

**STATE OF NEW HAMPSHIRE**

Honorarium or Expense Reimbursement Report  
Executive Branch – RSA 15-B



Type or Print all Information Clearly:

Name: Monica I. Mezzapelle Work Phone No. 603-271-2621  
First Middle Last

Work Address: 25 Capitol Street, Room 121, Concord, NH 03301

Office/Appointment/Employment held: New Hampshire Treasurer

List the full name, post office address, occupation, and principal place of business, if any, of the source of any reportable honorarium or expense reimbursement. When the source is a corporation or other entity, the name and work address of the person representing the corporation or entity in making the honorarium or expense reimbursement must be provided in addition to the name of the corporation or entity.

**Source of Honorarium or Expense Reimbursement:**

Name of source: \_\_\_\_\_  
First Middle Last

Post Office Address: \_\_\_\_\_

Occupation: \_\_\_\_\_

Principal Place of Business: \_\_\_\_\_

**If source is a Corporation or other Entity:**

Name of Corporation or Entity: National Association of State Treasurers Foundation

Name of Corporate/Entity Representative: Shawn Snyder, Executive Director

Work Address of Representative: 1201 Pennsylvania Ave NW Suite 800  
Washington, DC 20004

Value of Honorarium: \_\_\_\_\_ Date Received: \_\_\_\_\_ *If exact value is unknown, provide an estimate of the value of the gift or honorarium and identify the value as an estimate.* Exact \_\_\_\_\_ Estimate \_\_\_\_\_

Value of Expense Reimbursement: \$3,655 Date Received: 7/16/23 *A copy of the agenda or an equivalent document must be attached to this filing.* Exact  Estimate \_\_\_\_\_

Briefly describe the service or event this Honorarium or Expense Reimbursement relates to:

National Institute of Public Finance, Executive Treasury Management Program

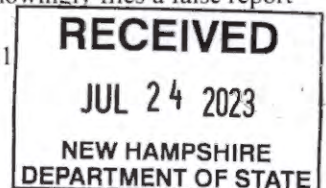
"I have read RSA 15-B and hereby swear or affirm that the foregoing information is true and complete to the best of my knowledge and belief."

Monica I Mezzapelle  
Signature of Filer

7/24/2023  
Date Filed

**RSA 15-B:9 Penalty.** Any person who knowingly fails to comply with the provisions of this chapter or knowingly files a false report shall be guilty of a misdemeanor.

**Return to:** Secretary of State's Office, 107 North Main Street, State House Room 204, Concord, NH 03301





# NATIONAL INSTITUTE *of* PUBLIC FINANCE

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Register



2023 Curriculum Theme

## Leadership Responsiveness in the New World of Work

*\*Faculty and speakers are being announced daily. Sessions, faculty, and speakers are subject to change.*

Filter curriculum by educational track 

### Executive Treasury Management Track

Day 1: Sunday, July 16

12:00–2:00 p.m.

Registration and Light Welcome Lunch

2:00–3:00 p.m.

Welcome and Opening Remarks

Faculty/Speakers:

Waller, Melissa

3:00–4:15 p.m.

Treasurers Leadership (ETM)

Topics on Leadership in the New World of Work – A Chat with Four Treasurers

Faculty/Speakers:

Yee, Kimberly; Eubanks, Rachael; Sprague, Robert; Diossa, James A.; Mangiofico, Gary

4:30–5:30 p.m.

NIPF Opening Keynote: 76th United States Secretary of the Treasury Jacob Lew (Core)

Jack is a Managing Partner at Lindsay Goldberg and has been with the Firm since 2017. Jack is a member of the Firm's Investment Committee and serves on the board of Creation Technologies and Galen Mental Health. Jack joined the Firm after serving as 76th Secretary of the Treasury of the United States.

Prior to serving as Treasury Secretary, Jack served as President Obama’s Chief of Staff, as well as Director of the Office of Management and Budget under Presidents Obama and Clinton. Previously, he was Managing Director and Chief Operating Officer of two units within Citi and served as Executive Vice President and Chief Operating Officer of New York University, where he was also a professor of public administration. Jack earned his J.D. from Georgetown University Law Center and his A.B. from Harvard University.

Faculty/Speakers:

Lew, Jacob

6:00–8:00 p.m.

Welcome Dinner at Malibu Farm Café

Malibu Pier

## Day 2: Monday, July 17

8:00–9:00 a.m.

Continental Breakfast

9:00–10:15 a.m.

Keynote Panel Discussion: “From the Treasurers’ Perspective”  
(Core)

10:30–11:45 a.m.

## Recruiting and Retention Challenges (ETM)

- Articulating Goals and Objectives for Treasury operations
- How do we set HR policies and procedures (what are the process considerations)?
- How do we attract or cover non-traditional pools of professionals (focus on broad representation)
- Are there salary and benefit components to consider in light of the change in the work force?
- "Cost of doing business" - how do you handle the dichotomy of wages for new versus longer tenured employees
- What is the engagement strategy for our team?
- How do you frame attrition as a leadership issue?
- This will be Solution Driven!

Faculty/Speakers:

Williams, Dawn; Cummings, Dan; Goldberg, Deborah B.

11:45 a.m.–1:00 p.m.

Lunch

12:45–2:00 p.m.

