

Parkrose School District 3

Code: DLC-AR Annex 2 &/or IICA-AR
 Adopted: 5/29/01
 Revised: 12.8.23

*****PAID BY ASBO*****

Request for Extended Travel and/or Field Trips and Special Events

*Expenses for travel will be reimbursed when the travel has the advance authorization of the travelers Supervisor. **Out-of-state travel or travel beyond 200 miles** will, additionally, require prior Board approval, unless fully funded from workshop allocations or contractual requirements. The District form "Request for Extended Travel," DLC-AR-Annex 2, will be completed prior to travel and authorized at the appropriate level. (DLC 05/06)*

Field trips and other curricular/co-curricular activities involving travel (out-of-state travel or travel beyond 200 miles) may be authorized by the superintendent or designee when such trips or activities contribute to the achievement of desirable educational/social/cultural goals. (IICA 3.13.23)

In planning and authorizing such trips, primary consideration will be given to educational values derived, the safety and welfare of students involved, community standards of conduct and behavior on the part of all participants and the selection of appropriate adult supervision, either from within the school staff or from the parent and community volunteer pool. (IICA 3.13.23)

Staff/Student Name(s), school & grade levels or total # of staff by school or department:	Sharie Lewis Director of Business Services and Operations		
Destination (city/state): Portsmouth, NH	Dates of travel:	May 28-June 1, 2024	
Purpose (conference name/student activity): CASBO Institute '24 Leadership Fostering Connections, Innovation, and Holistic Wellness			
Additional details (include support documents or conference web address): ASBO Board of Directors Meeting This is paid by ASBO			

ESTIMATED EXPENSES:	DESCRIPTION (list a description, indicate # of people, # of dates and multiply for a total cost)	COST
TRAVEL (plane, train or automobile)	Airline Alaska Airline Paid by ASBO	\$ 874.67
LODGING (hotel name, fees & number nights)	The beautiful and historic Wentworth by the Sea Hotel \$269.00 x 4 without tax --- Paid by ASBO ---	\$ 1,076.00

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PER DIEM (detail # of breakfasts, lunches & dinners)	All meals paid by ASBO	\$ 0
REGISTRATION FEES	Paid by ASBO	\$ 0
OTHER (bus, uber, sub costs, etc.)	Rental Car – No airline in or around Portsmouth, NH - Driving a rental car from Boston Logan Airport to Hotel Paid by ASBO	\$ 296.19
Name of authorized person completing this form: All being Paid by ASBO		TOTAL \$2,246.86

Budget Codes list all that apply, include budget code #, name of budget source and total amounts per code #

ALL BEING PAID BY ASBO

Signature: 
 Director of Business Services & Operations/CFO Sharie Lewis

Date: 4/12/24

- All volunteer/chaperones must be authorized by the district in accordance with the Board's Volunteer Policy IICC & district protocols.
- Written parental permission must be obtained for each trip. The signed form showing parental approval and acknowledgment of student conduct guidelines will be maintained on file in the school office for a period of one year. (IICA 3.13.23)

Signature:
Principal/Supervisor

Date:

Signature: 

