

HEREL2017

HIGHER EDUCATION REAL ESTATE LAWYERS ANNUAL CONFERENCE

• Penn-Wharton | San Francisco •

CONFERENCE SCHEDULE

Monday, September 25, 2017 <i>Wharton San Francisco, Hills Bros Plaza, 2 Harrison Street, 6th Floor</i>	
8:00 – 8:45 a.m.	<i>Arrival, Registration and Breakfast:</i>
8:45 – 9:00 a.m.	<i>Welcome:</i> Bernadette Birt, Exec. Director Wharton San Francisco
9:00 – 10:15 a.m.	<u>Session 1: Real Estate Tax Exemption – The Princeton Case</u> Presenter: Hannah S. Ross, General Counsel, Middlebury College Ms. Ross will discuss the recently settled litigation challenging Princeton University's exemption from real estate tax, focusing on the legal theories underlying the challenges presented by the plaintiffs and Princeton's response.
10:15 – 10:30 a.m.	Break
10:30 a.m. – 12:00 p.m.	<u>Session 2: Managing Fraternity Real Estate – Legal, Risk Management and Property Management Challenges</u> Presenters: Roman Petyk, Associate General Counsel, University of Pennsylvania Edwin D. Datz, Real Estate Director, University of Pennsylvania Benjamin Evans, Executive Director, Office of Risk Management and Insurance, University of Pennsylvania Fraternity and sorority occupancies in University owned/managed buildings create complex and interrelated legal, risk management and property management challenges. This session will focus on strategies to address these concerns.
12:00 – 1:00 pm	LUNCH On-site - Wharton San Francisco -- dining room

	Monday, September 25, 2017 (continued)
1:00 – 2:30 p.m.	<p><u>Session 3: Addressing the Legal Challenges of Design Build Contracts</u></p> <p>Presenters: Paul Sugar, Senior Counsel, Baker Donelson. Michael Schollaert, Shareholder, Baker Donelson</p> <p>This session will focus on the key elements of the design/build relationship and the challenges it presents to Owners accustomed to the conventional Owner/Architect and Owner/Contractor structure for procuring design and construction services.</p>
2:30 - 3:00 p.m.	Board bus and travel to The Presidio
3:00 – 4:15 p.m.	<p><u>Walking Tour of Presidio</u> Guide/Escort: Mark Zuffo, Real Estate Leasing at The Presidio Trust</p>
4:30 – 5:40 p.m.	<p><u>Session 4: Presidio –Adaptive Reuse Case Study</u></p> <p>Presenter: Joshua Bagley, Associate Director of Business Operations for Real Estate Development, The Presidio Trust</p> <p>This session will discuss ongoing redevelopment of The Presidio, a historic 1480 acre decommissioned military base located at the foot of the Golden Gate Bridge in San Francisco and jointly administered by the National Park Service and The Presidio Trust.</p>
5:45 – 6:45 p.m.	Cocktails - The Arguello Restaurant - Presidio Officers' Club
6:45 – 8:45 p.m.	Seated Dinner - The Arguello Restaurant –Presidio Officers' Club
9:00 p.m.	<p>Return by bus to:</p> <p>Marriott Courtyard San Francisco Downtown Hotel 299 2nd Street San Francisco, CA</p>

Tuesday, September 26, 2017

*Wharton San Francisco, Hills Bros Plaza,
2 Harrison Street, 6th Floor*

8:00 – 9:00 a.m.	<i>Breakfast and HEREL Business Meeting</i> <i>On-site - Wharton San Francisco – dining room</i>
9:00 – 10:30 a.m.	<u><i>Session 5: Structuring Campus Infrastructure Investments to Maximize Institutional Flexibility</i></u> Moderators: Bruce J. Baker, Partner and Michael J. Cooney, Partner - Nixon Peabody, LLP Presenters: Kevin R. Wayer, Co-President, Public Institutions, Jones Lang LaSalle Rick Beyer, Managing Principal, AGB Institutional Strategies Mark Meredith, Senior Counsel, University of California, Office of General Counsel This session will discuss development and financing structures that allow institutions to maximize flexibility in response to uncertain political and economic conditions and thus reduce the financial exposure of infrastructure investments.
10:30 – 10:45 a.m.	Break
10:45 a.m. – 12:15 p.m.	<u><i>Session 6: Section 179(D) – Energy Efficiency Tax Credits</i></u> Presenters: Tiffany Melchers, Associate General Counsel, University of Houston William Volker, President, Efficiency Energy This presentation will discuss how non-taxpaying government building owners may derive additional revenues/savings from energy efficient new construction and lighting/HVAC/envelope retrofits of government-owned buildings via transferable 179D tax deductions. The program will feature discussion of applicable projects, documentation, and negotiation with relevant case studies
12:15	Formal Sessions Adjourn
12:15 – 1:30 p.m.	LUNCH – Informal group discussion by topic <i>On site - Wharton San Francisco – dining room</i>