

U.S. House of Representatives
Committee on Ethics

EMPLOYEE POST-TRAVEL DISCLOSURE FORM

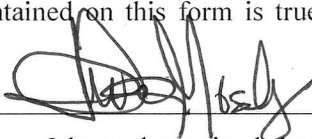
LEGISLATIVE RESOURCE CENTER
18 MAR -9 PM 1:56

This form is for disclosing the receipt of travel expenses from private sources for travel taken in connection with official duties. This form does not eliminate the need to report privately-funded travel on the annual Financial Disclosure Statements of those employees required to file them. In accordance with House Rule 25, clause 5, you must complete this form and file it with the Clerk of the House, 135 Cannon House Office Building, within 15 days after travel is completed. Please do not file this form with the Committee on Ethics.

NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001.

1. Name of Traveler: Jacque Chevalier Mosely
2. a. Name of accompanying relative: _____ or None
 b. Relationship to Traveler: Spouse Child Other (specify): _____
3. a. Dates of departure and return: Departure: Feb. 20, 2018 Return: Feb. 22, 2018
 b. Dates at personal expense (if any): _____ or None
4. Departure city: Washington, DC Destination: St. Michaels, MD Return city: Washington, DC
5. Sponsor(s) (who paid for the trip): The Aspen Institute (Education & Society Program)
6. Describe meetings and events attended: Attended sessions to discuss the implementation of the Every Student Succeeds Act and lessons learned with district and state leaders.
7. Attached to this form are EACH of the following (signify that each item is attached by checking the corresponding box):
 - a. a completed Sponsor Post-Travel Disclosure Form;
 - b. the Primary Trip Sponsor Form completed by the trip sponsor prior to the trip, including all attachments and Grantmaking or Non-Grantmaking Sponsor Forms;
 - c. page 2 of the completed Traveler Form submitted by the employee; *and*
 - d. the letter from the Committee on Ethics approving my participation on this trip.
8. a. I represent that I participated in each of the activities reflected in the attached sponsor's agenda. (Signify that statement is true by checking box):
 b. If not, explain: _____

I certify that the information contained on this form is true, complete, and correct to the best of my knowledge.

SIGNATURE OF TRAVELER:  DATE: 3/9/18

I authorized this travel in advance. I have determined that all of the expenses listed on the attached Sponsor Post-Travel Disclosure form were necessary and that the travel was in connection with the employee's official duties and would not create the appearance that the employee is using public office for private gain.

NAME OF SUPERVISING MEMBER: Robert C. "Bobby" Scott DATE: 3/9/18

SIGNATURE OF SUPERVISING MEMBER: 

**U.S. House of Representatives
Committee on Ethics**

SPONSOR POST-TRAVEL DISCLOSURE FORM

This form must be completed by an officer of any organization that served as the primary trip sponsor in providing travel expenses or reimbursement for travel expenses to House Members, officers, or employees under House Rule 25, clause 5. *A completed copy of the form must be provided to each House Member, officer, or employee who participated on the trip within 10 days of their return.* You must answer all questions, and check all boxes, on this form for your submission to comply with House rules and the Committee's travel regulations. Failure to comply with this requirement may result in the denial of future requests to sponsor trips and/or subject the current traveler to disciplinary action or a requirement to repay the trip expenses.

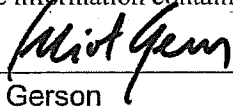
NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001.

1. Sponsor(s) (who paid for the trip): The Aspen Institute (Education & Society Program)
2. Travel Destination(s): St. Michaels, MD
3. Date of Departure: February 20, 2018 Date of Return: February 22, 2018
4. Name(s) of Traveler(s): Please see attached participant list
(NOTE: You may list more than one traveler on a form only if all information is identical for each person listed.)
5. **Actual amount** of expenses paid on behalf of, or reimbursed to, each individual named in response to Question 4:

	Total Transportation Expenses	Total Lodging Expenses	Total Meal Expenses	Other Expenses (dollar amount per item and description)
Traveler	\$92.94 (roundtrip mileage+tolls)	\$206.00 (two nights total) <input checked="" type="checkbox"/>	\$127.75	\$441.29 meeting room fees (includes meeting facilities, set up/take down cleaning, meeting materials) <input checked="" type="checkbox"/>
Accompanying Relative	n/a	n/a	n/a	n/a

6. All expenses connected to the trip were for actual costs incurred and not a *per diem* or lump sum payment. (Signify statement is true by checking box):

I certify that the information contained in this form is true, complete, and correct to the best of my knowledge.

