

48th Annual NAEN Conference

SAILING INTO THE SUNSET:

Creating Positive Labor Relations and Engaging in Successful Collective Bargaining

March 12-15, 2017 – Sheraton Sand Key, Clearwater, Florida

The 48th Annual Conference of the North American Association of Educational Negotiators will bring together approximately 100 educational negotiators and employee relations specialists from all over the United States and Canada to learn, participate, and network for three and one-half days of professional development in educational negotiations and employee relations. This conference offers the best opportunity to gain new insights, sharpen your negotiation skills, network with your peers, and share the best practices with your colleagues.



This conference is recommended for all education based management professionals who share an interest in employee and labor relations and who are committed to professional development, including school board members, superintendents, school attorneys, negotiators, building administrators, Principals, pupil services personnel, HR directors, and labor specialists. If you have questions regarding this conference, please email us at execdir@naen.org. We hope you will be able to join us in Clearwater for this most informative conference for professional and personal advancement.

Receive a Certificate of Completion to assist you with your professional development requirements!

- ❖ *"This was my first conference and it was excellent, great topics and speakers, networking was fantastic, learned from conference and social time."*
- ❖ *"One of the very best things about this conference is the tone – warm, friendly, focused, lots of interaction."*



NORTH AMERICAN ASSOCIATION OF EDUCATIONAL NEGOTIATORS

SAILING INTO THE SUNSET

Creating Positive Labor Relations and Engaging in Successful Collective Bargaining

NAEN's 48th Annual Conference—March 12-15, 2017

Saturday, March 11

- 9:00–4:00 p.m. Board Meeting
- 6:00–8:00 p.m. Board Dinner

Sunday, March 12 | *Pre-Conference*

- Breakfast on your own
- 9:00–11:30 a.m. Session 1—Negotiation Prep
- 11:30–12:30 p.m. Lunch on your own
- 12:30–3:00 p.m. Session 2—Negotiation Prep
- 4:00–5:30 p.m. Welcome and Keynote Speaker
Transgender Faculty Members in our Schools; The Legal and Personal Landscape; Dusty Rader and Robert Rader
- 5:30–7:00 p.m. President's Reception

Monday, March 13 | *Day 1 of Conference*

- 7:30–8:30 a.m. Breakfast
- 8:30–9:45 a.m. Welcome and General Session Speaker
Public Education Today and Tomorrow; Dr. Wes Smith
- 10:00–11:00 a.m. FMLA/ADA, Kathy Ahern, Esq.
- 10:00–11:00 a.m. Prescription Drug Savings, Michele Handzel, Esq., Dr. Mark Jones and Brian Fassett
- 10:00–11:00 a.m. Transgender in Schools, Dusty Rader and Robert Rader
- 11:00–11:15 a.m. AM Snack Break
- 11:15–12:15 a.m. Social Media; Lisa Freiley, Esq.
- 11:15–12:15 a.m. Health Insurance Audits; Rachel Risetto
- 11:15–12:15 a.m. Canadian Litigation & Arbitration Review; Michael Hines
- 12:15–1:15 p.m. Lunch
- 1:15–2:15 p.m. Interest Based Bargaining, Peter Martin
- 1:15–2:15 p.m. Effective Employee Discipline, Jacqui Litra, Esq.
- 4:00–5:30 p.m. Canadian Caucus

Tuesday, March 14 | *Day 2 of Conference*

- 7:30–8:30 a.m. Breakfast
- 8:30–9:45 a.m. Welcome and General Session Speaker
Hiring and Working with Millennials; Justin Petrarca, Esq.
- 10:00–11:00 a.m. Effectiveness at Arbitration, Peter Thorup, Esq.
- 10:00–11:00 a.m. Freedom of Region in Schools, John Lynch, Esq.
- 10:00–11:00 a.m. Role of the Superintendent at the Bargaining Table, Dr. Julio Fonseca and John Bryant
- 11:00–11:15 a.m. AM Snack Break
- 11:15–12:15 a.m. Teacher Performance Appraisals, Lynne Griffith Jones
- 11:15–12:15 a.m. HR Lessons from the World of Sports; Vince Pavic
- 11:15–12:15 a.m. Investigation Tools and Techniques, Jacqui Litra, Esq.
- 12:15–1:15 p.m. Lunch (Includes Business Meeting)
- 1:15–2:15 p.m. Human Rights Complaints, Peter Thorup, Esq.
- 1:15–2:15 p.m. Opening Minds to Lower Cost Health Plans; Sharon Brognia
- 4:00–6:00 p.m. Dinner Reception

