

*Celebrating 15 years, The Business Institute
Continues Growth and Service to the Region*



New Paltz

STATE UNIVERSITY OF NEW YORK

THE SCHOOL OF BUSINESS



THE BUSINESS INSTITUTE

EXECUTIVE EDUCATION CATALOG

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Letter from The Director

Greetings!

It is my honor to present The Business Institute's Executive Education course offerings for the summer and early fall of 2016. There are many exciting, challenging and unique sessions being taught by experts among our SUNY faculty as well as external experts, all of whom have significant real world success stories.

New and noteworthy among these series of seminars and workshops are three new certificates of participation in executive education and the very prestigious Business Institute Fellows program. The program criteria are:

Level 1 Certificate of Participation in Professional Project Management

Certificate qualifying courses:

1. Foundations of professional project management
2. Stepping up to professional project management
3. Choose three from among the following:
 - a. Agile project management
 - b. Leadership of Teams
 - c. Project communications
 - d. Stakeholder engagement
 - e. Change management

Senior Certificate of Participation in Professional Project Management

Experience: Portfolio of three or more projects managed; or, successful completion of Foundations in Professional Project Management.

Certificate qualifying courses:

1. Stepping up to professional project management
2. Choose four from among the following:
 - a. Agile project management
 - b. Leadership of Teams
 - c. Project communications

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- d. Stakeholder engagement
- e. Change management

Certificate of Participation in Food Retail Management

Experience: Portfolio of three or more years' experience, or permission of the instructor.

Certificate qualifying courses:

1. Sales management
2. Perspectives on retailing
3. Evaluating competition in retailing

Fellows of The Business Institute

Enjoy discounted enrollment fees on all courses, workshops and seminars as a Fellow of The Business Institute. Pay a \$100 yearly fellowship fee and receive a code worth several hundred dollars of enrollment discounts. Several Hudson Valley membership service organizations are institutional fellows and qualify for discounts. Members of the following organizations simply enter the organization's name and your membership number to qualify for discounted fees.

Council of Industry of SE NY (and, by association, Orange County Builders')

NYSSCPA – Mid-Hudson Chapter

Hudson Valley Chambers of Commerce (Including, not limited to, Ulster, New Paltz, Orange, Dutchess, Rhinebeck, Poughkeepsie Chambers).

For easy and efficient registration, [click here](#) or print out and fax the registration form in this catalog.

I will see you at the programs!

Very truly yours,

Rief Kanan

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Registration for The Business Institute Sessions

Please print or type:

Name: _____

Company: _____

Billing Address: _____

Credit Card: _____ Exp. ___/___/___ CVV _____

Telephone: _____ - _____ - _____ Signature: _____

Are you a Fellow of The Business Institute? Yes No Please enroll me.*

Catalog Page No.	Catalog Title of Course	Fee**
	Total Fees	
	Enroll me as a Fellow of The Business Institute*	
* Please check with your organization for Institutional membership. ** Please deduct discount for two or more enrolled from the same company.		\$

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The Business Institute's Offerings for Lifelong Learners

Summer/Fall Catalog 2016

	<u>Dates of Program</u>
➤ Project Management	
○ Foundations of Professional Project Management	June 6 - 8
○ Stepping Up To Professional Project Management	June 13 - 14
○ Agile Project Management	June 20
○ Leadership in Teams	July 11 - 12
○ Project Communications	June 21
○ Stakeholder Engagement	July 18
○ Enterprise, Project and Program Change Management	June 16 - 17
➤ Food Retail Management	
○ Sales Management	June 14 - 15
○ Perspectives on Retailing	June 20 - 21
○ Evaluating the Competition in Retailing	July 26 - 27
➤ Entrepreneurship and Innovation	
○ Legal and Financial Aspects of New Venture Creation	August 22 - 25
○ Introduction to Venture Funding	Aug 29 – Sep 1
➤ Sustainability Program for Small and Medium Enterprises	June 13
➤ Conscious Capitalism: Identifying and defining a Great and Worthy Purpose	July 25
➤ Accepting Personal Responsibility / Business Improvisation/Coaching	August 1 - 2
➤ Conflict Dynamics	
○ The Conflict Dynamics Profile (CDP and CDP-I)	August 3
○ Manager as Mediator	August 4 - 5
➤ Organizational Health	
○ Build a cohesive leadership team	August 16
○ Create, over communicate and reinforce clarity	August 17
○ Centrality and quality of meetings	August 18
➤ Leadership Matrix: Courses in Leadership Development	July 18 - 22
➤ Accounting and Cash Flow for the Non-Financial Executive	July 27
➤ Litigation Support: Expert Witness Boot Camp	July 29
➤ Continuing Professional Education (CPE) for CPAs	
○ Accounting Standards Update	August 8
○ Auditing Standards Update	August 9
➤ Professional Ethics and Ethical Decisions	
○ Professional Ethics Workshop	August 10
○ Proven Key Elements to a Successful Compliance Program	June 27
➤ Session Leaders' Profiles	
➤ Registration information & Chronological Schedule of Sessions	

The Business Institute is chartered under the Research Foundation of SUNY. Learn more about The Business Institute /[online](#).

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PROJECT MANAGEMENT

TITLE: *FOUNDATIONS OF PROFESSIONAL PROJECT MANAGEMENT*

DESCRIPTION: This course is designed to teach participants how to approach project management and understand all the essential concepts from both a theoretical and applied perspective.

OBJECTIVES:

1. Identify the elements of the PM life cycle, including plan, control, organize and allocate resources.
2. Understand PM processes.
3. Comprehend and become familiar with the use of basic tools and techniques to plan, organize and manage a project.
4. Optimize results while managing the constraints.

TOPICS:

- PM foundations: Define project, PM, and the role of the project manager
- Program management and portfolio management
- Project sponsorship, project office (PMO)
- Project organizational structures
- Understanding the PM context
- Project life cycle: sample life cycles, including traditional versus agile
- PM processes
- Project initiation: creating a charter and identifying stakeholders
- Project planning: creating a scope statement, building a WBS, identifying resources, building a project budget, and basic overview of scheduling networks
- Creating a PM plan along with some key subsidiary plans
- Project execution: directing and managing work

LEVEL OF KNOWLEDGE: Basic / Introductory (required for level 1 certificate)

DATES: June 6 – 8, 2016 *Must enroll by June 3rd!*

SESSION LEADER / INSTRUCTOR: Kevin Caskey, Ph.D.; Michael Chuang, Ph.D.

