

# **2018 Best Practices Conference on School Operations, Finance, and Business Leadership**

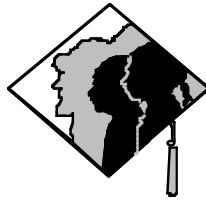
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*Sponsored by*

*New Hampshire School  
Administrators Association (NHSAA)*

and

*New Hampshire Association of  
School Business Officials (NHASBO)*



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**Tuesday and Wednesday**

**October 30 and 31, 2018**

**Grappone Conference Center  
Concord, NH**

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**See inside for daily agenda and  
conference registration form**

**2018 Best Practices Conference on  
School Operations, Finance, and Business Leadership**

**Tuesday, October 30, 2018**

**Agenda**

- 8:00-8:30      *Registration & Coffee – Visit with Exhibitors*
- 8:30-8:45      *Welcome, Review of Program, and Introduction of Exhibitors*  
                    ~ Dr. Carl Ladd, Executive Director, NHSAA
- 8:45-10:15     **General Session 1 – Salons A & B**  
**QuickSwitching: How to Change for Good**  
                    ~ Jon Wortmann, Author of *Hijacked by Your Brain*  
                    This session will discuss QuickSwitching: a new way of using the latest discoveries in brain science to give you more control over your inner life. This process turns what you’ve done unconsciously and resources you didn’t know you had into intentional new habits. Building on the methods in Jon’s book, *Hijacked by Your Brain*, the technique has helped athletes and professionals in diverse industries overcome fear, doubt, and stress. You will leave with practical new skills to change how you approach personal health, relationships, and leadership.
- 10:15-10:35    *Refreshment Break – Visit with Exhibitors*
- 10:35-11:35    **Concurrent Session A – see page 3**
- 11:45-12:45    **Concurrent Session B – see page 4**
- 12:45-1:45     *Lunch – Salons A & B – Visit with Exhibitors*  
*Exhibitor Presentation by HealthTrust*
- 1:45-2:45      **General Session 3 – Salons A & B**  
**Panel Discussion - Important Changes to Managing Your Student Activity Accounts**  
                    ~ Sheryl Pratt, CPA, Plodzik & Sanderson, PA, & Robert Vachon, CPA, Vachon Clukay & Company, PC, & Sheryl Stephens Burke, CPA, Melanson Heath; Moderated by Steve Martin, President, NHASBO  
                    The Government Accounting Standards Board (GASB) has issued its Statement #84 – Fiduciary Activities. This panel discussion will discuss the criteria for identifying fiduciary activities of school districts, new reporting requirements, and how this Statement impacts the processes districts must implement in managing your student activity accounts.
- 2:45-3:00      **Audience Discussion and Q&A**
- 3:00              *Raffle & Adjournment*