Signature: 
 Name: Elliot Gerson Title: Executive Vice President, Policy & Public Programs
 Organization: The Aspen Institute

I am an officer of the above-named organization (signify statement is true by checking box):

Address: 2300 N Street NW, Suite 700
Washington, DC 20037

Telephone number: 202-736-5859 (Lisa Jones, Assistant General Counsel)

Email Address: lisa.jones@aspeninstitute.org

Committee staff may contact the above-named individual if additional information is required.

If you have questions regarding your completion of this form, please contact the Committee on Ethics at (202) 225-7103.

U.S. House of Representatives
Committee on Ethics

TRAVELER FORM

1. Name of Traveler: Jacqueline Chevalier Mosely
2. Sponsor(s) (who will be paying for the trip): The Aspen Institute, Inc.
(Education and Society Program)
3. Travel destination(s): St. Michaels, MD
4. a. Date of departure 2/20/2018 Date of return: 2/22/2018
b. Will you be extending the trip at your personal expense? Yes No
If yes, dates at personal expense: _____
5. a. Will you be accompanied by a relative at the sponsor's expense? Yes No
b. If yes:
(1) Name of accompanying relative: _____
(2) Relationship to traveler: Spouse Child Other (specify): _____
(3) Accompanying relative is at least 18 years of age: Yes No
6. a. Did the trip sponsor answer "yes" to Question 9(d) on the Primary Trip Sponsor Form (i.e., travel is sponsored by an entity that employs a registered federal lobbyist or foreign agent and you are requesting lodging for two nights)? Yes No
b. If yes, explain why the second night of lodging is warranted:

7. Primary Trip Sponsor Form is attached, including agenda, invitee list, and any other attachments and contributing sponsor forms: Yes No
NOTE: The agenda should show the traveler's individual schedule, including departure and arrival times and identify the specific events in which the traveler will be participating.
8. Explain why participation in the trip is connected to the traveler's individual official or representational duties. Staff should include their job title and how the activities on the itinerary relate to their duties.
Job title: Director of Education Policy, lead
policy staff on implementation of the
Every Student Succeeds Act.
9. Is the traveler aware of any registered federal lobbyists or foreign agents involved in planning, organizing, requesting, and/or arranging the trip? Yes No
10. **FOR STAFF TRAVELERS:**
TO BE COMPLETED BY YOUR EMPLOYING MEMBER:

ADVANCED AUTHORIZATION OF EMPLOYEE TRAVEL

I hereby authorize the individual named above, an employee of the U.S. House of Representatives who works under my direct supervision, to accept expenses for the trip described in this request. I have determined that the above-described travel is in connection with my employee's official duties and that acceptance of these expenses will not create the appearance that the employee is using public office for private gain.

Date: 1/18/18



Signature of Employing Member

U.S. House of Representatives
Committee on Ethics

PRIMARY TRIP SPONSOR FORM

This form should be completed by private entities offering to provide travel or reimbursement for travel to House Members, officers, or employees under House Rule 25, clause 5. A completed copy of the form (and any attachments) should be provided to each invited House Member, officer, or employee, who will then forward it to the Committee together with a Traveler Form at least 30 days before the start date of the trip. The trip sponsor should NOT submit the form directly to the Committee. The Committee Web site (ethics.house.gov) provides detailed instructions for filling out the form.

NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001. Failure to comply with the Committee's Travel Regulations may also lead to the denial of permission to sponsor future trips.