COST (LINK TO REGISTRATION): \$600

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TITLE: *STEPPING UP TO PROFESSIONAL PROJECT MANAGEMENT*

DESCRIPTION: This second course in Professional Project Management places the participant in the role of manager. More advanced topics are introduced and are enhanced by connection to real world businesses engaged in project management. This course requires significant business experience or the completion of the Foundations of Professional Project Management basic course.

OBJECTIVES:

1. Managing the elements of the PM life cycle, including plan, control, organize and allocate resources.
2. Managing, modeling and directing PM processes.
3. Selecting and directing implementation of basic tools and techniques to plan, organize and manage multiple projects.
4. Optimize results while managing the triple constraints

TOPICS

- Project execution: directing and managing work
- Project monitoring and controlling: problem solving and decision making, managing changes to scope and schedule, understanding team dynamics, and managing resources effectively
- Project closing: gaining customer acceptance and documenting lessons learned
- Global issues in PM
- Introduction to the importance of people-oriented skills, such as communications management, HR, and leadership

LEVEL OF KNOWLEDGE: Intermediate / Prior PM experience or completion of the Foundations Course (required for senior certificate)

DATES: June 13 – 14, 2016

Must enroll by June 6th!

SESSION LEADER / INSTRUCTOR: Kevin Caskey, Ph.D.; Michael Chuang, Ph.D.

COST (LINK TO REGISTRATION): \$400

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TITLE: *AGILE PROJECT MANAGEMENT*

DESCRIPTION: This course provides participants with a comprehensive overview of the principles, processes, and practices of agile project management. Participants learn techniques for initiating, planning, and executing projects using agile methodologies.

OBJECTIVES: To introduce participants to the concept of agile project management and to link with the broader concept of organizational agility.

TOPICS

- Review of agile concepts
- Agile project management principles
- Comparison of agile and traditional PM models
- New roles and responsibilities in agile projects
- Practices to introduce agile PM

LEVEL OF KNOWLEDGE: Advanced / Significant experience (Elective for certificates)

DATES: June 20, 2016 *Must enroll by June 13th!*

SESSION LEADER / INSTRUCTOR: Kevin Caskey, Ph.D.; Michael Chuang, Ph.D.

COST (LINK TO REGISTRATION): \$200

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TITLE: *LEADERSHIP IN TEAMS*

DESCRIPTION: The use of teams has increased in organizations, and in project management they are an important component. The project leader has to forge a team and ensure that it functions as a cohesive unit to achieve goals and objectives under preset project constraints. The objective of this course is to prepare participants to become leaders in their professional work environment. It will guide them toward becoming productive project team members and eventually skilled project leaders and managers.

OBJECTIVES:

1. Understand the fundamental aspects of team structure, interpersonal dynamics, and role of the project manager.
2. Time-management techniques and strategies for individuals and team activities.
3. Apply emotional intelligence to project team operation.
4. Review team-management skills, and understand strengths and weaknesses.
5. Understand your emotional intelligence and utilize it to manage others.
6. Learn facilitation techniques for effective conflict resolution.
7. Demonstrate appropriate practices for motivating teams.
8. Acquire effective communication. Demonstrate communication competencies in multicultural, intergenerational, hierarchical, and virtual teams.

TOPICS:

- Leadership competence in project management
- Leadership-development models
- Leadership styles and self-assessment
- Building the project team and team-building challenges in the PM context
- Team-building processes and building high performance teams
- Launching a team, including goal setting, process definition, and kickoff meetings
- Principles of motivation, motivational theories, and leadership styles
- Barriers to leading project teams successfully, such as trust, and skills deficiencies
- Managing the team dynamics
- Conflict management theory and practice
- Addressing performance issues and increasing project-team performance

LEVEL OF KNOWLEDGE: Intermediate / Prior PM experience or completion of the Foundations Course (Elective for certificates)

DATES: July 11 – 12, 2016 *Must enroll by July 1st!*

SESSION LEADER / INSTRUCTOR: Angela Lebbon, Ph.D.

COST (LINK TO REGISTRATION): \$250

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TITLE: *PROJECT COMMUNICATIONS*

DESCRIPTION: This course provides students with project-communications and engagement knowledge and skills. They will master theoretical and applied skills drawn extensively from Plan, Distribute, and Manage Project Communications.

OBJECTIVES:

The course introduces the communications concepts and issues of effective project team development. Communication and decision making for projects is also elaborated.

TOPICS:

- Steps for building project teams
- Project Group development
- Virtual project teams and communication in a distributed environment
- Project communication issue and solution
- Managing conflict through effective communication
- Communication and decision making and in projects

LEVEL OF KNOWLEDGE: Intermediate / Prior PM experience or completion of the Foundations Course (Elective for certificates)

DATES: June 21, 2016 *Must enroll by June 14th!*

SESSION LEADER / INSTRUCTOR: Michael Chuang, Ph.D.

COST (LINK TO REGISTRATION): \$250

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TITLE: *STAKEHOLDER ENGAGEMENT*

DESCRIPTION: This course focuses on the understanding and the application of the stakeholder interface with special emphasis on leadership to ensure customer satisfaction, and sustainability.

OBJECTIVES:

- Defining customer success factors
- Understanding proper stakeholder engagement
- Understanding and identifying stakeholders and categorizing them
- Defining strategy with stakeholders to meet customer expectations
- Ability to gather customer requirements

TOPICS

- Understanding stakeholder engagement, types of stakeholders, roles, influence, and power
- Developing a stakeholder-engagement plan
- Gathering information about stakeholders
- Identifying, categorizing, and prioritizing stakeholders
- Assessing stakeholders' strengths and weaknesses
- Measuring stakeholder attitude and monitoring the relationship
- Managing stakeholder expectations for key project deliverables
- Strategic leadership and best practices in stakeholder management
- Concepts of customer consultation, customer renewal, and sustainability

LEVEL OF KNOWLEDGE: Intermediate / Prior PM experience or completion of the Foundations Course (Elective for certificates)

DATES: July 18, 2016 *Must enroll by July 11th!*

SESSION LEADER / INSTRUCTOR: Christina Bark, J.D.