Date: 4/12/24

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Superintendent or Designee

Board Approved

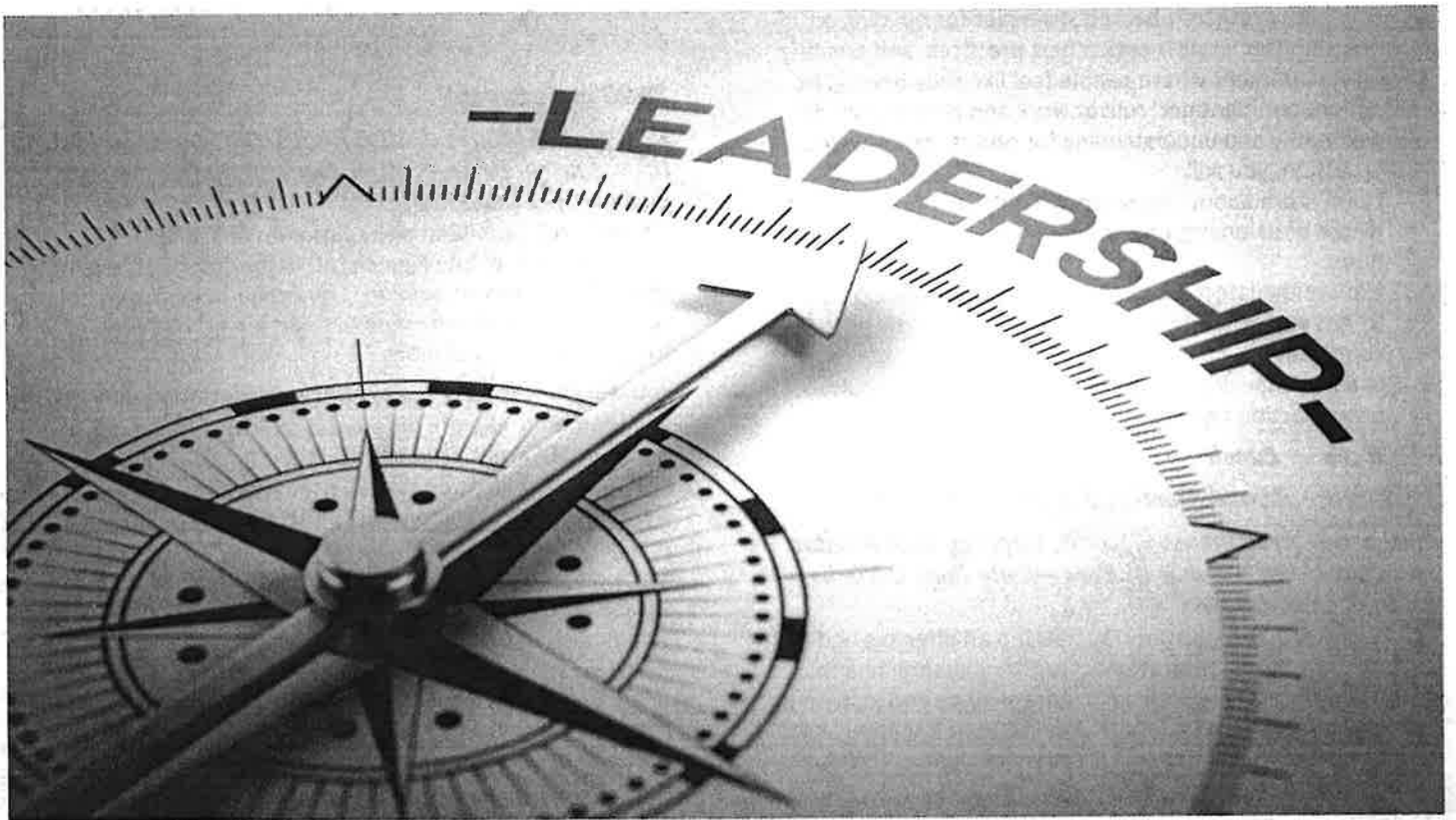
Board Denied

Board Chair Signature:

Date:

*CASBO Institute '24
Leadership...*

*Fostering connections,
innovation, and holistic wellness*



May 29-31, 2024

Wentworth by the Sea

Portsmouth, New Hampshire



An Invitation from CASBO President Elect, Chris Chemerka

Please join us!! Reserve your spot now and embark on a journey of growth, connection, and rejuvenation at the 2024 CASBO Institute! Prepare to enhance your professional skills at an event focused on "Fostering Connections, Innovation, and Holistic Wellness." With a dynamic lineup of topics and activities, this Institute guarantees an enriching experience. Engage in insightful discussions led by industry leaders like Devin Hughes, exploring the importance of authenticity, collaboration, and respect in creating a human-centered workplace. Discover strategies for prioritizing mental health and self-care with Lockton, essential for navigating today's demanding landscape. Jacquelyn Wieland will unveil the secrets of Working Genius, empowering you to unleash your full potential. Immerse yourself in the captivating realm of Artificial Intelligence with Mimi Merliss, delving into its endless possibilities through hands-on experiences. Plus, seize the opportunity to connect with fellow attendees during networking sessions, including a Wednesday evening casual gathering, the renowned President's Dinner on Thursday night, and a scenic sunset cruise aboard the Gundalow Piscataqua on Friday night. Join us in picturesque Portsmouth, New Hampshire, for a blend of learning, camaraderie, and celebration. You won't want to miss this extraordinary event!



