



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.

1. Name of Traveler: Christofer Horta
2. a. Name of Accompanying Relative: _____ **OR** None ☒
 b. Relationship to Traveler: ☐ Spouse ☐ Child ☐ Other (specify): N/A
3. a. Dates: Departure: May 29, 2019 Return: May 30, 2019
 b. Dates at Personal Expense, if any: _____ **OR** None ☒
4. Departure City: Washington, D.C. Destination: Stevensville, MD Return City: Washington, D.C.
5. Sponsor(s), Who Paid for the Trip: Postsecondary National Policy Institute
6. Describe Meetings and Events Attended: Attended a seminar on federal student aid. See agenda for additional information.
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** the *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 statement is true by checking the box:** ☐
 b. If not, explain: _____

LEGISLATIVE RESOURCE CENTER
2020 DEC 11 PM 1:53
OFFICE OF THE CLERK
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: _____ Date: 12/4/2020

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: Donna E. Shalala Date: 12/4/2020

Signature of Supervising Member: [Signature]



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.

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.

1. Sponsor(s) who paid for the trip: Postsecondary National Policy Institute (PNPI)

2. Travel Destination(s): Stevensville, MD

3. Date of Departure: May 29, 2019

Date of Return: May 30, 2019

4. Name(s) of Traveler(s): 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 Question 4:

	Total Transportation Expenses	Total Lodging Expenses	Total Meal Expenses	Total Other Expenses (dollar amount per item and description)
Traveler	\$55.73	\$118	\$98	\$ 56.16 (room rental and AV)
Accompanying Family Member	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: MaryEllen McGuire

Date: 6/3/19

Name: MaryEllen McGuire

Title: President

Organization: Postsecondary National Policy Institute (PNPI)



Address: 718 7th Street NW, Floor 2, Washington, DC 20001

Telephone: 202-407-3172

Email: mcguire@pnpi.org

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

Version date 12/2018 by Committee on Ethics



U.S. House of Representatives

COMMITTEE ON ETHICS

TRAVELER FORM

1. Name of Traveler: Cristofer Horta
2. Sponsor(s) who will be paying for the trip: Postsecondary National Policy Institute (PNPI)
3. Travel Destination(s): Stevensville, MD
4. a. Date of Departure: May 29, 2019 Date of Return: May 30, 2019
b. Will you be extending the trip at your personal expense? ☐ Yes ☒ No
If yes, list dates at personal expense: _____
5. a. Will you be accompanied by a family member at the sponsor's expense? ☐ Yes ☒ No If yes:
(1) Name of Accompanying Family Member: _____
(2) Relationship to Traveler: ☐ Spouse ☐ Child ☐ Other (specify): _____
(3) Accompanying Family Member is at least 18 years of age: ☐ Yes ☐ No
6. a. Did the trip sponsor answer "Yes" to Question 8(c) on the *Primary Trip Sponsor Form* (i.e., travel is sponsored by an entity that employs a registered federal lobbyist or a foreign agent)? ☐ Yes ☒ No
b. If yes, and you are requesting lodging for two nights, explain why the second night 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.
Boss is presently a Member of the Education Committee and is working on HEA Reauth. Cristofer Horta is the Legislative Assistant handling education.
9. Is the traveler aware of any registered federal lobbyists or foreign agents involved planning, organizing, requesting, 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.

Signature of Employing Member _____

Date 6/30/19



U.S. House of Representatives

COMMITTEE ON ETHICS

TRAVELER FORM

This form should be completed by House Members, officers, or employees seeking Committee approval of privately-sponsored travel or reimbursement for travel under House Rule 25, clause 5. The completed form should be submitted directly to the Committee by each invited House Member, officer, or employee, together with the completed and signed trip sponsor form(s) and any attachments. A copy of this form, minus this initial page, will be made available for public inspection. This form, and any attachments, may be faxed to the Committee at 202-225-7392, sent or delivered to the Committee at 1015 Longworth, or e-mailed to travel.requests@mail.house.gov.

Your completed request must be submitted to the Committee no less than 30 days before your proposed departure date. Absent exceptional circumstances, permission will not be granted for requests received less than 30 days before the trip commences. You must receive explicit approval from the Committee before you depart on this trip.

Name of Traveler: Cristofer Horta

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

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

Signature: _____

Name of Signatory (if other than traveler): _____

For Staff (name of employing Member or Committee): Representative Shalala

Office Address: 1320 Longworth House Office Building

Telephone Number: 202-225-3931

Email Address of Contact Person: cristofer.horta@mail.house.gov

☐ Check this box if the sponsoring entity is a media outlet, the purpose of the trip is to make a media appearance sponsored by that entity, and these forms are being submitted to the Committee less than 30 days before the trip departure date.

NOTE: You must complete all of the contact information fields above, as Committee staff may need to contact you if additional information is required.