Wednesday, March 15 | *Day 3 of Conference*

- 7:30–8:30 a.m. Breakfast
- 8:30–8:45 a.m. Closing Remarks and General Session Speaker
Excessive Use of Leave Time; Dominic D'Imperio, Esq. and Mark Pettitt
- 10:00–11:30 a.m. US Affairs, Jay Worona, Esq.
- 10:00–11:30 a.m. Canadian Affairs, Peter Martin and Kelley Terry
- 12:00 p.m.—2:00 p.m. Board of Directors Meeting

REGISTER online at www.naen.org

SAILING INTO THE SUNSET

MARCH 12-15, 2017 | CLEARWATER BEACH, FLORIDA

Collective Bargaining with NAEN Experts!

*Join us for the pre-conference on
Sunday, March 12th for this unique
opportunity!*

Send your entire bargaining team and you will walk away from a full day session with ground rules, draft proposals, salary analysis, health insurance analysis, negotiation strategies, and be well on your way to a successful negotiation process!

Your entire team will be paired up with a team of NAEN experts from the field who will work with your team to create specific proposals based on your unique bargaining circumstances. Let us help get you well on your way for successful collective bargaining in your District!

Join us on Sunday, March 12, 2017 during the pre-conference. The cost for your entire team (as many people as you would like to send) is only \$995.00 for the full day! (\$1,195 for non-members) This is not per person! It is for the entire team!!

Take advantage of this opportunity! The number of teams available to participate is limited, so sign up fast!!

HOTEL ACCOMMODATIONS

Sheraton Sand Key

1160 Gulf Boulevard
Clearwater Beach, FL 33767

Phone: (727) 595-1611

Make reservations directly with the hotel. The hotel is accepting reservations now. You will find the link at www.naen.org (the NAEN Group Code is NAEN201-) or call (727) 595-1611 to make reservations. Room rates for the NAEN block of rooms are guaranteed until 5:00(?) p.m. on February 8, 2017. The daily room rate structure is \$239.00 per night, single or double occupancy.

You must tell the hotel that you are with NAEN to get the group room rates. All guest rooms are subject to state and local taxes, currently 13.92%.

CONFERENCE REGISTRATION

The registration fee is \$550.00 for NAEN members; \$675.00 for non-members. There is a special one-day rate of \$305.00 for members and \$320.00 for non-members.

Training Electives require pre-registration. There is a \$90.00 registration fee for one workshop and a \$150.00 registration fee for two Training Electives (includes materials). Lunch is on your own.

Note: All fees are in US funds.

Register online at www.naen.org

CANCELLATIONS

Cancellation requests must be submitted in writing and received by February 15, 2017, to qualify for a refund. Cancellation administrative fees are as follows:

Conference: \$75

Cancellations received after February 15, 2017, will be billed the registration fee. "No Shows" will be billed the entire registration fee.

NAEN
152 Military Turnpike
Suite 100
Plattsburgh, NY 12901

SAILING INTO THE SUNSET

MARCH 12-15, 2017 | CLEARWATER BEACH, FLORIDA

GENERAL INFORMATION

| Registration |

The conference registration desk is located in Lobby 2 Sunday – Tuesday and will be open for registration and information:

| | |
|-------------------|------------------------|
| Sunday and Monday | 7:30 a.m. – 4:00 p.m. |
| Tuesday | 7:30 a.m. – 12:00 p.m. |

| Cell Phones |

As a courtesy to the speakers and other registrants, please silence your cell phone during sessions.

| No Smoking |

For the health and comfort of conference participants, please refrain from smoking in the meeting rooms or conference registration areas.

| Name Badge |

Please wear your badge at all times. It will help us better serve you. It is your ticket to all NAEN events.



| Evaluation Form |

Please complete the evaluation located on Survey Monkey. The evaluation form will be sent out a few days after the conference ends. We appreciate all of your input as it helps us continually improve our conference.

| Participation Certificates |

Certificates are available for continuing education credit for attendees upon request. See the registrations desk for more information.

| Pre-Conference Attendees |

Attendees who have registered for a pre-conference workshop have the name of the workshop printed on their badge in blue.

