



U.S. House of Representatives

COMMITTEE ON ETHICS

Employee Post-Travel Disclosure Form

Original Amendment

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, B-81 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.

- Name of Traveler: Loredana Valtierra
- a. Name of Accompanying Relative: _____ OR None
 b. Relationship to Traveler: Spouse Child Other (specify): _____
- a. Dates: Departure: Aug. 6, 2019 Return: Aug. 8, 2019
 b. Dates at Personal Expense, if any: _____ OR None
- Departure City: Washington, DC Destination: Warrenton, VA Return City: Washington, DC
- Sponsor(s), Who Paid for the Trip: The Aspen Institute, Inc. (Education and Society Program)
- Describe Meetings and Events Attended: Attended al sessions and all networking events.
All sessions related to implementation of The Elementary and Secondary Education Act.
- Attached to this form are *each* of the following, *signify that each item is attached by checking the corresponding box*:
 - a completed *Sponsor Post-Travel Disclosure Form*;
 - the *Primary Trip Sponsor Form* completed by the trip sponsor *prior* to the trip, *including all attachments and the Grantmaking or Non-Grantmaking Sponsor Forms*;
 - page 2 of the completed *Traveler Form* submitted by the employee; *and*
 - the letter from the Committee on Ethics approving my participation on this trip.
- a. I represent that I participated in each of the activities reflected in the attached sponsor's agenda.
Signify statement is true by checking the box:
 b. If not, explain: _____

LEGISLATIVE RESOURCE CENTER
2019 AUG 19 PM 3:53
U.S. HOUSE OF REPRESENTATIVES

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

Signature of Traveler: Loredana Valtierra Date: 8/19/19

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: 8/19/19

Signature of Supervising Member: [Signature]



U.S. House of Representatives COMMITTEE ON ETHICS

Sponsor Post-Travel Disclosure Form

Original Amendment

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 ten 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.

- Sponsor(s) who paid for the trip: The Aspen Institute, Inc (Education & Society Program)
- Travel Destination(s): Warrenton, VA
- Date of Departure: August 6, 2019 Date of Return: August 8, 2019
- Name(s) of Traveler(s): Loredana Valtierra
Note: You may list more than one traveler on a form only if all information is identical for each person listed.
- Actual amount of expenses paid on behalf of, or reimbursed to, each individual named in Question 4:

	Total Transportation Expenses	Total Lodging Expenses	Total Meal Expenses	Total Other Expenses (dollar amount per item and description)
Traveler	\$58.00	\$188.00	\$110.50	\$402.50
Accompanying Family Member	N/A	N/A	N/A	N/A

- 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: *Elliot Gerson* Date: 8/15/19

Name: Elliot Gerson Title: EVP, Policy & Public Programs

Organization: The Aspen Institute, Inc.

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: 202-736-5859 (Lisa Jones, Deputy General Counsel) Email: 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: Loredana Valtierra
2. Sponsor(s) (who will be paying for the trip): Aspen Education and Society Program
3. Travel destination(s): Airlie House, Warrenton, VA
4. a. Date of departure 08/06/19 Date of return: 08/08/19
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.
The conference will discuss the implementation of the Every Student Succeeds Act (ESSA). As the Education Policy Counsel for the Committee, I work on k-12 education policy and the ESSA.
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: 7/8/19

Burke
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: August 6, 2019 Date of return: August 8, 2019
7. a. City of departure: Washington, DC
b. Destination(s): Warrenton, VA
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 12 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 and 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): _____
8/6/19 \$14.25 8/7/19 \$55.00, 8/8/19 \$41.25

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: Airlie House City: Warrenton, VA Cost per night: \$94.00

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	\$58.00 (round trip mileage and applicable tolls)	\$188.00(two nights total)	\$110.50
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	\$402.50	meeting room fees (includes meeting facilities, setup/takedown, cleaning, meeting materials)
For each accompanying relative	n/a	n/a

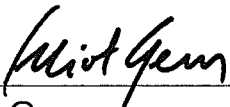
NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001.