COST (LINK TO REGISTRATION): \$200

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TITLE: *ENTERPRISE, PROJECT AND PROGRAM CHANGE MANAGEMENT*

DESCRIPTION: This course provides an integrated introduction to enterprise project and program management and project governance. It also focuses on change management. Participants learn the fundamental aspects of modern project management, both Managerial and technical from the lens of governance. The key topics associated with this course are: organizational governance of projects, governance in projects, governance of the project, and change management.

OBJECTIVES:

- Facing uncertainty: project governance and control
- Project governance models
- Monitoring and controlling projects
- Applying scope-management and change-control principles to a project
- Monitoring and controlling risk, scheduling, resources and quality
- Starting and stopping projects, and project closeout
- Measure project sponsor or customer satisfaction -- validation of results

TOPICS

- Creating an accountable organization with well-defined roles based on transparency and accountability
- Understanding project governance, processes, and structures (e.g., sponsors, steering groups, organizational structure, large projects; portfolio management)
- Elements of good project governance and role of top management in project sponsorship and championing projects
- Ensuring effective communication; ensuring sound project decision making
- Professionalism and ethics
- Providing training, supporting audits and reviews
- Enterprise-wide projects and management of megaprojects.

LEVEL OF KNOWLEDGE: Intermediate / Prior PM experience or completion of the Foundations Course (Elective for certificates).

DATES: June 16 - 17, 2016 *Must enroll by June 9th!*

SESSION LEADER / INSTRUCTOR: Christina Bark, J.D.

COST (LINK TO REGISTRATION): \$250

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FOOD RETAIL MANAGEMENT

TITLE: *SALES MANAGEMENT*

DESCRIPTION: Introduction to sales management functions, including following a detailed ten-step process to build a mutually beneficial relationship with all parties involved in selling. Concentration on selling activities that includes sales demonstrations and special selling presentations. Local sales representatives will be involved in the class.

OBJECTIVE: To develop the skills necessary to engage in mutually beneficial business relationships.

TOPICS:

- Golden rule of selling
- Ten step process of relationship building
- Three parallel processes of selling
- The sale begins the relationship

LEVEL OF KNOWLEDGE: Intermediate / Prior experience helpful, not required (This course is required for Certificate in Food Retail Management)

DATES: June 14 - 15, 2016 TIME: 11:00 AM to 2:00 PM *Must enroll by June 7th!*

SESSION LEADER / INSTRUCTOR: Russell Zwanka, DBA

COST (LINK TO REGISTRATION) \$250

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TITLE: *PERSPECTIVES ON RETAILING*

DESCRIPTION: Acquaint the participant with the nature and scope of retailing. Presents retailing as a major economic and social force. Touches on strategic and operating details that lead to successful retailers. Local retailers will be involved in the class.

OBJECTIVE: To cultivate a knowledge base of retail as a driving force in customer connectivity, plus focus on the evolution of retail into the next twenty years.

TOPICS

- ✓ Familiarize attendees with all levels of food retail.
- ✓ Cover critical issues impacting the food industry.
- ✓ Analyze the basics of food distribution, wholesaling, and retailing.
- ✓ Discuss and apply concepts and processes of market segmentation, target market selection, and positioning.

LEVEL OF KNOWLEDGE: Intermediate / Prior experience helpful, not required (This course is required for Certificate in Food Retail Management)

DATES: June 20 - 21, 2016 TIME: 11:00 AM to 2:00 PM *Must enroll by June 13th!*

SESSION LEADER / INSTRUCTOR: Russell Zwanka, DBA

COST (LINK TO REGISTRATION) \$250

Celebrating 15 years, The Business Institute

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TITLE: *EVALUATING THE COMPETITION IN RETAILING*

DESCRIPTION: Acquaint the participant with the nature and scope of retailing. Presents retailing as a major economic and social force. Touches on strategic and operating details that lead to successful retailers. Local retailers will be involved in the class.

OBJECTIVE: To cultivate a knowledge base of retail as a driving force in customer connectivity, plus focus on the evolution of retail into the next twenty years.

TOPICS

- ✓ Familiarize attendees with all levels of food retail.
- ✓ Cover critical issues impacting the food industry.
- ✓ Analyze the basics of food distribution, wholesaling, and retailing.
- ✓ Discuss and apply concepts and processes of market segmentation, target market selection, and positioning.

LEVEL OF KNOWLEDGE: Intermediate / Prior experience helpful, not required (This course is required for Certificate in Food Retail Management)

DATES: July 26 - 27, 2016 TIME: 9:00 AM to 12:00 PM *Must enroll by July 18th!*

SESSION LEADER / INSTRUCTOR: Russell Zwanka, DBA

COST (LINK TO REGISTRATION) \$250

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ENTREPRENEURSHIP AND INNOVATION

TITLE: *LEGAL AND FINANCIAL ASPECTS OF NEW VENTURE CREATION*

DESCRIPTION: In this course we will follow the major steps of the fascinating journey of entrepreneurs who launch a new venture. The participants will work in teams to deal with legal and financial aspects in every major juncture of the journey, starting at the ideation process, the seed stage, early and late stages, and all the way to the proverbial exit, either M&A or IPO.

Along the way we will discuss the legal, financial and tax advantages and disadvantages of the various forms of incorporation; tax and securities law; legal aspects of raising capital, including structuring venture capital and private equity financing; entrepreneurial acquisition structures, employment law and legal topics including the enforceability of confidentiality, non-competition and other restrictive covenants in employment agreements; and intellectual property law including trade secrets, copyrights, patents, and trademarks.

TOPICS

- Advantages and disadvantages of forms of incorporation
- Tax and securities law
- Raising capital
- Planning an exit

LEVEL OF KNOWLEDGE: Intermediate

DATES: August 22 - 25, 2016

Must enroll by August 9th!

SESSION LEADERS / INSTRUCTORS: Barak Ben-Avinoam, DBA

COST (LINK TO REGISTRATION) \$400

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TITLE: *INTRODUCTION TO VENTURE FUNDING*

DESCRIPTION: The course provides an analysis of various ways to fund your firm, ranging from Crowd-Funding and business angels to venture capital and private equity funds. During the course, participants will gain a thorough understanding of the various mechanisms available for them to finance a new venture or to grow an existing business. The course looks at how VC's and private equity investors finance companies through equity in the different stages of the company's life-cycle, starting from the very beginning (startup and early stage) to a more mature phase (i.e. expansion, mature age, etc.) or also coping with crisis.