KEEP A COPY OF THIS FORM. Page 2 (but not this page) must be submitted to the Clerk as part of the post-travel disclosure required by House Rule 25. Travel Regulation § 404(d) also requires you to keep a copy of all request forms and supporting paperwork for three subsequent Congresses from the date of travel.

If there are any questions regarding this form, please contact the Committee on Ethics at 202-225-7103 or via travel e-mail: travel.requests@mail.house.gov.

RECEIVED
2019 APR 29 PM 12:52
COMMITTEE ON ETHICS



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 website (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: Postsecondary National Policy Institute (PNPI)
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 and Melinda Gates Foundation, The Lumina Foundation, and The Kresge 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.
5. Is travel being offered to an accompanying family member of the House invitee(s)? ☐ Yes ☒ No
6. Date of Departure: May 29, 2019 Date of Return: May 30, 2019
7. a. City of departure: Washington, DC
b. Destination(s): Stevensville, MD
c. City of return: Washington, DC
8. **Check only one.** I represent that:
 - 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 only 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 you checked this box, explain why the second night of lodging is warranted: _____



U.S. House of Representatives

COMMITTEE ON ETHICS

10. Attached is a detailed agenda of the activities 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 only one of the following:**
- 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. *Not Applicable.* 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:
- See attached.
-
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: _____)
- c. If travel will be first class, or by chartered or private aircraft, explain why such travel is warranted:
- N/A
-
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. **Check only one.** I represent that either:
- 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): We estimate \$54 on the first day and \$40 on the second day. ☒
- 2) Provide the reason for selecting the location of the event or trip: Kent Manor Inn is located approximately 60 miles east of D.C. providing convenient access for congressional staff and speakers.
16. Name, nightly cost, and reasons for selecting each hotel or other lodging facility:
- Hotel Name: Kent Manor Inn City: Stevensville, MD Cost Per Night: \$118
- Reason(s) for Selecting: The facility provides both meeting space and overnight lodging on-site.
- 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:* ☒



U.S. House of Representatives

COMMITTEE ON ETHICS

18. Total Expenses for each Participant:

☐ Actual Amounts	Total Transportation Expenses per Participant	Total Lodging Expenses per Participant	Total Meal Expenses per Participant
☒ Good Faith Estimates			
For each Member, Officer, or Employee	\$77.17 (roundtrip)	\$118	\$94
For each Accompanying Family Member	N/A	N/A	N/A

	Other Expenses (dollar amount per item)	Identify Specific Nature of "Other" Expenses (e.g., taxi, parking, registration fee, etc.)
For each Member, Officer, or Employee	\$81.83	Room space and AV costs
For each Accompanying Family Member	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 only one:

a. I certify that I am an officer of the organization listed below: ☒ OR

b. *Not Applicable.* Trip 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: MaryEllen McGuire Date: 4/1/19

Name: MaryEllen McGuire

Title: President

Organization: Postsecondary National Policy Institute (PNPI)

Address: 718 7th Street NW, Floor 2, Washington, DC 20001

Telephone: 202-407-3172

Email: mcguire@pnpi.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, D.C. 20515

Phone: 202-225-7103 General Fax: 202-225-7392



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): 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: Postsecondary National Policy Institute (PNPI)

3. I certify that my organization (check and 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.

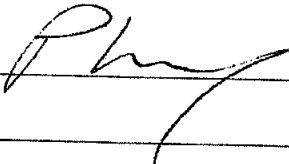
4. Check only one:

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:  Date: 3/22/19

Name: Patrick Murray Title: Senior Program Officer

Organization: Bill & Melinda Gates Foundation

Address: 500 N Fifth Ave, Seattle, WA 98109

Telephone: (206) 709-3100 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, D.C. 20515

Phone: 202-225-7103 General Fax: 202-225-7392



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): Lumina Foundation
has been designated a § 501(c)(3) nonprofit charitable organization by the Internal Revenue Service. ☒ Yes ☐ No

2. Name of Primary Trip Sponsor: Postsecondary National Policy Institute (PNPI)

3. I certify that my organization (check and 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.

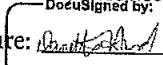
4. Check only one:

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:  Date: 3/28/2019 | 2:06 PM EDT

Name: Danette Howard Title: Chief Strategy Officer

Organization: Lumina Foundation

Address: 30 S. Meridian St. Suites 700-800 Indianapolis, IN 46206-1806

Telephone: 800-834-5456 Email: dhoward@luminafoundation.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, D.C. 20515

Phone: 202-225-7103 General Fax: 202-225-7392



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 Kresge Foundation
has been designated a § 501(c)(3) nonprofit charitable organization by the Internal Revenue Service. ☒ Yes ☐ No

