



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, by email at [gifttravelreports@mail.house.gov](mailto:gifttravelreports@mail.house.gov), 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: Melissa Bellin
2. a. Name of Accompanying Relative: \_\_\_\_\_ **OR** None   
 b. Relationship to Traveler:  Spouse  Child  Other (specify): \_\_\_\_\_
3. a. Dates: Departure: October 11, 2022 Return: October 13, 2022  
 b. Dates at Personal Expense, if any: \_\_\_\_\_ **OR** None
4. Departure City: Washington, DC Destination: Stevensville, MD Return City: Washington, DC
5. Sponsor(s), Who Paid for the Trip: The Aspen Institute, Inc (Education & Society Program)
6. Describe Meetings and Events Attended:  
 The meetings included Hill staff and leaders in education (principals, district level staff, and state leaders) as we discussed issues related to implementation of the Every Student Succeeds Act, use of American Rescue Plan funds, and administration of assessments. Events attended included a fireside chat, sessions, and working meals.
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 *Additional Sponsor Form(s)*;
  - 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: \_\_\_\_\_

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

Signature of Traveler: Melissa Bellin Digitally signed by Melissa Bellin Date: 2022.10.28 14:40:46 -04'00' Date: 10/28/2022

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: 10/29/22

Signature of Supervising Member: 



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TRAVELER FORM

1. Name of Traveler: Melissa Bellin

2. Sponsor(s) who will be paying or providing in-kind support for the trip:  
Bill & Melinda Gates Foundation , The Aspen Institute

3. City and State OR Foreign Country of Travel : Stevensville, MD

4. a. Date of Departure: October 11, 2022 Date of Return: October 13, 2022

b. Yes  No  Will you be extending the trip at your personal expense?  
If yes, list dates at personal expense: \_\_\_\_\_

5. a. Yes  No  Will you be accompanied by a family member at the sponsor's expense? **If yes:**

(1) Name of Accompanying Family Member: \_\_\_\_\_

(2) Relationship to Traveler:  Spouse  Child  Other (specify): \_\_\_\_\_

(3) Yes  No  Accompanying Family Member is at least 18 years of age:

6. a. Yes  No  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)?

b. **If yes**, and you are requesting lodging for two nights, explain why the second night is warranted:

7. Yes  No  *Primary Trip Sponsor Form* is attached, including agenda, invitee list, and any other attachments and Additional Sponsor Forms.

*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 purpose of the trip is to explore how state and local educational agencies are implementing the Every Student Succeeds Act (ESSA) with a focus on restarting federal accountability and school improvement efforts. As a Professional Staff Member for the Committee, this directly pertains to my work, as my portfolio includes Title I of ESSA (ie. accountability and school improvement efforts).

9. **Yes  No  Is the traveler aware of any registered federal lobbyists or foreign agents involved planning, organizing, requesting, or arranging the trip?**

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 9/6/2022





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](http://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:
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:
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):
5. Yes  No  Is travel being offered to an accompanying family member of the House invitee(s)?
6. Date of departure: \_\_\_\_\_ Date of return: \_\_\_\_\_
7. a. City of departure: \_\_\_\_\_  
b. Destination(s): \_\_\_\_\_  
c. City of return: \_\_\_\_\_
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; **OR**
  - b.  I checked 8(c) above but am not offering any lodging; **OR**
  - 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:



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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:
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:
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 the 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):
- 2) Provide the reason for selecting the location of the event or trip: Meeting Space creates atmosphere to support
16. Name, nightly cost, and reasons for selecting each hotel or other lodging facility:
- Hotel Name: \_\_\_\_\_ City: \_\_\_\_\_ Cost Per Night: \_\_\_\_\_  
Reason(s) for Selecting: \_\_\_\_\_
- 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 the box.*



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# COMMITTEE ON ETHICS

### 18. Total Expenses for each Participant:

<input type="checkbox"/> Actual Amounts	Total Transportation Expenses per Participant	Total Lodging Expenses per Participant	Total Meal Expenses per Participant
<input type="checkbox"/> Good Faith Estimates			
For each Member, Officer, or Employee			
For each Accompanying Family Member			

	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		
For each Accompanying Family Member		


**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 by my signature that

- a. I read and understand the Committee's Travel Regulations;
- b. I am not a registered federal lobbyist or registered foreign agent; and
- c. The information on this form is true, complete, and correct to the best of my knowledge.

