

# COMMITTEE ON ETHICS

## EMPLOYEE POST-TRAVEL DISCLOSURE FORM Original Amendment

This form is for disclosing the receipt of travel expenses from private sources for travel taken in connection with official duties. This form does not eliminate the need to report privately-funded travel on the annual *Financial Disclosure Statements* of those employees required to file them. In accordance with House Rule 25, clause 5, **you must complete this form and file it with the Clerk of the House by email at [gifttravelreports@mail.house.gov](mailto:gifttravelreports@mail.house.gov), within 15 days after travel is completed.** Please **do not** file this form with the Committee on Ethics.

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

1. Name of Traveler: Jack Bridgewater
2. a. Name of Accompanying Relative: \_\_\_\_\_ **OR**  None  
b. Relationship to Traveler:  Spouse  Child  Other (specify): N/A
3. a. Dates: Departure: April 23, 2025 Return: April 24, 2025  
b. Dates at Personal Expense, if any: \_\_\_\_\_ **OR**  None
4. Departure City: Washington, D.C. Destination: Warrenton, VA Return City: Washington, D.C.
5. Sponsor(s), Who Paid for the Trip: Postsecondary National Policy Institute
6. Describe Meetings and Events Attended: attended a seminar on college cost.
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: Jack Bridgewater Digitally signed by Jack Bridgewater  
Date: 2025.04.28 11:52:53 -04'00' Date: 4/28/2025

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: Michael Baumgartner Date: 4-28-25  
Signature of Supervising Member: Rep. Michael Baumgartner

# 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

2. Travel Destination(s): Warrenton, VA

3. Date of Departure: April 23, 2025 Date of Return: April 24, 2025

4. Name(s) of Traveler(s): Jack Bridgewater, Ruben Cedillo, Solomon Chen, Aashi Parekh, & Samantha Wilkerson

*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	\$85.48	\$110	\$92	\$210
Accompanying Family Member	N/A	N/A	N/A	N/A

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

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

Signature: MaryEllen McGuire Date: 4/28/25

Name: MaryEllen McGuire Title: President

Organization: Postsecondary National Policy Institute

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

Address: 1828 L St, NW, Washington, DC 20036

Telephone: 202-407-3172 Email: 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

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](mailto: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: Jack Bridgewater

**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: Jack Bridgewater (Jack Bridgewater)

Name of Signatory (if other than traveler): \_\_\_\_\_

For Staff (name of employing Member or Committee): Rep. Michael Baumgartner

Office Address: Cannon House Office Building, Office 124  
27 Independence Ave SE, Washington, DC 20003

Telephone Number: (360) 590-2038

Email Address of Contact Person: Betsy Prueter [prueter@pnpi.org](mailto:prueter@pnpi.org)

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](mailto:travel.requests@mail.house.gov).

# COMMITTEE ON ETHICS

## TRAVELER FORM

1. Name of Traveler: Jack Bridgewater
2. Sponsor(s) who will be paying or providing in-kind support for the trip: Postsecondary National Policy Institute
3. City and State **OR** Foreign Country of Travel: Warrenton, VA
4. a. Date of Departure: April 23, 2025 Date of Return: April 24, 2025  
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.**

I am a legislative assistant in Congressman Baumgartner's  
Office. I cover the House Education and Workforce Committee for  
the Congressman. This trip directly relates to Education Policy.

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: Michael Baumgartner Date: 3-17-2025

# 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:

Postsecondary National Policy Institute

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: Gates Foundation ; Kresge Foundation; Strada Education 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 page.

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

6. Date of Departure: April 23, 2025 Date of Return: April 24, 2025

7. a. City of departure: Washington, D.C.

b. Destination(s): Warrenton, VA

c. City of return: Washington, D.C.

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

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

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

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

9. **Check only one of the following.**
- a.  I checked 8(a) or (b) above; **OR**
  - b.  I checked 8(c) above but am not offering any lodging; **OR**
  - c.  I checked 8(c) above and am offering lodging and meals for one night; **OR**
  - d.  I checked 8(c) above and am offering lodging and meals for two nights. If you checked this box, explain why the second night of lodging is warranted. \_\_\_\_\_
- 

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:  
**See attached page.**
- 
- 

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): \$52 (April 23rd) and \$40 (April 24th)
    - 2) Provide the reason for selecting the location of the event or trip: There is lodging available on property with meeting space.
- 

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

Hotel Name: Airlie Conference Center City: Warrenton, VA Cost Per Night: \$110  
Reason(s) for Selecting: It is a reasonable distance from D.C. and meeting space and lodging are both on site.