2. Name of Primary Trip Sponsor: Postsecondary National Policy Institute (PNPI)

3. I certify that my organization (check and 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 only 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: CB Smith Date: 3/25/19

Name: Caroline Altman Smith Title: Deputy Director

Organization: The Kresge Foundation

Address: 3215 W. Big Beaver Rd., Troy, MI 48084

Telephone: 248-502-0534 Email: cbasmith@kresge.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, D.C. 20515

Phone: 202-225-7103 General Fax: 202-225-7392

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

May 23, 2019

Mr. Christofer Horta
Office of the Honorable Donna E. Shalala
1320 Longworth House Office Building
Washington, DC 20515

Dear Mr. Horta:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to Stevensville, Maryland, scheduled for May 29 to 30, 2019, sponsored by the Postsecondary National Policy Institute, with financial support from the Bill & Melinda Gates Foundation, the Lumina Foundation, and The Kresge 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:kej



April 4, 2019

Dear Ariel,

We are writing to invite you to participate in the Postsecondary National Policy Institute's (PNPI) *Federal Student Aid (FSA) Boot Camp*, May 29-30, 2019, in Stevensville, MD at Kent Manor Inn. This seminar is designed to introduce staff to and extend staff knowledge of how federal student aid programs work, whom they serve, and the impact they have on access and completion. The seminar will also deepen participants' understanding of student loan borrowing patterns, student loan debt, the federal student aid repayment programs, and student loan servicing.

Included with this invitation are the forms necessary for ethics rules compliance. **By Monday, April 29, 2019, you must submit these included forms and documents directly to the Ethics Committee in Longworth 1015. They are:**

- A Primary Trip Sponsor Form with all attachments, including a list of all House staff invitees and an hour-by-hour itinerary and agenda;
- A Grantmaking Trip Sponsor Form; and
- A signed and completed Traveler Form.

After receiving the completed travel package, the Ethics Committee will review the package and issue an approval for travel to you or your sponsoring Member. The Ethics Committee advises **all House employees to maintain copies of all forms submitted for pre-approval since you will need to resubmit those as part of your post-travel disclosure requirement.** After the seminar, we will provide you with all of the post-travel forms that you will need to complete and submit.

Even if you are unsure whether you will be able to attend the seminar, please submit the paperwork so you will have the option to participate. **Paperwork submitted to the Ethics Committee after the deadline will not be considered.**

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 foundations supporting PNPI are the Bill and Melinda Gates Foundation, the Lumina Foundation, and the Kresge Foundation. PNPI is the sole sponsor, planner and executor of the trip. PNPI maintains autonomy over the agenda, invitations and materials provided before and after the seminar.

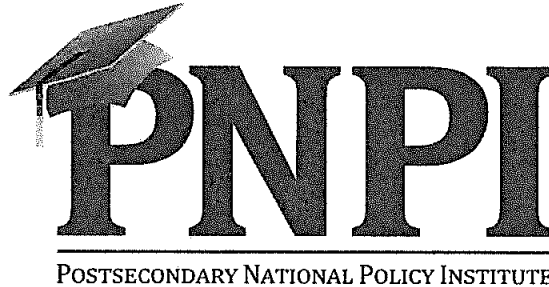
We will depart for Kent Manor Inn at 8:30 am on Wednesday, May 29 from Peace Circle (located by the reflecting pool on the northwest side of the U.S. Capitol), Pennsylvania Avenue and First Street NW, Washington, D.C. The program will begin at 10:00 am and will conclude on Thursday, May 30 at 2:00 pm. If you have any questions about the seminar, please do not hesitate to email or call us directly.

PNPI's *Federal Student Aid Boot Camp* promises to be both educational and productive. We look forward to your participation!

Sincerely,

A handwritten signature in black ink, appearing to read "MaryEllen McGuire". The signature is fluid and cursive, with the first name "MaryEllen" and last name "McGuire" clearly distinguishable.

MaryEllen McGuire, President
Postsecondary National Policy Institute (PNPI)
mcguire@pnpi.org
202-407-3172



Federal Student Aid Boot Camp

Wednesday, May 29 – Thursday, May 30, 2019

Kent Manor Inn
Stevensville, MD

SPEAKER BIOS

Colleen Campbell

Center for American Progress (CAP)

Colleen Campbell is a director for Postsecondary Education at American Progress. She was formerly a senior policy analyst at the Association of Community College Trustees and a research analyst at the Institute for Higher Education Policy. Prior to working in higher education policy, Colleen served as the assistant director of financial aid at the Juilliard School. Her work focuses on providing accessible, affordable postsecondary options for underrepresented communities and adult learners. Colleen holds a master's degree in public policy and Master of Arts in higher education from the University of Michigan.

