

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: Rashage Green
2. a. Name of Accompanying Relative: _____ **OR** None
b. Relationship to Traveler: Spouse Child Other (specify): _____
3. a. Dates: Departure: April 2 Return: April 4
b. Dates at Personal Expense, if any: _____ **OR** None
4. Departure City: Washington, DC Destination: Birmingham & Montgomery, AL Return City: Washington, DC
5. Sponsor(s), Who Paid for the Trip: The Aspen Institute
6. Describe Meetings and Events Attended: We attended meetings and events with school leaders, school district leaders, state administrators, experts and state legislators to discuss state of K12 education in AL.
especially their efforts to implement their Literacy and Numeracy Acts.
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: Rashage Green Digitally signed by Rashage Green
Date: 2024.04.19 11:18:56 -04'00' Date: April 19, 2024

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. Robert C. "Bobby" Scott Date: April 19, 2024

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: _____

2. Travel Destination(s): _____

3. Date of Departure: _____ Date of Return: _____

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

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				
Accompanying Family Member				

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: _____

Name: _____ Title: _____

Organization: _____

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

Address: _____

Telephone: _____ Email: _____

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

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:

The Aspen Institute, Inc. (Education and Society Program)

2. I represent that the trip will not be financed, in whole or in part, by a registered federal lobbyist or foreign agent. *Signify that the statement is true by checking box.*

3. **Check only one.** I represent that:

a. The primary trip sponsor has not accepted from any other source, funds intended directly or indirectly to finance any aspect of the trip; **OR**

b. The trip is arranged without regard to congressional participation and the primary trip sponsor has accepted funds only from entities that will receive a tangible benefit in exchange for those funds; **OR**

c. The primary trip sponsor has accepted funds, 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: The Bill and Melinda Gates Foundation

4. Provide names and titles of **ALL** House Members *and* employees you are inviting. **For each House invitee, provide an explanation of why the individual was invited** (include additional pages if necessary): See attached list with explanation

5. Yes No Is travel being offered to an accompanying family member of the House invitee(s)?

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

7. a. City of departure: Washington, DC

b. Destination(s): Birmingham Alabama and Montgomery Alabama

c. City of return: Washington, DC

8. **Check only one.** I represent that

a. The sponsor of the trip is an institution of higher education within the meaning of section 101 of the Higher Education Act of 1965; **OR**

b. The sponsor of the trip does not retain or employ a registered federal lobbyist or foreign agent; **OR**

c. The sponsor employs or retains a registered federal lobbyist or foreign agent, but the trip is for attendance at a one-day event *and* lobbyist / foreign agent involvement in planning, organizing, requesting, or arranging the trip was *de minimis* under the Committee's travel regulations.

9. **Check only one of the following.**
- a. I checked 8(a) or (b) above; **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:
 Our Program has a 20 year history of providing non-partisan education programs for Congressional Staff. The purpose of this trip is to discuss the implication of the Every Student Succeeds Act on State Reading and Math gains. Aspen is solely responsible for organizing.

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): approx \$59/day
 - 2) Provide the reason for selecting the location of the event or trip: Alabama was chosen as a site visit due to its advances in Science of Reading and recent numeracy laws that connect directly with the learning objectives of this trip.

16. Name, nightly cost, and reasons for selecting each hotel or other lodging facility:

Hotel Name: Staybridge Suites Montgomery City: Montgomery Cost Per Night: \$107
 Reason(s) for Selecting: Proximity to Site Visit locations and Cost

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	\$1200	\$214	\$177
For each Accompanying Family Member	\$0	\$0	\$0


	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	\$650	Room Rental fees at Central (private convening space) & Equal Justice Initiative (meeting space and tour fees), A/V and Meeting Materials
For each Accompanying Family Member	\$0	

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: February 15, 2024
 Name: Elliot Gerson Title: EVP of Policy & Public Programs
 Organization: The Aspen Institute
 Address: 2300 N St NW Suite 700 Washington, DC 20037
 Email: lisa.jones@aspeninstitute.org Telephone: 202-736-5859

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 Aspen Institute, Inc. (Education and Society Program)
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: Kathryn Young  Digitally signed by Kathryn Young
Date: 2024.02.05 11:58:47 -05'00' Date: 02/05/2024