*Tuesday, October 30, 2018*

**Concurrent Session A: 10:35-11:35**

Capital	<p><b>1. Volunteer Liability: Strategies for Minimizing Your Exposure</b> Volunteers are a wonderful resource in our classrooms and throughout our schools. This session takes a detailed look at best practices to minimize risk for the districts and their volunteers, including auxiliary groups such as PTOs/PTAs. Attendees will leave with techniques they can immediately implement in their districts and samples to use throughout their process. ~ <i>Monica Panait, Sr. Risk Management Consultant, Primex</i></p>
Concord	<p><b>2. Tips, Tools and Take Aways for Employee Health Benefits</b> This session will review pertinent ACA compliance info, the role employers and employees can take to control health care costs, and a look at what to expect next in health benefits. ~ <i>Lisa Duquette, Executive Director, &amp; Christopher Glenn, Group Relationship Specialist, &amp; Jana Dalton, Group Relationship Specialist, SchoolCare</i></p>
Merrimack	<p><b>3. Food Service Management Company Contracts in New Hampshire</b> There are additional regulations and oversight responsibilities required of the SAU when contracting food services. Therefore, this workshop will offer the participant information regarding the SAU responsibilities in the procuring of and managing of a food service management company. ~ <i>Kathryn G.M. Hodges, Program Specialist, Bureau of Nutrition Programs and Services, NHDOE</i></p>
Salon C Front	<p><b>4. Criminal Background Check Information &amp; DOE Investigations</b> This session will discuss the educational criminal record background check process as well as discussion on the recently adopted process for backgrounding school transportation drivers seeking to drive for multiple school districts. ~ <i>Attorney Diana Fenton, NH DOE &amp; Jeff Kellett, Chief Administrator, NH Dept. of Safety</i></p>
Salon C Back	<p><b>5. Virtual Reality: How it is taking over the IT World!</b> Virtual Reality is going to be used from classrooms to healthcare to corporate. Come learn how each industry is already implementing virtual reality and what to expect in the future! ~ <i>Keith Martin, Director of Training, Whalley Computer Associates, Inc</i></p>
Pierce	<p><b>6. Adequacy 101</b> A brief history of the creation of the New Hampshire adequate education funding formula and explanation of how the current funding formula works. ~ <i>Caitlin Davis, Internal Auditor, NH DOE</i></p>
Webster	<p><b>7. Do you have the Energy (efficiency) to Save Money in your School?</b> Energy bills are a type of controllable expenses that can free-up resources for other budgetary shortfalls. This session will guide attendees through the key first step to managing your energy budget in a simplified way. Attendees will then learn about incentives and technical assistance available for projects that can help reduce energy costs and lead to better outcomes in school buildings. ~ <i>Amy Clark, Administrator, School Safety &amp; Facility Management Bureau, NH Department of Education &amp; Joe Van Gombos, Program Coordinator, Unifit Corporation, &amp; Joe Lajewski, Program Administrator, NH Electric Cooperative &amp; John Balfe, Buildings &amp; communities Senior Associate, NEEP</i></p>

**Tuesday, October 30, 2018**

**Concurrent Session B: 11:45-12:45**

Capital	<p><b>8. Volunteer Liability: Strategies for Minimizing Your Exposure</b> Volunteers are a wonderful resource in our classrooms and throughout our schools. This session takes a detailed look at best practices to minimize risk for the districts and their volunteers, including auxiliary groups such as PTOs/PTAs. Attendees will leave with techniques they can immediately implement in their districts and samples to use throughout their process. ~ <i>Monica Panait, Sr. Risk Management Consultant, Primex</i></p>
Concord	<p><b>9. Strategies that Work – Impacting the Cost of Healthcare</b> Healthcare costs have a significant impact on budgets and collective bargaining. Learn how plan design and other strategies to increase consumerism and engagement can favorably affect claims costs and rates. ~ <i>Darlene Simmons, Engagement Manager, &amp; Dave Salois, Member Relations Representative, HealthTrust</i></p>
Merrimack	<p><b>10. Food Service Management Company Contracts in New Hampshire</b> There are additional regulations and oversight responsibilities required of the SAU when contracting food services. Therefore, this workshop will offer the participant information regarding the SAU responsibilities in the procuring of and managing of a food service management company. ~ <i>Kathryn G.M. Hodges, Program Specialist, Bureau of Nutrition Programs and Services, NHDOE</i></p>
Salon C Front	<p><b>11. Criminal Background Check Information &amp; DOE Investigations</b> This session will discuss the educational criminal record background check process as well as discussion on the recently adopted process for backgrounding school transportation drivers seeking to drive for multiple school districts. ~ <i>Attorney Diana Fenton, NH DOE &amp; Jeff Kellett, Chief Administrator, NH Dept. of Safety</i></p>
Salon C Back	<p><b>12. Energy Market Trends</b> A discussion of trends in the Energy Market, and what they mean for consumers. ~ <i>Larry Pignataro, Account Manager, &amp; Charlie Agnew, Business Development &amp; Account Manager, Competitive Energy Services</i></p>
Pierce	<p><b>13. Adequacy 101</b> A brief history of the creation of the New Hampshire adequate education funding formula and explanation of how the current funding formula works. ~ <i>Caitlin Davis, Internal Auditor, NH DOE</i></p>
Webster	<p><b>14. Do you have the Energy (efficiency) to Save Money in your School?</b> Energy bills are a type of controllable expenses that can free-up resources for other budgetary shortfalls. This session will guide attendees through the key first step to managing your energy budget in a simplified way. Attendees will then learn about incentives and technical assistance available for projects that can help reduce energy costs and lead to better outcomes in school buildings. ~ <i>Amy Clark, Administrator, School Safety &amp; Facility Management Bureau, NH Department of Education &amp; Joe Van Gombos, Program Coordinator, Unutil Corporation, &amp; Joe Lajewski, Program Administrator, NH Electric Cooperative &amp; John Balfe, Buildings &amp; communities Senior Associate, NEEP</i></p>

