

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: Cody Rowe
2. a. Name of Accompanying Relative: _____ OR None
b. Relationship to Traveler: Spouse Child Other (specify): _____
3. a. Dates: Departure: April 2, 2024 Return: April 4, 2024
b. Dates at Personal Expense, if any: _____ OR None
4. Departure City: Washington, D.C. Destination: Boston, Massachusetts 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 seminar on higher education accreditation.
A revised agenda is attached.
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: Cody Rowe Date: 4-17-24

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: Burgess Owens Date: 4-17-24

Signature of Supervising Member: 

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 in the trip within 10 days of their return.** You must answer all questions, and check all boxes, on this form for your submission to comply with House Rules and the Committee's Travel Regulations. Failure to comply with this requirement may result in the denial of future requests to sponsor trips and/or subject the current traveler to disciplinary action or a requirement to repay the trip expenses.

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

1. Sponsor(s) who paid or provided in-kind support for the trip: Postsecondary National Policy Institute (PNPI)

2. Travel Destination(s): Boston, Massachusetts

3. Date of Departure: April 2, 2024 Date of Return: April 4, 2024

4. Name(s) of Traveler(s): Amaris Benavidez, Solomon Chen, Darrell Rico Doss, Mary Christina Riley and Cody Rowe

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

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

| | Total Transportation Expenses | Total Lodging Expenses | Total Meal Expenses | Total Other Expenses (dollar amount per item and description) |
|----------------------------|-------------------------------|------------------------|---------------------|---|
| Traveler | \$725.83 | \$562 | \$172.46 | N/A |
| Accompanying Family Member | N/A | N/A | N/A | N/A |

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

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

Signature: _____ Date: 4/9/24

Name: MaryEllen McGuire Title: President & Founder

Organization: Postsecondary National Policy Institute (PNPI)

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

Address: 1828 L Street NW, Suite 300-E, Washington, D.C. 20036

Telephone: 202-407-3172 Email: m McGuire@pnpi.org

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

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

COMMITTEE ON ETHICS

TRAVELER FORM


1. Name of Traveler: Cody Rowe
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: Boston, MA
4. a. Date of Departure: April 2, 2024 Date of Return: April 4, 2024
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, invitation, 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 who handles education policy, this trip will help me gain a deeper understanding of the accreditation process so that legislation and policy can be better tailored to address accreditation.
9. Yes No Is the traveler aware of any registered federal lobbyists or foreign agents involved in 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: March 1, 2024

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

Keelie Broom
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

March 25, 2024

Mr. Cody Rowe
Office of the Honorable Burgess Owens
309 Cannon House Office Building
Washington, DC 20515

Dear Mr. Rowe:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to Boston, Massachusetts, scheduled for April 2 to 4, 2024, sponsored by Postsecondary National Policy Institute, Bill & Melinda Gates Foundation, Lumina Foundation for Education, Inc., 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



Accreditation Seminar and Site Visit
Tuesday, April 2- Thursday, April 4
Boston, MA

Learning Objectives

- Increase participants' understanding of what accreditation is and how it works;
- Increase participants' understanding of NECHE's accreditation process;
- Increase participants' understanding of how accreditation is experienced from the perspective of an accreditor and an institution.

AGENDA

Tuesday, April 2, 2024

11:35am-1:08pm **Staff depart Ronald Reagan Washington National Airport (DCA) For Boston, Massachusetts (BOS)**
JetBlue Airlines #554

1:08pm-2:00pm **Staff arrive in Boston, Massachusetts (BOS)**
Depart Airport for Boston Marriott Long Wharf
296 State Street, Boston, MA 02109

2:00pm-2:30pm **Check In: Boston Marriott Long Wharf & Break**
296 State Street, Boston, MA 02109

2:30pm-4:00pm **Welcome & Introduction to Accreditation**
Boston Marriott Long Wharf, 296 State Street, Boston, MA 02109

Speakers: MaryEllen McGuire, PNPI; Betsy Prueter, PNPI; & Constance Bond, Educational Consultant

This session will provide a foundational understanding of the history of accreditation and how the accreditation process works.