Matthew Chingos

Urban Institute

Matthew M. Chingos directs the Center on Education Data and Policy at the Urban Institute. He leads a team of scholars who undertake policy-relevant research on issues from prekindergarten through postsecondary education and create tools such as Urban's Education Data Portal. Matt is an executive editor of *Education Next* and coauthor of *Game of Loans: The Rhetoric and Reality of Student Debt* and *Crossing the Finish Line: Completing College at America's Public Universities*. He has testified before Congress, and his work has been featured in media outlets such as the *New York Times*, the *Washington Post*, and NPR.

Before joining Urban, Matt was a senior fellow at the Brookings Institution. He received a BA in government and economics and a PhD in government from Harvard University.

Rajeev Darolia

University of Kentucky

Rajeev Darolia, PhD is an Associate Professor of Public Policy at the University of Kentucky. He is also a Visiting Scholar at the Federal Reserve Bank of Philadelphia. Prior to joining the faculty at UK, Rajeev was an Assistant Professor of Public Policy and of Education at the University of Missouri.

and served as the Director of Research for the Institute of Public Policy. He serves on the editorial boards of the Journal of Higher Education and Educational Researcher.

Rajeev's research interests include questions about how public policy affects economic mobility and financial security. Much of his research is on topics in education policy, but he also has active research agendas in consumer finance and corrections/reentry. He publishes research across public policy, economics, and education journals, including in the Journal of Policy Analysis and Management, Journal of Public Economics, and Journal of Higher Education. His work has been funded by the National Science Foundation, the US Department of Labor, and the Association for Institutional Research. In his professional life before academia, he worked as an economist and financial analyst in Washington, DC and Silicon Valley.

Rajeev received a PhD in Public Policy and Public Administration from George Washington University where he was recognized with the Outstanding Dissertation Award from the Association for Education Finance and Policy. He also holds a master's degree in economics and a bachelor's degree in finance.

Rachelle Feldman **University of North Carolina**

Rachelle Feldman is currently the Associate Provost and Director of Scholarships and student aid at the University of North Carolina at Chapel Hill. A native of Washington, DC, she spent most of her adult life in Berkeley, California where she spent many years in the Financial Aid and Scholarships Office at her alma mater, the University of California, Berkeley, eventually earning the role of director. While at Berkeley, she developed several programs including the Middle Class Access Plan, and implemented BEAR\$ for Student Success – a peer-led financial wellness initiative for undergraduate and graduate students. Rachelle co-founded and co-led the University of California's system wide Financial Aid Leadership Institute and served on state aid advisory committees.

She currently holds several national leadership positions including chair of the Coalition of University State Aid Administrators, Treasurer of the Higher Education Loan Coalition and trustee of the National Endowment for Financial Education. Rachelle regularly advocates for students at the national level and is passionate about access to higher education and giving all students the full experience and preparation, they need to live successful, fulfilling lives after graduation.

Adrian Haugabrook **Southern New Hampshire University**

Dr. Haugabrook currently serves as Senior Vice President at Southern New Hampshire University. In his role he supports the University President and Chief Executive Officer, Dr. Paul LeBlanc, in providing strategic leadership and direction for the largest non-profit university in the U.S. with over 135,000 students in the U.S. and across the world. In his role, Dr. Haugabrook oversees SNHU's leadership strategy and execution ensuring that all of the University's units and leaders are aligned with the overall strategy, priorities and resources.

SNHU recently acquired an educational technology company based in Chicago (IL), LRNG, and Dr. Haugabrook was named as their Chief Operating Officer. He spends time between Manchester and Chicago ensuring strategic alignment and direction as the organizations merge. Prior to SNHU, he was Vice President for Student Success and Engagement at Wheelock College (Boston, MA) serving as the Chief Enrollment and Student Affairs Officer. He was also

the College's first Chief Diversity Officer.

Prior to joining Wheelock College, Dr. Haugabrook served as Vice President for Local College Access Programs at The Education Resources Institute (TERI) where he led efforts to increase the scale and scope of the organization's college access programs and services in the Greater Boston area. Before TERI, he served at Boston-based, Citizen Schools as Executive Director of Public Policy and Alliances where he led the national program launch founding new program sites in seven states, managed strategic partnerships, and built a state and national public policy platform. He has also served as Assistant Dean of Students at the University of Massachusetts Boston and Assistant Dean of Student Services and Multicultural Affairs at Framingham State University and held posts at the University of West Georgia and Georgia Southwestern State University.

Dr. Haugabrook is married to his college sweetheart, Angela Salone Haugabrook, and they have two college-aged children attending Spelman College and Morehouse College respectively in Atlanta, GA. A former scholarship collegiate athlete (football), he holds the Doctorate of Education (Ed.D.) from the University of Massachusetts Boston; a M.S. from Georgia Southwestern State University; and B.S. from the University of West Georgia.