Hotel Accommodations

The beautiful and historic Wentworth by the Sea Hotel will be our location for Institute. A special room rate of \$269++ is available until April 29 (or until sold out, whichever occurs first). Please use this link to make your reservation: [CASBO Institute 2024](#)

President's Dinner

The always memorable President's Dinner will be held on the Wentworth property in the beautiful Grand Ballroom. Meal Choices: Seared Chilean sea bass with miso glaze, ginger lemongrass butter sauce; or seared Bell & Evans chicken breast with apple sage chutney, roasted shallots jus.

Registration Fees:

We are offering the following packages for members (non-members add \$50), after May 13th, please add \$25.

Institute I—\$ 470

Includes the meeting sessions, Wednesday's reception, breakfasts, breaks, and lunches on Thursday and Friday.

Institute II—\$545

Includes the meeting sessions, Wednesday's reception, breakfasts, breaks, and lunches on Thursday and Friday, and one ticket to the Presidents' dinner.

Institute III—\$595

Includes the meeting sessions, Wednesday's reception, breakfasts, breaks, and lunches on Thursday and Friday, one ticket to the Presidents' dinner, and one ticket to the sunset cruise.

Individual tickets for GUESTS

Lunch—\$40

President's Dinner—\$85

Sunset Cruise—\$50

Lunch and President Dinner tickets are not available for purchase without a member's full registration.

Thank You!

Strategic Members

Amazon Business—East River Energy—Equitable—Horace Mann—OperationsHero—First Student

Platinum Sponsor

Corebridge Financial—Lockton Companies

Silver Sponsors

Aetna—American Athletic Track & Turf—CCi Voice—Playground Medic

About the Presenters



Frank DeFrancesco, CRES, New Canaan Group

Frank DeFrancesco is a Partner and Financial Advisor at New Canaan Group. He has over 20 years of financial experience. With a focus on retirement benefits and financial literacy, his experience is in helping his clients prepare for their financial future. This is done through customized financial plans using investment & risk management, wealth preservation, and wealth distribution strategies. He has been invited by many school districts and organizations throughout the state to present educational and financial literacy workshops specifically designed to help Connecticut educators understand some of the most critical details on their pension and personal assets. It's one of his favorite things to do and he is actively working to expand the availability of these workshops.

Kelly Fogg, Lockton Companies

Kelly leads the Northeast People Solutions Precision Health Practice team. Located in the Lockton Northeast Boston office, she is responsible for growing and developing the team which brings together clinicians, population health specialists, and data informatics experts. Kelly has 25-years of seasoned experience in population health and employee engagement, providing advice to a variety of clients across different industries and sectors. She collaborates with client service teams and clients to prioritize proactive approaches to improve health outcomes through data integration, earlier intervention, cost containment, and patient-centered care management strategies. Her specialty is leading transformation work as well as engaging organizations in policy and environmental changes that positively impact individual and organizational health.



Kimberly Greenberg, Lockton Companies

Kim has more than 25 years of experience in marketing, health promotion, and chronic disease management. Prior to joining Lockton, she managed a wellness program for an 11,000 employee hospital/health system in Scottsdale, Arizona. Kim has also worked in a clinical capacity with cardiac, diabetic, pulmonary, and cancer patients as a clinical exercise physiologist in an outpatient cardiopulmonary rehabilitation setting. At Dannon Yogurt, she supported a national customer marketing launch for the company's proactive health offerings.

Devin C. Hughes

Devin is an author, speaker, consultant, executive coach, and an internationally recognized expert in the science of happiness, workplace culture, and leadership development. He has lectured and worked with school districts across the U.S., the Secret Service, the IRS, and various profit and nonprofit organizations. Devin is the author of 21 books and has lectured in more than 15 countries. He lives in San Diego, California, with his wife, four daughters, and two rescue dogs.