Signature:  Date: \_\_\_\_\_

Name: \_\_\_\_\_ Title: Executive Vice President, Policy & Public Programs

Organization: \_\_\_\_\_

Address: \_\_\_\_\_

Email: lisa.jones@aspeninstitute.org Telephone: 202-736-5859 (Lisa Jones, Deputy General Counsel)

## INSTRUCTIONS

Complete the *Primary Trip Sponsor Form* and submit the agenda, invitation list, any attachments, and any *Additional Trip Sponsor Forms* directly to the Travelers.

Written approval from the Committee on Ethics is required before traveling on this trip. The Committee on Ethics will notify the House invitees directly and will not notify the trip sponsors.

**Willful or knowing misrepresentation on this form may be subject to criminal prosecution under 18 U.S.C. § 1001. Signatures must comply with section 104(bb) of the Travel Regulations.**

**For questions, please contact the Committee on Ethics at:**

1015 Longworth House Office Building  
Washington, D.C. 20515

[ethicscommittee@mail.house.gov](mailto:ethicscommittee@mail.house.gov) | 202-225-7103  
More information and forms available at [ethics.house.gov](http://ethics.house.gov)



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# COMMITTEE ON ETHICS

## PRIMARY TRIP SPONSOR FORM

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1. Sponsor who will be paying for the trip:
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:
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):
5. Yes  No  Is travel being offered to an accompanying family member of the House invitee(s)?
6. Date of departure: \_\_\_\_\_ Date of return: \_\_\_\_\_
7. a. City of departure: \_\_\_\_\_  
b. Destination(s): \_\_\_\_\_  
c. City of return: \_\_\_\_\_
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; **OR**
  - b.  I checked 8(c) above but am not offering any lodging; **OR**
  - 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:



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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:
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:
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 the 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):
- 2) Provide the reason for selecting the location of the event or trip: Meeting Space creates atmosphere to support
16. Name, nightly cost, and reasons for selecting each hotel or other lodging facility:
- Hotel Name: \_\_\_\_\_ City: \_\_\_\_\_ Cost Per Night: \_\_\_\_\_  
Reason(s) for Selecting: \_\_\_\_\_
- 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 the box.*





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# COMMITTEE ON ETHICS

### 18. Total Expenses for each Participant:

<input type="checkbox"/> Actual Amounts	Total Transportation Expenses per Participant	Total Lodging Expenses per Participant	Total Meal Expenses per Participant
<input type="checkbox"/> Good Faith Estimates			
For each Member, Officer, or Employee			
For each Accompanying Family Member			

	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		
For each Accompanying Family Member		


**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 by my signature that

- a. I read and understand the Committee's Travel Regulations;
- b. I am not a registered federal lobbyist or registered foreign agent; and
- c. The information on this form is true, complete, and correct to the best of my knowledge.

Signature:  Date: \_\_\_\_\_

Name: \_\_\_\_\_ Title: Executive Vice President, Policy & Public Programs

Organization: \_\_\_\_\_

Address: \_\_\_\_\_

Email: lisa.jones@aspeninstitute.org Telephone: 202-736-5859 (Lisa Jones, Deputy General Counsel)

## INSTRUCTIONS

Complete the *Primary Trip Sponsor Form* and submit the agenda, invitation list, any attachments, and any *Additional Trip Sponsor Forms* directly to the Travelers.

Written approval from the Committee on Ethics is required before traveling on this trip. The Committee on Ethics will notify the House invitees directly and will not notify the trip sponsors.

**Willful or knowing misrepresentation on this form may be subject to criminal prosecution under 18 U.S.C. § 1001. Signatures must comply with section 104(bb) of the Travel Regulations.**

**For questions, please contact the Committee on Ethics at:**

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Washington, D.C. 20515

[ethicscommittee@mail.house.gov](mailto:ethicscommittee@mail.house.gov) | 202-225-7103  
More information and forms available at [ethics.house.gov](http://ethics.house.gov)



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# COMMITTEE ON ETHICS

## ADDITIONAL TRIP SPONSOR FORM

This form should be completed by an organization that provides funds, services, or in-kind assistance 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. Name of Primary Trip Sponsor: Bill & Melinda Gates Foundation
2. Name of your organization: The Aspen Institute Education and Society Program
3. Yes  No  Is your organization designated a § 501(c)(3) charitable organization by the Internal Revenue Service?
4. Yes  No  Does your organization receive funding from any foreign government or multinational organization?
5. **Check one.** I certify that my organization:
  - 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. **OR**
  - c.  Has provided in-kind support to the above-named Primary Trip Sponsor (e.g., meeting planning assistance, meeting space and set-up, and paying for expenses related to this trip directly to the service provider).
6. **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.
7. I certify by my signature that
  - a. I read and understand the Committee's Travel Regulations;
  - b. I am not a registered federal lobbyist or registered foreign agent;
  - c. I am an officer of this organization and am duly authorized to sign this form; and
  - d. The information on this form is true, complete, and correct to the best of my knowledge.