TOPICS

- Opportunities, tools and techniques to fund a new venture
- Financing the growth of an existing business
- Finding capital when the situation is "do or die"

LEVEL OF KNOWLEDGE: Intermediate

DATES: August 29 – September 1, 2016 *Must enroll by August 9th!*

SESSION LEADERS / INSTRUCTORS: Barak Ben-Avinoam, DBA

COST (LINK TO REGISTRATION) \$400

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TITLE: *SUSTAINABILITY REPORTING & COMMUNICATIONS FOR SMALL AND MEDIUM ENTERPRISES*

DESCRIPTION: This course serves as an introduction to sustainability reporting and communications. Through sustainability reporting and communications, a company conveys its sustainability strategy – how it's environmental, social and governance (ESG) policies, practices and processes are helping the company to manage risk and create value through efficiencies, innovation and/or enhanced good will.

This course provides an overview of trends and best practices in corporate sustainability reporting and communications, with a particular focus on sustainability reporting frameworks and green and social marketing.

TOPICS

- Overview of reporting standards (UN Global Compact, Global Reporting Initiative, and SASB)
- Planning the reporting and/or communications process
- Working with key stakeholders
- Selecting report content and assembling the report
- Communicating results internally and externally
- Integrating sustainability efforts into marketing and branding
- Monitoring progress

BENEFITS TO PARTICIPANTS

- Better assess and mitigate risk
- Recognize new opportunities
- Assume greater control over internal operations and supply chain
- Improve reputation through sustainability leadership
- Strategically plan to meet organizational sustainability and overarching goals
- Identify and prioritize sustainability issues based on importance to internal and external stakeholders, and impact to the environment and/or society
- Work collaboratively to develop strategies promoting sustainable solutions and to develop effective, professional communications
- Demonstrate working knowledge of the processes needed for companies to measure, manage, and report on progress against sustainability targets

LEVEL OF KNOWLEDGE: Introductory / Prior experience not required

DATES: June 13, 2016 TIME: 8:00 AM to 12:00 PM *Must enroll by June 6th!*

SESSION LEADERS / INSTRUCTORS: Michael Sheridan, Ph.D. & Perry Goldschein, JD

COST (LINK TO REGISTRATION) \$300 (Fellows of The Business Institute \$275*)

Enroll two or more as a team from one institution, save \$25 per person.

* See registration page for details.

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TITLE: *CONSCIOUS CAPITALISM: IDENTIFYING AND DEFINING A GREAT AND WORTHY PURPOSE*

DESCRIPTION: What is your organization's Great and Worthy Purpose (GWP)? What is the reason it exists and how does it enhance your wealth? This session is based on the book *Conscious Capitalism* that has given birth to an entire movement dedicated to its concepts. It exists to elevate humanity.

OBJECTIVES: This survey session is designed to introduce the tenets of Conscious Capitalism to allow participants to decide to pursue its principles and ideals.

TOPICS:

- Purpose
- Culture
- Stakeholder
- Leadership

LEVEL OF KNOWLEDGE: Intermediate / Prior experience

DATE: July 25, 2016

HOURS: 9:00 AM to 12:00 PM

Must enroll by July 18th!

SESSION LEADERS / INSTRUCTORS: Rief Kanan, MS, CPA

COST (LINK TO REGISTRATION): \$200

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TITLE: *ACCEPTING PERSONAL RESPONSIBILITY: BUSINESS IMPROV*

DESCRIPTION: Exploring business improvisation and innovation techniques using methods borrowed from improvisational theater. Organizations thrive by tapping into creative talents of their employees. Innovation and creativity enhance product quality, accelerate market response capabilities, increase operating system efficiencies and help sustain the competitive advantage.

OBJECTIVES:

- Have fun
- Ignite and sustain passion
- Encourage individual choices, exploration and risk taking

TOPICS:

- “Yes, and”
- Listen to understand, not to respond
- Suspend judgment
- Be in the moment
- Loosen up
- Thank you, gratitude, buzzwords, acceptance

LEVEL OF KNOWLEDGE: Intermediate / Prior experience

DATES: August 1 - 2, 2016 *Must enroll by July 25th!*

SESSION LEADERS / INSTRUCTORS: Rief Kanan, MS, CPA

COST (LINK TO REGISTRATION) \$400

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TITLE: *THE CONFLICT DYNAMICS PROFILE (CDP AND CDP-I)*

DESCRIPTION: Unresolved workplace conflict can cost organizations a great deal of time and money. Wasted management time, absenteeism, lowered employee retention, medical claims, grievances, lawsuits and workplace violence can all be aggravated by ineffective conflict management efforts.

The Conflict Dynamics Profile (CDP) was developed to provide managers and employees with a greater awareness of how they respond when faced with conflict so that they can improve on those behaviors causing the most problems.

The CDP's focus on conflict behaviors, rather than styles, emphasizes an action-oriented approach which lessens the problems associated with harmful or unproductive forms of conflict and results in more effective conflict management skills.

OBJECTIVES:

- Experience the CDP
- Recognize triggers
- Escalate or de-escalate
- Self-recognition of ways to

TOPICS

- Using the CDP and CDP-I
- The CDP as a coaching tool
- Interpreting the CDP & CDP-I
- Defining conflict dynamics triggers, reactions
- Should every conflict be de-escalated? When to escalate.

LEVEL OF KNOWLEDGE: Intermediate / Prior experience valuable, not required

DATES: August 3, 2016 *Must enroll by July 25th!*

SESSION LEADERS / INSTRUCTORS: Rief Kanan, MS, CPA, Certified CDP Consultant

COST (LINK TO REGISTRATION) \$250

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TITLE: *MANAGER AS MEDIATOR*

DESCRIPTION: Managers are usually very effective problem solvers. They may be better at it than the employees who are in conflict. The managers may see solutions to the problem that seem obvious. They will want to wrap things up quickly so everyone can go back to work. As time goes it becomes more difficult for them to stay uninvolved.

Yet, this is exactly what is needed. If they have chosen to use managerial mediation as a method for solving the business problem caused by the employees' conflict, the managers need to let the employees solve the problem. The employees, in turn, will have to make the trek up Conflict Mountain in order to reach the Breakthrough that will lead to a resolution of the problem. The trek up the mountain takes time and can seem frustrating to both the employees and especially the manager.