Leadership Development Strategies (ETM)

- How do you develop professionals from within / how do you build your bench?
- What are the dynamics of the work force today – particularly what drives succession planning – how do we identify and plan for succession?
- What management training opportunities should be considered
- Are there differences between large and small offices and how do we balance political versus professional staff, particularly on development issues?

Faculty/Speakers:

Boozer, Young; Knowling, Michael; Carson, Marisa; Wong, Swee Lin

2:00–3:15 p.m.

### Change Management for the Office—A Teaching Session (ETM)

- What is change management (you can't make good decisions amid chaos so how do you manage change)?
- How do we prepare for transitions, particularly when we know it is coming in advance (e.g., term limits versus election results)
- How do we make sure change initiatives don't fail?
- What are the steps to effective change?
- Are there operational considerations for a new work environment?
- Are there tools we can share to manage change (this comes from the July 2022 meeting with the Advisory Board)

- Physical operating changes (brick and mortar vs WFH)
- Biggest challenge is engagement ... it's not just rolling out new policies and procedures but it's getting people to adopt them
- This would be the "how-to" session

Faculty/Speakers:

Mangiofico, Gary; Glenn, Laura; Reinertsen, Anders; Diaz, Fernando

3:15–4:30 p.m.

### Joint Session - A Discussion with Regulators (ETM)

A joint session with the Public Finance and Debt Management Track (ETM) where Treasury, SEC and MSRB leaders will review priorities, offer insights on the key regulatory topics of the day, and engage in Q&A.

Faculty/Speakers:

Reynolds, Christine; Kim, Mark T.; Whitten, Cori Shepherd

6:30–9:30 p.m.

### Dinner Reception at the Westlake Village Inn

Lakeside Patio

## Day 3: Tuesday, July 18

8:00–9:00 a.m.

### Continental Breakfast

9:00–10:15 a.m.

## The Secret Vocabulary of Conflict Resolution (Core)

Conflict resolution competencies rely on the building block of interest identification. Most interventions, tricks, and techniques lead back to this fundamental concept. Interest Identification is often taught in a cursory fashion without a roadmap for how to practice or implement the skill. This plenary session is a deep dive into interest identification, the secret vocabulary of conflict resolution. Participants will leave with a paradigm for identifying interests, an understanding of the top ten interests in the public sector employee context, and an introduction to the skill of reframing. Interest Identification skills-building supports not only employee-employer relations, but ultimately positive outcomes for constituents, public/private partnerships, communities, and boards.

Faculty/Speakers:

Blondell, Stephanie

10:30 a.m.–12:00 p.m.

## Organizational Design for the Delivery of Constituent Services (ETM)

- How do we “build a better mousetrap for the public?” (e.g., how do you develop, manage and improve call centers)
- What’s the “change” impact in the delivery of services? (consider, too, language and accessibility issues)
- How do we gauge, measure and test User Experience?
- How do we blend technology with constituent services (e.g., benefits



payments, payment alternatives – even for consumer facing programs)?

- An important element here is that States are responsible for the work provided by the private sector, so there is a delivery of services to the States and then the delivery of services to the constituents. The Advisory Board would like both points addressed
- How do partners manage both the state's expectations and the retail consumer

Faculty/Speakers:

Parker, Michael; McRae, David; Slitt, Martha; Natelson, David; Morris, Mary

11:45 a.m.–1:00 p.m.

Lunch

1:00–2:15 p.m.

Governance and Oversight (ETM)

- An opportunity to identify from the top a variety of risks faced by Treasury organizations or as managers of public fund programs (e.g., financial institutions, economic markets, litigation, cybersecurity and related fraud)
- What factors or indicators should administrators look for?
- How do the factors get assessed?
- What is the appropriate response to complex situations (it may depend on the risk itself) and how do you respond to complex situations

Faculty/Speakers:

Beck, Henry; Chanay, Jeff; Duque, Laura Pavlik; Kaplan, David R.;  
Troncoso, Michael

2:30–3:45 p.m.

Policy Initiatives (ETM)

- Topics to be determined by the Deputies / COS Committee
- Is there a policy initiative here? How do we gauge, measure and test User Experience?
- Employment policies?

Faculty/Speakers:

Wilson, Brian; Battle, Jillean Long; Austin, Karen; Van Ry, Kirsten

5:00–9:30 p.m.

Reception, Self-Guided Tour, and Dinner at the Ronald Reagan  
Presidential Library and Museum

Reagan Library: Ruwe Terrace

## Day 4: Wednesday, July 19

8:30–9:00 a.m.

Continental Breakfast

9:00–10:15 a.m.

## On the Horizon - Technology Integration into Treasury – Highlighting AI and ChatGPT (Core)

### Faculty/Speakers:

Waller, Melissa; Goldberg, Deborah B.; Short, Cole

10:30–11:45 a.m.

### Lessons Learned / Take-aways (ETM)

- Are there particular policies or lessons that can be implemented right away or in the near term?
- Part of this discussion should also be how NAST or other entities (maybe even the Corporate Sponsors) can help deliver or facilitate solutions to issues raised.
- Ultimately, the content of this session will be driven by the Deputies / Chiefs assigned as Panelists

### Faculty/Speakers:

Boyles, Gavin; Nabors, Ashley; Adams, Clarissa; Comer, Andréa;  
Dannels, Cynthia G.; Goins, Laura

12:00 p.m.

### Closing Remarks

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