Michelle McGuire, CFA®, RICP, CRES, New Canaan Group

Michelle McGuire is a Financial Advisor at New Canaan Group with more than 20 years of experience. She frequently consults on the Connecticut Teachers Pension, its impact on Social Security, and spousal considerations. In addition to employee benefits workshops and consulting with employers on the latest concerns and solutions, she provides clients with financial coaching, technical planning, and implementation specifically around life transitions. She enjoys working with clients' other strategic advisors, such as attorneys and accountants, bringing a team approach to planning with a focus on the whole picture. Her belief is that the true value of a wealth manager is putting together a strategy that can be implemented and reviewed regularly through life's changes.

Mimi Merliss, Amazon Business for Education

Mimi is an education technology professional dedicated to enhancing educational experiences for students and streamlining support for school administration. Mimi first discovered her passion for EdTech as a Technology Operations Coordinator for Teach for America, after which she dove headfirst into the EdTech world gaining experience at Apex Learning, Committee for Children, and now Amazon Business for Education. In 2023, Mimi completed her Masters of Science in Organizational Leadership and Learning from Pepperdine University, where her thesis focused on AI in EdTech. She continues to study AI in conjunction with student data privacy, online safety, and ways this tool can be a positive addition to daily life. In Seattle, Mimi volunteers with Bigs in Tech, Reading Partners, and is a social-emotional learning advocate.



Jacquelyn Wieland

Jacquelyn is a trusted advisor, consultant, and executive coach to leaders in corporate, educational, and non-profit organizations. From tackling personal decisions to reaching important professional milestones, Solutions Provided Founder & Chief Leadership Strategist, Jacquelyn Wieland and her team will guide you along the path to greater success. Jacquelyn brings over 37 years of corporate business experience, including over 27 years of strategic leadership coaching expertise to every client relationship.

Wednesday, May 29, 2024
6:30 pm—Registration & Welcome Reception

Thursday, May 30, 2024
8:00 am – Breakfast

9:00 am – The Human-Centered Workplace: Establishing Belonging Through Authenticity, Collaboration, and Respect – Devin Hughes

Our world has changed, and your organization needs to reflect these changes. By being aware of those around you, showing respect, and appreciating both individuals and their unique qualities, you'll create the right environment to foster true belonging.

Workplaces are increasingly disconnected. It is vital that individuals feel authentic, valued for their contributions, and have a strong sense of connection and community. Leaders must build these environments when their plates are already full.

Devin will offer research-backed strategies for building an inclusive mindset, implementing best practices, and creating a work environment where people feel like they belong. He will explore our identities' role at work and how we can develop empathy and understanding for others' experiences. In this session, you will:

- ◆ Learn more about organizations' unique role in creating places of belonging and encouraging authentic connections.
- ◆ Explore the latest research to understand workforce trends and dive into what it means for employees to be connected.
- ◆ Learn the specific actions necessary to create a culture of connection and belonging.

12:00 pm – Lunch

1:00 pm – Annual Meeting & Legislative Update

1:30 pm – Crafting an Effective Strategy with Mental Health and Self-Care at its Core—Kelly Fogg & Kimberly Greenberg, Lockton

Join our interactive workshop to develop an effective and sustainable well-being strategy, prioritizing mental health and self-care. Learn how to cultivate resilience and long-term success in individuals and organizations. Together, let's build a healthier, happier, and more productive workplace.

3:00 pm – Building a Strong Foundation: The Crucial Link Between Financial and Overall Wellness—Michelle McGuire & Frank DeFrancesco, Equitable

In our fast-paced world, achieving true wellness requires a holistic approach that goes beyond just physical health. Join us for an insightful workshop as we explore the often-overlooked connection between financial wellness and overall well-being. "Building a Strong Foundation" will shed light on how your financial situation plays a pivotal role in shaping your holistic wellness. Join us for an engaging session that will empower you to take control of your financial future and unlock the door to a healthier, happier you.

6:30 pm—Presidents Dinner

Join your friends and colleagues in honoring outgoing President Joe Martino and incoming President Chris Chemerka.