4:00pm-4:10pm **Break**

4:10pm-5:30pm **Accreditation Oversight**
Boston Marriott Long Wharf, 296 State Street, Boston, MA 02109

Speaker: David Bergeron, College Unbound & Constance Bond,
Educational Consultant

This session will provide an overview of the federal government's role in accreditor oversight including the roles of the U.S. Department of Education and NACIQI.

5:30pm-6:15pm **Break**

6:15pm-6:30pm **Travel to Dinner at Tresca**
233 Hanover Street, Boston, MA 02110

6:30pm-7:45pm **Dinner at Tresca**
233 Hanover Street, Boston, MA 02110

Dinner will provide an opportunity for PNPI to review the agenda for the visit to the New England Commission of Higher Education (NECHE) on Wednesday and to answer any remaining questions about the topics covered earlier in the day.

7:45pm-8:00pm **Travel back to Boston Marriott Long Wharf**
296 State Street, Boston, MA 02109

Wednesday, April 3, 2024

8:00am-8:30am **Breakfast**
Boston Marriott Long Wharf, 296 State Street, Boston, MA 02109

8:30am-9:15am **Travel to New England Commission of Higher Education (NECHE)**
301 Edgewater Place, Suite 210, Wakefield, MA 01880

9:15am-9:30am **Welcome & Introduction to NECHE**
301 Edgewater Place, Suite 210, Wakefield, MA 01880

Speaker: Larry Schall, President, NECHE

This session will provide participants with a general introduction to NECHE.

- 9:30am-10:30am **NECHE's Accreditation Process**
301 Edgewater Place, Suite 210, Wakefield, MA 01880
- Speakers:* Larry Schall, President, NECHE & Pat O'Brien, Vice President, NECHE
- This session will cover how NECHE accredits their institutions, including how they develop their standards and policies, and how they train and support their evaluators.*
- 10:30am-10:45am **Break**
- 10:45am-12:00pm **Oversight and Evaluation: Challenges & Room for Improvement**
301 Edgewater Place, Suite 210, Wakefield, MA 01880
- Speakers:* Larry Schall, President, NECHE & Pat O'Brien, Vice President, NECHE
- This session will cover how the Department of Education evaluates NECHE and how oversight works in accreditation. Speakers will share examples of issues that may come up during evaluations and oversight. Speakers will also address where there are challenges in this system and where improvements might be made.*
- 12:00pm-1:15pm **Working Lunch**
301 Edgewater Place, Suite 210, Wakefield, MA 01880
- Lunch will provide an opportunity for staff to ask questions of the day's presenters as well as guests from institutions who have recently been through the accreditation process.*
- 1:15pm-2:30pm **Accreditation from the Institution Perspective**
301 Edgewater Place, Suite 210, Wakefield, MA 01880
- Speakers:* Marie Buley, President, Rivier College; Rick Daniels, NECHE Commissioner; Lisa Ijiri, Senior Advisor to the Dean, Boston University; Sharale Mathis, Vice President for Academic and Student Affairs, Holyoke Community College
- This session will feature a panel of commissioners who will share their experiences and insights into the accreditation process.*
- 2:30pm-2:45pm **Break**

- 2:45pm-4:00pm **Accreditation Process Simulation**
301 Edgewater Place, Suite 210, Wakefield, MA 01880
- Speakers:* Betsy Prueter, PNPI & MaryEllen McGuire, PNPI
- This session will allow staff to experience a simulation where they take on the role of accreditors and evaluate a fictional institution.*
- 4:00pm-4:30pm **Final Questions on Accreditation**
301 Edgewater Place, Suite 210, Wakefield, MA 01880
- Speaker:* Pat O'Brien, Vice President, NECHE
- This session will allow staff to ask their final questions of both NECHE and institutional staff regarding possible reforms and improvements.*
- 4:30pm-5:15pm **Travel back to Boston Marriott Long Wharf**
296 State Street, Boston, MA 02109
- 5:15pm-6:15pm **Break at Boston Marriott Long Wharf**
296 State Street, Boston, MA 02109
- 6:15pm-6:30pm **Travel to Dinner at Quincy Market**
206 South Market Street, Boston, MA 02109
- 6:30pm-7:45pm **Dinner at Quincy Market**
206 South Market Street, Boston, MA 02109
- 7:45pm-8:00pm **Travel back to Boston Marriott Long Wharf**
296 State Street, Boston, MA 02109

