



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, 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: Juliana Dauchess
2. a. Name of Accompanying Relative: _____ **OR** None
 b. Relationship to Traveler: Spouse Child Other (specify): _____
3. a. Dates: Departure: April 11, 2023 Return: April 12, 2023
 b. Dates at Personal Expense, if any: _____ **OR** None
4. Departure City: Washington, D.C. Destination: Warrenton, VA Return City: Washington, D.C.
5. Sponsor(s), Who Paid for the Trip: Postsecondary National Policy Institute (PNPI)
6. Describe Meetings and Events Attended:
 Attended a two day seminar on federal student loan debt and repayment.
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: Juliana Dauchess Date: 4/14/23

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: Rep. Lloyd K. Smucker Date: 14 April 2023

Signature of Supervising Member: [Signature]



U.S. House of Representatives

COMMITTEE ON ETHICS

SPONSOR POST-TRAVEL DISCLOSURE FORM



Original



Amendment

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

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

- Sponsor(s) who paid for the trip: Postsecondary National Policy Institute
- Travel Destination(s): Warrenton, VA
- Date of Departure: April 11, 2023 Date of Return: April 12, 2023
- Name(s) of Traveler(s): Juliana Dauchess

Note: You may list more than one traveler on a form only if *all* information is *identical* for each person listed.

- Actual amount of expenses paid on behalf of, or reimbursed to, each individual named in Question 4:

	Total Transportation Expenses	Total Lodging Expenses	Total Meal Expenses	Total Other Expenses (dollar amount per item and description)
Traveler	\$109	\$98	\$79	\$238, meeting space, AV, WiFi
Accompanying Family Member	N/A	N/A	N/A	N/A

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

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

DocuSigned by:
 Signature: MaryEllen McGuire Date: 4/13/2023
4E6B30068EBF41E...

Name: MaryEllen McGuire Title: President

Organization: Postsecondary National Policy Institute

I am an officer of the above-named organization. Signify statement is true by checking box.

Address: 1828 L Street NW, Washington, DC 20036

Email: mcguire@pnpi.org Telephone: 202

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

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



U.S. House of Representatives

COMMITTEE ON ETHICS

TRAVELER FORM

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 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: Juliana Dauchess

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: Juliana Dauchess

Name of Signatory (if other than traveler): _____

For Staff (name of employing Member or Committee): Rep. Lloyd Smucker

Office Address: 302 Cannon House Office Building, Washington DC 20002

Telephone Number: 202-225-2411

Email Address of Contact Person: juliana.dauchess@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 e-mail: travel.requests@mail.house.gov.



U.S. House of Representatives

COMMITTEE ON ETHICS

TRAVELER FORM

1. Name of Traveler: Juliana Dauchess
2. Sponsor(s) who will be paying or providing in-kind support for the trip:
The Postsecondary National Policy Institute
3. City and State OR Foreign Country of Travel: Warrenton, Virginia
4. a. Date of Departure: April 11, 2023 Date of Return: April 12, 2023
 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.
As a Legislative Assistant that covers Education and Workforce issues for a Member on that committee, this seminar will give me a stronger understanding of debt and repayment issues in the higher education space.
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: [Signature] Date 2/27/23



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 & Melinda Gates 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):
included on a separate page
5. Yes No Is travel being offered to an accompanying family member of the House invitee(s)?
6. Date of departure: April 11, 2023 Date of return: April 12, 2023
7. a. City of departure: Washington, D.C.
b. Destination(s): Warrenton, VA
c. City of return: Washington, D.C.
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:



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:
- 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:
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):
- \$59/day
- 2) Provide the reason for selecting the location of the event or trip:
- It is a reasonable distance from D.C. and meeting space and lodging are both on site.
16. Name, nightly cost, and reasons for selecting each hotel or other lodging facility:
- Hotel Name: Airlie City: Warrenton, VA Cost Per Night: \$98
- Reason(s) for Selecting: There is lodging available on property with meeting space.
- 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.*



U.S. House of Representatives

COMMITTEE ON ETHICS

18. Total Expenses for each Participant:

<input type="checkbox"/> Actual Amounts <input checked="" type="checkbox"/> Good Faith Estimates	Total Transportation Expenses per Participant	Total Lodging Expenses per Participant	Total Meal Expenses per Participant
For each Member, Officer, or Employee	\$109	\$98	\$79
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	\$238	meeting space, AV, WiFi
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 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: 2/27/2023
 Name: MaryEllen McGuire Title: President & Founder
 Organization: Postsecondary National Policy Institute (PNPI)
 Address: 1828 L St, NW, Suite 300-A, Washington, DC 20036
 Email: mcguire@pnpi.org Telephone: (202) 407-3172

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 | 202-225-7103
 More information and forms available at ethics.house.gov



U.S. House of Representatives

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: Postsecondary National Policy Institute
2. Name of your organization: The Bill and Melinda Gates Foundation
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.

