues for foreign offices

C. Ancillary Joint Ventures
Ofer Lion, Seyfarth Shaw LLP
Michael L. Sanders, Blank Rome LLP
Michael A. Troncoso, Managing Counsel, Health Law and Medical Center Services, Office of General Counsel, University of California
- Key factors in establishing charitability
- Issues with unrelated ancillary joint ventures
- Defining acceptable levels of EO control/Veto rights

3:55 - 4:00 pm
Networking Break

4:00 - 5:00 pm
CONCURRENT SESSIONS
A. Recent Developments in Retirement Benefits and Deferred Compensation
Ilya E. Enkishev, Attorney, Internal Revenue Service
Gregory L. Needles, Morgan Lewis & Bockius LLP
C. Fringe Benefit Issues for Colleges and Universities
- Tuition reporting update

4:00 - 5:00 pm
CONCURRENT SESSIONS
B. Executive Compensation: Designing Incentive Plans that Work for 501(c)(3)s
Bruce Greenblatt, Managing Principal, Sullivan, Cotter and Associates, Inc.
Charles W. Quatt, President & Founder, Quatt Associates Inc.
- Key considerations in designing incentive compensation plans
- Special issues with long-term incentive plans
- Establishing reasonableness and 990 reporting

5:00 pm
Adjournment
Program Details

Hotel Reservations
A block of rooms has been held at the Grand Hyatt Washington (our host hotel) and will be honored until 6:00 pm ET, Tuesday, March 27, 2018. These rooms will be held as a block, unless exhausted, until the above date at which time they will be released to the general public. Be sure to mention “Representing and Managing Tax-Exempt Organizations” to receive the room rate below if calling to book a reservation.

Grand Hyatt Washington
1000 H Street NW
Washington, DC 20001
Room Rate: $349
1-855-821-4281 or (202) 582-1234
https://goo.gl/h8Y4PD
A block of rooms has also been held at the Marriott Marquis Washington DC and will be honored until 6:00 pm ET, Wednesday, April 4, 2018. These rooms will be held as a block, unless exhausted, until the above date at which time they will be released to the general public. Be sure to mention “Representing and Managing Tax-Exempt Organizations” to receive the room rate below if calling to book a reservation.

Marriott Marquis Washington DC
901 Massachusetts Avenue NW
Washington, DC 20001
Room Rate: $339
1-855-821-4281 or (202) 824-9200

Group Discounts
Group discounts are available for agencies, firms, or companies registering three or more attendees at one time. If you would like to take advantage of the discounts listed below, please contact cle@law.georgetown.edu to receive the discount code.

- 3-5 registrants: $100 off each registration
- 6-9 registrants: $200 off each registration
- 10+ registrants: $300 off each registration

Disclaimer
Speakers are subject to change.

Special Needs or Dietary Restrictions
Email cle@law.georgetown.edu or call 202-662-9890.

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Cancellations and Substitutions
Cancellation notices must be received by 5:00 pm ET on Thursday, April 19, 2018 for a refund (less $100 administrative fee). Substitutions are accepted at any time prior to the program. Registration for the live, in-person program is not transferable to the live webcast or bonus on-demand access.

Course Materials
Course materials will be distributed prior to the program. Registrants will receive an email from the Georgetown Law CLE office at least one week before the program.

Satisfaction Guarantee
We are confident that you will value the information sharing and networking at this conference. However, if you feel you have not received your money's worth by the end of the program, please contact a member of our registration team before leaving the conference. All refund requests will be reviewed carefully and are subject to approval by the Executive Director for Academic Conferences and Continuing Legal Education.

CLE Credits
Accreditation has been or will be requested for Representing and Managing Tax-Exempt Organizations from most states with mandatory continuing legal education requirements for 14.4 CLE credits (based on a 60-minute hour), including an optional 1.1 ethics credits; and 17.3 CLE credits (based on a 50-minute hour), including an optional 1.4 ethics credits. For Nonprofit Governance accreditation has been or will be requested for from most states with mandatory continuing legal education requirements for 7.0 CLE credits (based on a 60-minute hour) and 8.4 CLE credits (based on a 50-minute hour). Georgetown Law is an accredited CLE provider in most MCLE states. Georgetown Law CLE is a State Bar of California-approved MCLE provider. Please note that this program is eligible for only Nontransitional CLE credit in New York. MCLE state credit rules vary for online CLE. Please check online at https://georgetown.inreachce.com/ to see if the program has been approved in your state. We will apply upon request in some states; alternatively, many states allow attorneys to apply on their own.

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Representing and Managing Tax-Exempt Organizations
Course Level: Overview; Group-Live and Group-Internet Based, No Prerequisites or Advance Preparation Required;
Program Level: Basic; Up to 17.0 CPE credits, including credit in Taxes, Specialized Knowledge and Applications, and Regulatory Ethics.

Nonprofit Governance Charitable Advocacy: What Nonprofit Organizations Need to Know
Course Level: Overview; Group-Live and Group-Internet Based, No Prerequisites or Advance Preparation Required;
Program Level: Basic; Up to 8.5 CPE credits in Specialized Knowledge and Taxes.

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If you cannot join us, watch the conference conveniently from your office.
Registration Form

PLEASE PRINT OR TYPE. Payment must accompany registration.

Best Value: Nonprofit Governance + Representing and Managing Tax-Exempt Organizations
- $1,895.00 Early-Bird Registration (due March 27 by 5:00PM ET)
- $1,995.00 Regular Registration
- $1,795.00 Georgetown Law Alumni Registration
- $1,695.00 Nonprofit Organization Registration (full-time nonprofit employee)

Nonprofit Governance Charitable Advocacy: What Nonprofit Organizations Need to Know (April 25, 2018)
- $695 Regular Registration
- $595 Nonprofit Organization Registration (full-time nonprofit employee)

Representing and Managing Tax-Exempt Organizations (April 26-27, 2018)
- $1,295.00 Early-Bird Registration (due March 27 by 5:00PM ET)
- $1,395.00 Regular Registration
- $1,195.00 Georgetown Law Alumni Registration
- $1,195.00 Nonprofit Organization Registration (full-time nonprofit employee)

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- Bonus On-Demand Access $299

Please print clearly and list name exactly as you would like it to appear on your program name badge.

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*Please Note: Any outstanding balances must be paid in full prior to the event start date and no later than the first day of the event.
1. **Hear** about EO priorities directly from top IRS and Treasury EO officials
2. **Create** your own learning experience by choosing breakout sessions that meet your needs
3. **Learn** about legislative issues for exempt organizations in 2018 from key congressional staffers
4. **Explore** the most important developments in 2018 with the national exempt organizations authority Bruce R. Hopkins
5. **Review** the most challenging issues with 990 schedules
6. **Examine** the different types of fiscal sponsorships and the challenges of using intermediaries
7. **Learn** about how to navigate choices for charitable business formation
8. **Survey** recent developments and current hot issues at the popular “Hot UBIT Topics” session
9. **Obtain** tips for managing complex grantmaking issues
10. **Analyze** legal ethics issues for EO practitioners