*A special thank you to our diamond sponsors:*



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*2018 Best Practices Conference on*  
**School Operations, Finance, and Business Leadership**

**Wednesday, October 31, 2018**

**Agenda**

- 8:00-8:30      *Registration & Coffee – Visit with Exhibitors*
- 8:30-8:45      *Welcome, Review of Program, and Introduction of Exhibitors*  
                    ~ Dr. Carl Ladd, Executive Director, NHSAA
- 8:45-10:15     **General Session 1 – Salons A & B**  
**Deepening Your School System’s Partnership with Your Bank: Tapping Bank Grant and CRA Support for Digital Equity and Economic Opportunity**  
                    ~ Robert McLaughlin, Executive Director, National Collaborative for Digital Equity  
                    Under the federal Community Reinvestment Act, nearly all federally insured banks have been required since 1977 to make investments for economic opportunity in low- and moderate-income (LMI) areas in their service region. School system leaders have the authority to determine both where their district does its banking as well as whether and how they might partner with their bank to tap CRA and grant support to remove the digital divide at home for low-income students and their families. During this informative session and extended Q & A we will explore strategies to develop a deeper partnership with NH banking leaders in LMI and non-LMI NH communities, working together to build a high-skill, high wage economy for all families.
- 10:15-10:35    *Refreshment Break – Visit with Exhibitors*
- 10:35-11:35    *Concurrent Session A – see page 7*
- 11:45-12:45    *Concurrent Session B – see page 8*
- 12:45-1:45     *Lunch – Salons A & B – Visit with Exhibitors*  
*Exhibitor Presentation by NHSAVES*
- 1:45-2:45      **General Session 2 – Salons A & B**  
**Federal Education Policy: Looking Back and Ahead**  
                    ~ Leslie Finnan, Senior Legislative Analyst, AASA  
                    As we near the 2018 midterm elections, this presentation will provide an overview of what has happened in federal education policy in the 115th Congress (2016-2018) and a look at what may happen in the next Congress. It will discuss appropriations, ESSA, higher education, Perkins CTE, Medicaid, and other topics.
- 2:45-3:00      *Audience Discussion/Q&A*
- 3:00              *Raffle & Adjournment*