Name: Kathryn Young Title: Senior Program Officer

Organization: Bill & Melinda Gates Foundation

Address: 1300 I Street NW, Suite 300, Washington, DC 20005

Telephone: (202) 230-2174 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

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 submitted at 1015 Longworth House Office Building or 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: Rashage Green

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: Rashage Green

Digitally signed by Rashage Green
Date: 2024.02.25 16:49:19 -05'00'

Name of Signatory (if other than traveler): _____

For Staff (name of employing Member or Committee): House Education and the Workforce Committee

Office Address: 2101 Rayburn House Office Building

Telephone Number: 202-225-3725

Email Address of Contact Person: Rashage.Green@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 email: travel.requests@mail.house.gov.

COMMITTEE ON ETHICS

TRAVELER FORM

1. Name of Traveler: Rashage Green
2. Sponsor(s) who will be paying or providing in-kind support for the trip: The Aspen Institute, Inc. (Education and Society Program)
3. City and State **OR** Foreign Country of Travel: Birmingham Alabama and Montgomery Alabama
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 the Education Policy Director for Ranking Member Scott, the activities on this trip will help inform my work on the Committee. Specifically, it will further help me to understand the ways states and school districts are teaching the Science of Reading and the strategic use of ESSER funds, among other issues impacting states, school districts and students.
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: 2/26/24

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 submitted at 1015 Longworth House Office Building or 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: Rashage Green

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: Rashage Green

Digitally signed by Rashage Green
Date: 2024.02.25 16:49:19 -05'00'

Name of Signatory (if other than traveler): _____

For Staff (name of employing Member or Committee): House Education and the Workforce Committee

Office Address: 2101 Rayburn House Office Building

Telephone Number: 202-225-3725

Email Address of Contact Person: Rashage.Green@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 email: travel.requests@mail.house.gov.

COMMITTEE ON ETHICS

TRAVELER FORM

1. Name of Traveler: Rashage Green
2. Sponsor(s) who will be paying or providing in-kind support for the trip: The Aspen Institute, Inc. (Education and Society Program)
3. City and State **OR** Foreign Country of Travel: Birmingham Alabama and Montgomery Alabama
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 the Education Policy Director for Ranking Member Scott, the activities on this trip will help inform my work on the Committee. Specifically, it will further help me to understand the ways states and school districts are teaching the Science of Reading and the strategic use of ESSER funds, among other issues impacting states, school districts and students.
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: 2/26/24

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 28, 2024

Ms. Rashage Green
Committee on Education and the Workforce
2101 Rayburn House Office Building
Washington, DC 20515

Dear Ms. Green:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to Montgomery, Alabama, scheduled for April 2 to 4, 2024, 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 \$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:tn



February 9, 2024

Dear House Colleague,

We are writing to invite you to participate in an upcoming site visit– ***“Alabama's Educational Leadership: Insights and Innovations in Math, Reading and Workforce Readiness”*** – for the Aspen Senior Congressional Education Staff Network from **11:00 AM Tuesday, April 2, 2024**, to **10:45 AM Thursday, April 4, 2024** in Birmingham and Montgomery, Alabama.

The site visit offers a comprehensive exploration of Alabama's educational system, focusing on integrating the Science of Reading, the impact of recent math legislation, and the strategic use of ESSER funds. It will include school visits in both Birmingham and Montgomery, including the innovative Alabama Aerospace and Aviation High School. Participants will engage in meaningful discussions with educators, policymakers, and special guests, such as key state leaders from the executive and legislative branches, and representatives from the Alabama State Department of Education. The agenda is thoughtfully structured to provide insights into federal and state educational policies, their implementation at the local level, and how these are shaping student outcomes. On this site visit, staffers will:

1. Gain deeper insights into how the Science of Reading is integrated within Alabama's education system, focusing on its effectiveness, teacher training, and student literacy outcomes.
2. Examine the development and implementation of Alabama's recent math legislation. Assess its early outcomes, including improvements in student proficiency and teacher preparedness in mathematics.
3. Engage in discussions about the federal government's role in shaping education in Alabama, with a specific focus on equity implications, policy impacts, and the balancing of state and federal priorities.
4. Understand how Alabama has strategically utilized Elementary and Secondary School Emergency Relief (ESSER) funds in enhancing its reading and math programs, and evaluate their overall impact on educational reforms and student achievement.
5. Investigate how local schools in Alabama are designing educational programs and school infrastructures in alignment with local workforce and industry demands

We are committed to working with you and the House Ethics Committee to ensure compliance with the House rules regarding privately-funded sponsored travel. Enclosed you will find all the forms necessary for filing the trip with the Ethics Committee:

- A detailed agenda listing discussion sessions
- A completed Primary Trip Sponsor Form
- A signed Additional Trip Sponsor Form

- A list of invited House staffers
- A Traveler Form [must be filled out by Staffer]
- Completed Grantmaking Organization Additional Trio Sponsor Form from the Bill & Melinda Gates Foundation

You must complete the Traveler Form and submit it with the enclosed agenda, list of invited staffers, and Primary Trip Sponsor Form directly to the House Ethics Committee (1015 Longworth) no later than Friday, March 1, 2023. After receiving the completed travel package, the Ethics Committee will review and issue an approval to you or your sponsoring Member. After the trip, you will need to complete a post-travel form that we will email to you after the site visit.

Attendance is by invitation only, with no outside observers or federal lobbyists. Funding is provided solely by grants from established foundations – no government, individual, foreign, corporate, or special interest money is accepted. The Network is supported by The Bill & Melinda Gates Foundation. The Aspen Education & Society Program maintains autonomy over invitations, materials, and the agenda for the retreat.

The site visit promises to be productive and informative. We look forward to seeing you there.

Warm regards,

The image shows four handwritten signatures in black ink. From left to right, they appear to be: Ross Wiener, Megan Bennett, Aisha Zaman, and Lorén Cox. The signatures are written in a cursive, flowing style.

Ross Wiener Megan Bennett Aisha Zaman Lorén Cox

AGENDA

Alabama's Educational Leadership: Insights and Innovations in Reading, Mathematics, and Workforce Readiness

Site Visit Goals:

- Gain insight into how the Science of Reading is being implemented across Alabama's education system, focusing on fidelity of implementation, how effectiveness is being measured, teacher training, student literacy outcomes, and opportunities for improvement.
- Examine the development and implementation of Alabama's recent math legislation, the Alabama Numeracy Act. Assess its initial roll-out, including the availability of relevant research, experts and supporting staff, as well as the overall receptivity of Alabama's education system, particularly in context of the ongoing efforts to implement Science of Reading.
- Engage in discussions about the federal government's role in shaping education in Alabama, with a specific focus on equity implications, policy impacts, and the balancing of state and federal priorities.
- Understand how Alabama has strategically utilized Elementary and Secondary School Emergency Relief (ESSER) funds in enhancing its reading and math programs, and evaluate the overall impact on educational reforms and student achievement.
- Investigate how local schools in Alabama are designing educational programs and school models to address identified needs in the local workforce and industry trends.

Tuesday, April 2, 2024

11:00 AM **Arrival in Birmingham Airport**

11:30 AM **Airport Transport to Site Visit at Birmingham City Schools**

Transportation via chartered bus from the airport to Birmingham City Schools, a public school district located at 2015 Park Place N. Birmingham, AL 35203

12:00 - 1:00 PM **Welcome & Lunch with Birmingham School District Leaders**

Lunch to be served in Birmingham City School building with discussion of the district's successes and challenges, with specific focus on Science of Reading implementation, initial work on the Alabama Numeracy Act (ANA), and student workforce readiness.

Panelists:

Dr. Mark Sullivan, Superintendent, Birmingham City Schools (invited)

Dr. Spencer Horn, Chief of Staff, Birmingham City Schools (invited)

Dr. Pamela Williams, Interim Chief Academic and Accountability Officer, Birmingham City Schools (invited)

1:00 – 1:30 PM

Transportation to Charles A. Brown Elementary

Charles A. Brown is a Birmingham City School's elementary school located at 4811 Court J, Birmingham, AL 35208

1:30 – 2:45 PM

[School Visit: Charles A. Brown Elementary](#)

1:30 - 2:00: School Tour

2:00 - 3:00: Roundtable discussion with Principal Dr. Janice Sanders Drake and leadership team. Additional invited guests: **Rafiq Vaughn**, Principal of Central Park Elementary School; **Ruth Ann Moss**, Executive Director of Small Magic, a non-profit working to increase early literacy in Birmingham City Schools.