Signature: Kathryn Young Date: July 21, 2022

Name: Kathryn Young Title: Senior Program Officer

Organization: Bill & Melinda Gates Foundation

Address: 500 5th Ave N, Seattle, WA 98109

Email: kathryn.young@gatesfoundation.org Telephone: (202) 230-2174



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# COMMITTEE ON ETHICS

## INSTRUCTIONS

Complete the *Additional Trip Sponsor Form* and submit the forms directly to the Primary Trip Sponsor.

Written approval from the Committee on Ethics is required before traveling on this trip. The Committee on Ethics will notify the House invitees directly and will not notify the trip sponsors.

**Willful or knowing misrepresentation on this form may be subject to criminal prosecution under 18 U.S.C. § 1001. Signatures must comply with section 104(bb) of the Travel Regulations.**

**For questions, please contact the Committee on Ethics at:**

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# U.S. House of Representatives

COMMITTEE ON ETHICS

Washington, DC 20515

September 23, 2022

Ms. Melissa Bellin  
Committee on Education and Labor  
2176 Rayburn House Office Building  
Washington, DC 20515

Dear Ms. Bellin:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to Stevensville, Maryland, scheduled for October 11 to 13, 2022, sponsored by Aspen Institute, Inc. and the Bill & Melinda Gates Foundation.

You must complete an Employee Post-Travel Disclosure Form (which your employing Member must also sign) and file it, together with a Sponsor Post-Travel Disclosure Form completed by the trip sponsor, with the Clerk of the House within 15 days after your return from travel. As part of that filing, you are also required to attach a copy of this letter and both the Traveler and Primary Trip Sponsor Forms (including attachments) you previously submitted to the Committee in seeking pre-approval for this trip. If you are required to file an annual Financial Disclosure Statement, you must also report all travel expenses totaling more than \$415 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



Michael Guest  
Acting Ranking Member

TED/MG:smm



## Aspen Senior Congressional Education Staff Network Retreat *Restarting Accountability and School Improvement in the Endemic Era*

Kent Island Resort, MD  
October 11-13, 2022

### AGENDA

#### Retreat Goals:

- Explore how state and local education agencies (SEAs and LEAs) are implementing the Every Student Succeeds Act (ESSA) in the context of COVID, including how states and districts are re-starting accountability, federal school identification, and formal school-improvement processes;
- Understand how SEAs and LEAs are responding to the ongoing COVID pandemic, including how they have used, or plan to use, federal relief dollars and early lessons learned, particularly around addressing learning loss and student well-being;
- Examine the impact of COVID on assessment and accountability policy and practice at the height of the pandemic and thereafter, including considerations of what a “new normal” may be;
- 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, October 11

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**4:00 PM**                      **Arrival and Check-In**

**5:00 – 6:00 PM**            **Opening Reception and Overview of Retreat**

Aspen team to provide briefing welcoming remarks about resuming in-person retreats, high-level summary of the retreat, and hoped-for education and relational outcomes. Light refreshments will be served.

**6:00 – 7:00 PM**            **Setting the Context: Fireside Chat with Chief State School Officers**

Staff will have the opportunity to hear from – and engage with – one former chief state school officer. This state chief has deep insights into the intersection of federal policy and leading large-scale, system-level change efforts and will share lessons learned in their leadership inclusive of federal accountability and school improvement.

Speakers:

- Carey Wright, former Mississippi Superintendent of Education

**7:00 – 8:30 PM**            **Working Dinner**

A plated dinner will be served featuring discussion of the remarks during the fireside chat and the upcoming agenda for the convening.

## Wednesday, October 12

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**7:30 – 8:45 AM**      **Breakfast**

**8:45 – 9:00 AM**      **Agenda Review and Retreat Objectives**

To guide the retreat’s discussion, Congressional staff and faculty members will share their top learning objectives for the convening as well as to share any thoughts from the previous evening’s programming.

**9:00 – 10:00 AM**      **Session I: What Do We Know About the State of Education Systems and Student Outcomes**

What is the state of the education system at the state and local levels looking at on-the-ground indicators like attendance, student well-being, student outcomes, academic regression/acceleration, and more.