Hotel Name: \_\_\_\_\_ City: \_\_\_\_\_ Cost Per Night: \_\_\_\_\_  
Reason(s) for Selecting: \_\_\_\_\_

Hotel Name: \_\_\_\_\_ City: \_\_\_\_\_ Cost Per Night: \_\_\_\_\_  
Reason(s) for Selecting: \_\_\_\_\_

17.  I represent that all expenses connected to the trip will be for actual costs incurred and not a per diem or lump sum payment. *Signify that the statement is true by checking the box.*

18. **Total Expenses for each Participant:**

<input type="checkbox"/> Actual Amounts <input checked="" type="checkbox"/> Good Faith Estimates	Total <b>Transportation</b> Expenses per Participant	Total <b>Lodging</b> Expenses per Participant	Total <b>Meal</b> Expenses per Participant
For each Member, Officer, or Employee	\$109	\$110	\$92
For each Accompanying Family Member	N/A	N/A	N/A


	<b>Other</b> Expenses (dollar amount per item)	Identify Specific Nature of "Other" Expenses (e.g., taxi, parking, registration fee, etc.)
For each Member, Officer, or Employee	\$210	conference fee, wifi, AV
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: 3/13/2025

Name: MaryEllen McGuire Title: President

Organization: Postsecondary National Policy Institute

Address: 1828 L Street NW, Washington, DC 20036

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

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

Michael Guest, Mississippi  
*Chairman*  
Mark DeSaulnier, California  
*Ranking Member*

John H. Rutherford, Florida  
Andrew R. Garbarino, New York  
Ashley Hinson, Iowa  
Nathaniel Moran, Texas

Deborah K. Ross, North Carolina  
Glenn F. Ivey, Maryland  
Sylvia R. Garcia, Texas  
Suhas Subramanyam, Virginia



ONE HUNDRED NINETEENTH 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  
<https://Ethics.House.gov>

April 8, 2025

Mr. Jack Bridgewater  
Office of the Honorable Michael Baumgartner  
124 Cannon House Office Building  
Washington, DC 20515

Dear Mr. Bridgewater:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to Warrenton, Virginia, scheduled for April 23 to 24, 2025, sponsored by Postsecondary National Policy Institute, the Bill & Melinda Gates Foundation, the Kresge Foundation, and the Strada Education 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

Mark DeSaulnier  
Ranking Member

MG/MD:eme



March 2025

Good Afternoon!

We are writing to invite you to participate in the Postsecondary National Policy Institute's (PNPI) College Cost & Affordability Seminar on April 23-24, 2025. This event is designed to deepen your understanding of college cost and price. Included with this invitation are the forms necessary for ethics rules compliance. **By Monday, March 24, 2025, you must submit these included forms and documents directly to the Ethics Committee by emailing them to [travel.requests@mail.house.gov](mailto:travel.requests@mail.house.gov);**

- A Primary Trip Sponsor Form with all attachments, including a list of all House staff invitees and an hour-by-hour itinerary;
- Grantmaking Trip Sponsor Forms; 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 24th 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 Gates Foundation, Kresge Foundation, and Strada Education 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 8:30am on Wednesday, April 23rd. If you have any questions about the trip, please do not hesitate to email or call us directly.

PNPI's College Cost & Affordability Seminar promises to be both educational and productive. We look forward to your participation!

Sincerely,

*MaryEllen McGuire*

MaryEllen McGuire, President  
Postsecondary National Policy Institute (PNPI)  
[mcguire@pnpi.org](mailto:mcguire@pnpi.org)

**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):

**Brian Arata**  
**Legislative Assistant**  
[brian.arata@mail.house.gov](mailto:brian.arata@mail.house.gov)

**Courtney Ball**  
**Legislative Assistant**  
[courtney.ball@mail.house.gov](mailto:courtney.ball@mail.house.gov)

**LeahGrace Blackwell**  
**Legislative Assistant**  
[leahgrace.blackwell@mail.house.gov](mailto:leahgrace.blackwell@mail.house.gov)

**Jack Bridgewater**  
**Legislative Assistant**  
[Jack.bridgewater@mail.house.gov](mailto:Jack.bridgewater@mail.house.gov)

