

UNDER ONE ROOF:

Districts Track Equipment, Maintenance with Single Software Platform



One of NYSIR's newest value-added services

is called HELIXintel, an equipment and building management platform that helps school districts and BOCES organize, track and maintain parts, supplies and maintenance tasks in one location.

function that allows for a more proactive approach to equipment maintenance. Even better, it could save districts up to 40% on procedural costs.

"With the potential for a significant amount

of savings, the value of a platform such as HELIXintel is tremendous," says Robert Lulley, Jr., NYSIR executive director. "With inflation still impacting prices nearly across the board, the benefit of schools reducing their maintenance costs is clear."

New NYSIR President and Board Members

It Could Happen to You

Offered at no cost to subscribers in conjunction with Hartford Steam Boiler (HSB), data related to those school operations is brought together by HELIXintel into one digital



DISTRICTS TRACK EQUIPMENT... CONTINUED

THE USER EXPERIENCE

When facilities managers and other school officials log in to HELIXintel, they will be

HELIXintel

able to see everything from the largest pieces of equipment in their

school buildings, such as boilers and fleet vehicles, to air filters and other small items. The manufacturer lifespan for each product is preloaded in the system, and the platform prioritizes necessary

maintenance so users know the timeframe in which upkeep and fixes need to be completed.

“What really distinguishes HELIXintel from other computerized maintenance management systems is that we’re partnered with the largest reinsurer of building equipment on the planet,” says Ben Hauser, vice president of outreach for HELIXintel. “HSB performs a lot of jurisdictional inspections, and we get access to all of the data they receive, such as make, model and manufacturing date,

which allows us to help the end user prepopulate all of the information they’ll need.”

Once manufacturer data is loaded, users can adjust information relevant to their own specific pieces of equipment.

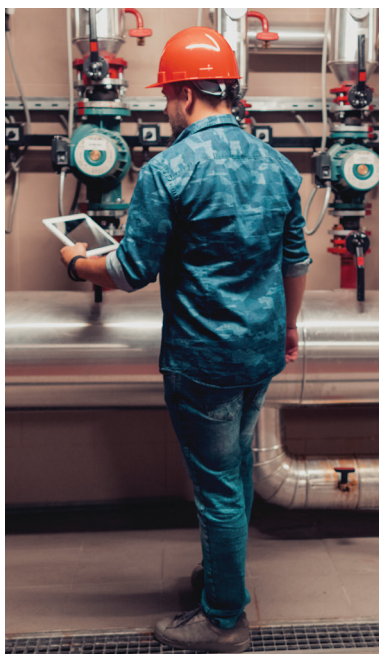
When facilities managers and other school officials log in to HELIXintel, they will be able to see everything from the largest pieces of equipment in their school buildings, such as boilers and fleet vehicles, to air filters and other small items.

“If schools are performing inspections and walk-throughs with their own team, all of that is customizable within the platform,” says Mike Mainier, HELIXintel’s cofounder and president. “The platform really conforms to the end user, so the operator or facilities director gets what they need, when they need it.”

GETTING A FIX

Vendor information also is available through HELIXintel, so school officials can use the platform to connect with providers of equipment or parts to obtain a work estimate or schedule maintenance. Additionally, HELIXintel has a communications component that allows facilities managers to assign maintenance tasks to technicians and track the progress of individual projects. A district’s inventory of parts also can be uploaded into the platform and categorized to ensure correct components are being used.

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Over 100 NYSIR subscriber districts and BOCES currently are using HELIXintel. That includes Williamsville Central School District, where Keith Langlotz is director of facilities. He says having all his district’s equipment and mechanical asset information in one place not only helps

DISTRICTS TRACK EQUIPMENT... CONTINUED

him keep track of current needs, but also helps him plan ahead.

“Our next big capital improvement project includes a large HVAC component, so having details about our major equipment made providing replacement data to our designers and construction managers very easy,” he said.