Guiding Questions:

- *What does the data tell us about the state of enrollment, student well-being, and academic regression/acceleration? What measures are proving the most information/greatest insight?*
- *How have states fared with assessments, including formative, interim and summative assessments?*
- *What data is there about other accountability indicators like absenteeism, chronic absenteeism, student discipline?*
- *What data do we have about the performance and well-being of students with disabilities and English learners?*
- *What other data (climate, OTL, teacher retention surveys) provides insights about the state of education?*

Faculty:

- Johnny Key, Secretary of Education, Arkansas (invited)
- Jhone Ebert, State Superintendent of Public Instruction, Nevada Department of Education (invited)
- Shirley Vargas, Senior Administrator, Office of Coordinated School and District Support, Nevada Department of Education
- Kristen Danusis, Director, Office of School & District Improvement, Rhode Island Department of Education (invited)
- Michael Hinojosa, former Superintendent, Dallas Independent School District, Texas
- Nate Meyer, Assistant Superintendent Accelerated Improvement Schools, Jefferson County Public Schools
- Tonya Strozier, Principal, Holladay Elementary School, Tucson, Arizona

**10:00 – 10:15 AM**      **Break and Individual Reflection**

**10:15 – 11:45 AM**      **Session II: Restarting Accountability: State and District Perspectives**

This session will focus on the challenges, opportunities, successes, and unanswered questions from the unprecedented “restart” of accountability in the short, medium, and long terms.

Guiding Questions:

- *In context of learning loss, mental health challenges, teacher shortages, as well as huge amounts of federal stimulus funding, how has re-starting federal accountability been managed – and communicated to stakeholders and the public?*
- *What accountability plan adjustments and amendments are being made to address short, medium, long-term needs and goals? How is the U.S. Department of Education engaging in the process?*
- *How are states measuring growth, as well as adjusting other accountability indicator weights (or the changing indicators entirely?)*
- *Will states need to reset their accountability timelines coming out of the pandemic?*
- *How are districts coping with restarting federal accountability in the context of state and district accountability systems?*
- *How are districts working with schools identified before the pandemic? How will they exit those schools?*
- *Are too many schools being identified for improvement under the federal system?*

Faculty:

- Johnny Key, Secretary of Education, Arkansas (invited)
- Shirley Vargas, Senior Administrator, Office of Coordinated School and District Support, Nevada Department of Education
- Kristen Danusis, Director, Office of School & District Improvement, Rhode Island Department of Education (invited)
- Michael Hinojosa, former Superintendent, Dallas Independent School District, Texas
- Nate Meyer, Assistant Superintendent Accelerated Improvement Schools, Jefferson County Public Schools

**11:45 – 1:00 PM**

**Working Lunch**

**1:00 – 2:15 PM**

**Session III: School Improvement Implementation**

In this session, staff will examine how districts and schools are employing specific strategies and tactics to meet immediate needs and address longer-term challenges and opportunities in school improvement.

Guiding Questions:

- *What is the first/most important need that must be addressed before any school improvement work can begin/or be successful?*
- *How is student mental health being supported and what impact does that have on school and student performance?*
- *How does each level (federal, state, and if it exists, district accountability) in the system work together – or not?*
- *Are districts more accountable/more supportive of school improvement work now than in the past? Why or why not?*
- *To what extent is the teacher shortage/teacher overwork impacting school improvement efforts?*
- *What is the impact of federal identification on improving or turning-around schools?*



Faculty:

- Michael Hinojosa, former Superintendent, Dallas Independent School District, Texas
- Nate Meyer, Assistant Superintendent Accelerated Improvement Schools, Jefferson County Public Schools
- Tonya Strozier, Principal, Holladay Elementary School, Tucson, Arizona

**2:15– 2:30 PM**                      **Break and Individual Reflection**

**2:30 – 3:00 PM**                      **Partner Walk:** Discuss learnings and implications from the opening three sessions to guide the discussion in the next session regarding building coherence across systems and the following sessions the next day.

**3:00 – 4:15 PM**                      **Session IV: Building Coherence Across Systems**

Faculty will discuss how the multitude of programs and funding at the federal, state, and local levels can be mis-aligned and how leaders are working to bring greater coherence among programs and funding to be more efficient and effective.