**Wednesday, October 31, 2018**

**Concurrent Session A: 10:35-11:35**

<i>Capital</i>	<b>15. Energy Market Trends</b> A discussion of trends in the Energy Market, and what they mean for consumers. ~ Larry Pignataro, Account Manager, & Charlie Agnew, Business Development & Account Manager, Competitive Energy Services
<i>Concord</i>	<b>16. Strategies that Work – Impacting the Cost of Healthcare</b> Healthcare costs have a significant impact on budgets and collective bargaining. Learn how plan design and other strategies to increase consumerism and engagement can favorably affect claims costs and rates. ~ Darlene Simmons, Engagement Manager, & Dave Salois, Member Relations Representative, HealthTrust.
<i>Merrimack</i>	<b>17. NHRS Retirement Update</b> NHRS staff will provide an update on retirement system-related issues, including the changes to the working-after-retirement laws enacted this past legislative session, the recently certified FY 20-21 employer contribution rates, , and other important information relative to the operations of NHRS. ~ Marty Karlon, Public Information Officer, and Mark Cavanaugh, Associate Counsel, NH Retirement System
<i>Salon C Front</i>	<b>18. Federal Labor Laws for Schools</b> This session will provide compliance assistance regarding labor law questions for schools, including overtime, exemptions from overtime, volunteers, independent contractors, working in multiple positions, internships, and child labor. ~ Steve McKinney, Community Outreach & Resource Planning Specialist, US Department of Labor
<i>Salon C Back</i>	<b>19. Is Managed Service Right for You?</b> Do you need to free up time to handle the bigger picture? Or does your team need a hand in handling the bigger picture? Whalley can help fill the gap in your service. WCA can watch your system while your team is on vacation, sleeping and/ or even your team just needs help keeping watch. ~ Kevin Russell, Manager of Managed Services, Whalley Computer Associates, Inc
<i>Pierce</i>	<b>20. Ethics and Conduct: What is the Purpose?</b> The aim of this session is to present the overall landscape of work in developing a Code of Ethics and a Code of Conduct for the state’s education workforce. A three year historical overview will be offered, along with the current status of both codes as they journey through the state’s rule making process. Session highlights include a detailing of the distinct differences across ethics and conduct as well as concrete recommendations for school district implementation and consideration. ~ Nicole Heimarck, Director of Governmental Relations, & Attorney Barrett Christina, Executive Director, NHSBA
<i>Webster</i>	<b>21. Understanding Your Financial Statements</b> Understanding your school district’s financial statements, including the impact of recently issued and upcoming accounting pronouncements. What you need to know about your audit, and how to explain it to stakeholders. ~ Scott Eagen, Senior Manager, Plodzyk & Sanderson, PA

**Wednesday, October 31, 2018**

**Concurrent Session B: 11:45-12:45**

<i>Capital</i>	<p><b>22. Title IV Part A Student Support and Academic Enrichment Grant</b> In this session, we will discuss Title IV Part A, its timeline and funding allocations, the period of availability, the requirements for a comprehensive needs assessment, allowable activities, and additional resources available to districts in NH. The formula-based grant is now available for this school year, and our presentation will provide time for participants to ask questions about the full program. ~ <i>Nate Greene, Science Education Consultant, &amp; Ashley Frame, Education Consultant, DOE</i></p>
<i>Concord</i>	<p><b>23. Tips, Tools and Take Aways for Employee Health Benefits</b> This session will review pertinent ACA compliance info, the role employers and employees can take to control health care costs, and a look at what to expect next in health benefits. ~ <i>Lisa Duquette, Executive Director, &amp; Christopher Glenn, Group Relationship Specialists, &amp; Jana Dalton, Group Relationship Specialist, SchoolCare!</i></p>
<i>Merrimack</i>	<p><b>24. NHRS Retirement Update</b> NHRS staff will provide an update on retirement system-related issues, including the changes to the working-after-retirement laws enacted this past legislative session, the recently certified FY 20-21 employer contribution rates, , and other important information relative to the operations of NHRS. ~ <i>Marty Karlon, Public Information Officer, and Mark Cavanaugh, Associate Counsel, NH Retirement System</i></p>
<i>Salon C Front</i>	<p><b>25. Federal Labor Laws for Schools</b> This session will provide compliance assistance regarding labor law questions for schools, including overtime, exemptions from overtime, volunteers, independent contractors, working in multiple positions, internships, and child labor. ~ <i>Steve McKinney, Community Outreach &amp; Resource Planning Specialist, US Dept of Labor</i></p>
<i>Salon C Back</i>	<p><b>26. Leveraging Technology to Establish, Implement and Streamline your District Plans</b> Come and learn how Epping superintendent Valerie McKenney built a sustainable and realistic road map for the leadership, staff, board, and community to achieve the mission of their Vision for Epping 21st Century leveraging technology. You will learn how technology is helping simplify the monitoring and reporting of the objectives and goals to the board and community. ~ <i>Valerie McKenney, Superintendent, SAU 14, &amp; Corey Masson, Director of Business Development and SAU 17 School Board Member, &amp; Jamie Saucier, Executive Accounts Manager and SAU 16 School Board Member, NXTBoard</i></p>
<i>Pierce</i>	<p><b>27. Ethics and Conduct: What is the Purpose?</b> The aim of this session is to present the overall landscape of work in developing a Code of Ethics and a Code of Conduct for the state’s education workforce. A three year historical overview will be offered, along with the current status of both codes as they journey through the state’s rule making process. Session highlights include a detailing of the distinct differences across ethics and conduct as well as concrete recommendations for school district implementation and consideration. ~ <i>Nicole Heimark, Director of Governmental Relations, &amp; Attorney Barrett Christina, Executive Director, NHSBA</i></p>
<i>Webster</i>	<p><b>28. Understanding Your Financial Statements</b> Understanding your school district’s financial statements, including the impact of recently issued and upcoming accounting pronouncements. What you need to know about your audit, and how to explain it to stakeholders. ~ <i>Scott Eagen, Senior Manager, Plodzyk &amp; Sanderson, PA</i></p>