“As a district with 15 locations spanning nearly two million square feet, being able

to see both macro and granular information is very important.”

SAVING(S) GRACE

The platform also features a fully managed service called Savings Scout to identify, apply for, and redeem available incentives from utility companies and county, state and federal entities. Since the company's founding in 2020, over 250,000 rebate checks have been secured for HELIXintel's managed services partners and used for preventive maintenance,

renovation initiatives, retrofit programs and new construction projects. Two specific examples identified by Hauser: a rebate of \$32,000 for a manufacturing

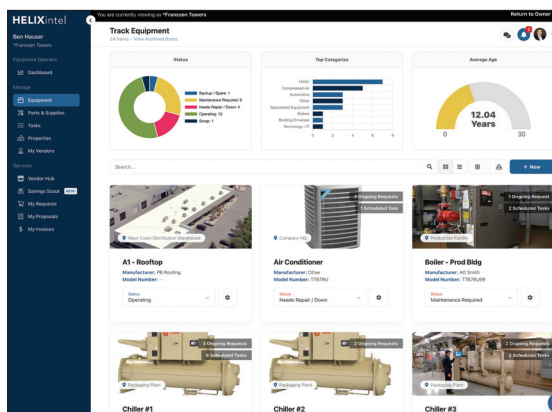
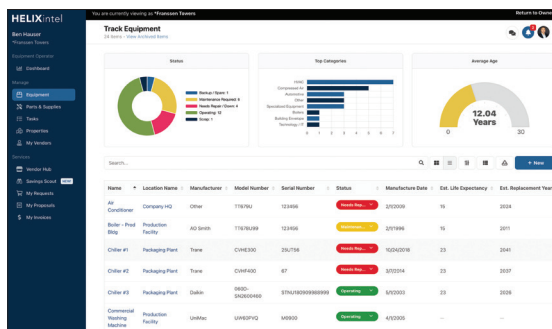
company, and another \$500,000 rebate for a district high school.

Savings are likely to be enhanced even more when HELIXintel's new project, the Predict and Prevent engine, is completed. The initiative involves a data team that analyzes aggregate data collected from schools and other

entities by their insurance companies' risk manager, with the aim of providing additional insights to help identify areas where insured parties can reduce risk of loss.

“We already have risk managers using the HELIXintel platform to help perform risk assessments across their entire member base,” says Mainier, “so we're really excited to partner with the insurance industry and policyholders to make much more of a broad impact with Predict and Prevent.”

NYSIR subscribers interested in learning more about the HELIXintel platform should contact Senior Vice President and Director of Risk Management Brett Carruthers at (716) 282-4890 or bcarruthers@nysir.org; HELIXintel Customer Success Manager Kevin O'Connor at (540) 230-0863 or kevin.oconnor@HELIXintel.com; or Hauser at (507) 321-1204 or ben.hauser@HELIXintel.com.



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Across the Board: *NYSIR added three new members and a new president to its Board of Governors in 2023, and it's no stretch to say that "highly qualified" is a term that applies to all of them.*

INTRODUCING NYSIR'S NEW BOARD MEMBERS AND PRESIDENT

BOARD OF GOVERNORS

Jennifer Avery

Dr. Jennifer Avery was appointed president of the NYSIR Board of Governors in August.



She's been a member of the board for almost a decade and currently serves as chairperson of the Executive Committee.

Avery is deputy superintendent at Otsego Northern Catskills BOCES, a position she's held since 2010, and prior to that she served as the organization's assistant

superintendent for management services. Her professional experience also includes three years as director of finance at Erie 2-Chautauqua-Cattaraugus BOCES and three years as district treasurer for the Cold Spring Harbor School District.

Additionally, Avery has held leadership positions with the Association of School Business Officials (ASBO) New York, ASBO International and the New York Liquid Asset Fund.