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: 
 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 Education and 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: Patrick Murray

Name: Patrick Murray Title: Senior Program Officer

Organization: Bill & Melinda Gates Foundation

Address: 1300 I Street NW, Washington, D.C. 20005

Telephone number: 202-662-8130 Email: patrick.murray@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)

Theodore E. Deutch, Florida
Chairman
Kenny Marchant, Texas
Ranking Member

Grace Meng, New York
Susan Wild, Pennsylvania
Dean Phillips, Minnesota
Anthony Brown, Maryland

John Ratcliffe, Texas
George Holding, North Carolina
Jackie Walorski, Indiana
Michael Guest, Mississippi



ONE HUNDRED SIXTEENTH CONGRESS

U.S. House of Representatives

COMMITTEE ON ETHICS

Thomas A. Rust
Staff Director and Chief Counsel

David W. Arrojo
Counsel to the Chairman

Christopher A. Donesa
Counsel to the Ranking Member

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

July 24, 2019

Loredana Valtierra
Committee on Education and Labor
2176 Rayburn House Office Building
Washington, DC 20515

Dear Ms. Valtierra:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to Warrenton, Virginia, scheduled for August 6 to 8, 2019, sponsored by Aspen Institute, Inc., and 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,

Theodore E. Deutch
Chairman

Kenny Marchant
Ranking Member

TED/KM:



THE ASPEN INSTITUTE
EDUCATION & SOCIETY PROGRAM

June 18, 2019

Dear House Colleague,

We are writing to invite you to participate in an upcoming retreat – ***“Implementing ESSA: School Improvement and Innovation”*** – for the Aspen Senior Congressional Education Staff Network from **12:00 PM Tuesday, August 6, 2019 to 1:00 PM Thursday, August 8, 2019** at Airlie House, 6809 Airlie Road, Warrenton, VA 20187, located 50 miles from Washington, DC.

At this convening, staffers will hear from state and district leaders on the implementation of the Every Student Succeeds Act. Staffers will understand how states implementing their ESSA plans and building coherence across priorities, systems, and programs. Participants will also have a chance to explore school improvement, including how states and districts are responding to new reporting requirements and taking advantage of flexibilities to implement innovative initiatives like project-based learning and competency-based education. 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 are committed to working with you and the House Ethics Committee to ensure compliance with the House rules regarding privately-funded sponsored travel. Enclosed you will find all the forms necessary for filing the trip with the Ethics Committee:

- A detailed agenda listing discussion sessions
- A completed Primary Trip Sponsor Form
- A list of invited House 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, July 8, 2019. 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, August 6, 2019**, at Airlie House and will conclude at **1:00 PM on Thursday, August 8, 2019**. Please plan your travel accordingly in order to be present for the duration of the retreat. Dress is business 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

Implementing ESSA: School Improvement and Innovation

**Airlie House
6809 Airlie Drive
Warrenton, VA 20187**

August 6-8, 2019

#4. Please provide names and titles of ALL House Members and employees you are inviting.

The House employees invited (listed below) are senior education staff responsible for education issues; they are invited specifically because of their education portfolio to meet with leaders and educational experts from states, districts, research, and support organizations to engage in non-partisan dialogue on the impact of federal policy on different levels of the education system.

HOUSE CONGRESSIONAL STAFF

Amy Jones

Minority Director of Education and Human Services Policy
House Committee on Education and Labor

Robin Juliano

Majority Professional Staff
House Appropriations Subcommittee on Labor, Health and Human Services, and Education

Jacque Chevalier Mosely

Majority Education Policy Director
House Committee on Education and Labor

Susan Ross

Minority Staff Director
House Appropriations Subcommittee on Labor, Health and Human Services and Education

Kathryn Salmon

Minority Professional Staff
House Appropriations Subcommittee on Labor, Health and Human Services, and Education