Julie Peller

Higher Learning Advocates

Julie brings a deep background in federal postsecondary education policy, federal budgeting, and professional management to the organization. She is recognized as a leader on postsecondary education issues including, student attainment, federal policy, and student financial aid. Julie served as a senior policy advisor and the deputy staff director for the Committee on Education and the Workforce in the U.S. House of Representatives, where she led significant legislative efforts to reform the Higher Education Act, federal student aid programs, and other higher education policies. Prior to joining Higher Learning Advocates, Julie served as the director of federal policy at Lumina Foundation.

Rich Williams

Pew Charitable Trusts

Rich Williams is an Officer for Pew's Project on Student Borrower Success where he specializes in evidence-based research, policy development, and advocacy. The initiative promotes successful repayment of student loans, especially among borrowers at greatest risk for delinquency and default. Before joining Pew, he worked on issues related to college affordability and student loan financing and repayment for the Office for Students and Young Consumers at the Consumer Financial Protection Bureau and as the Senior Higher Education Policy Advisor for the House Committee on Education and the Workforce under Congressman George Miller and Bobby Scott.

Before working in government, Rich represented student interests in front of policymakers in D.C. as the lead advocate for the U.S. Public Interest Research Group student chapters. His work has been featured in major televised and print media, including the New York Times, Wall Street Journal, NBC Nightly News, and Good Morning America. Rich is a first-generation college student who attended Coconino Community College and Northern Arizona University in Flagstaff, AZ.

Guidelines for PNPI Participation

Honor confidentiality. Remember that all of PNPI's events are closed-door and off the record.

Listen, consider, reflect, respond. Allow others the opportunity to speak.

Be open-minded. Value multiple perspectives from each other and from our speakers.

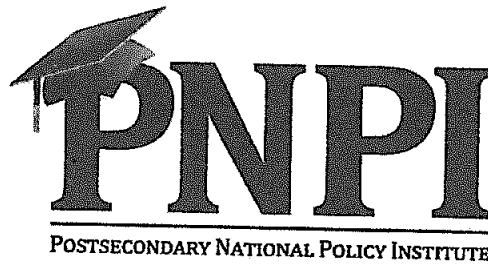
Assume positive intent and good will. We are all here to learn!

Be willing to agree to disagree. Engage in dialogue and discussion with others in a respectful and thoughtful manner.

Please be respectful of speakers and presenters by refraining from using your personal devices and by keeping conversations to a minimum. PNPI understands the need to handle work matters while at our events; if such a need arises, please feel free to exit the conference or meeting room to resolve any issues or address any concerns. We understand your work doesn't disappear just because you left DC!

Remember that you are here as a representative of your office.

Roll out where



Federal Student Aid New Staff Boot Camp Agenda

Stevensville, Maryland
May 29-30, 2019

Seminar Goals:

- Increase participants' understanding of how federal student aid programs work, whom they serve and the impact they have on access and completion;
- Provide participants with an understanding of how the Free Application for Federal Student Aid (FAFSA) works and the impact of simplification;
- Deepen participants' understanding of student loan borrowing patterns and student loan debt;
- Increase participants' understanding of federal student aid repayment programs; and,
- Deepen participants' understanding of the role loan servicers play in the federal Direct Loan system and their work as it relates to regular in school, repayment and pre-default servicing.

Wednesday, May 29

8:15 am

Staff arrive to board shuttle

Peace Circle (located by the reflecting pool on the northwest side of the U.S. Capitol)
Pennsylvania Ave. and First Street NW, Washington, D.C.

8:30 am

Depart Peace Circle

9:45 am

Arrive at Kent Manor Inn

500 Kent Manor Drive
Stevensville, MD 21666

9:45-10:00 am

Check-In and Registration

10:00 - 10:10 am

Welcome and Introductions

Speaker:

MaryEllen McGuire, PNPI

10:10 - 11:30 am

The Federal Pell Grant Program

Speaker:

Raj Darolia, University of Kentucky

Questions for Discussion:

- What is the Pell grant and how is it structured?
- What are the current characteristics of Pell Grant recipients (income, race, gender, IHEs)?
- How are Pell grants calculated?
- How much do students receive? How much does the program cost?
- Are Pell students completing their course of study?
- What changes have been made to the program over recent years? What impact have recent changes had on recipients?

11:30 - 11:45 am

Break

11:45am - 1:00 pm

Federal Student Loans & Campus Based Aid

Speaker:

Rachelle Feldman, University of North Carolina

Questions for Discussion:

- What are the different federal loan programs and how do they work?
- What are the eligibility requirements for the federal loan programs?
- What types of students take out student loans (demographic, financial and attendance profile)?
- What is campus-based aid? How is campus-based aid paid for?
- Who is eligible for campus-based aid (institutions/students) and how is it allocated?
- What do we know about the impact of federal student aid on student access, completion and retention?
- To what extent do impacts differ based on a student's demographic, financial and attendance profile (FT/PT)?