1. Sponsor (who will be paying for the trip): _____
The Aspen Institute, Inc. (Education and Society Program) _____
2. I represent that the trip will not be financed (in whole or in part) by a registered federal lobbyist or foreign agent (signify that the statement is true by checking box):
3. Check only one: I represent that:
 - a. the primary trip sponsor has not accepted from any other source funds intended directly or indirectly to finance any aspect of the trip *or*
 - b. the trip is arranged without regard to congressional participation and the primary trip sponsor has accepted funds only from entities that will receive a tangible benefit in exchange for those funds *or*.
 - c. the primary trip sponsor has accepted funds from other source(s) intended directly or indirectly to finance all or part of this trip and has enclosed disclosure forms from each of those entities.
If "c" is checked, list the names of the additional sponsors: _____
The Bill & Melinda Gates Foundation _____
4. Provide names and titles of ALL House Members and employees you are inviting. For each House invitee, provide an explanation of why the individual was invited (include additional pages if necessary):
See attached list of staff invited and explanation (note: all are senior education staffers responsible for education policy) _____
5. Is travel being offered to an accompanying relative of the House invitee(s)? Yes No
6. Date of departure: February 20, 2018 Date of return: February 22, 2018
7. a. City of departure: Washington, DC
b. Destination(s): St. Michaels, MD
c. City of return: Washington, DC
8. I represent that (check one of the following):
 - a. The sponsor of the trip is an institution of higher education within the meaning of section 101 of the Higher Education Act of 1965: *or*
 - b. The sponsor of the trip does not retain or employ a registered federal lobbyist or foreign agent: *or*
 - c. The sponsor employs or retains a registered federal lobbyist or foreign agent, but the trip is for attendance at a one-day event and lobbyist/foreign agent involvement in planning, organizing, requesting, or arranging the trip was *de minimis* under the Committee's travel regulations.
9. Check one of the following:
 - a. I checked 8(a) or (b) above:
 - b. I checked 8(c) above but am not offering any lodging:
 - c. I checked 8(c) above and am offering lodging and meals for one night: *or*
 - d. I checked 8(c) above and am offering lodging and meals for two nights:
If "d" is checked, explain why the second night of lodging is warranted: _____

10. Attached is a detailed agenda of the activities the House invitees will be participating in during the travel (i.e., an hourly description of planned activities for trip invitees) (indicate agenda is attached by checking box):

11. Check one:

- a. I represent that a registered federal lobbyist or foreign agent will not accompany House Members or employees on any segment of the trip (signify that the statement is true by checking box): *or*
b. N/A – trip sponsor is a U.S. institution of higher education.

12. For each sponsor required to submit a sponsor form, describe the sponsor's interest in the subject matter of the trip and its role in organizing and/or conducting the trip:

The Aspen Institute's Education and Society Program has an 11 year history of providing non-partisan education programs for Congressional staff. The purpose of this trip is to convene a conference to discuss the implementation of the Every Student Succeeds Act. Aspen's Education and Society Program is solely responsible for organizing or conducting the meeting. The Bill & Melinda Gates Foundation provides funding to the Education and Society Program but does not have a role in organizing or conducting the meeting.

13. Answer parts a and b. Answer part c if necessary.

- a. Mode of travel: Air Rail Bus Car Other (Specify: _____)
b. Class of travel: Coach Business First Charter Other (Specify: self-travel)
c. If travel will be first class or by chartered or private aircraft, explain why such travel is warranted:

14. I represent that the expenditures related to local area travel during the trip will be unrelated to personal or recreational activities of the invitee(s). (signify that the statement is true by checking box):

15. I represent that either (check one of the following):

- a. The trip involves an event that is arranged or organized *without regard* to congressional participation and that meals provided to congressional participants are similar to those provided to or purchased by other event attendees: *or*
b. The trip involves events that are arranged specifically *with regard* to congressional participation:

If "b" is checked:

1) Detail the cost per day of meals (approximate cost may be provided): _____
2/20/18 \$36.75, 2/21/18 \$64.00, 2/22/18 \$31.00

2) Provide reason for selecting the location of the event or trip: _____
The meeting space creates the appropriate atmosphere to support off-the-record, non-partisan exchanges of ideas and professional learning a short distance away from Washington, DC.

16. Name, nightly cost, and reasons for selecting each hotel or other lodging facility:

Hotel name: Inn at Perry Cabin City: St. Michaels, MD Cost per night: \$103.00

Reason(s) for selecting: Easily accessible with sufficient lodging and meeting space for all participants

Hotel name: _____ City: _____ Cost per night: _____

Reason(s) for selecting: _____

Hotel name: _____ City: _____ Cost per night: _____

Reason(s) for selecting: _____

17. I represent that all expenses connected to the trip will be for actual costs incurred and not a per diem or lump sum payment. (signify that the statement is true by checking box):

18. TOTAL EXPENSES FOR EACH PARTICIPANT:

<input type="checkbox"/> actual amounts <input checked="" type="checkbox"/> good faith estimates	Total <i>Transportation</i> Expenses per Participant	Total <i>Lodging</i> Expenses per Participant	Total <i>Meal</i> Expenses per Participant
For each Member, Officer, or employee	\$92.94 (roundtrip mileage+tolls)	\$206.00 (two nights)	\$127.75
For each accompanying relative	n/a	n/a	n/a

	<i>Other</i> Expenses (dollar amount per item)	Identify Specific Nature of "Other" Expenses (e.g., taxi, parking, registration fee, etc.)
For each Member, Officer, or employee	\$441.29	meeting room fees (includes meeting fac
For each accompanying relative	n/a	n/a

NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001.