Thursday, April 4, 2024

- 7:00am-7:45am **Check-out & Working Breakfast**
Boston Marriott Long Wharf, 296 State Street, Boston, MA 02109
- Breakfast will provide an opportunity for staff to formally debrief on all sessions, share their final takeaways, and ask any remaining questions they have about accreditation.*
- 7:45am-8:30am **Depart hotel for Amtrak/South Station**
- 9:20am **Depart South Station (BOS) for Union Station, Washington, D.C. (WAS)**
Amtrak, 93 Northeast Regional
- 12:00pm **Lunch on Amtrak**
93 Northeast Regional
- 5:23pm **Arrive at Union Station, Washington, D.C. (WAS)**



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80 Atlantic Ave, Boston, MA 02110

6:30pm-7:45pm **Dinner at Boston Sail Loft**
80 Atlantic Ave, Boston, MA 02110

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296 State Street, Boston, MA 02109
- 5:15pm-6:15pm **Break at Boston Marriott Long Wharf**
296 State Street, Boston, MA 02109
- 6:15pm-6:30pm **Travel to Dinner at Cantina Italiana**
346 Hanover Street, Boston, MA 02113
- 6:30pm-7:45pm **Working Dinner at Catina Italiana**
346 Hanover Street, Boston, MA 02113
- Dinner will provide staff with an opportunity to review what was learned over the course of the day.*
- 7:45pm-8:00pm **Travel back to Boston Marriott Long Wharf**
296 State Street, Boston, MA 02109

Thursday, April 4, 2024

- 7:00am-7:45am **Check-out & Working Breakfast**
Boston Marriott Long Wharf, 296 State Street, Boston, MA 02109
- Breakfast will provide an opportunity for staff to formally debrief on all sessions, share their final takeaways, and ask any remaining questions they have about accreditation.*
- 7:45am-8:30am **Depart hotel for airport**
- 10:00am-11:39am **Depart Boston, Massachusetts (BOS) for Ronald Reagan Washington National Airport (DCA)**
JetBlue Airlines #1655
- 11:39am **Arrive at Ronald Reagan Washington National Airport (DCA)**



February 16, 2024

Dear Cody

We are writing to invite you to participate in the Postsecondary National Policy Institute's (PNPI) Accreditation Site Visit on April 2-4, 2024, to Boston, MA. This event is designed to deepen your understanding of the higher education accreditation process. Included with this invitation are the forms necessary for ethics rules compliance. **By Monday, March 4, 2024, you must submit these included forms and documents directly to the Ethics Committee in Longworth 1015. They are:**

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

After receiving the completed travel package, the Ethics Committee will review it and issue an approval for travel to you or your sponsoring Member. The Ethics Committee advises all House employees to maintain copies of all submitted forms for their own records. After the trip, we will provide you with a post-travel form that you will need to complete and submit.

If you do not submit the required paperwork by the Committee's deadline of March 4th you will not have the option to participate. Paperwork submitted to the Ethics Committee after the deadline will not be considered.

Attendance is by invitation only, with no outside observers or lobbyists. Funding is provided solely by grants from established foundations. No government, individual, foreign, corporate or special interest money is accepted. The foundations supporting this programming are the Bill and Melinda Gates Foundation, the Kresge Foundation, and the Lumina Foundation. No funding from these foundations has been earmarked for this specific trip and PNPI is the trip's sole sponsor, planner, and executor. PNPI maintains autonomy over the agenda, invitations, and event materials.