1:00 - 2:00 pm

Lunch - Ask an FSA Expert!

2:00 - 3:45 pm

Applying for Financial Aid

Speaker:

Adrian Haugabrook, Southern New Hampshire University

Questions for Discussion:

- What is the FAFSA? Why is it important? How does it work? Who can apply?
- What is the EFC?
- How has the FAFSA been simplified over the last few years?

3:45 - 4:00 pm

Break

4:00 pm - 5:15 pm

A Primer: Debt and Default

Speaker:

Matthew Chingos, Urban Institute

Questions for Discussion:

- How much are students and families borrowing to attend college? How has this changed over time?
- Who is borrowing and what institutions are they attending?
- What do we know about private student loan borrowing and credit card debt?
- How does an individual's socioeconomic status, college major, type of institution, amount borrowed, and post-graduation income impact their likelihood of repayment or default?
- What do we know about student loan delinquency? What types of borrowers are delinquent on their student loans?
- What do we know about student loan default? What types of borrowers are defaulting on their student loans? What are their loan balances when they default?
- Why has student debt increased over the last two decades?

5:15-5:30 pm

Wrap-Up & Close

Questions for Participant Discussion:

- What were your big takeaways from today?
- What have you learned about federal student aid that surprised you?
- What further questions do you have regarding federal student aid?

5:30-6:00 pm

Break

6:00-7:30 pm

Dinner & Day Two Preview

Over dinner, PNPI staff will provide a preview of the panels for the second day of programming, with an emphasis on exploring what staff know, don't know, and would like to know about federal repayment programs and loan servicing.

Questions for Participant Discussion:

- Going into tomorrow's programming, what more would you like to learn?
- What are some specific questions that you have about federal repayment programs and federal student loan servicing?

Thursday, May 30

8:00-9:00 am

Breakfast

9:00- 10:30am

Welcome Back & Federal Repayment Programs

Speakers:

MaryEllen McGuire, PNPI

Rich Williams, Pew Charitable Trusts

Questions for Discussion:

- What is the frequency with which the various plans are used (percentage and number of borrowers)? How has this changed over time?
- What does data on repayment rates tell us? What are some of the data issues associated with them?
- How does IBR work?
- Who qualifies?
- Are some students better advantaged by the program than others?
- How does loan forgiveness within IBR work?

10:30-10:45 am

Break

10:45 am - 12:00 pm

Loan Servicing 101

Speaker:

Colleen Campbell, Center for American Progress

Questions for Discussion:

- What is federal student loan servicing? What is the frequency with which the various plans are used (percentage and number of borrowers)?
- Who are the current federal student loan servicers under the Direct Loan (DL) program and how were they selected? What is the scope of their work?
- What are the current roles/responsibilities of the DL servicers (i.e., regular in school and repayment servicing, pre-default servicing)?
- How does the U.S. Department of Education (ED) assign DLs to servicers?
- What performance metrics does ED use to evaluate the DL servicers? What is "performance-based compensation"?
- What are the interactions between DL servicers and financial aid departments at institutions of higher education?

12:00 - 1:00 pm

Lunch: Ask an FSA Expert!

1:00 - 2:00 pm

Close & Evaluation

Questions for Participant Discussion:

- What is your biggest takeaway from the last two days?
- What were you most surprised to learn?
- How might you apply what you learned to your current work?
- Is there a part of the process you'd like to learn more about?

2:00 pm

Depart from Kent Manor Inn

3:15 pm

Arrive at Peace Circle, Washington, D.C.

The Bill & Melinda Gates Foundation is interested in expanding opportunities for all students to be able to complete a high-quality, affordable postsecondary education that leads to a sustaining career. Toward that end, it is important to help policymakers better understand federal student aid programs and the roles of the Free Application for Federal Student Aid (FAFSA), student loan servicing, and repayment programs.

The Kresge Foundation is committed to increasing opportunities for low-income and students of color to enter and succeed in undergraduate education. The Foundation supports a range of efforts designed to help students and families understand the type of federal aid that is available to them, including receiving assistance filling out the FAFSA. A more nuanced understanding of the complexities that families face when navigating the FAFSA and the student loan system will hopefully lead to simplifying the FAFSA and the consideration of student-centric improvements to the student loan servicing system.

PNPI created the agenda, developed the invitation list and is managing all event logistics. None of PNPI's funders, the Bill and Melinda Gates Foundation, the Lumina Foundation or the Kresge Foundation, have played a role in organizing the referenced Congressional trip, or in the selection or invitation of travel participants. Decisions regarding travel participants have been controlled by and were at all times under the sole discretion of, PNPI.