Mandy Schaumburg

Minority Education Deputy Director and Senior Counsel
House Committee on Education and Labor

Lakeisha Steele

Majority Professional Staff
House Committee on Education and Labor

Brad Thomas

Minority Senior Education Policy Advisor
House Committee on Education and Labor

Philip Tizzani

Majority Professional Staff
House Appropriations Subcommittee on Labor, Health and Human Services, and Education

Loredana Valtierra

Majority Professional Staff
House Committee on Education and Labor

Aspen Senior Congressional Education Staff Network Retreat

Implementing ESSA: School Improvement and Innovation

Airlie House
6809 Airlie Rd
Warrenton, VA 20187
P: (540) 347-1300

August 6-8, 2019

AGENDA

Retreat Goals:

- Understand how states and districts are implementing the Every Student Succeeds Act (ESSA), including school improvement strategies after the first year of school identifications;
- Understand how states and districts are using innovation, especially around teaching and learning, accountability, and assessment, to address equity and support school improvement;
- Engage in active learning and build working relationships with education leaders from the field, as well as with colleagues from different parties and chambers.

Tuesday, August 6, 2019

- | | |
|------------------------|---|
| 12:00 PM | Arrival and Check-In (<i>participants to arrive by personal transportation</i>) |
| 12:30 – 1:00 PM | Lunch |
| 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 – 3:00 PM | <u>Session I: Lessons from ESSA Accountability Year 1 Implementation</u>
Angélica Infante-Green , Commissioner, Rhode Island Department of Education (<i>invited</i>)

LaTanya McDade , Chief Education Officer, Chicago Public Schools (<i>invited</i>)

Guiding Questions: <ul style="list-style-type: none">• <i>How did the identification of schools for CSI, ATSI, or TSI compare to expectations and/or state plan projections? What are implications? Are there any false negatives/positives?</i>• <i>How are SEAs and LEAs preparing for year 2 of ESSA accountability implementation? What lessons have been learned, what adjustments are being made?</i>• <i>To what extent are SEAs amending their approved ESSA plans and/or seeking waivers? How are SEAs and LEAs engaging stakeholder groups in drafting amendments or seeking waivers?</i> |

- *What role are support organizations playing in supporting implementation and building capacity in SEAs and LEAs?*
- *What role has the U.S. Department of Education (ED) played during the first year of implementation and what are state and districts expectations for what they should be doing in year 2 and beyond?*

3:00 – 3:15 PM

Break

3:15 – 5:00 PM

Session II: Innovation Focus on Personalized Learning

Participants will learn about innovative approaches to teaching and learning, such as personalized learning and competency-based education, how these approaches can help to increase equity and outcomes for all students, and their intersection with ESSA and other state laws and policies.

Guiding Questions:

- *How does ESSA encourage innovation like personalized learning? What state and district capacity is needed to effectively implement practices like personalized learning and competency-based education?*
- *Could ESSA and/or other current/future federal policy or funding encourage more innovation or help to scale best practices?*
- *How are these models being evaluated for impact? Or being used to support and complement school improvement initiatives?*

5:00 – 5:15 PM

Taking stock: Staff reflections and feedback to guide remaining discussions

6:30 PM

Networking Reception with Expert Faculty

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

7:00 – 8:30 PM

Dinner with Discussion of Earlier Sessions

Wednesday, August 7, 2019

7:30 – 8:30 AM

Breakfast

8:30 – 8:35 PM

Group reflection on Day 1: What thoughts and questions were raised for further discussion?

8:35 – 11:00 AM

Session III: Deep Dive on School Improvement

Leighann Lenti, Chief of Partnership, University of Virginia Partnership for Leaders in Education (invited)

Staff will be led through a detailed presentation on district turnaround efforts being supported by the University of Virginia's work nationally, with a close examination of the work in a partner district. Staff and faculty will consider implementation implications, including what it means for SEA and LEA capacity, human capital decisions, budgeting, and overall strategy.