TOPICS:

- Keep disputants engaged in the Essential Process (by preventing violations of the Cardinal Rules)
- Support Conciliatory Gestures, and
- Wait! (remember the abbreviation W.A.I.T. = "Why Am I Talking")

LEVEL OF KNOWLEDGE: Intermediate / Prior experience (required for certificate)

DATES: July 20, 2016 *Must enroll by July 8th!*

SESSION LEADERS / INSTRUCTORS: Barbara Driscoll, MS, LMHC

COST (LINK TO REGISTRATION) \$300

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ORGANIZATIONAL HEALTH

TITLE: *BUILD A COHESIVE LEADERSHIP TEAM*

DESCRIPTION: Cohesive teams build trust, eliminate politics, and increase efficiency.

OBJECTIVES: A healthy organization is one that has less politics and confusion, higher morale and productivity, lower unwanted turnover and lower recruiting costs than an unhealthy one. No leader would dispute the power of these qualities and every leader would love his or her organization to have them. Unfortunately, most of us struggle with how to make this happen.

TOPICS:

- Knowing one another's unique strengths and weaknesses
- Openly engaging in constructive ideological conflict
- Holding one another accountable for behaviors and actions
- Committing to group decisions

LEVEL OF KNOWLEDGE: Intermediate / Prior experience

DATES: August 16, 2016 *Must enroll by August 9th!*

SESSION LEADERS / INSTRUCTORS: Rief Kanan, MS, CPA

COST (LINK TO REGISTRATION) \$200

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TITLE: *CREATE, OVER COMMUNICATE AND REINFORCE CLARITY*

DESCRIPTION: Healthy organizations minimize the potential for confusion by clarifying... Over-Communicate Clarity: Healthy organizations align their employees around organizational clarity by communicating key messages... Reinforce Clarity Organizations sustain their health by ensuring that leaders communicate key messages to direct reports

OBJECTIVES: Who is responsible for what? Why do we exist? How do we behave? What do we do? How will we succeed? What is most important right now? Who must do what? We're afraid to repeat the same message, again and again. Simplicity: The more complicated the message, the more potential for confusion and inconsistency. Multiple mediums: People react to information in many ways; use a variety of media. Cascading messages: Leaders communicate key messages to direct reports; the cycle repeats itself until the message is heard by all. Consistency in...Hiring, managing performance, meeting structure, rewards and recognition, employee dismissal.

TOPICS:

- Tips for creating a cohesive team
- Tips for creating clarity
- Tips for over communicating clarity
- Tips for reinforcing clarity

LEVEL OF KNOWLEDGE: Intermediate / Prior experience

DATES: August 17, 2016 *Must enroll by August 9th!*

SESSION LEADERS / INSTRUCTORS: Rief Kanan, MS, CPA

COST (LINK TO REGISTRATION) \$250

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TITLE: *CENTRALITY AND QUALITY OF MEETINGS.*

DESCRIPTION: At first glance, meetings may not seem like a human system. In reality, meetings are one of the most important human systems that exist within an organization. Without effective meetings, an organization will waste time, make poor decisions and leave employees frustrated and resolved to work in silos. Put in place a meeting structure that delineates between tactical and strategic issues so employees can properly focus. Avoid the desire to fit everything into one big meeting.

OBJECTIVES:

- Know the purpose of the meeting
- Clarify what is at stake
- Hook them from the outset
- Set aside enough time
- Provoke conflict

TOPICS

- Tactical or strategic issue?
- Brainstorm? Offer alternatives? Debate or just sit and listen?
- Conflict should be ideologically emotional
- The mark of a great meeting

LEVEL OF KNOWLEDGE: Intermediate / Prior experience

DATES: August 18, 2016 *Must enroll by August 9th!*

SESSION LEADERS / INSTRUCTORS: Rief Kanan, MS, CPA

COST (LINK TO REGISTRATION) \$200

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LEADERSHIP MATRIX: COURSES IN LEADERSHIP DEVELOPMENT

TITLE: *LEADERSHIP FOR THE CEO, SENIOR EXECUTIVE, OWNER OR SENIOR MANAGEMENT*

DESCRIPTION: This course is part of a series designed to explore accountability, organizational effectiveness, effective communication and conflict dynamics, and, coaching and mentoring, all from the perspective of the Chief Decision Maker of their organization.

OBJECTIVES: Demonstrate that the Chief Decision Maker is always “on stage”

TOPICS:

- Master of the company vision
- Culture trumps everything...and it comes from the top
- It's often lonely at the top
- Coaching vs. mentoring vs. directing: when, where, what, why?

LEVEL OF KNOWLEDGE: Chief decision makers / Prior experience

DATES: July 18 - 22, 2016 *Must enroll by July 8th!*

SESSION LEADERS: Kristin Backhaus, Ph.D., Rief Kanan, MS, CPA and Angela Lebbon, Ph.D.

COST (LINK TO REGISTRATION) \$1,000

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TITLE: *LEADERSHIP FOR DEPARTMENT/DIVISION MANAGERS, LINE EXECUTIVES & SUPERVISORS*

DESCRIPTION: This course is part of a series designed to explore accountability, organizational effectiveness, effective communication and conflict dynamics, and, coaching and mentoring, all from the perspective of the business unit executives of their organization. Content is modified to resonate for department or division managers, line executives and supervisors with the intent to enhance their growth as leaders.

OBJECTIVES: Demonstrate the multiplier effect achieved when leaders view as one of their prime tasks the development of future leaders.

TOPICS:

- The multiplier effect
- Four obsessions of an extraordinary executive
- *Death by Meeting: about solving the most painful problem in business*, Lencioni
- Destroying the barriers that turn colleagues into competitors

LEVEL OF KNOWLEDGE: Intermediate / Prior experience in business unit management

DATES: July 18 - 22, 2016

Must enroll by July 8th!

SESSION LEADERS: Kristin Backhaus, Ph.D., Rief Kanan, MS, CPA and Angela Lebbon, Ph.D.

COST (LINK TO REGISTRATION) \$1,000

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TITLE: *LEADERSHIP FOR TEAM LEADERS, TEAM MEMBERS, FRONT LINE AND ADMINISTRATIVE STAFF*

DESCRIPTION: This course is part of a series designed to explore accountability, organizational effectiveness, effective communication and conflict dynamics, and, coaching and mentoring, all from the perspective of the front line team member and administrative staff of their organization. Content is modified to resonate for team leaders, line supervisors, team members and administrative staff with the intent to enhance their emergence as leaders.