ATTACHMENT:
House Private Sponsor Travel Certification Form

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):

Bridget Handy
Legislative Assistant
Representative Foxx

Ariel Jona
Staff Assistant
Representative Scott

Noelle Verhelst
Legislative Assistant
Representative Smucker

Nabeel Alam
Legislative Aide
Representative Susie Lee

Mark Rusthoven
Legislative Assistant
Representative Banks

Cristofer Horta
Legislative Assistant
Representative Shalala

Elle Ciapciak
Legislative Assistant
Representative Meuser

Katilyn Monhan
Legislative Assistant
Representative Castro

All staff were invited due to their employment with the House Committee on Education and Labor or with a Member who sits on the Committee.

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:

This seminar is designed to introduce staff to and extend staff knowledge of how federal student aid programs work, whom they serve, and the impact they have on access and completion. The seminar will also deepen participants' understanding of student loan borrowing patterns, student loan debt, the federal student aid repayment programs, and student loan servicing.

Lumina Foundation is interested in increasing postsecondary education attainment, including through the support of activities that ensure students, policymakers and other stakeholders deepen their understanding of the opportunities and barriers presented by federal student aid programs.



POSTSECONDARY NATIONAL POLICY INSTITUTE

**Federal Student Aid Boot Camp
Participant List
May 29-30, 2019
Stevensville, MD**

CONGRESSIONAL STAFF

Nabeel Alam

Legislative Assistant

Representative Lee (D-NV)

nabeel.alam@mail.house.gov

Christofer Horta

Legislative Assistant

Representative Shalala (D-FL)

christofer.horta@mail.house.gov

Ariel Jona

Staff Assistant

House and Labor Committee

ariel.jona@mail.house.gov

Kaitlyn Montan

Legislative Assistant

Representative Castro (D-TX)

kaitlyn.montan@mail.house.gov

Noelle Verhelst

Legislative Assistant

Representative Smucker (R-PA)

noelle.verhelst@mail.house.gov

SPEAKERS

Colleen Campbell

Director for Postsecondary Education

Center for American Progress

ccampbell@americanprogress.org

Matthew Chingos

Vice President, Education Data and Policy

Urban Institute

mchingos@urban.org

Rajeev Darolia

Associate Professor of Public Policy

University of Kentucky

rajeev.darolia@uky.edu

Rachelle Feldman

**Associate Provost and Director of
Scholarships and Student Aid**

University of North Carolina

rachelle.feldman@unc.edu

Adrian Haugabrook

Senior Vice President

Southern New Hampshire University

a.haugabrook@snhu.edu

Julie Peller

Executive Director

Higher Learning Advocates

jpeller@higherlearningadvocates.org

Rich Williams

Officer, Student Borrower Success

Pew Charitable Trusts

rwilliams2@pewtrusts.org

PNPI STAFF & FOUNDATION STAFF

Austin Birchell

Summer Scholar

Postsecondary National Policy Institute

birchell@pnpi.org

Selena Cardona

Summer Scholar

Postsecondary National Policy Institute

cardona@pnpi.org

MaryEllen McGuire

President

Postsecondary National Policy Institute

mcguire@pnpi.org

MacGregor Obergfell

Research and Program Associate

Postsecondary National Policy Institute

obergfell@pnpi.org

Patrick Murray

Senior Program Officer

Bill and Melinda Gates Foundation

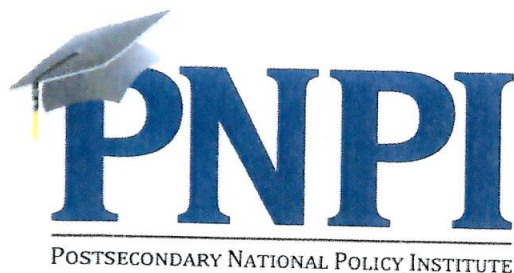
patrick.murray@gatesfoundation.org

Betsy Prueter

**Chief of Staff and Director of Prospective
Policymaker Education**

Postsecondary National Policy Institute

prueter@pnpi.org



Federal Student Aid New Staff Boot Camp Agenda

Stevensville, Maryland

May 29-30, 2019

Seminar Goals:

- Increase participants' understanding of how federal student aid programs work, whom they serve and the impact they have on access and completion;
- Provide participants with an understanding of how the Free Application for Federal Student Aid (FAFSA) works and the impact of simplification;
- Deepen participants' understanding of student loan borrowing patterns and student loan debt;
- Increase participants' understanding of federal student aid repayment programs; and,
- Deepen participants' understanding of the role loan servicers play in the federal Direct Loan system and their work as it relates to regular in school, repayment and pre-default servicing.

Wednesday, May 29

8:15 am

Staff arrive to board shuttle

Peace Circle (located by the reflecting pool on the northwest side of the U.S. Capitol)
Pennsylvania Ave. and First Street NW, Washington, D.C.