19. Check one:

- a. I certify that I am an officer of the organization listed below. *or*
 b. N/A – sponsor is an individual or a U.S. institution of higher education.

20. I certify that I am not a registered federal lobbyist or foreign agent for any sponsor of this trip.

21. I certify by my signature that the information contained in this form is true, complete, and correct to the best of my knowledge

Signature: *Elliot Gerson*
 Name: Elliot Gerson
 Title: Executive Vice President, Policy & Public Programs
 Organization: The Aspen Institute
 Address: 2300 N Street NW, Suite 700, Washington, DC 20037
 Telephone number: 202-736-5859 (Lisa Jones, Deputy General Counsel)
 Email address: lisa.jones@aspeninst.org

If there are any questions regarding this form please contact the Committee at the following address:

Committee on Ethics
 U.S. House of Representatives
 1015 Longworth House Office Building
 Washington, DC 20515
 (202) 225-7103 (phone)
 (202) 225-7392 (general fax)

U.S. House of Representatives
Committee on Ethics

GRANTMAKING TRIP SPONSOR FORM

This form should be completed by a public charity or private foundation (both as defined under section 501(c)(3) of the Internal Revenue Code) that provides a grant of funds to another entity to underwrite, in whole or in part, a trip or an event, meal, or activity that will occur during a trip, or a necessary expense that will be incurred during a trip, with express or implicit knowledge or understanding that one or more House Members or employees may participate in or attend that trip or event, or otherwise may be beneficiaries of the gift or donation. Provide a copy of your completed form to the primary sponsor of the trip.

NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001. Failure to comply with the Committee's Travel Regulations may also lead to the denial of permission to sponsor future trips.

1. I certify that (name of your organization): The Bill & Melinda Gates Foundation
has been designated a § 501(c)(3) nonprofit charitable organization by the Internal Revenue Service.
 Yes No
2. Name of Primary Trip Sponsor: Aspen Institute, Education & Society Program
3. I certify that my organization (*complete a or b*):
 - a. Has provided a grant, gift, or donation to the above-named Primary Trip Sponsor and conducts an audit or review of its grant, gift, or donation to ensure that the funds are spent in accordance with the terms of its grant, gift, or donation. *or*
 - b. Has had a direct role in the organizing, planning, or conducting of a trip to
(destination) _____ on (date) _____ that is
being organized or arranged by the above-named Primary Trip Sponsor.
4. Check one:
 - a. My organization does not employ or retain a registered federal lobbyist or foreign agent *or*
 - b. My organization employs a registered federal lobbyist or foreign agent, but their involvement in planning, organizing, or arranging the trip was *de minimis* under the travel regulations.
5. I certify that I am not a registered federal lobbyist or foreign agent for any sponsor of this trip.
6. I certify by my signature that the information contained in this form is true, complete, and correct to the best of my knowledge.

Signature: _____

Name: Julius Lloyd Horwich Title: Senior Program Officer

Organization: The Bill & Melinda Gates Foundation

Address: 1300 I (Eye) Street NW; Washington, DC 20005

Telephone number: 202-662-8130 Email: lloyd.horwich@gatesfoundation.org

If there are any questions regarding this form please contact the Committee at the following address:

Committee on Ethics
U.S. House of Representatives
1015 Longworth House Office Building
Washington, DC 20515
(202) 225-7103 (phone)
(202) 225-7392 (general fax)

Susan W. Brooks, Indiana
Chairwoman
Theodore E. Deutch, Florida
Ranking Member



ONE HUNDRED FIFTEENTH CONGRESS

U.S. House of Representatives

COMMITTEE ON ETHICS

February 14, 2018

Thomas A. Rust
Staff Director and Chief Counsel

Donna Herbert
Director of Administration

Megan Savage
*Chief of Staff and Counsel to
the Chairwoman*

Daniel J. Taylor
Counsel to the Ranking Member

1015 Longworth House Office Building
Washington, D.C. 20515-6328
Telephone: (202) 225-7103
Facsimile: (202) 225-7392

Kenny Marchant, Texas
Leonard Lance, New Jersey
Mimi Walters, California
John Ratcliffe, Texas