Guiding questions:

- *What does the day-to-day work of the school leadership team look like? Who else exercises leadership in the school and what do they do?*
- *How has the school implemented the Science of Reading and what results is it seeing?*
- *What implications has the implementation of the Science of Reading had for curriculum, professional development, human capital, resource allocation?*
- *Where does the school stand in implementing the Alabama Numeracy Act (ANA)? How does that align with, or complicate, the Science of Reading implementation?*
- *Have ESEA and ESSER investments supported the implementation of the Science of Reading or the ANA?*

2:45 – 3:00 PM

Transportation to Alabama Aerospace and Aviation High School

The Alabama Aerospace and Aviation High School is a public charter school located 1414 2nd Ave N, Bessemer, AL 35020

3:00 – 4:15 PM

[School Visit: Alabama Aerospace and Aviation High School](#)

3:30 - 4:00: School Tour

4:00 - 4:45: Roundtable discussion with Principal Ruben Morris, leadership team, and students.

Guiding questions:

- *What does the day-to-day work of the school leadership team look like? Who else exercises leadership in the school and what do they do?*
- *What led to the creation of the Alabama Aerospace and Aviation High School? Why was aerospace and aviation chosen as the focus of the school?*
- *How does the school prepare students for the workforce?*
- *What partnerships does the school leverage to provide educational and training experiences for students?*
- *Does the school address the Science of Reading and what results is it seeing?*
- *What challenges does the school face in realizing its mission, in education/preparing students, in finding staff, etc.?*
- *Have ESEA and ESSER investments supported the school's mission, goals, outcomes?*

4:15 - 6:00 PM

Transportation to Montgomery, AL via chartered coach bus

Staybridge Suites Montgomery
275 Lee St, Montgomery, AL 36104

6:00 - 7:00 PM

Break

7:00 - 7:15 PM

Walk to Dinner (7 min)

7:15 – 9:00 PM

[Dinner](#)

Dreamland BBQ
12 W. Jefferson St.

Wednesday, April 3, 2024

8:30 – 9:00 AM

Breakfast

Staybridge Suites Montgomery
275 Lee St, Montgomery, AL 36104

9:00 – 9:30 AM

Transportation to Alabama State Capitol Building

9:30 - 10:30 AM

[Session I: Education Advocacy in Alabama](#)

Room 200, Alabama State House, 11 S Union St

This session will focus on past advocacy work in Alabama around the Science of Reading and the Alabama Numeracy Act (ANA), as well as efforts to increase students' workforce readiness. In addition, this session will discuss future advocacy work, such as the ongoing implementation of the Science of Reading, the new implementation of the ANA, and other topics.

Panelists:

- **Mark Dixon**, President, A+ Alabama
- **Corinn O'Brien**, VP of Policy, A+ Alabama

Guiding questions:

- *What is the historical context in Alabama, from Brown v. Board to the last 20 years, and how has this affected schools, students, staff, and families?*
- *What are the most pressing issues facing schools, students, staff, and families in Alabama? Is the same or different in Montgomery, Birmingham or other parts of Alabama?*
- *What are the greatest successes – and challenges – in the implementation of the Science of Reading? The Alabama Numeracy Act (ANA)?*
- *How can the state education system prepare students for post-secondary success, particularly in workforce readiness?*
- *What are the top priorities for education advocates in the next 5 years? The next 10?*

10:30 - 11:00 AM

Session II: Conversation with Governor Kay Ivey

Room 200, Alabama State House, 11 S Union St

This session will focus on the Governor's past policy initiatives around the Science of Reading and the recent legislation, the Alabama Numeracy Act (ANA), as well as efforts to increase students' workforce readiness. In addition, this session will discuss the Governor's future policy goals.