OBJECTIVES: Building trust is the foundation required to raise a high performing team from the ashes of dysfunction. Discover how trust leads to healthy communication and clarity of purpose.

TOPICS:

- Five dysfunctions of a team. No trust, no triumph
- *Silos, Politics and Turf Wars: a leadership fable*, Lencioni
- *The Three Signs of a Miserable Job: a fable for managers (and their employees)*, Lencioni
- *Death by Meeting: about solving the most painful problem in business*, Lencioni

LEVEL OF KNOWLEDGE: Intermediate / Prior experience

DATES: July 18 - 22, 2016 *Must enroll by July 8th!*

SESSION LEADERS: Kristin Backhaus, Ph.D., Rief Kanan, MS, CPA and Angela Lebbon, Ph.D.

COST (LINK TO REGISTRATION) \$1,000

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TITLE: *ACCOUNTING AND CASH FLOW FOR THE NON-FINANCIAL EXECUTIVE*

DESCRIPTION: Managing a business unit's budget? Responsible for financial performance? Not an accountant? Wish someone would explain accounting and cash flow in PLAIN ENGLISH? This workshop is for you! Have an accountant who is experienced, and understands the operating side of business, walk you through the planning, budgeting/forecasting, reporting and responsibility phases applicable to most business enterprises.

OBJECTIVES:

- To gain comfort with your company's numbers and financial systems.
- To be able to speak confidently about account-related issues
- To understand budgeting and forecasting and explain the difference

TOPICS

- Creating a cash flow budget
- "So, why did I have a record profit year and STILL have no cash?"
- Fundamentals of budgeting and forecasting
- How do budgets and forecasts differ?
- Ten great questions to ask your controller or CFO

LEVEL OF KNOWLEDGE: Basic / overview

DATES: July 27, 2016 *Must enroll by July 20th!*

SESSION LEADERS / INSTRUCTORS: Rief Kanan, MS, CPA (+guest CEOs, CFOs, CPAs)

COST (LINK REGISTRATION) \$250 (NYSSCPA Members & Fellows of The Business Institute \$150*)
Enroll two or more as a team from one institution, save \$25 per person.

* See registration page for details.

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TITLE: *LITIGATION SUPPORT: EXPERT WITNESS BOOTCAMP*

DESCRIPTION: Litigation attorneys and experienced experts provide first-hand guidance on the role of the expert witness. Through role play and case studies you will experience pre- and post-courtroom activities and preparation as well. The session will end with a mock trial where you will be called to provide expert testimony.

OBJECTIVES: Gain an understanding of the role of the expert witness. Complete with attendant risks and rewards.

TOPICS:

- Rules and procedures: New York and Federal
- Daubert?
- Relationship to the client
- Attorney's work product – a matter of privilege
- Qualification
- Fees
- Deposition
- Testimony

LEVEL OF KNOWLEDGE: Intermediate / Prior experience NOT required

DATES: July 29, 2016 *Must enroll by July 20th!*

SESSION LEADERS / INSTRUCTORS: Rief Kanan, MS, CPA (+guest experts & attorneys)

COST (LINK REGISTRATION) \$250 (NYSSCPA Members & Fellows of The Business Institute \$150*)
Enroll two or more as a team from one institution, save \$25 per person.

* See registration page for details.

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CONTINUING PROFESSIONAL EDUCATION (CPE) FOR CPAs

TITLE: ACCOUNTING STANDARDS UPDATE

DESCRIPTION: Updates and sample cases regarding the latest changes in accounting standards are reviewed rapid fire in this three-hour CPE-bearing interactive session. Significant SEC and IFRS changes, if any, are touched upon as a part of this session. A very brief segment is invested in the description of changes in the FAR section of the CPA exam.

OBJECTIVE: To interactively share updates in U.S. GAAP and other authoritative literature with professionals in the form of a summary update.

TOPICS:

- Review of the latest changes in accounting literature/US GAAP
- Review of the latest changes in SEC
- Review of the latest changes in IFRS
- General discussion of the changes for the 2017 CPA exam

LEVEL OF KNOWLEDGE: Intermediate / Prior experience

DATES: August 8, 2016 TIME: 9:00 AM to 12:00 PM **(3 CPE credits in accounting)**

Must enroll by July 25th!

SESSION LEADERS / INSTRUCTORS: Rief Kanan, MS, CPA

COST (LINK REGISTRATION) \$200 (NYSSCPA Members & Fellows of The Business Institute \$150*)
Enroll two or more as a team from one institution, save \$25 per person.

* See registration page for details.

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TITLE: *AUDITING STANDARDS UPDATE*

DESCRIPTION: Updates and sample cases regarding the latest changes in auditing standards are reviewed rapid fire in this three-hour CPE-bearing interactive session. Significant compilation and review changes, if any, are touched upon as a part of this session. A very brief segment is invested in the description of changes in the auditing section of the CPA exam.

OBJECTIVE: To interactively share updates in the auditing and other attest literature with professionals in the form of a summary update.

TOPICS:

- Review of the latest changes in auditing literature/GAAS
- Review of the latest changes in SSARS
- General discussion of the changes for the 2017 CPA exam

LEVEL OF KNOWLEDGE: Intermediate / Prior experience

DATES: August 9, 2016 TIME: 9:00 AM to 12:00 PM **(3 CPE credits in auditing)**

Must enroll by July 25th!

SESSION LEADER / INSTRUCTOR: Rief Kanan, MS, CPA

COST (LINK REGISTRATION) \$200 (NYSSCPA Members & Fellows of The Business Institute \$150*)
Enroll two or more as a team from one institution, save \$25 per person.

* See registration page for details.

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PROFESSIONAL ETHICS AND ETHICAL DECISIONS

TITLE: *PROFESSIONAL ETHICS WORKSHOP*

DESCRIPTION: Three hours workshop using case studies of serious, complex ethical dilemma to explore tactics to identify and name the dilemma, identify and explore the impact on stakeholders, formulate and simulate reasonable courses of action. A look at, and some practice with, approaches to ethical decision making espoused by *The Wall Street Journal*, Warren Buffet, Robert Solomon, Peter Drucker and Texas Instruments.

OBJECTIVE: To continue professional business discourse around ethical conduct and decision making in challenging and often hostile circumstances: keeping the discussion active, relevant and current.