DocuSigned by:
Signature: Kathryn Young Date: 2/17/2023
724D86038FA044D...

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



U.S. House of Representatives

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:

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

ethicscommittee@mail.house.gov | 202-225-7103
More information and forms available at ethics.house.gov



U.S. House of Representatives

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: Postsecondary National Policy Institute

2. Name of your organization: The Kresge Foundation

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.

DocuSigned by:
Signature: Caroline Altman Smith Date: 2/9/2023
F7A7C459DAB74E6...

Name: Caroline Altman Smith Title: Deputy Director, Education

Organization: The Kresge Foundation

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

Email: CBASmith@kresge.org Telephone: 248-502-0534



U.S. House of Representatives

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:

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

ethicscommittee@mail.house.gov | 202-225-7103
More information and forms available at ethics.house.gov

Michael Guest, Mississippi
Chairman
Susan Wild, Pennsylvania
Ranking Member

David P. Joyce, Ohio
John H. Rutherford, Florida
Andrew R. Garbarino, New York
Michelle Fischbach, Minnesota

Veronica Escobar, Texas
Mark DeSaulnier, California
Deborah K. Ross, North Carolina
Glenn F. Ivey, Maryland



ONE HUNDRED EIGHTEENTH CONGRESS

U.S. House of Representatives

COMMITTEE ON ETHICS

Thomas A. Rust
Staff Director and Chief Counsel

Kelle A. Strickland
Counsel to the Chairman

David Arrojo
Counsel to the Ranking Member

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

April 7, 2023

Ms. Juliana Dauchess
Office of the Honorable Lloyd Smucker
302 Cannon House Office Building
Washington, DC 20515

Dear Ms. Dauchess:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to Warrenton, Virginia, scheduled for April 11 to 12, 2023, sponsored by Postsecondary National Policy Institute, the Bill & Melinda Gates 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 \$480 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,

Michael Guest
Chairman

Susan Wild
Ranking Member

MG/SW:rp

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):

Amaris Benavidez
Professional Staff Member
Representative Scott (D-VA)
House Committee on Education &
Workforce
Amaris.Benavidez@mail.house.gov

Solomon Chen
Policy Advisor
Representative Foxx (R-NC)
House Committee on Education &
Workforce
Solomon.Chen@mail.house.gov

Sujith Cherukumilli
Legislative Assistant
Representative Bonamici (D-OR)
Sujith.Cherukumilli@mail.house.gov

Juliana Dauchess
Legislative Assistant
Representative Smucker (R-PA)
Juliana.Dauchess@mail.house.gov

Amy Jones
Director of Education & Human Services
Policy

Representative Foxx (R-NC)
House Committee on Education &
Workforce
Amy.jones@mail.house.gov

Olivia Morales
Fellow
Representative Wilson (D-FL)
Oliva.morales@mail.house.gov

Phelton Moss
Senior Policy Advisor
Representative Wilson (D-FL)
Phelton.Moss@mail.house.gov

Chance Russell
Professional Staff Member
Representative Foxx (R-NC)
House Committee on Education &
Workforce
chance.russell@mail.house.gov

Taylor Ware
Legislative Assistant
Representative Adams (D-NC)
Taylor.Ware@mail.house.gov

All staff were invited due to their employment with the House Committee on Education and Workforce 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:

PNPI has designed the event to deepen participants' understanding of federal student loan debt and repayment. PNPI created the agenda, developed the invitation list, and is managing all event logistics. Neither of PNPI's funders, the Bill and Melinda Gates 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.

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 financial aid processes and policies and their impact on students' postsecondary access and completion.

The Kresge Foundation is committed to increasing opportunities for low-income and students of color to enter and succeed in undergraduate education. A deeper understanding of current and future issues in debt and repayment is fundamental when developing policies that will help students earn degrees with the support of federal financial assistance.



**Federal Student Loan Debt & Repayment
Seminar
April 11 & 12
Warrenton, Virginia**

Seminar Goals:

- Increase participants' understanding of student loan debt;
- Deepen participants' understanding of delinquency and default;
- Introduce participants to borrower perspectives on debt and default;
- Increase participants' understanding of student loan repayment plans;
- Increase participants understanding of the Public Service Loan Forgiveness Program; and,
- Examine the cost of the federal student loan and repayment programs.