Copies of presentations will be available online at NAEN.org

| REGISTRATION | | | |
|---|----------|------------|-------|
| | Member | Non-Member | Total |
| Full Conference Registration | \$550.00 | \$675.00 | |
| One Day Registration | \$305.00 | \$320.00 | |
| OPTIONAL EVENTS | | | |
| <i>Training Elective - Sunday, March 13</i> | | | |
| | | | |
| Full Day Session for | | | |
| entire bargaining team | \$995.00 | \$1,195.00 | |
| | | | |
| Please indicate how many | | | |
| team members will be | | | |
| attending | | | |
| | | | |
| TOTAL DUE: | | | |
| Purchase Order No. _____ | | | |
| Bill district/Organization <input type="checkbox"/> Check enclosed <input type="checkbox"/> | | | |
| Please make checks payable in U.S. funds. | | | |
| NAEN's FEIN No. 59-2112656. | | | |
| NAEN accepts American credit cards - PaySchools Online and Paypal | | | |
| See our webpage for processing directions | | | |

| ATTENDEE | | |
|--|------|----|
| Name: | | |
| Title: | | |
| District/Organization: | | |
| Address: | | |
| City/State/Province/Zip: | | |
| Phone/Cell: | Fax: | |
| Email: | | |
| Is this your first NAEN conference? | Yes | No |
| If you have food allergies or dietary requests or require special services or accommodations, please describe: | | |
| | | |

Sailing into the Sunset

NAEN 2017 Conference

**Creating Positive Labor Relations and Engaging in Successful
Collective Bargaining**

Sunday, March 12, 2017

9:00 am to 3:00 pm Conference Registration

**9:00 am to 3:00 pm Pre-Conference Workshop: Negotiation
Preparation**

Facilitators: Each District team will have their own experts assigned to them for the entire day to assist them with their upcoming negotiations.

**11:30 am to 12:30 pm
Lunch on your own**

Each District team will be paired up with a team of NAEN experts who will assist them in developing draft proposals, ground rules, salary analysis, health insurance analysis, and negotiation strategy. Each team should walk out of this full day session ready to move forward into negotiations!

4:00 pm to 5:30 pm Welcome and Key Note Speakers

**“Transgender Faculty Members in our Schools; The Legal and
Personal Landscape”**

**Presenters: Dusty Rader, English Teacher and Robert Rader,
Executive Director, Connecticut Association of Boards of Education**

Dusty Rader, an English Teacher in the Avon, CT Central School District will share his very personal experiences with being transgender and how his gender identity affects his position as a teacher. Dusty will be joined by his father, Executive Director of the Connecticut Association of Boards of Education to discuss his personal journey with his son's transgender transition, and how he has used such personal experiences to enlighten his member school districts. Jay Worona, Esq., from the New York State School Boards Association, will provide an overview of the legal landscape surrounding this issue.

**5:30 pm to 7:00 pm Hospitality – All Annual Conference Attendees
Welcome to Attend**

Please join us for great food and great company!

Monday, March 13, 2017

7:30 am to 8:30 am Breakfast

7:30 am to 4:00 pm Conference Registration

8:30 am to 9:45 am General Session

“Public Education Today and Tomorrow”

Presenters: Dr. Wes Smith, Executive Director of the Association of California School Administrators

Dr. Smith will provide an in depth presentation on issues and opportunities regarding the implementation of the Every Student Succeeds Act and the competing demands for resources in our school districts.

9:45 am to 10:00 am Break

10:00 am to 11:00 am

Session 1: Family Medical Leave Act and Fair Labor Standards Act Updates

Presenter: Kathy Ahearn, Esq. (Guercio & Guercio, LLP)

A much needed update on changes in FMLA and FLSA that every employer needs to know. With recent changes in the “white collar” exemption and rulings that HR professionals may be personally liable for violations of the FMLA, this is timely and important information.