11:00 – 11:15 AM **Break and individual reflection**

11:15 AM – 12:15 PM **Session IV: School Improvement Reflection: Context and Implications**

Faculty will respond to issues raised in earlier sessions and respond to the questions staffers are most interested in learning more about.

Guiding Questions:

- *Is ESSA's theory of action around school improvement playing out as envisioned? Why or why not?*
- *How are ATSI and TSI identified schools sufficiently differentiated?*
- *How are SEAs leveraging ESSA's evidence requirements for interventions? What interventions are they using?*
- *For CSI schools, are improvement plans (including resource allocation reviews) proving useful (or different from prior practice)? Are SEAs engaging with CSI plans in a timely and useful way? What supports do LEAs need to effectively support CSI schools?*
- *What role can/should ED play in promoting effective practices and evidence-based improvement strategies?*

12:15 – 1:30 PM **Lunch**

1:30 – 3:00 PM **Session V: Innovation Focus on Accountability and Assessment**

Staff will go on a partner walk to answer two questions:

1. What innovation(s) did you expect to see following ESSA's passage?
2. How can can/should federal policy encourage/allow/support innovation?

All staff and faculty will engage in a full group discussion reflecting on discussions from the partner walk. Followed by a look at how states and districts are thinking about innovation in accountability and assessment.

Guiding Questions:

- *How does ESSA allow for flexibility to support innovation/alternative approaches to assessment and accountability? Through its accountability structure? Through the Innovative Assessment Pilot?*
- *What will it take to effectively scale innovations across more districts/states (i.e., capacity, funding, flexibility)?*
- *What is the role of ESSA relative to other state and/or district policies, practices, and/or funding streams in supporting innovation? How could these policies be more coherent and aligned?*
- *What role can/should the federal government play in fostering innovation in assessment and accountability?*

3:00 – 3:30 PM **Break**

3:30 – 4:45 PM **Session VI: Exploring Report Cards in the ESSA Era**

Guiding Questions:

- *How do families and other stakeholder groups perceive the role and usefulness of state and district report cards?*

- *How are report cards helping to highlight equity? Are there any concerns about transparency, accessibility, and disaggregation?*
- *How are states and districts reporting on additional measures (such as discipline or teacher quality data), as well as other metrics states have chosen to report on that do not contribute to accountability determinations?*
- *Are LEA report cards complimenting SEA report cards and adding contextual and/or additional information that is relevant and useful to stakeholders?*
- *Which SEA or LEA report cards are especially well-designed? What about them seems most promising?*

4:45 – 5:00 PM **Taking stock: Staff reflections and feedback to guide remaining discussions**

6:30 PM **Networking Reception with Expert Faculty**
Staffers will have the opportunity to network with faculty during the reception.

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

Thursday, August 8, 2019

7:30 – 8:45 AM **Breakfast**

8:45 – 8:50 AM **Staff reflections and feedback to guide remaining discussion**

8:50 – 10:20 AM **Session VII: Connecting Innovation and School Improvement under ESSA**
Leighann Lenti, Chief of Partnership, University of Virginia Partnership for Leaders in Education (invited)

LaTanya McDade, Chief Education Officer, Chicago Public Schools (invited)

Guiding Questions:

- *How can innovative practices be used to support school improvement efforts? Are there technical or adaptive challenges to achieving this?*
- *How tight/loose do SEAs and LEAs need to be to create space for innovation while meeting required timelines for improvement and outcomes?*
- *How are SEA and LEA leaders using federal funds to support innovation?*
- *What supports do SEAs and LEAs need to foster a culture of innovation and to scale successful innovations?*

10:20 – 10:30 AM **Break**

10:30 – 10:50 AM **Complete Retreat Evaluation**

10:50 – 11:20 AM **Final Observations from Expert Faculty**

11:20 – 11:45 PM **Taking Stock: Staff Reflections and Feedback to Guide Next Steps for the Network**

12:00 – 1:00 PM **Lunch and Adjourn (participants to depart by personal transportation)**