Faculty:

- **Governor Kay Ivey**, Alabama (invited)
- **Nick Moore**, Education Policy Advisor & Coordinator Governor's Office of Education & Workforce Transformation, Office of Gov. Kay Ivey

Guiding questions:

- *What is the historical context in Alabama, from Brown v. Board to the last 20 years, and how has this affected schools, students, staff, and families?*
- *What are the most pressing issues facing schools, students, staff, and families in Alabama? Is the same across the different regions and cities in Alabama?*
- *How can the state education system prepare students for post-secondary success, particularly in workforce readiness?*

- *What are the top priorities for education policy and legislation in the next 1-2 years? Next 5-10?*
- *What is your view of ESSA and ESSER in supporting – or hindering – Alabama’s efforts to improve its education system for all students?*

11:00 – 11:45 PM

Session III: Policymaker Perspectives on the Science of Reading, the Alabama Numeracy Act, and Workforce Readiness

Room 200, Alabama State House, 11 S Union St

This session will focus on past policy initiatives around the Science of Reading and the recent legislation, the Alabama Numeracy Act, as well as efforts to increase students’ workforce readiness. In addition, this session will discuss future policy goals for the state.

Faculty:

- **State Senator Arthur Orr, Chair**, Senate Finance and Taxation: Education Committee (invited)
- **State Representative Alan Baker**, Vice Chair, Education Policy Committee (invited)
- **State Representative Terri Collins**, Chair, House Education Policy Committee (invited)
- **State Representative Barbara Drummond**, Ranking Minority Member, Education Policy Committee (invited)
- **State Representative Danny Garrett**, Chair, House Ways and Means: Education Committee (invited)

Guiding questions:

- *What is the historical context in Alabama, from Brown v. Board to the last 20 years, and how has this affected schools, students, staff, and families?*
- *What are the most pressing issues facing schools, students, staff, and families in Alabama? Is the same across the different regions and cities in Alabama?*
- *How can the state education system prepare students for post-secondary success, particularly in workforce readiness?*
- *What are the top priorities for education policy and legislation in the next 1-2 years? Next 5-10?*
- *What is your view of ESSA and ESSER in supporting – or hindering – Alabama’s efforts to improve its education system for all students?*

11:45 – 12:00 PM

Walk from the State Capitol Building to the Alabama State Department of Education

Alabama State Department of Education – 50 North Ripley Street
Montgomery AL 36130

12:00 – 1:00 PM

Session IV: Meeting with Alabama State Department of Education

This session will focus on the implementation of policy initiatives, including the Science of Reading and the Alabama Numeracy Act (ANA), as well as efforts to increase students' workforce readiness. In addition, this session will discuss future policy goals for the education system in the state of Alabama.

Faculty:

- **Dr. Eric Mackey**, Alabama State Superintendent of Education
- **Angela Martin**, Deputy State Superintendent of Education (invited)
- **Bonnie Short**, Coordinator, Alabama Reading Initiative (invited)
- **Dr. Karen Anderson**, Director, Office of Mathematics Improvement
- **Dr. Jimmy Hull**, Assistant State Superintendent of Education, CTE/Workforce Development (invited)

Guiding questions:

- *What does the Alabama Reading Initiative do in support of the implementation of the Science of Reading? What are its successes and challenges?*
- *Describe the efforts of the Alabama State Department of Education to lead and support the implementation of the ANA.*
- *What are the most pressing issues facing schools, students, staff, and families in Alabama? Is the same across the different regions and cities in Alabama?*
- *How can the state education system prepare students for post-secondary success, particularly in workforce readiness?*
- *What are the top priorities for education policy in the next 1-2 years? Next 5-10?*
- *What is your view of ESSA and ESSER in supporting – or hindering – Alabama's efforts to improve its education system for all students?*
- *Are there other federal laws, policies, supports, and research that could assist Alabama in achieving its goals and initiatives?*

1:00 – 1:15 PM **Transportation to the Equal Justice Initiative Legacy Annex**

115 Coosa St, Montgomery, AL 36104

1:15 – 2:45 PM **Lunch and Panel Discussion at the Equal Justice Initiative Legacy Annex**

115 Coosa St, Montgomery, AL 36104

1:15 – 1:45 PM **Lunch**

1:45 – 2:45 PM **[Session V: Panel Discussion on the Federal Role in Equity and Education](#)**

This session will focus on the historical and contemporary efforts by the federal government to require equitable access to education for all

students regardless of race, color or creed and to create the conditions for equitable opportunity for all through court cases, legislation, and policy.