We will depart for the seminar at 11:35am on Tuesday, April 2nd from Ronald Reagan Washington National Airport. If you have any questions about the seminar, please do not hesitate to email or call us directly.

PNPI's Accreditation Site Visit promises to be both educational and productive. We look forward to your participation!

Sincerely,

DocuSigned by:

4E6B30068EBF41E...

MaryEllen McGuire

President

Postsecondary National Policy Institute (PNPI)

mcguire@pnpi.org

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's website (ethics.house.gov) provides detailed instructions for filling out the form. The Committee will notify the House invitees directly of its decision and will not notify the trip sponsors.

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. Signatures must comply with section 104(bb) of the Travel Regulations.

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, services, or in-kind assistance 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. _____
-

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 the statement is true by clicking the 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 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: _____
-

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.*

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 | \$415.58 (\$343.03- airfare; \$72.55- shuttle) | \$562 | \$197.50 |
| 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 | N/A | N/A |
| For each Accompanying Family Member | N/A | N/A |

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: 2/14/2024
Name: MaryEllen McGuire _____ Title: President & Founder
Organization: Postsecondary National Policy Institute _____
Address: 1828 L Street NW, Washington, D.C. 20036 _____
Email: mcguire@pnpi.org _____ Telephone: 202-841-7359

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

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 & the
Workforce
Amaris.Benavidez@mail.house.gov

Joanna Brown
Legislative Director
Representative Walberg (R-MI)
joanna.brown@mail.house.gov

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

Samantha DeVito
Legislative Assistant
Representative Courtney (D-CT)
House Committee on Education & the
Workforce
Samantha.devito@mail.house.gov

Rico Doss
Economic Policy Counsel
Representative Wilson (D-FL)
rico@mail.house.gov

Gianni Morsell
Legislative Assistant
Representative Adams (D-NC)
House Committee on Education & the
Workforce
Gianni.Morsell@mail.house.gov

Mary Christina Riley
Professional Staff Member
Representative Foxx (R-NC)
House Committee on Education & the
Workforce
Marychristina.riley@mail.house.gov

Cody Rowe
Legislative Assistant
Representative Owens (R-UT)
House Committee on Education & the
Workforce
Cody.rowe@mail.house.gov

All staff were invited due to their employment with the House Committee on Education & the 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 accreditation. PNPI created the agenda, developed the invitation list, and is managing all event logistics. None of

PNPI's funders, the Bill and Melinda Gates Foundation, The Kresge Foundation, or Lumina 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 accreditation and the role that accreditors play in determining and enforcing program and institution quality requirements.

The Kresge Foundation is committed to increasing opportunities for low-income and students of color to enter and succeed in undergraduate education. Accreditation is a key component of institutional accountability, and a more nuanced understanding of the purposes and types of accreditation will hopefully lead to policies and reforms that help institutions achieve their missions by serving college students well.

Lumina Foundation is interested in increasing postsecondary education attainment, including through the support of activities that ensure students, policymakers and other stakeholders deepen their understanding of the complexities of the college accreditation process.



Accreditation Seminar and Site Visit
Tuesday, April 2- Thursday, April 4
Boston, MA

Learning Objectives

- Increase participants' understanding of what accreditation is and how it works;
- Increase participants' understanding of NECHE's accreditation process;
- Increase participants' understanding of how accreditation is experienced from the perspective of an accreditor and an institution.

DRAFT AGENDA

Tuesday, April 2, 2024

11:35am-1:08pm **Staff depart Ronald Reagan Washington National Airport (DCA) For Boston, Massachusetts (BOS)**
JetBlue Airlines #554

1:08pm-2:00pm **Staff arrive in Boston, Massachusetts (BOS)**
Depart Airport for Boston Marriott Long Wharf
296 State Street, Boston, MA 02109

2:00pm-2:30pm **Check In: Boston Marriott Long Wharf & Break**
296 State Street, Boston, MA 02109

2:30pm-4:00pm **Welcome & Introduction to Accreditation**
Boston Marriott Long Wharf, 296 State Street, Boston, MA 02109

Speakers: MaryEllen McGuire, PNPI; Betsy Prueter, PNPI; & Constance Bond, Educational Consultant

This session will provide a foundational understanding of the history of accreditation and how the accreditation process works.