Yvette D. Clarke, New York
Jared Polis, Colorado
Anthony Brown, Maryland
Steve Cohen, Tennessee

Ms. Jacqueline Mosely
Office of the Honorable Bobby Scott
2101 Rayburn House Office Building
Washington, DC 20515

Dear Ms. Mosely:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to St. Michaels, Maryland, scheduled for February 20 to February 22, 2018, sponsored by the Aspen Institute, Inc., with financial support from the Bill & Melinda Gates Foundation.

You must complete an Employee Post-Travel Disclosure Form (which your employing Member must also sign) and file it, together with a Sponsor Post-Travel Disclosure Form completed by the trip sponsor, with the Clerk of the House within 15 days after your return from travel. As part of that filing, you are also required to attach a copy of this letter and both the Traveler and Primary Trip Sponsor Forms (including attachments) you previously submitted to the Committee in seeking pre-approval for this trip. If you are required to file an annual Financial Disclosure Statement, you must also report all travel expenses totaling more than \$390 from a single source on the "Travel" schedule of your annual Financial Disclosure Statement covering this calendar year. Finally, Travel Regulation § 404(d) also requires you to keep a copy of all request forms and supporting information provided to the Committee for three subsequent Congresses from the date of travel.

If you have any further questions, please contact the Committee's Office of Advice and Education at extension 5-7103.

Sincerely,

Susan W. Brooks
Chairwoman

Theodore E. Deutch
Ranking Member

SWB/TED:kej


THE ASPEN INSTITUTE
EDUCATION & SOCIETY PROGRAM

January 8, 2018

Dear House Colleague,

We are writing to invite you to participate in an upcoming retreat – ***“From Planning to Implementation”*** – for the Aspen Senior Congressional Education Staff Network from **12:00 PM Tuesday, February 20, 2018 to 1:00 PM Thursday, February 22, 2018** at the Inn at Perry Cabin, located 79 miles from Washington, DC.

At this convening, staffers will hear from state and district leaders on early implementation lessons of the Every Student Succeeds Act. Staffers will understand how states are creating and implementing their ESSA plans, including how they will monitor implementation at different levels of the system. The convening will also focus on school improvement strategies, support for teachers and leaders, and potential roles for Congress and the U.S. Department of Education in monitoring and guidance around ESSA implementation. Finally, the retreat will provide an opportunity for staffers to engage in their own learning and build working relationships with colleagues from different parties and chambers and with leading experts in the field.

We fully comply with the rules that have been enacted by the House regarding privately-funded travel. Enclosed you will find all the forms necessary for Ethics rules compliance:

- A detailed agenda listing discussion sessions
- A completed Primary Trip Sponsor Form
- A list of invited staffers
- A blank Traveler Form
- Completed Grantmaking Trip Sponsor Form from the Bill & Melinda Gates Foundation

You must complete the Traveler Form and submit it with the enclosed agenda, list of invited staffers, and Primary Trip Sponsor Form directly to the Committee on Ethics (1015 Longworth) no later than Monday, January 22, 2018. After receiving the completed travel package, the Ethics Committee will review and issue an approval to you or your sponsoring Member. After the trip, you will need to complete a post-travel form that we will email to you after the site visit.

Attendance is by invitation only, with no outside observers or lobbyists. Funding is provided solely by grants from established foundations – no government, individual, foreign, corporate, or special interest money is accepted. The Network is supported by The Bill & Melinda Gates Foundation. The Aspen Education & Society Program maintains autonomy over invitations, materials, and the agenda for the retreat.

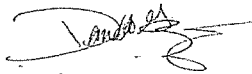
The retreat will begin at **12:00 PM on Tuesday, February 20, 2018**, at the Inn at Perry Cabin and will conclude at **11:30 AM on Thursday, February 22, 2018**. Please plan your travel accordingly in order to be present for the duration of the retreat. Dress is casual for all meetings.

The retreat promises to be productive and informative. We look forward to seeing you there.