**Ruben Cedillo**  
**Legislative Assistant**  
[Ruben.cedillo@mail.house.gov](mailto:Ruben.cedillo@mail.house.gov)

**Solomon Chen**  
**Policy Advisor**  
[Solomon.Chen@mail.house.gov](mailto:Solomon.Chen@mail.house.gov)

**Juliana Dauchess**  
**Legislative Assistant**  
[Juliana.Dauchess@mail.house.gov](mailto:Juliana.Dauchess@mail.house.gov)

**Jeb Houpt**  
**Legislative Assistant**  
[jeb.houpt@mail.house.gov](mailto:jeb.houpt@mail.house.gov)

**Emanuel Kimble**  
**Professional Staff Member**  
[Emanuel.kimble@mail.house.gov](mailto:Emanuel.kimble@mail.house.gov)

**Mieko Kuramoto**  
**Senior Legislative Assistant**  
[Mieko.kuramoto@mail.house.gov](mailto:Mieko.kuramoto@mail.house.gov)

**Aashi Parekh**  
**Legislative Assistant**  
[aashi.parekh@mail.house.gov](mailto:aashi.parekh@mail.house.gov)

**Allie Pearce**  
**Legislative Assistant**  
[allie.pearce@mail.house.gov](mailto:allie.pearce@mail.house.gov)

**Chance Russell**  
**Economist & Policy Advisor**  
[chance.russell@mail.house.gov](mailto:chance.russell@mail.house.gov)

**Brianna Tibbets**  
**Legislative Assistant**  
[Brianna.tibbets@mail.house.gov](mailto:Brianna.tibbets@mail.house.gov)

**Jasleen Vig**  
**Legislative Assistant**  
[jasleen.vig@mail.house.gov](mailto:jasleen.vig@mail.house.gov)

**Samantha Wilkerson**  
**Legislative Assistant**  
[Samantha.wilkerson@mail.house.gov](mailto:Samantha.wilkerson@mail.house.gov)

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

**12. For each sponsor required to submit a sponsor form, describe the sponsor's interest in the subject matter of the trip and its role in organizing and/or conducting the trip:**

PNPI has designed the event to deepen participants' understanding of federal student loan debt and repayment. PNPI created the agenda, developed the invitation list, and is managing all event logistics. None of PNPI's funders, the Gates Foundation, the Kresge Foundation, or Strada Education 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 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 the role that college cost and affordability play in students' completion of credentials.

The Kresge Foundation is committed to increasing opportunities for low-income, students of color, and other underrepresented students to enter and succeed in undergraduate education, and affordability is key to their success. A more nuanced understanding of college cost and affordability will hopefully lead to policies and reforms that help institutions achieve their missions by serving college students well.

Strada Education Foundation is committed to expanding opportunities of education to work for all students. To do so, students need quality and affordable postsecondary education opportunities and various pathways to work experiences that lead to successful futures. Policy makers need to be well informed of work being conducted in this space, have access to quality data and research from the field to properly assess impact for students and families.



***College Cost & Affordability Seminar***  
***April 23-24, 2025***

**Location:** Airlie Conference Center, Warrenton, VA

**AGENDA**

***Wednesday, April 23, 2025***

**8:30-9:45am**                      **Meet at Peace Circle, Washington, D.C. and travel to Warrenton, VA**

**9:45am**                              **Arrive in Warrenton, VA**

**9:45-10:00am**                      **Check In & Registration  
Airlie Conference Center**

**10:00-11:15am**                      **Welcome & Overview of College Cost & Price**  
**Speakers:** MaryEllen McGuire, Postsecondary National Policy Institute (PNPI); Betsy Prueter, Postsecondary National Policy Institute (PNPI); & Jennifer Ma, College Board

**Questions for Discussion:**

- What is sticker price? What is net price? What is the difference?
- What are recent trends in sticker and net price?
- How is price different from cost?
- What are the trends in college costs?
- How do the state, institutional, and student shares of college cost compare? What trends have we seen over time?
- What is the cost of college relative to family income? How has this changed over time?
- How does the price of college compare to the price of other goods and services?

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

**11:30am-12:30pm**                **Net Price Overview & Simulation**

**Speaker:** Jeremy Wright-Kim, University of Michigan

**Questions for Discussion:**

- What are net price calculators (NPC)?
- Do NPCs provide realistic estimates of financial aid and out-of-pocket costs, or are there discrepancies between estimated and actual aid awards?
- How do NPCs influence college choice, enrollment rates, and student debt levels?
- How could NPCs be improved to better reflect actual financial aid package numbers?