4:00pm-4:10pm **Break**

4:10pm-5:30pm **Accreditation Oversight**
Boston Marriott Long Wharf, 296 State Street, Boston, MA 02109

Speaker: David Bergeron, College Unbound & Constance Bond,
Educational Consultant

This session will provide an overview of the federal government's role in accreditor oversight including the roles of the U.S. Department of Education and NACIQI.

5:30pm-6:00pm **Break**

6:00pm-6:15pm **Travel to Dinner at Boston Sail Loft**
80 Atlantic Ave, Boston, MA 02110

6:15pm-7:45pm **Dinner at Boston Sail Loft**
80 Atlantic Ave, Boston, MA 02110

Dinner will provide an opportunity for PNPI to review the agenda for the visit to the New England Commission of Higher Education (NECHE) on Wednesday and to answer any remaining questions about the topics covered earlier in the day.

7:45pm-8:00pm **Travel back to Boston Marriott Long Wharf**
296 State Street, Boston, MA 02109

Wednesday, April 3, 2024

8:00am-8:30am **Breakfast**
Boston Marriott Long Wharf, 296 State Street, Boston, MA 02109

8:30am-9:15am **Travel to New England Commission of Higher Education (NECHE)**
301 Edgewater Place, Suite 210, Wakefield, MA 01880

9:15am-9:30am **Welcome & Introduction to NECHE**
301 Edgewater Place, Suite 210, Wakefield, MA 01880

Speaker: Larry Schall, President, NECHE

This session will provide participants with a general introduction to NECHE.

9:30am-10:30am

NECHE's Accreditation Process

301 Edgewater Place, Suite 210, Wakefield, MA 01880

Speakers: Larry Schall, President, NECHE; Carol Anderson, Vice President, NECHE; Laura Gambino, Vice President, NECHE; Paula Harbecke, Vice President, NECHE; Pat O'Brien, Vice President, NECHE; and Aaron Perkus, Vice President, NECHE

This session will cover how NECHE accredits their institutions, including how they develop their standards and policies, and how they train and support their evaluators.

10:30am-10:45am

Break

10:45am-11:45am

Oversight and Evaluation

301 Edgewater Place, Suite 210, Wakefield, MA 01880

Speakers: Larry Schall, President, NECHE; Carol Anderson, Vice President, NECHE; Laura Gambino, Vice President, NECHE; Paula Harbecke, Vice President, NECHE; Pat O'Brien, Vice President, NECHE; and Aaron Perkus, Vice President, NECHE

This session will cover how the Department of Education evaluates NECHE and how oversight works in accreditation. Speakers will share examples of issues that may come up during evaluations and oversight.

11:45am-12:00pm

Break

12:00pm-1:00pm

Working Lunch

301 Edgewater Place, Suite 210, Wakefield, MA 01880

Lunch will provide an opportunity for staff to ask questions of the day's presenters as well as guests from institutions who have recently been through the accreditation process.

1:00pm-2:15pm

Accreditation from the Institution Perspective

301 Edgewater Place, Suite 210, Wakefield, MA 01880

Speakers: Larry Schall, President, NECHE; Carol Anderson, Vice President, NECHE; Laura Gambino, Vice President, NECHE; Paula Harbecke, Vice President, NECHE; Pat O'Brien, Vice President, NECHE; and Aaron Perkus, Vice President, NECHE

This session will feature a panel of commissioners who will share their experiences and insights into the accreditation process.