Session 2: Health Insurance – Prescription Drug Cost Savings

Presenters: Michele Handzel, Esq., Dr. Mark Jones, and Brian Fassett, Capital Region BOCES

Prescription drugs continue to be the primary driver increasing health insurance premiums. We will look at cooperative measures to help control drug benefit costs. This will include bargaining opportunities and administrative opportunities both with the Union’s collaboration and without.

Session 3: Transgender in our Schools

Presenters: Dusty Rader and Bob Rader

A continuation of last night's discussion and presentation during the keynote, Dusty and Bob will be able to share more detail on employee issues related to transgender, and real life solutions to be implemented in public schools.

11:00 am to 11:15 am AM Snack Break

11:15 am to 12:15 pm

Session 1: Health Insurance Audits

Presenter: Rachel Risetto, Executive Director, NAEN

This workshop will review how to engage in an audit of health insurance eligibility to ensure only those dependents who are eligible under the terms of the CBA and plan design are receiving benefits. This presentation will provide real life experience and data related to an audit of a health plan covering over 10,000 dependents; the process utilized, pros and cons, and stumbling blocks experienced along the way. You will be astounded by the savings realized by the District!

Session 2: Social Media: What can an employee do and what can they not do?

Presenter: Lisa Freiley, Esq. Oregon School Boards Association

This session will focus on the use of social media inside and outside the classroom. What can your teachers post? Student pictures? Student information? Curriculum? Assignments? Can they text students? Email students? Facebook? Twitter? Snapchat?

Session 3: Canadian Litigation & Arbitration Review

Presenters: Michael Hines

This workshop will provide a year end review all recent arbitrations and relevant litigation results specific to the employment sector of Canada.

12:15 pm to 1:15 pm Lunch

1:15 pm to 2:15 pm

Session 1: Interest Based Bargaining Strategies and Structures

Presenter: Peter Martin, Manager – Human Resource Services

Interest-based bargaining frames negotiation as joint problem solving to resolve each party's underlying issues, needs, and concerns. This workshop provides a systematic process for putting interest-based negotiation principles into practice in collective bargaining and grievance handling. Participants will assess how their own organization's bargaining practices can be more effective in reaching durable agreements that improve the working relationships between the parties.

Session 2: Effective Employee Discipline

Presenter: Jacqui Litra, Esq., Fagen Friedman & Fulfrost

Disciplinary decisions are subject to rigorous scrutiny. Anyone involved in formulating or implementing disciplinary decisions must have command of progressive discipline, establishment of cause for termination, as well as a solid understanding of the best practices for discipline management.

4:00 pm to 5:30 pm Canadian Caucus

Hosted by Hicks Morley, Hamilton Stewart, Storie, LLP, the Canadian Caucus gives Canadian NAEN Members an opportunity to network and discuss Canadian issues in a more relaxed format. Come enjoy the company, food and drink!

Tuesday, March 14, 2017

7:30 am to 8:30 am Breakfast

7:30 am to 12:00 pm Conference Registration

8:30 am to 9:45 am General Session

“Hiring Millennials; Navigating Through Unique Challenges”

Presenters: Justin Petrarca, Esq. and Lynn Adler, Training Director, IEA-NEA

Schools are grappling with the complexities of employing young adults born in the 80's and 90's (Millennials) and helping them transition into culture of education. Those District's who successfully recruit, motivate and retain the emerging generation position themselves to positively leverage this new talent pool for the future growth, sustainability, and enhanced educational opportunities for the students served. The panel will discuss strategies on how to effectively recruit and manage millennials in our school system.

9:45 am to 10:00 am Break

10:00 am to 11:00 am

Session 1: Effectiveness at Arbitration

Presenter: Peter Thorup, Esq.

Contractual or disciplinary disputes that cannot be resolved by the parties are ultimately tried and resolved in arbitration. This workshop is designed for those who need to develop a strategy for preparing, presenting, or assisting in presenting evidence in labor arbitration.

Session 2: Freedom of Religion in School

Presenter: John Lynch, Esq., Hogan & Sarzynski

This session will focus on: Religious use of property, Religious displays, Curriculum issues, Access to Information on the Internet, and Teachers' Rights regarding freedom of religion and the District's ability to address concerns if necessary.