She said that serving on the NYSIR board not only helped her better understand the reciprocal's operations but gave her insight into the far-reaching implications of leadership and governance decisions on subscriber schools – information she plans to utilize in her new role.

"One of my aims is to guide our team in making judicious decisions that prioritize the long-term viability and health of our insurance plan," she says. "I also aspire to enhance the sense of partnership between NYSIR and member districts, emphasizing our shared commitment to providing new opportunities for our students."

Avery said providing highly responsive customer service, a wide variety of professional development opportunities and a dedicated emphasis on effective risk management strategies are just a few examples of what NYSIR does best.

When she isn't busy in one of her professional roles, Avery likes to take daytrips with her husband and five-year-old daughter, among other activities.

Christopher Dillon

Appointed in May to the NYSIR Board of Governors, Dr. Christopher Dillon serves on its Finance Committee.

He currently is assistant superintendent for business at Plainview-Old Bethpage Central School District (CSD) and has experience as a school administrator in similar roles at Levittown School District, Valley Stream



Union Free School District (UFSD) 30 and Plainedge School District. He's

also held positions with Kohler and Pepsi Cola. Additionally, Dillon has served on boards for ASBO New York and Reform Educational Financing Inequities Today (REFIT).

Dillon was first introduced to NYSIR in 2011 when the district he worked

for at the time became a subscriber. He recalled that he was impressed with the reciprocal's efforts the following year when, after Superstorm Sandy caused

widespread damage, he was able to work with NYSIR and its construction partners to have roofs repaired and replaced in district buildings in just 10 days.

"NYSIR always puts its districts first, allowing the districts to put students first," Dillon says. "I wanted to join the NYSIR board because I believe in giving back. I wouldn't have succeeded as a business official if it weren't for the various organizations I've worked with, including NYSIR."

In his spare time, Dillon enjoys working around the house and playing outside with his eight-year-old daughter and five-year-old son.

Ann Meccariello

Appointed in August, Ann Meccariello is the reciprocal's newest member of the board, where she serves on the Operations Committee.



Her current professional role is superintendent of Campbell-Savona CSD, a position she's held since 2021. Previously, she worked at Cooperstown CSD, where she was a teacher before being

promoted to elementary principal and then secondary principal. Prior to that, she was a teacher at Worcester Central School.

Meccariello says she hopes serving on the board will give her the chance not only to broaden her own knowledge and professional development, but leverage

her expertise in various school roles on behalf of NYSIR and its subscribers.

"One aspect of my experience is that I've had the good fortune of wearing many hats," she says. "Those various perspectives allow me to see situations from different angles."

She added that her latest vantage point as superintendent has illuminated what she believes is one of the reciprocal's best features: excellent customer service.

"NYSIR has a more personal touch than other insurance providers," she says. "The company always is very responsive to its subscribers, regardless of whether the issue is big or small."

That approach to member relations is just one of the positives Meccariello says she would point out to a district or BOCES

Continued on back page.

Education.

It's a complicated enterprise. Faculty. Staff. Students. Supplies. Transportation. Buildings and grounds. With seemingly a thousand things demanding attention all at once, risk management is bound to slip to the bottom of the list every once in a while, right? Here's why it shouldn't, and why it's important to remember...

It Could Happen to You.

The district's head of buildings and grounds responded overnight to an alarm triggered at an elementary school to find wet ceiling tiles in a hallway.

After an onsite coordinator for a school construction project fell from a ladder during a rainstorm, would the risk transfer maneuvers that followed result in

clear skies for one NYSIR subscriber district, or would a significant soaking be in the forecast?

The district's head of buildings and grounds responded overnight to an alarm triggered at an elementary school to find wet ceiling tiles in a hallway. Believing an ongoing rainstorm was causing the roof to leak, he called the project manager for a construction management services firm that was then renovating and repairing the roof.

The project manager arrived at the school

and made his way to the roof using a ladder belonging to a separate contracting company that had been hired to perform the renovation. After assessing the damage, he attempted to climb down when the ladder began to slide away from the building, causing him to fall 16 feet to the ground.