- 2:15pm-3:30pm **Accreditation Process Simulation**
301 Edgewater Place, Suite 210, Wakefield, MA 01880
- Speakers:* Betsy Prueter, PNPI & MaryEllen McGuire, PNPI
- This session will allow staff to experience a simulation where they take on the role of accreditors and evaluate a fictional institution.*
- 3:30pm-3:45pm **Break**
- 3:45pm-4:30pm **Accreditation Challenges, Room for Improvement & Close**
301 Edgewater Place, Suite 210, Wakefield, MA 01880
- Speakers:* Larry Schall, President, NECHE; Carol Anderson, Vice President, NECHE; Laura Gambino, Vice President, NECHE; Paula Harbecke, Vice President, NECHE; Pat O'Brien, Vice President, NECHE; and Aaron Perkus, Vice President, NECHE
- This session will allow staff to ask their final questions of both NECHE and institutional staff regarding possible reforms and improvements.*
- 4:30pm-5:15pm **Travel back to Boston Marriott Long Wharf**
296 State Street, Boston, MA 02109
- 5:15pm-6:00pm **Break at Boston Marriott Long Wharf**
296 State Street, Boston, MA 02109
- 6:00pm-6:15pm **Travel to Dinner at Cantina Italiana**
346 Hanover Street, Boston, MA 02113
- 6:15pm-7:45pm **Working Dinner at Catina Italiana**
346 Hanover Street, Boston, MA 02113
- Dinner will provide staff with an opportunity to review what was learned over the course of the day.*
- 7:45pm-8:00pm **Travel back to Boston Marriott Long Wharf**
296 State Street, Boston, MA 02109

Thursday, April 4, 2024

- 7:00am-8:00am **Check-out & Working Breakfast**
Boston Marriott Long Wharf, 296 State Street, Boston, MA 02109
- Breakfast will provide an opportunity for staff to formally debrief on all sessions, share their final takeaways, and ask any remaining questions they have about accreditation.*
- 8:00am-8:30am **Depart hotel for airport**
- 10:00am-11:39am **Depart Boston, Massachusetts (BOS) for Ronald Reagan Washington National Airport (DCA)**
JetBlue Airlines #1655
- 11:39am **Arrive at Ronald Reagan Washington National Airport (DCA)**

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. Signatures must comply with section 104(bb) of the Travel Regulations.

1. Name of Primary Trip Sponsor for this trip: The 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.

Signature: Caroline Altman Smith Date: 1/30/2024
F7A7C459DAB74E6...
 Name: Caroline Altman Smith Title: Deputy Director, Education

Organization: The Kresge Foundation
 Address: 3215 W. Big Beaver Rd., Troy MI 48084
 Telephone: 248,502,053 Email: CBASmith@kresge.org

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

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. Signatures must comply with section 104(bb) of the Travel Regulations.

1. Name of Primary Trip Sponsor for this trip: The Postsecondary National Policy Institute
2. Name of your organization: Bill & 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.

Signature:  Date: 1/30/2024
724D86038FA044D...
 Kathryn Young
 Name: _____ Title: Senior Program Officer

Organization: Bill & Melinda Gates Foundation
 Address: 1300 I Street NW, Suite 300, Washington, DC 20005
 Telephone: 202.662.8113 Email: Kathryn.Young@gatesfoundation.org

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

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. Signatures must comply with section 104(bb) of the Travel Regulations.

1. Name of Primary Trip Sponsor for this trip: The Postsecondary National Policy Institute

2. Name of your organization: Lumina Foundation for Education, Inc.

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: Michelle Asha Cooper Date: 2/13/2024
1EECB5201DD441D...
Name: Michelle Asha Cooper Title: VP of Public Policy and Executive

Organization: Lumina Foundation for Education, Inc.

Address: 30 S Meridian Street, suite 700, Indianapolis, IN 46204

Telephone: 800, 834, 575 Email: mcooper@luminafoundation.org

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



POSTSECONDARY NATIONAL POLICY INSTITUTE

Accreditation Site Visit Participant List April 2-4, 2024 Boston, MA

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constanza007@aol.com

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