8:30 am

Depart Peace Circle

9:45 am

Arrive at Kent Manor Inn

500 Kent Manor Drive
Stevensville, MD 21666

9:45-10:00 am

Check-In and Registration

10:00 - 10:10 am

Welcome and Introductions

Speaker:

MaryEllen McGuire, PNPI

10:10 - 11:30 am

The Federal Pell Grant Program

Speaker:

Rajeev Darolia, University of Kentucky

Questions for Discussion:

- What is the Pell grant and how is it structured?
- What are the current characteristics of Pell Grant recipients (income, race, gender, IHEs)?
- How are Pell grants calculated?
- How much do students receive? How much does the program cost?
- Are Pell students completing their course of study?
- What changes have been made to the program over recent years? What impact have recent changes had on recipients?

11:30 - 11:45 am

Break

11:45am - 1:00 pm

Federal Student Loans & Campus Based Aid

Speaker:

Rachelle Feldman, University of North Carolina

Questions for Discussion:

- What are the different federal loan programs and how do they work?
- What are the eligibility requirements for the federal loan programs?
- What types of students take out student loans (demographic, financial and attendance profile)?
- What is campus-based aid? How is campus-based aid paid for?
- Who is eligible for campus-based aid (institutions/students) and how is it allocated?
- What do we know about the impact of federal student aid on student access, completion and retention?
- To what extent do impacts differ based on a student's demographic, financial and attendance profile (FT/PT)?

1:00 - 2:00 pm

Lunch - Ask an FSA Expert!

2:00 - 3:45 pm

Applying for Financial Aid

Speaker:

Adrian Haugabrook, Southern New Hampshire University

Questions for Discussion:

- What is the FAFSA? Why is it important? How does it work? Who can apply?
- What is the EFC?
- How has the FAFSA been simplified over the last few years?

3:45 - 4:00 pm

Break

4:00 pm - 5:15 pm

A Primer: Debt and Default

Speaker:

Matthew Chingos, Urban Institute

Questions for Discussion:

- How much are students and families borrowing to attend college? How has this changed over time?
- Who is borrowing and what institutions are they attending?
- What do we know about private student loan borrowing and credit card debt?
- How does an individual's socioeconomic status, college major, type of institution, amount borrowed, and post-graduation income impact their likelihood of repayment or default?
- What do we know about student loan delinquency? What types of borrowers are delinquent on their student loans?
- What do we know about student loan default? What types of borrowers are defaulting on their student loans? What are their loan balances when they default?
- Why has student debt increased over the last two decades?

5:15-5:30 pm

Wrap-Up & Close

Questions for Participant Discussion:

- What were your big takeaways from today?
- What have you learned about federal student aid that surprised you?
- What further questions do you have regarding federal student aid?

5:30-6:00 pm

Break

6:00-7:30 pm

Dinner & Day Two Preview

Over dinner, PNPI staff will provide a preview of the panels for the second day of programming, with an emphasis on exploring what staff know, don't know, and would like to know about federal repayment programs and loan servicing.

Questions for Participant Discussion:

- Going into tomorrow's programming, what more would you like to learn?
- What are some specific questions that you have about federal repayment programs and federal student loan servicing?

Thursday, May 30

8:00-9:00 am

Breakfast

9:00- 10:30am

Welcome Back & Federal Repayment Programs

Speakers:

MaryEllen McGuire, PNPI

Rich Williams, Pew Charitable Trusts

Questions for Discussion:

- What is the frequency with which the various plans are used (percentage and number of borrowers)? How has this changed over time?
- What does data on repayment rates tell us? What are some of the data issues associated with them?
- How does IBR work?
- Who qualifies?
- Are some students better advantaged by the program than others?
- How does loan forgiveness within IBR work?

10:30-10:45 am

Break

10:45 am - 12:00 pm

Loan Servicing 101

Speaker:

Colleen Campbell, Center for American Progress

Questions for Discussion:

- What is federal student loan servicing? What is the frequency with which the various plans are used (percentage and number of borrowers)?
- Who are the current federal student loan servicers under the Direct Loan (DL) program and how were they selected? What is the scope of their work?
- What are the current roles/responsibilities of the DL servicers (i.e., regular in school and repayment servicing, pre-default servicing)?
- How does the U.S. Department of Education (ED) assign DLs to servicers?
- What performance metrics does ED use to evaluate the DL servicers? What is "performance-based compensation"?
- What are the interactions between DL servicers and financial aid departments at institutions of higher education?

12:00 - 1:00 pm

Lunch: Ask an FSA Expert!

1:00 - 2:00 pm

Close & Evaluation

Questions for Participant Discussion:

- What is your biggest takeaway from the last two days?
- What were you most surprised to learn?
- How might you apply what you learned to your current work?
- Is there a part of the process you'd like to learn more about?

2:00 pm

Depart from Kent Manor Inn

3:15 pm

Arrive at Peace Circle, Washington, D.C.