Guiding Questions:

- *How much overlap is there between learning loss/accelerated learning activities and school improvement?*
- *What systems or processes can be utilized to build greater alignment between various plans, reporting, and monitoring activities?*
- *If there are some learning loss/accelerated learning strategies that are working, can they be used in school improvement?*
- *Are there ways leaders can align ESSA accountability and IDEA? What about with ESSER, state and local programs and funding?*
- *What are the obstacles to greater coherence across systems, programs, and funding?*
- *How can coherence be established across multiple years?*

Faculty suggestions:

- Johnny Key, Secretary of Education, Arkansas (invited)
- Shirley Vargas, Senior Administrator, Office of Coordinated School and District Support, Nevada Department of Education (invited)
- Kristen Danusis, Director, Office of School & District Improvement, Rhode Island Department of Education (invited)

**4:15 – 4:30 PM**                      **Taking Stock: Staff Reflections and Feedback to Guide Remaining Discussions**

**5:30 PM**                                      **Networking Reception with Expert Faculty**

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

**6:30 – 8:30 PM**                      **Dinner with Discussion of Earlier Sessions**

## Thursday, October 13

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**7:30 – 8:45 AM**      **Breakfast**

**8:45 – 9:00 AM**      **Staff Reflections and Feedback to Guide Remaining Discussion**

**9:00 – 10:15 AM**      **Session V: Coordinating School Improvement, ESSER Funds, and Other Sources of Funds**

This session will focus on how SEAs and LEAs are coordinating the various sources of funding available for maximum effect, including the challenges in doing so.

Guiding Questions:

- *What do we know about how SEAs and LEAs are spending stimulus funds on learning loss and how does that align with using federal school improvement funds?*
- *Is there too much funding to effectively deploy in the timelines required?*
- *Do different federal funding streams align with themselves or with other state funding sources? How much can funding be blended or braided?*
- *How was federal school improvement funding used during the pandemic?*
- *How have stakeholders been consulted and engaged throughout the process?*
- *How can initiatives starting during the pandemic/endemic era be sustained?*

Faculty:

- Johnny Key, Secretary of Education, Arkansas (invited)
- Shirley Vargas, Senior Administrator, Office of Coordinated School and District Support, Nevada Department of Education
- Kristen Danusis, Director, Office of School & District Improvement, Rhode Island Department of Education (invited)
- Michael Hinojosa, former Superintendent, Dallas Independent School District, Texas

**10:15 – 10:30 AM**      **Break and Individual Reflection**

**10:30 – 11:45 AM**      **Session VI: District Roundtable**

The District Roundtable will be composed of faculty district staff and two local district staff who will engage in a discussion of their specific situations relative to the topics below with a goal of generalizing those experiences to a broader set of districts.

Topics for discussion:

- *Student mental health, absenteeism, discipline, engagement*
- *Faculty – staffing shortages/stress/overwork*
- *Remediation, accelerating learning, school improvement – what are the differences, similarities?*
- *Using stimulus funding – immediate needs vs. long-term goals*
- *Leading vs. lagging success and accountability (?) indicators*
- *Accountability to whom and for what? Are there more context-sensitive and/or comprehensive ways to approach accountability?*

Faculty:

- Michael Hinojosa, former Superintendent, Dallas Independent School District, Texas
- Nate Meyer, Assistant Superintendent Accelerated Improvement Schools, Jefferson County Public Schools
- Doug Strader, Chief Accountability Officer, Prince Georges County Public Schools, Maryland (invited)

11:45 – 1:00 PM

**Working Lunch**

1:00 – 2:15 PM

**Session VI: Looking Ahead: Is there a “New Normal”?**

This session will seek to take stock of the lessons learned from the pandemic and whether they point to a new future state that is markedly different or just incrementally changed.

Guiding Questions:

- *What is the future of accountability? What innovations are coming out of the pandemic experience?*
- *How can accountability become an engine for change and improvement in the endemic era?*
- *The pre-pandemic status quo left too many students behind – how do we move forward in new ways under current policy structures?*
- *Are there lessons learned from the COVID era that can apply to a future reauthorization of ESSA?*
- *How does the system deal with the growing teacher shortage crisis?*
- *Does the structure, uses, amounts of stimulus funding hold implications for the future of federal education funding?*
- *What evidence should be used to judge the success of a program or initiative?*

Faculty:

- All faculty

2:15 – 2:30 PM

**Break**

2:30 – 2:45 PM

**Complete Retreat Evaluation**

2:45 – 3:15 PM

**Final Observations from Expert Faculty**

3:15 – 3:30 PM

**Taking Stock: Staff Reflections and Feedback to Guide Next Steps for the Network**

3:30

**Adjourn**

**Aspen Senior Congressional Education Staff Network Retreat**  
*Restarting Accountability and School Improvement in the Endemic Era*