***2018 Best Practices Conference on***  
**School Operations, Finance, and Business Leadership**

General Session Speakers

Leslie Finnan – AASA

Robert McLaughlin – National Collaborative for Digital Equity

Sheryl Pratt – Plodzik & Sanderson, PA

Sheryl Stephens Burke – Melanson Health

Robert Vachon – Vachon Clukay & Company, PC

Jon Wortmann – Author

Concurrent Session Speakers

Charlie Agnew

Marty Karlon

John Balfe

Jeff Kellett

Mark Cavanaugh

Joe Lajewski

Barrett Christina

Keith Martin

Amy Clark

Corey Masson

Jana Dalton

Valerie McKenney

Caitlin Davis

Steve McKinney

Lisa Duquette

Monica Panait

Scott Eagen

Larry Pignataro

Diana Fenton

Kevin Russell

Ashley Frame

Dave Salois

Christopher Glenn

Jamie Saucier

Nate Greene

Darlene Simmons

Nicole Heimark

Joe Van Gombos

Kathryn Hodges

# NOTES

# 2018 Best Practices Conference on School Operations, Finance, and Business Leadership

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New Hampshire School Administrators Association (NHSAA)  
and  
New Hampshire Association of School Business Officials (NHASBO)

Tuesday, October 30 & Wednesday, October 31, 2018

Grappone Conference Center  
Concord, NH

Conference Registration



## Please Note:

- Please use one registration form for each person attending (copy form as needed).
- Registration fees include lunch and access to all sessions.
- Registration fees are non-refundable and subject to regular billing unless **written** cancellation is received at least 7 days prior to the event.
- Season Tickets will be applied at time of billing. All other registrations must be accompanied by a check payable to NHSAA or a purchase order from your district. Electronic payment is available with online registration.
- Register by fax at 603-225-3225 or online at [www.nhsaa.org](http://www.nhsaa.org)
- Scan this QR code with your smart phone to go directly to [www.nhsaa.org](http://www.nhsaa.org)

I will attend: \_\_\_\_\_ Tuesday \_\_\_\_\_ Wednesday

Cost: \$160.00 per person/per day or \$300.00 per person/two days

\_\_\_\_\_ Check enclosed (payable to NHSAA)

\_\_\_\_\_ I will use the NHSAA Season Ticket/GSLA Ticket

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Name: \_\_\_\_\_

District/SAU#: \_\_\_\_\_

Position: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

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NHSAA

46 Donovan Street, Suite 3

Concord, NH 03301

Phone: 603-225-3230 ~ Fax: 603-225-3225

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