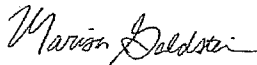
Warm regards,



Ross Wiener



Danielle Gonzales



Marisa Goldstein



Doug Mesecar

**Aspen Senior Congressional Education Staff Network Retreat
From Planning to Implementation: ESSA's Initial Impact in the Field**

Inn at Perry Cabin
308 Watkins Lane
St. Michaels, MD 21663
Phone: (410) 745-2200

February 20-22, 2018

CONGRESSIONAL HOUSE STAFF

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Minority Education Policy Director
House Committee on Education and the
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Mandy.Schaumburg@mail.house.gov

Leslie Tatum
Majority Professional Staff Member
House Committee on Education and the
Workforce
Leslie.Tatum@mail.house.gov



Aspen Senior Congressional Education Staff Network Retreat

From Planning to Implementation: ESSA's Initial Impact in the Field

**Inn at Perry Cabin
308 Watkins Lane
St. Michaels, MD 21663
P: 410-745-2200**

February 20-22, 2018

AGENDA

Retreat Goals:

- Understand how states are creating and implementing their Every Student Succeeds Act (ESSA) plans, how they will monitor implementation at different levels of the system, and what factors drive decision making.
- Understand states' and districts' theories of action around their approach to school improvement and support for teachers and leaders, including any connection to the Higher Education Act (HEA).
- Engage in active learning and build working relationships with education leaders from the field, as well as with colleagues from different parties and chambers.
- Explore potential roles for Congress and the U.S. Department of Education (ED) in monitoring and guidance around ESSA implementation.

Tuesday, February 20, 2018

All Meeting Sessions in the Commodore Room

12:00 PM Arrival and Check-In

12:30 – 1:00 PM Lunch

Fireside section of the Stars Restaurant

1:15 – 1:45 PM Welcome, Overview, and Retreat Objectives

To guide the retreat's discussion, Congressional staffers and faculty members will begin by sharing their top learning objectives for the convening.

1:45 – 3:15 PM

Session I: Themes and Trends in Approved State Plans

Chad Aldeman, Principal, Bellwether Education Partners
MaryEllen Elia, Commissioner, New York State Department of Education
Erika Landl, Senior Associate, National Center for the Improvement of Educational Assessment

Guiding Questions:

- *What themes have emerged in approved state plans (i.e., indicator selection, accountability system design, school identification, inclusion of student subgroups, report cards, assessment)?*
- *How are state plans surfacing issues of equity and meeting the law's requirements related to equity?*

- *What lessons have states learned from the second round of peer review?*

3:15 – 3:45 PM

Break and individual reflection

3:45 – 5:00 PM

Session II: Supporting School Improvement

Angela Minnici, Senior Director of State Strategy, Technical Assistance, and Policy, WestEd

Seth Rau, Director of Legislative and Strategic Partnerships, San Antonio Independent School District

Eric Thomas, Chief Turnaround Officer, Georgia Department of Education

Guiding Questions:

- *How are states and districts preparing for the initial identification of CSI and TSI schools in 2018-19 (i.e., data collection/reporting, allowing for a planning year or requiring immediate action)?*
- *How are states and districts communicating accountability decisions, school ratings, and school improvement strategies to internal stakeholders (schools, principals, teachers) and external stakeholders (the public, local communities, support organizations)?*
- *How are states and districts thinking about ESSA's evidence-based provisions?*
- *How might states and districts use school improvement funds and other resources?*

5:00 – 5:20 PM

Taking stock: Staff reflections and feedback to guide remaining discussions

6:30 PM

Networking Reception with Expert Faculty

Miles Room

Staffers will have the opportunity to network with participants during the reception.

7:00 – 8:30 PM

Working Dinner with Discussion of Earlier Sessions *Fireside section of the Stars Restaurant*

Wednesday, February 21, 2018

All Meeting Sessions in the Commodore Room

7:30 – 8:30 AM

Breakfast

Fireside section of the Stars Restaurant

8:30 – 10:45 AM

Session III: Deep Dive – Exploring States' Approaches to School Improvement

Staffers and faculty members will work in small groups to analyze selected accountability sections from a few state plans and consider the strengths and weaknesses of how these states are approaching school improvement. We will also have an opportunity to discuss the utility of external state plan reviews, what they signal to the field, and how they inform the conversation about ESSA.