The project manager sustained a bone fracture in his left foot, which ultimately required multiple surgeries, as well as back fractures that were addressed with physical therapy and chiropractic treatments.

THE CLOUDS GATHER

He filed suit against the district, the project management firm and the contracting company that owned the ladder, seeking damages that climbed to \$4.6 million.

While all of the parties filed a motion for summary judgment, attorneys for the district, project manage-

ment firm and roofing contractor argued that the plaintiff's labor law violation claim was all wet. They maintained it should be dismissed because the project manager was not engaging in construction activities at the time of the incident; his role in the project did not involve performing construction work, and his actions were the sole cause of the fall.



The plaintiff's attorneys argued that the ladder, which did not have rubber feet, was a violation of labor regulations as a matter of law.

A court found that labor law was applicable to the action of inspecting the roof, and that the project manager was



indeed engaging in covered activity. But it also ruled that questions of fact existed as to whether the plaintiff's actions were the sole proximate cause of the incident.

In response to the claim of negligence filed against the district, summary judgment was granted in its favor, with the court finding the school did not have authority over the plaintiff's work and did not provide him with the defective ladder. The decision left only one remaining issue for the district: If a jury found that the plaintiff's actions were not the incident's sole proximate cause, the district and the roofing contractor each could be held liable under labor law.

OPENING A RISK TRANSFER UMBRELLA

With the school district listed as an additional insured under the roofing company's policy, the company's insurance carrier agreed to accept a risk transfer if it was determined that the plaintiff's injuries resulted from their client's work.

Additionally, insurers for the roofing contractor and the project management firm agreed to a 50/50 split of defense costs. Later on, however, counsel for the contracting company denied the plaintiff's injuries were a result of its client's work and moved to withdraw from the joint defense agreement.

Indemnification of the district continued to be discussed during subsequent mediation, and the carrier for the project management firm finally agreed to pay half of the school district's share of any settlement. An offer made to the plaintiff, however, was rejected. Further, a suggestion by

the contracting company's counsel that NYSIR pay 10% of a proposed settlement became moot when the case failed to settle at a subsequent conference.

The matter finally closed when the plaintiff agreed to a \$1,250,000 settlement, with the project management firm's carrier paying 60% and the contracting company's carrier covering 40%, resulting in no contribution from the district.

THE LESSON?

The right risk transfers can often prevent a financial rainy day.

INTRODUCING NYSIR'S NEW BOARD MEMBERS AND PRESIDENT

BOARD OF GOVERNORS

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considering joining NYSIR. In fact, expanding the reciprocal's client base in her district's area, the Southern Tier region, is a discussion she says she'd like to focus

on during her tenure on the board.

When she's not working, Meccariello enjoys boating and golfing with her husband, spending time with their five children and traveling.

Suzanne Slack

Suzanne Slack joined the board of governors in May and serves on the Planning and Development Committee.



She currently is assistant superintendent for administration at Onondaga-Cortland-Madison BOCES and has prior experience at Syracuse City School District as chief financial officer and director of fiscal services. She also has held

finance positions in the private sector. Her professional affiliations include ASBO New York, the New York State School Boards Association (NYSSBA) and the Government Finance Officers Association.

Slack says she's been aware of NYSIR for most of her career in education and holds the reciprocal in high regard.

"I understand firsthand the value of a partner who has the district's interest at heart," she advises, "because I've also seen what happens when you don't have a strong partner to provide reliable insurance coverage and help with understanding and managing risk."

Knowing that NYSIR prioritizes the interest of its subscribers is one of the aspects of the reciprocal that stands out, according to Slack.

"NYSIR provides peace of mind to district administrators," she says. "Knowing that you can call their experts at any time and that they will guide you in decision-making is priceless."

Slack enjoys riding bicycles and spending time with family and friends during her free time.

