AD HOC TAX GROUP

The Ad Hoc Tax Group is an informal group of universities and higher education associations that have a particular interest in federal tax policy and its impact on the higher-education community.

In order to keep members apprised of developments on the legislative and regulatory fronts, the Ad Hoc Tax Monitor in Washington, D.C., provides an array of services that includes reporting on emerging tax proposals in the Congress and the Administration with an eye toward early identification of problematic proposals and opportunities to advance higher education’s tax agenda; education of coalition members about tax issues; advice on advocacy strategy; and management of day-to-day activities and communications of the coalition. The Monitor is also available to respond to the questions of individual members.

The Ad Hoc Tax Group is led by two co-chairs, one from a public institution and one from a private institution. The current co-chairs are Ellyn Perrone, Associate Vice President for Research-Federal Relations, the University of Texas at Austin, and Steve Heuer, Director of Government Relations, New York University.

Contributions for member institutions are $2,550 a year.

For further information, contact the Ad Hoc Tax Monitor: Nancy O’Neall (noneall@psw-inc.com) at Public Strategies Washington, 202-783-2596.

ISSUES

Since its inception in the early 1970s, Ad Hoc has focused on a variety of tax issues:
- Proposals affecting university endowments, tax-exempt bond financing, and the unrelated business income tax (UBIT).
- Nonprofit governance reforms and proposals dealing with executive compensation, supporting organizations, and donor advised funds.
- Proposals affecting charitable giving.
- Proposals that would repeal the Sec. 117(d) employee tuition benefit and limit the FICA tax exemption for students.
- Oversight of tax-exempt organizations.
- Tax credits and deductions for college expenses.
MEETINGS

The Ad Hoc Tax Group holds an annual retreat as well as three quarterly meetings each year in Washington, D.C.

AD HOC MEMBERS

Baylor University
Boston College
Boston University
Brown University
Carnegie Mellon University
Case Western Reserve University
Columbia University
Cornell University
Duke University
Duquesne University
Emory University
George Washington University
Harvard University
Indiana University
Iowa State University
Johns Hopkins University
Marquette University
Massachusetts Institute of Technology
New York University
Northeastern University
Northwestern University
Notre Dame University
Ohio State University

Princeton University
Rensselaer Polytechnic Institute
Rochester Institute of Technology
Rutgers University
Stanford University
Syracuse University
Tulane University
University of California System
University of Chicago
University of Florida Foundation
University of Michigan
University of North Carolina
University of Pennsylvania
University of Pittsburgh
University of Rochester
University of Southern California
University of Texas
Vanderbilt University
Wake Forest University School of Medicine
Washington University
Yale University

Association Participants

American Association of Community Colleges
American Council on Education
Association of American Medical Colleges
Association of American Universities
Association of Governing Boards
Association of Jesuit Colleges and Universities
Association of Public and Land Grant Universities
Council for Advancement and Support of Education
Consortium on Financing Higher Education
National Association of College and University Business Officers
National Association of Independent Colleges and Universities

3/13/14