Friday, May, 31, 2024
8:00 am—Breakfast

9:00 am—Working Genius – Jacquelyn Wieland

Work is a broad term that applies to almost every part of our lives, even beyond what we formally refer to as jobs. Most of our waking hours involve some kind of work. We have discovered there are six types of work. These six are required whether you're working on launching a project, running a department, or planning a vacation. The Working Genius model explains the six types of work and the order of those stages. Each of us have the ability to get joy and energy from two of those types of work. And because we love that kind of work, we usually gravitate toward it and are pretty good at it. We're meant to use these gifts, what we call our geniuses, to contribute to the world around us. We should use our geniuses with our teams, communities, and families. When we don't use them, or can't use them, it's frustrating and sometimes downright tragic. To use our geniuses well, we must know what they are.

12:00 pm—Lunch

1:00 pm—AI Unleashed: A Hands-On Journey into Artificial Intelligence – Mimi Merliss, MSOL, Amazon Business for Education

Embark on an exhilarating exploration of the fascinating world of Artificial Intelligence (AI) in this interactive workshop. This hands-on session is designed to demystify the complexities of AI and empower participants to wield its transformative capabilities.

You will gain insights into how AI is revolutionizing our work environments, explore different AI platforms (gaining insight into different products and their functionalities) while brainstorming ideas on how AI can be of direct benefit to you in your work environment. This session will foster a sense of community as you collaborate with fellow participants on group projects, share ideas, troubleshoot challenges, and learn from each other's experiences in a supportive and dynamic environment. Whether you are a curious beginner or an experienced professional this session will provide you with exhilarating information. AI brings many benefits, but rest assured the session wouldn't be complete without a discussion on AI warnings and pitfalls.

Join us for "AI Unleashed" and equip yourself with the skills and knowledge needed to navigate the evolving landscape of Artificial Intelligence as it relates to our daily work environments. Get ready to unleash the power of AI in your hands!

Bring your computer or laptop to fully experience the session. Please come with a Chat GPT account (<https://chat.openai.com/>) created so we can hit the ground running. This account is free and utilizes your cell phone number as your account number.

6:00 pm—Sunset Cruise Aboard Gundalow Piscataqua

Unwind at the end of the day with a relaxing 2-hour sunset sail on the beautiful Piscataqua River. Join the crew in raising the sail and steering the ship, if you wish. The crew will share their knowledge of the Piscataqua maritime region, as well as the cultural and natural history of the area.

Institute '24

You may register online at www.ct-asbo.org. Please duplicate for additional registrants.

Name _____

Guest's Name: _____

District/Company: _____

Street Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Special needs or food allergies: _____

Yes, I'll attend Wednesday's Reception

Institute Registration:

MEMBER RATE (Non-members, please add \$75):

Institute I \$0 Prepaid w/Dues
 \$470 (by May 10th) \$495 (after May 10th) \$ _____

Institute II \$0 Prepaid w/Dues
 \$545 (by May 10th) \$570 (after May 10th) \$ _____

Presidents' Dinner Meal Choice: _____ Sea Bass _____ Chicken

Institute III \$595 (by May 10th) \$630 (after May 10th)
Presidents' Dinner Meal Choice: _____ Sea Bass _____ Chicken

INDIVIDUAL EVENT TICKETS FOR GUESTS OF REGISTRANTS:

Presidents' Dinner (please indicate # of tickets for each meal choice):

of Tickets _____ @ \$85/person—Meal Choice: _____ Sea Bass _____ Chicken \$ _____

Friday Evening Sunset Cruise Total # of Tickets _____ @ \$50/person \$ _____

Lunch Ticket(s) @ \$40 each: _____ Thursday _____ Friday \$ _____

Total Enclosed \$ _____

You may register online at www.ct-asbo.org. You may pay with a credit card online or an invoice will be emailed to you. Checks should be made payable to CASBO. Dinner tickets are not available for purchase without a member's full registration. Cancellations must be received in writing by May 10th; after which no refund will be available.

Please mail to CASBO, 53 Sea Spray Avenue, Niantic, CT 06357-3337 . Questions? Call 860.519.0023.