Tuesday, April 11

- | | |
|---------------|--|
| 8:45am | Staff arrive to board shuttle
Peace Circle
Pennsylvania Ave and First Street NW, Washington, D.C. |
| 9:00am | Depart Peace Circle |
| 10:15am | Arrive at Airlie
6809 Airlie Road
Warrenton, VA 20187 |
| 10:15-10:30am | Check-In and Registration |

10:30am- 12:00pm Welcome & Debt Overview

Speakers: *Betsy Prueter, Postsecondary National Policy Institute (PNPI); MaryEllen McGuire, PNPI; and Jinann Bitar, The Education Trust*

This session will provide an overview of federal student loan debt, including how much students and families are borrowing to attend college; the types of institutions borrowers are attending; and how borrowing and debt patterns vary across income and demographics.

12:00-1:00pm Lunch with Experts

Lunch will provide an opportunity for staff to ask the day's panelists additional questions in a smaller group setting.

1:00pm-2:30pm Delinquency & Default Overview

Speakers: *Regan Fitzgerald, Pew Charitable Trusts and Victoria Jackson, The Education Trust*

This session will provide an overview of delinquency and default, including how borrowers enter delinquency and/or default; how deferments and forbearances work; trends in delinquency and default rates over time; and how borrower demographics impact the likelihood of default.

2:30-2:45pm Break

2:45-4:15pm Borrower Perspectives on Debt & Default

Speakers: *Tia Caldwell, New America and Melissa Emrey Arras, The Government Accountability Office (GAO)*

This session will examine students' perceptions of financing a college education including the gaps between what students identify as "reasonable" debt and what they deem as "expected" debt. It will also review how students and borrowers view their own debt balances and default experiences.

4:15-4:30pm Break

4:30- 5:00pm Closing Discussion

Speaker: *Betsy Prueter, PNPI and MaryEllen McGuire, PNPI*

In this session, participants will review the day's programming and share any additional questions they have on debt, delinquency, and default.

5:00-6:00pm Break

6:00-7:00pm **Working Dinner**

Facilitator: *Betsy Prueter, PNPI and MaryEllen McGuire, PNPI*

Dinner will provide an opportunity for staff to ask expert panelists additional questions in a smaller group setting. In addition, PNPI staff will provide a preview of the second day of programming.

Wednesday, April 12

8:30-9:00am **Breakfast**

9:00-10:15am **Welcome & Overview of Repayment Plans**

Speakers: *Betsy Prueter, PNPI; MaryEllen McGuire, PNPI; James Bergeron, National Council of Higher Education Resources (NCHER); and Lexi West, Pew Charitable Trusts*

This session will provide an overview of all federal repayment plans, the frequency with which the various plans are used, and the advantages and disadvantages of the current system.

10:15-10:30am **Break**

10:30-11:15am **Overview of Public Service Loan Forgiveness Program (PSLF)**

Speaker: *Lexi West, Pew Charitable Trusts*

This session will provide an in-depth overview on PSLF.

11:15-11:30am **Break**

11:30am-12:30pm **Repayment Simulation**

Speaker: *Lexi West, Pew Charitable Trusts*

This session will allow participants to learn more about the strengths and challenges of repayment plans by applying the plans to a borrower profile.

12:30-1:30pm **Lunch with Experts**

Lunch will provide an opportunity for staff to ask the day's panelists additional questions in a smaller group setting.

1:30-2:45pm **The Cost of Federal Student Loan & Repayment Programs**

Speakers: *Noah Mann, Office of Management & Budget and Katherine Sydor, Office of Management & Budget*

This session will examine the cost of the federal student loan and repayment programs and the major drivers of costs and savings each year.

2:45-3:00pm **Break**

3:00- 4:15pm **Roundtable Discussion: Current Issues in Debt & Repayment**

Speakers: *Preston Cooper, Foundation for Research on Equal Opportunity; Jason Delisle, The Urban Institute; and Sarah Sattelmeyer, New America*

This session will allow participants to ask any remaining questions of our experts regarding debt and/or repayment.

4:15-4:20pm **Break**

4:20-5:00pm **Closing Discussion**

Speaker: *Betsy Prueter, PNPI and MaryEllen McGuire, PNPI*

In this session, participants will review the day's programming, share what they have learned over the two days, consider how they might apply what they learned, and share any additional questions they have on debt and repayment.

5:00pm **Depart Airlie**

6:15pm **Arrive at Peace Circle, Washington, D.C.**