**Kent Island Resort  
Stevensville, MD**

**October 11-13, 2022**

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**

**Aileen Ma**

Majority Professional Staff  
House Committee on Education and the Workforce

**Rashage Green**

Director of Education Policy, Counsel  
House Education and Labor Committee

**Melissa Bellin**

Majority Professional Staff  
House Committee on Education and Labor

**Aspen Senior Congressional Education Staff Network Retreat**  
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## HOUSE CONGRESSIONAL STAFF

**Aileen Ma**

Professional Staff  
House Committee on Education and the Workforce

**Amy Jones**

Minority Director of Education and Human  
Services Policy  
House Committee on Education and the Workforce

**Brad Thomas**

Minority Senior Education Policy Advisor  
House Committee on Education and the Workforce

**Kathryn Salmon**

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

**Mandy Schaumburg**

Minority Education Deputy Director and Senior  
Counsel  
House Committee on Education and the Workforce

**Mellisa Bellin**

Professional Staff  
House Education and Labor Committee

**Rashage Green**

Director of Education Policy, Counsel  
House Education and Labor Committee

**Philip Tizzani**

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

**Phoebe Ball**

Disability Counsel  
House Education and Labor Committee

# Agenda

## Retreat Goals:

- Explore how state and local education agencies (SEAs and LEAs) are implementing the Every Student Succeeds Act (ESSA) in the context of the COVID pandemic, including how states and districts are restarting accountability, federal school identification, and formal school-improvement processes;
- Understand how SEAs and LEAs are responding to the ongoing COVID endemic, including how they have used, or plan to use, federal relief dollars and early lessons learned, particularly around addressing learning loss and student well-being, and how this relates to formal school-improvement processes;
- Examine the impact of COVID on assessment and accountability policy and practice, including considerations of what a “new normal” may be;
- 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, October 11, 2022

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**4:00 PM**

**Arrival and Check-In**

**5:00 – 6:00 PM**

**Opening Reception and Overview of Retreat**

Aspen team to provide brief welcoming remarks about resuming in-person retreats, high-level summary of the retreat, and hoped-for education and relational outcomes. Light refreshments will be served.

**6:00 – 7:00 PM**

**Setting the Context: Fireside Chat with Carey Wright**

Staff will have the opportunity to hear from – and engage with – a celebrated former chief state school officer, who spent a decade leading Mississippi’s Department of Education after a distinguished career in schools and districts. Carey Wright has deep insights into the intersection of federal policy and leading large-scale, system-level change efforts and will share lessons learned in her leadership inclusive of federal accountability and school improvement

Speakers:

- Carey Wright, former Mississippi Superintendent of Education

**7:00 – 8:30 PM Working Dinner**

A plated dinner will be served with continued discussion from the fireside chat and overview of the upcoming agenda for the convening.

**Wednesday, October 12, 2022**

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**7:30 – 8:45 AM Breakfast****8:45 – 9:00 AM Agenda Review and Retreat Objectives**

To guide the retreat's discussion, Congressional staff and faculty members will share their top learning objectives for the convening as well as share any thoughts from the previous evening's programming.

**9:00 – 10:00 AM [Session I: What Do We Know About the State of Education Systems and Student Outcomes](#)**

What is the state of education systems, at the state and local levels, when looking at on-the-ground indicators like attendance, student well-being, student outcomes, academic regression/acceleration, and more.

Guiding Questions:

- *What does the data tell us about the state of enrollment, student well-being, and academic regression/acceleration? What measures are providing the most information/greatest insight?*
- *How have states fared with administering assessments, including formative, interim and summative assessments?*
- *What data is there about other accountability indicators like chronic absenteeism, student discipline, etc.?*
- *What data do we have about the performance and well-being of students with disabilities and English learners?*
- *What other data (climate, OTL (Opportunities to Learn), teacher retention surveys) provide insights about the state of education?*

Faculty:

- Margie Vandeven, Commissioner, Missouri Department of Elementary and Secondary Education
- Shirley Vargas, Senior Administrator, Office of Coordinated School and District Support, Nebraska Department of Education
- Kristen Danusis, Director, Office of School & District Improvement, Rhode Island Department of Education
- Michael Hinojosa, former Superintendent, Dallas Independent School District, Texas
- Nate Meyer, Assistant Superintendent, Accelerated Improvement Schools, Jefferson County Public Schools, Louisville, Kentucky
- Tonya Strozier, Principal, Holladay Elementary School, Tucson, Arizona
- Sabrina Doublin, Principal, Marquand-Zion High School, Marquand, Missouri

**10:00 – 10:15 AM Break and Individual Reflection**

**10:15 – 11:45 AM**

### **Session II: Restarting Accountability: State and District Perspectives**

This session will focus on the challenges, opportunities, successes, and unanswered questions from the unprecedented “restart” of accountability systems.