Faculty:

- **Thomas Rains**, Executive Director, The Judge Frank M. Johnson, Jr. Institute
- **Bryan Stevenson**, Founder and Executive Director of the Equal Justice Initiative (invited)
- **Stephanie Johnson Monore**, former Assistant Secretary for Civil Rights, U.S. Department of Education

Guiding questions:

- *How does the legacy of the Civil Rights movement, Brown v. Board, the Elementary and Secondary Education Act, and other federal civil rights legislation and jurisprudence still shape the context of providing education to Alabama's Black and minority students?*
- *What obstacles remain in realizing the promise of equal access and opportunity for Alabama's Black and minority students?*
- *Have subsequent reauthorizations of the Elementary and Secondary Education Act, including the most recent – the Every Student Succeeds Act – helped to address the historic inequities in educational access and outcomes in Alabama?*
- *What more can and should be done to continue building on the legacy of the Civil Rights movement in addressing racism, inequity, and increasing opportunity for Alabama's Black and minority students?*

2:45 - 3:00 PM

Walk to Legacy Museum (7 min)

450 North Court Street, Montgomery, AL 36104

3:00 – 5:00 PM

Self Guided Tour of the Equal Justice Initiative Legacy Museum

450 North Court Street, Montgomery, AL 36104

5:00 – 6:00 PM

Walk Back to Hotel (10 min) and Break

6:00 – 6:15 PM

Walk to Reception & Dinner (5 min)

Central: 129 Coosa St. Montgomery, AL 36104

6:15 – 8:00 PM

Reception & Dinner with local education leaders

8:00 – 8:30 AM

Breakfast

Staybridge Suites Montgomery
275 Lee St, Montgomery, AL 36104

8:30 – 8:45 AM

Transportation to Montgomery Public Schools School Visit

TBD School (working with Montgomery Superintendent to confirm)

8:45 – 10:15 AM

[School Visit: TBD School](#)

8:45 - 9:15: School Tour

9:15 – 10:15: Roundtable discussion with Principal and leadership team. Additional invited guests: **TBD** district staff from Montgomery Public Schools.

Guiding questions:

- *What does the day-to-day work of the school leadership team look like? Who else exercises leadership in the school and what do they do?*
- *How has the school implemented the Science of Reading and what results is it seeing?*
- *What implications has the implementation of the Science of Reading had for curriculum, professional development, human capital, resource allocation?*
- *Where does the school stand in implementing the Alabama Numeracy Act (ANA)? How does that align with, or complicate, the Science of Reading implementation?*
- *Have ESEA and ESSER investments supported the implementation of the Science of Reading or the ANA?*

10:15 - 10:45 AM

Final Reflections

TBD Room in school

Guiding questions:

- *What strategies, tactics, and/or processes at the different districts and schools seem promising – or problematic?*
- *Is there alignment between the state policymakers' views, policies, and investments with what is happening on the ground in districts and schools? How would you characterize the relationship between the SEA and LEAs and schools?*
- *Is the state's educational system trying to do too much – or too little – and is it organized for and supporting a coherent approach to improving both reading and math?*

- *Is Alabama doing enough to prepare its students for postsecondary success?*
- *Does Alabama's implementation of its Science of Reading initiative hold lessons for other states? For future federal policy?*
- *Are there challenges that practitioners are anticipating that federal policy or investments can help address?*
- *Are there federal supports and research that could assist Alabama in achieving its goals and initiatives?*

10:45 – 11:00 AM Meeting Ends & Transportation to Montgomery Airport

12:30 PM Departures to Washington, DC from Montgomery Airport



Aspen Senior Congressional Education Staff Network Site Visit

Alabama's Educational Leadership: Insights and Innovations in Math, Reading and Workforce Readiness

Birmingham and Montgomery, Alabama

April 2-4, 2024

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.

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House Committee on Education and the Workforce

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