10:45 – 11:00 AM

Break

11:00 AM – 12:00 PM

Session IV: Assessment: Continuities, Innovations, Challenges

MaryEllen Elia, Commissioner, New York State Department of Education

Lou Fabrizio, Education Consultant (Retired, North Carolina Department of Public Instruction)

Erika Landl, Senior Associate, National Center for the Improvement of Educational Assessment

Guiding Questions:

- *How are states taking advantage of ESSA to revamp their assessment systems (i.e., by reducing testing, replacing old assessments and/or incorporating new assessments, using assessment approaches like computer adaptive testing, etc.)?*
- *Are states using the testing flexibilities in the law to make their assessment systems more responsive, targeted, and instructionally-relevant? Why or why not?*
- *How are districts evaluating or changing their local assessment systems/practices as a result of their state ESSA plans or other factors?*

12:00 – 1:00 PM

Lunch

Fireside section of the Stars Restaurant

1:00 – 2:45 PM

Session V: Elevating Teachers and Leaders in ESSA

Chad Aldeman, Principal, Bellwether Education Partners

Angela Minnici, Senior Director of State Strategy, Technical Assistance, and Policy, WestEd

Randy Poe, Superintendent, Boone County Schools

Guiding Questions:

- *How are states and districts approaching teacher and leader development under ESSA? What evidence are they considering?*
- *How are states and districts innovating around more effective forms of professional development for teachers and leaders?*
- *How have states addressed equitable distribution of teachers in their state plans? How are they monitoring and supporting equitable access to effective educators?*
- *How are states and districts considering using Title II funds for additional activities, such as improving teacher preparation, developing and improving teacher evaluation systems, improving alternative certification pathways, and developing teacher leadership opportunities?*
- *How is this work being integrated into existing state and local initiatives on educator effectiveness, and where is it siloed?*
- *What are potential implications of HEA (especially Title II of HEA) on the implementation of ESSA Title II?*

2:45 – 3:00 PM

Break

3:00 – 4:45 PM

Session VI: Federal and State Monitoring of Implementation

MaryEllen Elia, Commissioner, New York State Department of Education

Lou Fabrizio, Education Consultant (Retired, North Carolina Department of Public Instruction)

Eric Thomas, Chief Turnaround Officer, Georgia Department of Education

Guiding Questions:

- *Now that most state plans have been approved, what are possible ways the U.S. Department of Education will monitor and support implementation going forward? What does this suggest for the role of Congress?*
- *How are states considering their monitoring and oversight role over districts and schools, particularly around school improvement? What capacity and resources do they need to best oversee and support districts and schools?*
- *How are these approaches informed by previous successes and challenges?*

4:45 – 5:10 PM

Taking stock: Staff reflections and feedback to guide remaining discussions

6:15 PM **Networking Reception with Expert Faculty** *Morning Room*
Staffers will have the opportunity to network with participants during the reception.

7:00 – 8:30 PM **Working Dinner with Discussion of Earlier Sessions** *Admiral Room*

Thursday, February 22, 2018 **All Meeting Sessions in the Commodore Room**

7:30 – 8:30 AM **Breakfast** *Fireside section of the Stars Restaurant*

8:30 – 8:40 AM **Staff reflections and feedback to guide remaining discussion**

8:40 – 10:15 AM **Session VII: Trends in District Implementation**

Randy Poe, Superintendent, Boone County Schools

Seth Rau, Director of Legislative and Strategic Partnerships, San Antonio Independent School District

Eric Thomas, Chief Turnaround Officer, Georgia Department of Education

Guiding Questions:

- *How are districts preparing to implement approved state ESSA plans? How are districts approaching the development of local consolidated plans? What kind of guidance, if any, are states providing?*
- *What are ways districts might respond to other components of ESSA, such as Title II, Title IV, and new provisions around English learners? How is this being integrated with existing district initiatives (e.g., residencies, recruitment, etc.)?*
- *How are districts collaborating with each other and/or through regional service centers around ESSA implementation?*
- *How well do districts understand their new role in monitoring and supporting school improvement? How are states and districts planning to coordinate around identification, notification, and the use of evidence to determine improvement strategies?*

10:15 – 10:30 AM **Break + Complete Retreat Evaluation**

10:30 – 10:50 AM **Final Observations from Expert Faculty**

10:50 – 11:20 AM **Taking Stock: Staff Reflections and Feedback to Guide Next Steps for the Network**

11:20 – 11:30 AM **Adjourn**

11:30 AM – 12:30 PM **Lunch available** *Fireside section of the Stars Restaurant*