Guiding Questions:

- *How has restarting federal accountability been managed and communicated to stakeholders and the public? How is the broader context (e.g., learning loss, teacher shortages, federal emergency funds) influencing this re-start and how it is framed publicly?*
- *What accountability plan adjustments and amendments are being made to address short, medium, long-term needs and goals? How is the U.S. Department of Education engaging in the process?*
- *How are states measuring growth, as well as adjusting other accountability indicator weights (or changing indicators entirely) in response to the post-pandemic reality (e.g., to account for missing data from pandemic years)?*
- *Will states need to reset their accountability timelines coming out of the pandemic?*
- *How are districts working with schools identified before the pandemic? How will they exit those schools?*
- *Are too many schools being identified for improvement under the federal system?*

Faculty:

- Margie Vandeven, Commissioner, Missouri Department of Elementary and Secondary Education
- Shirley Vargas, Senior Administrator, Office of Coordinated School and District Support, Nebraska Department of Education
- Kristen Danusis, Director, Office of School & District Improvement, Rhode Island Department of Education
- Michael Hinojosa, former Superintendent, Dallas Independent School District, Texas
- Nate Meyer, Assistant Superintendent, Accelerated Improvement Schools, Jefferson County Public Schools, Louisville, Kentucky

**11:45 – 1:00 PM**

### **Working Lunch**

During lunch, participants will be seated with faculty and given the opportunity to continue discussion from the morning’s session.

**1:00 – 2:15 PM**

### **Session III: School Improvement Implementation**

In this session, staff will examine how districts and schools are employing specific strategies and tactics to meet immediate needs and address longer-term challenges and opportunities in school improvement.

Guiding Questions:

- *What is the first/most important need that must be addressed before any school improvement work can begin/or be successful?*
- *How is student mental health being supported and what impact does that have on school and student performance?*
- *How does each level (federal, state, and if it exists, district, accountability) in the system work together – or not?*



- *Are districts more accountable/more supportive of school improvement work now than in the past? Why or why not?*
- *To what extent is the teacher shortage/teacher overwork impacting school improvement efforts?*
- *What is the impact of federal identification on improving or turning-around schools?*

Faculty:

- Michael Hinojosa, former Superintendent, Dallas Independent School District, Texas
- Nate Meyer, Assistant Superintendent Accelerated Improvement Schools, Jefferson County Public Schools, Louisville, Kentucky
- Tonya Strozier, Principal, Holladay Elementary School, Tucson, Arizona
- Sabrina Doublin, Principal, Marquand-Zion High School, Marquand, Missouri

**2:15– 2:30 PM Break and Individual Reflection**

**2:30 – 3:00 PM** [Partner Walk](#): Discuss learnings and implications from the opening three sessions to guide the discussion in the next session regarding building coherence across systems and the following sessions the next day.

**3:00 – 4:15 PM** [Session IV: Building Coherence Across Systems](#)

Faculty will discuss how the multitude of programs and funding at the federal, state, and local levels can be misaligned and how leaders are working to bring greater coherence to be more efficient and effective.

Guiding Questions:

- *How much overlap is there between responding to learning loss/accelerating learning activities and school improvement?*
- *What systems or processes can be utilized to build greater alignment between various federal and state plans, reporting, and monitoring activities?*
- *Are there ways leaders can align ESSA accountability and IDEA accountability? What about with ESSER, state and local programs and funding?*
- *How are new investments/policies related to “community schools” being coordinated with school improvement strategies?*
- *What are the obstacles to greater coherence across systems, programs, and funding?*
- *How can coherence be established across multiple years?*

Faculty suggestions:

- Margie Vandeven, Commissioner, Missouri Department of Elementary and Secondary Education
- Shirley Vargas, Senior Administrator, Office of Coordinated School and District Support, Nebraska Department of Education
- Kristen Danusis, Director, Office of School & District Improvement, Rhode Island Department of Education

**4:15 – 4:30 PM Taking Stock: Staff Reflections and Feedback to Guide Remaining Discussions**

**5:30 – 6:30 PM Networking Hour with Expert Faculty**

Staffers will have the opportunity to network with expert faculty.

**6:30 – 8:30 PM Dinner with Discussion of Earlier Sessions**

A plated dinner will be served, participants and faculty will be seated together and will use time together to reflect on the day’s session and prepare for the final day’s content.