**12:30-1:15pm**                      **Working Lunch**

*This session will give participants a chance to ask additional questions of the morning's presenters.*

**1:15-3:15pm**                      **Overview of Cost of Attendance (COA)**

**Speakers:** Rachel Fishman, New America & Phil Asbury, University of Wisconsin-Madison

**Questions for Discussion:**

- What is COA and how is it different from tuition? What portion of a student's total COA comes from tuition alone?
- How do institutions calculate COA? How accurate are their calculations? How do the calculations vary among institutions?
- How does an institution's COA affect federal financial aid allocation? Why is it so important?
- What are direct and indirect costs, and what are examples of each?

**3:15-3:30pm**                      **Break**

**3:30-4:45pm**                      **Overview of Financial Aid Letters & Simulation**

**Speaker:** Rachel Fishman, New America

**Questions for Discussion:**

- How accurate are net cost estimates in financial aid offer letters?
- Why do financial aid offers vary widely in format and clarity across different colleges?
- How does the wide variety in financial aid letters affect students' ability to compare offers?

**4:45-6:00pm**                      **Break**

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

*Dinner will provide an opportunity for PNPI to review the agenda for Thursday and to answer any remaining questions about the topics covered earlier in the day.*

**Thursday, April 24, 2025**

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**8:15-9:00am**                      **Breakfast**

**9:00-10:05am**                      **Welcome & Student Perspectives**

**Moderators:** Betsy Prueter, PNPI; MaryEllen McGuire, PNPI; Ryan Arsenault, Northern Virginia Community College; Kelsey Brown, University of Maryland; Alessandra Elarae, Minneapolis College; & Stephanie Lewis, Minnesota State College Southeast

**Questions for Discussion:**

- When you first received your financial aid offer letter, did you understand how much you would actually have to pay out-of-pocket?
- Were you able to easily distinguish between grants, scholarships, loans, and work-study in your financial aid package?
- Did you receive consistent and clear cost estimates from different colleges when comparing offers?
- Did you use a Net Price Calculator (NPC) before applying? If so, was it accurate in estimating your costs?
- How easy was it to find clear, reliable information about tuition, fees, and living expenses before you enrolled?
- Have financial concerns ever made you consider dropping out or taking time off from school?
- Do you feel prepared for loan repayment after graduation?
- If you could change one thing about how college costs are presented or managed, what would it be?

**10:05-10:15am**                      **Break**

**10:15-11:30am**                      **Drivers of College Cost**

**Speaker:** Robert Kelchen, University of Tennessee, Knoxville

**Questions for Discussion:**

- What drives college tuition and the overall price of college?
- How is tuition money spent by institutions? What percent is spent on direct services?

- What role do state appropriations play in college costs?
- What role do states play in setting tuition?
- What is the Bennett Hypothesis and is there any evidence to support it?

**11:30-11:45am**                      **Break**

**11:45am-12:45pm**                **Federal Levers for College Affordability**

**Speakers:** Julie Peller, Peller Strategies & MaryEllen McGuire, PNPI

**Questions for Discussion:**

- What provisions related to college cost exist in current law?

**12:45-1:45pm**                      **Working Lunch**

*This session will give participants a chance to talk further with the day's speakers.*

**1:45-2:45pm**                      **Roundtable: Increasing College Affordability**

**Speakers:** Katie Berger, Lumina Foundation; Preston Cooper, American Enterprise Institute (AEI); & Laura Keane, Independent Consultant

**Questions for Discussion:**

- When you are asked how best to increase college affordability, what's the first thing that comes to mind?
- What are the pros and cons of proposed ideas to make college more affordable?
- What more could be done to ensure college affordability and should it be done at the institution, state, or federal level?

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

**3:00-3:30pm**                      **Wrap Up & Close**

**Speakers:** Betsy Prueter, PNPI & MaryEllen McGuire, PNPI

*This session will provide an opportunity for staff to formally debrief on all sessions, share their final takeaways, and ask any remaining questions they have about college affordability.*

**3:30-4:45pm**                      **Travel from Warrenton, VA to Washington D.C.**

**4:45pm**                                **Arrive at Peace Circle, Washington, D.C.**