TOPICS:

- *How Good People Make Tough Choices* (Rushworth M. Kidder)
- *There's No Such Thing as "Business" Ethics* (John C. Maxwell)
- *The Business Ethics Activity Book* (Marlene Caroselli)

LEVEL OF KNOWLEDGE: Intermediate

DATE: August 10, 2016 TIME: 9:00 AM to 12:00 PM *Must enroll by July 25th!*

SESSION LEADER / INSTRUCTOR: Rief Kanan, MS, CPA

COST (LINK REGISTRATION) \$200 (NYSSCPA Members & Fellows of The Business Institute \$150*)
Enroll two or more as a team from one institution, save \$25 per person.

* See registration page for details.

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TITLE: *PROVEN KEY ELEMENTS TO A SUCCESSFUL COMPLIANCE PROGRAM*

DESCRIPTION: The course provides an introduction to new and experienced company personnel on how to communicate and enact an effective corporate compliance for businesses. Preventing and detecting issues is critical before they surface to cost business owners, management and department leaders headaches heads, liability and fines.

TOPICS:

- Why Ethics, Why Now?
- Defense and Healthcare industries background
- How to Write and Communicate an Effective Compliance Program
- Integration into Workforce
- 8 Specific Case Situations
- Ethics on the golf course
- Certifications to New York State and federal government

LEVEL OF KNOWLEDGE: Introductory/prior experience for all management/department levels/entrepreneurs

DATES: June 27

HOURS: 9:00 AM to 12 PM *Must enroll by July 20th!*

SESSION LEADERS/INSTRUCTORS: Michael A. Smith, CCO, CCE

COST (LINK TO REGISTRATION): \$300

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MEET OUR FACULTY



Kristin Backhaus, Ph.D.

Dr. Backhaus is the Dean of the School of Business and has many awards and honors. She is broadly published and has consulted in several of her areas of expertise. Some of her many accomplishments include:

Director, Leadership Institute, School of Business, 2008-2015

Co-Editor, Current Empirical Research, Organization Management Journal

Consulting in the areas of employer branding, employee training and development, and marketing research projects.

Chancellor's Award for Excellence in Teaching, 2009

SUNY New Paltz School of Business Distinguished Service Award, 2008

Distinguished Teacher Award, Alumni Association, 2005

Publications in: Business and Society; Career Development International; Educational Psychology; Journal of Business Communication; Journal of Management Education; Organization Management Journal; Journal of the Academy of Business Education; Journal of Faculty Development



Christina Bark, J.D.

Christina Bark is an expert in strategy, business transformation, stakeholder engagement, business law, leadership and human capital development, global mergers and acquisitions, and risk management. Christina draws upon her professional experience to provoke students to break the barriers of old thinking to pursue new outcomes.

As a SUNY-New Paltz School of Business faculty member, she has taught principles of management, human resource management, applications in human resource/organizational behavior management, and business law for accountants. She also teaches modules for the C.P.A. review course.

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In parallel with teaching, she leads a business advisory firm serving clients in the U.S., which specializes in strategic planning, business transformation, leadership and human capital development, global human resources, risk management, and change implementation. Their Hudson Valley clients represent various industries, including manufacturing, medical services, IT, hospitality, foundations, and professional service firms.

Over the course of her career, Christina has held various leadership positions, including Global Leader of Business Affairs for Oliver Wyman (2.2B global consultancy), General Counsel of Scient, Inc. (an e-business start-up) and Interim Executive Director for Historic Huguenot Street (a national historic landmark district non-profit).

She began her career as an employment attorney for the NYC-based law firm of Proskauer Rose, and served as a Senior Attorney for IBM. In addition, she has engaged in various entrepreneurial ventures as either an owner, investor, or adviser throughout her career. Her first crash course in starting-up ventures came as a co-founder of a chain of in-line skate and snowboard stores in the San Francisco Bay Area back in 1992.

She is a graduate of Vassar College (A.B., Sociology; *Phi Beta Kappa*) and Stanford Law School (J.D.).



Barak Ben-Avinoam, DBA

Dr. Barak Ben-Avinoam is a Partner at Benhamou Global Ventures (BGV), a Silicon Valley-based early stage venture capital fund that focuses on enterprise IT innovation. Barak is an expert in the field of early-stage investments, accelerators and incubators.

Prior to BGV Barak Ben-Avinoam was a Managing Partner at Fastlane Ventures (FLV), the leading Internet accelerator in Russia, and a Managing Director at QuantumWave Capital (QWC), a boutique, Paris-based investment banking firm specializing in technology mergers and acquisitions.

Before his tenure as an investor Barak was a co-Founder and held C-level positions at several technology start-up companies, including CEO of Flash Networks, GM of European Operations at Business Layers, and CEO of Prolify.

Barak holds a Doctorate of Business Administration, with honors, from the International School of Management, Paris, France, and a B.Sc. in Information Systems, with honors, from Drexel University, Philadelphia, PA.

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Kevin Caskey, Ph.D.

Consultant in the areas of smaller firm manufacturing and building research consortia with corporate and academic participation, 1995 to present;
Research Manager and Scientist, Technical University of Eindhoven (Netherlands), 1996-2001; Research Scientist, Bremen Institute of Production Technology (Germany), 1994-1996; Simulation Specialist, Boeing Computer Services, 1985-1994. Dr. Caskey is engaged in research and consults in:
Manufacturing; Operations; Simulations; Statistics and Operations Research
Operations Research; Supply Chain Management
Project Management



Michael Chuang, Ph.D.

Michael Chuang is a member of the faculty of the School of Business at the State University of New York at New Paltz. He has obtained Master's degrees in accounting and civil engineering, and a Ph.D. in business administration. He has project management expertise in transportation, construction, and information systems management and development. He teaches statistics, decision analysis, and information systems, and conducts research in related areas such as in healthcare informatics, socio-behavioral issues of technology systems, information systems analysis, design, and development, technology innovation and project management.

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Barbara Driscoll, MS

Barbara Driscoll, MS, LMHC, has been a lead trainer with the Dispute Resolution Center for over 14 years, providing in-school mediation trainings, as well as various character education and conflict resolution trainings to after school programs and community groups. Mrs. Driscoll is also the lead trainer for a 15 session parent education series.