Session 3: The Role of the Superintendent at the Bargaining Table

Presenters: Dr. Julio Fonseca, Superintendent, San Ysidro USD and John Bryant, Director at the Waterloo Region District School Board, in Waterloo, Ontario

The role of school superintendent in modern America is an increasingly difficult task. Superintendents of public schools are currently challenged by inadequate financing, student achievement reform, strained superintendent-board of education relations, school violence, and increasing pressures from interest groups. Each of these factors falls squarely within the realm of responsibilities commonly assumed by public school superintendents. Discuss the role of the Superintendent at the bargaining table, do's and don't, with a very experienced Superintendent. Learn how to use the Superintendent to best suit your needs and get what you want from the Union.

11:00 am to 11:15 am AM Snack Break

11:15 am to 12:15 pm

Session 1: Teacher Performance Appraisals; When and how to assist teachers to improve and when is it time to let them go

Presenter: Lynne Griffith Jones, Superintendent of Human Resources, Thames Valley DSB

This session will review the steps that can assist teachers to improve their performance when specific skills are identified as unsatisfactory. Lynne will also review the necessary steps that need to occur to support a recommendation for termination due to unsatisfactory performance.

Session 2: Investigation Tools and Techniques

Presenter: Jacqui Litra, Esq., Fagen Friedman & Fulfrost

Effectively dealing with complaints and conducting investigations is a critical part of creating a productive and fair workplace culture. This workshop will focus on both the strategic considerations as well as nuts and bolts of investigating issues related to employee misconduct.

Session 3: HR Lessons from the World of Sports

Presenter: Vince Pavic, Director of Human Resources and Employee Relations, Wicomico County Public Schools

How does the world of sports translate to Human Resources? For starters, there are rule books and contracts for both, and you better know how to officiate and consistently interpret those rules, sometimes on the fly. You have to be flexible in your game management and make those half-time adjustments. And “free agency” – you bet. You can no longer expect new employees to make your school system their career. Learn more in this intriguing session.

12:15 pm to 1:15 pm Lunch (Annual Business Meeting)

1:15 pm to 2:15 pm

Session 1: Human Rights Complaints. What do you do when you get one?

Presenter: Peter Thorup, Esq.

Over the past few years, retaliation has been the most frequently cited discrimination claim in private and public workplaces and accounts for more than 30 percent of the nearly 100,000 private sector discrimination charges each year. We will look at how to respond when you receive a complaint and best practices

Session 2: Opening Minds to Lower Cost Health Plans

Presenter: Sharon Brognia, Area Vice President, Benefits & WellBeing, Arthur J. Gallagher & Co.

As healthcare costs continue to rise across the nation, lower cost health insurance plans that feature deductibles vs. copays are being widely offered by employers. With scary names like “high deductible”, confusing terminology and a general fear of the unknown, many members put up barriers to assessing if this would actually be the right plan for them to enroll in. During this session we will defeat the common misconceptions around high deductible plans, discuss the importance of districts and members “doing the math” and share case studies and best practices for successful rollout.

5:30 pm to 7:00 pm Hospitality – All Annual Conference Attendees Welcome to Attend

Please join us for great food and great company!!

Wednesday, March 15, 2016

7:30 am to 8:30 am Breakfast

8:30 am to 9:45 am General Session

“Excessive use of Leave Time”

Presenter Dominic D’Imperio, Esq. (Jefferson-Lewis BOCES) Mark Pettitt (OCM BOCES)

Excessive use of leave time and drastic shortage of available substitutes have an increasingly negative impact on educational programs for students. We will look at strategies to combat absenteeism, the use of incentives and sanctions, and how districts have worked to increase and improve their substitute pools. We will also discuss and suggest ways to address this issue through the Collective Bargaining process, and how to bolster your arguments with effective data.

9:45 am to 10:00 am Break

10:00 am to 11:00 am

Session 1: Canadian Affairs

Presenters: Peter Martin and Kelley Terry

Peter and Kelley will facilitate a conversation with attendee's, providing a year end review on hot topics related to labor relations and negotiations in Canada. Come and share what you have experienced in the last year!

Session 2: US Affairs

Presenter: Jay Worona, Esq., New York State School Boards Association

Jay will facilitate a conversation with attendee's, providing a year end review on hot topics related to labor relations and negotiations in the US. Come and share what you have experienced in the last year!

11:00 Conference Ends! See you next year!!! Safe Travels