**Thursday, October 13**

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**7:30 – 8:45 AM Breakfast**

**8:45 – 9:00 AM Staff Reflections and Feedback to Guide Remaining Discussion**

**9:00 – 10:15 AM [Session V: Coordinating School Improvement, ESSER Funds, and Other Sources of Funding](#)**

This session will focus on how SEAs and LEAs are coordinating the various sources of funding available for maximum effect, including the challenges in doing so.

Guiding Questions:

- *What do we know about how SEAs and LEAs are spending stimulus funds (ESSER, CARES, GEAR, etc.) on learning loss/accelerating learning and does that align with using federal school improvement funds?*
- *Are ESSER funds being coordinated with other federal, state, and/or local funding sources? Are there particular pain points in blending or braiding ESSER funds with other sources of funding?*
- *Do different federal funding streams align with each other or with other state funding sources? How much can funding be blended or braided?*
- *How was federal school improvement funding used during the pandemic?*
- *How have stakeholders been consulted and engaged throughout the process?*
- *How can initiatives starting during the pandemic/endemic era be sustained?*

Faculty:

- Margie Vandeven, Commissioner, Missouri Department of Elementary and Secondary Education
- Shirley Vargas, Senior Administrator, Office of Coordinated School and District Support, Nebraska Department of Education
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**10:15 – 10:30 AM Break and Individual Reflection**

**10:30 – 11:45 AM [Session VI: District Roundtable](#)**

The District Roundtable will be composed of faculty with district roles as well as two invited speakers representing local district staff who will engage in a discussion of their specific situations relative to the topics below with a goal of generalizing those experiences to a broader set of districts.

Topics for discussion:

- *How are districts addressing the impact of the pandemic on students, including student mental health, absenteeism, discipline, and engagement?*
- *How are districts addressing the impact of the pandemic on teachers and staff, including staffing shortages, stress, overwork, and public perception?*

- *Remediation, accelerating learning, school improvement – what are the differences and similarities?*
- *What are the current trends for stimulus funding – immediate needs vs. long-term goals?*
- *How do districts measure and use leading and lagging success and accountability indicators?*
- *Accountability to whom and for what? Are there more context-sensitive and/or comprehensive ways to approach accountability?*

Faculty:

- Michael Hinojosa, former Superintendent, Dallas Independent School District, Texas
- Nate Meyer, Assistant Superintendent, Accelerated Improvement Schools, Jefferson County Public Schools, Louisville, Kentucky
- Reid Wodicka, Deputy Superintendent for Operations and Strategic Planning, Lynchburg Public Schools, Virginia
- Corey Miklus, Superintendent, Seaford Public Schools, Delaware
- Jeffrey Lawson, Superintendent, Cecil County Public Schools, Maryland

**11:45 – 1:00 PM**

**Working Lunch**

During lunch, participants will be seated with faculty and given the opportunity to continue discussion from the morning’s session.

**1:00 – 2:15 PM**

**[Session VI: Looking Ahead: Is There a “New Normal”?](#)**

This session will seek to take stock of the lessons learned from the pandemic and whether they point to a new future state that is markedly different or just incrementally changed.

Guiding Questions:

- *What is the future of accountability? What innovations are coming out of the pandemic experience?*
- *How can accountability become an engine for change and improvement in the endemic era?*
- *The pre-pandemic status quo left too many students behind – how do we move forward in new ways under current policy structures?*
- *Are there lessons learned from the COVID era that can apply to a future reauthorization of ESEA?*
- *Do the structures, uses, amounts of stimulus funding hold implications for the future of federal education funding?*

Faculty:

- Margie Vandeven, Commissioner, Missouri Department of Elementary and Secondary Education
- Shirley Vargas, Senior Administrator, Office of Coordinated School and District Support, Nebraska Department of Education
- Kristen Danusis, Director, Office of School & District Improvement, Rhode Island Department of Education
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- Sabrina Dublin, Principal, Marquand-Zion High School, Marquand, Missouri

**2:15 – 2:30 PM**

**Break**

- 2:30 – 2:45 PM**      **Complete Retreat Evaluation**
- 2:45 – 3:15 PM**      **Final Observations from Expert Faculty**
- Faculty will share their major takeaways from the convening, including what they have learned from the other faculty and participants.
- 3:15 – 3:30 PM**      **Taking Stock: Staff Reflections and Feedback to Guide Next Steps for the Network**
- Participants will share their major takeaways from the convening and note what additional support the Aspen Institute can provide in future convenings. Aspen staff will note high level takeaways and themes from the convening, as well as next steps for the Network.
- 3:30 PM**              **Adjourn**