Mrs. Driscoll has a Master's degree in Mental Health Counseling and has an active private practice in Middletown for over 25 years.

Mrs. Driscoll is dedicated to educating the community to the DRC's mission of the peaceful resolution of conflict.



Perry Goldschein, JD

Perry Goldschein is a corporate sustainability consultant, and former environmental and regulatory lawyer, with 15 years of experience helping organizations with their sustainability efforts. He has expertise across strategy, communications, marketing, law, compliance, and reporting, with Global Reporting Initiative (GRI) certified training. Perry has served such world-class clients as GE, Goldman Sachs, the International Monetary Fund, Johnson & Johnson, National Geographic, PepsiCo, Walmart, and Yale University. He has been quoted and published widely in academic journals, industry press, and the general media, including Advertising Age, GreenBiz.com, MediaPost, Sacramento Bee, Sustainable Brands, and the U.C.L.A. Journal of Environmental Law & Policy. He has also taught at the State University of New York, New Paltz, and presented at ad:tech Chicago, American Strategic Management Institute, Cornell University, Sustainable Brands, University of Maryland, and Net Impact. Perry holds a J.D. from the University of California, Davis, and a B.A. from the University of Pennsylvania.

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Rief Kanan, MS, CPA, CGMA

Lecturer of accounting at the School of Business of The State University of New York at New Paltz, where he is the Director of The Business Institute and holds a Sam Walton Free Enterprise Fellowship. He is a graduate of Bryant University and Syracuse University's Whitman Graduate School of Management. He also holds a Certificate in Advanced Management Studies from Yale University. Professor Kanan is certified in Financial Forensics (CFF) by the American Institute of CPAs and the National Association of Certified Valuation Analysts have designated him a Master Analyst of Financial Forensics (MAFF). He holds the Chartered Global Management Accountant (CGMA) designation. In May 2014, he received the Dr. Emanuel Saxe Outstanding CPA in Education Award which is the highest honor given an educator by the NY State Society of CPAs. His forty years of experience include public accounting, corporate auditing and accounting, corporate management and entrepreneurial activities in real estate and retail businesses. Professor Kanan has been teaching at the bachelor degree and MBA levels since 1983, in addition to his business activities. He maintains his entrepreneurial edge by assembling "think tanks" of twelve to sixteen CEOs, company presidents and senior executives each. These executives work on the strategies and operations of their businesses in association with each other. As Director of The Business Institute, he administers or delivers consulting services to small and mid-sized companies including training programs, company planning meetings, marketing research, operations management, organizational development, organizational behavior and web-based services consulting. Most recently, he completed the instructional development and facilitation of a multi-national leadership development program delivered to executives in Cranbury, NJ, Melville, LI, NY, Sofia, Bulgaria and Montevideo, Uruguay. He has had articles appear in the Academy of Business Research, *Family Lawyer Magazine* and *The Trusted Professional* newsletter of the NY State Society of CPAs.

Mr. Kanan is campus champion for student membership in the NY State Society of CPAs and chairman of the Cooperation with Education Committee of the Mid-Hudson Chapter of the NY State Society of CPAs. He is past chairman of the Career Opportunities in the Accounting Profession (COAP) Board. He has also served as Trustee of the Foundation for Accounting Education, a member of the Arbitration and Mediation and Auditing Standards and Procedures Committees of the Society and the Professional Ethics and the Accounting Standards Committees. He is also a member and campus champion of the American Institute of CPAs. He is a member of the Association of Certified Fraud Examiners, the National Association of Certified Valuation Analysts and Financial Executives International. Mr. Kanan is a member of the Institute of Management Accountants. He has recently been admitted as a fellow of the Ethics Network of the Center for the Public Trust, National Association of State Boards of Accountancy (NASBA).

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Angela Lebbon, Ph.D.

Professor Lebbon earned her doctorate in behavior analysis (with an emphasis in organizational behavior management) and her MA in industrial/organizational psychology from Western Michigan University. She has corporate experience with a large Fortune 500 company in Global Organization Effectiveness and has consulting experience in various industries including manufacturing, energy and utilities, food services, and healthcare.



Michael A. Smith, CCO, CCE

Michael's background includes being a business partner and co-chief executive officer for the J. & H. Smith Light Corporation in New Windsor, New York, a manufacturer of panel indicator light parts for the Department of Defense ships, submarines and aircraft carriers. The defense industry became the first industry to adopt ethical standards and corporate compliance. The business was sold to one of Mike's excellent customers.

During this time, he became involved with Chambers of Commerce, Pattern for Progress, Council of Industry and also served 13 years as a volunteer Board President of the Holden Home, a senior adult care facility. While leading this board, Mike became involved with health care compliance for the Home and facilitated a successful management arrangement with the Culinaricians' Home in New Paltz for over 10 years.

Mike became the Vice-President, Chief Compliance Officer and also Foundation Chair of Major Events for the Elant health care system, serving five counties in the Hudson Valley. Mike led the firm in its corporate compliance program and served as their Foundation Chair for events including their annual Golf and Polo outings and recruiting all-time best selling writer James Patterson for three years.

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Mike served as President of the New Paltz Regional Chamber of Commerce and as a project leader with the Nevele Resort in Ellenville. Today, Mike is the Chief Compliance Officer of EverCare, a non-profit Managed Long Term Care Plan chartered with the goal of helping people live at home rather than entering a nursing home. He serves on several regional boards including the Catskill Hudson Area Health Education Center and the SUNY New Paltz School of Business Advisory Council.

Michael has a B.A. degree from Marist College in business administration. He is a certified compliance executive (CCE); and an author of over 100 published business articles plus a #1 and top ten ranked business golf specialty book on Amazon.com.



Michael Sheridan, Ph.D.

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Dr. Sheridan is expert in business strategy, corporate sustainability, GRI standards, local food systems, organic food, sustainability reporting, particularly focused on small to medium enterprises.



Russell Zwanka, DBA

Dr. Zwanka has previously taught Marketing and Business Strategy at Siena College and Hudson Valley Community College. He is currently CEO of Triple Eight Marketing, a retail food industry consultancy working on developing customer-centered, integrity-first approaches to all customer connectivity areas of the business. He has worked extensively as a merchandising and marketing executive for retail and wholesale grocery companies in domestic and international markets, including Price Chopper, Ahold, Bozzutos, Inc. and the North West Company.

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THE CHRONOLOGICAL
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