

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: Isaiah Knox
2. a. Name of Accompanying Relative: _____ **OR** None
b. Relationship to Traveler: Spouse Child Other (specify): _____
3. a. Dates: Departure: March 31, 2026 Return: April 2, 2026
b. Dates at Personal Expense, if any: _____ **OR** None
4. Departure City: Washington, D.C. Destination: Richmond, 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 Workforce Pell.
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: Isaiah Knox Date: 4/7/2026

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: Tim Walberg Date: 4-9-26

Signature of Supervising Member: Tim Walberg

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.

- Sponsor(s) who paid or provided in-kind support for the trip: Postsecondary National Policy Institute
- Travel Destination(s): Richmond, VA
- Date of Departure: March 31, 2026 Date of Return: April 2, 2026
- Name(s) of Traveler(s): Solomon Chen, Isaiah Knox, Amaris Benavidez, Lauren Hassett, Jannie Kamara, & Tonia Wu
Note: You may list more than one traveler on a form only if all information is identical for each person listed.
- Actual amount** of expenses paid on behalf of, or reimbursed to, each individual named in Question 4:

	Total Transportation Expenses	Total Lodging Expenses	Total Meal Expenses	Total Other Expenses (dollar amount per item and description)
Traveler	\$150.23	\$264.10	\$94.61	\$32.50 (meeting room rental & AV)
Accompanying Family Member	N/A	N/A	N/A	N/A

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

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

DocuSigned by:
MaryEllen McGuire
Signature: 4E6B30068EBE41E Date: 4/3/2026

Name: MaryEllen McGuire Title: President & Founder

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: pnpi@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.

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: _____

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: Isaiah Knox

Name of Signatory (if other than traveler): _____

For Staff (name of employing Member or Committee): _____

Office Address: _____

Telephone Number: _____

Email Address of Contact Person: _____

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: _____
2. Sponsor(s) who will be paying or providing in-kind support for the trip: _____

3. City and State **OR** Foreign Country of Travel: _____
4. a. Date of Departure: _____ Date of Return: _____
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.**

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: _____

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.

- Sponsor(s) who paid or provided in-kind support for the trip: Postsecondary National Policy Institute
- Travel Destination(s): Richmond, VA
- Date of Departure: March 31, 2026 Date of Return: April 2, 2026
- Name(s) of Traveler(s): Solomon Chen, Isaiah Knox, Amaris Benavidez, Lauren Hassett, Jannie Kamara, & Tonia Wu
Note: You may list more than one traveler on a form only if all information is identical for each person listed.
- Actual amount** of expenses paid on behalf of, or reimbursed to, each individual named in Question 4:

	Total Transportation Expenses	Total Lodging Expenses	Total Meal Expenses	Total Other Expenses (dollar amount per item and description)
Traveler	\$150.23	\$264.10	\$94.61	\$32.50 (meeting room rental & AV)
Accompanying Family Member	N/A	N/A	N/A	N/A

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

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

DocuSigned by:
MaryEllen McGuire
Signature: 4E6B30068EBE41E Date: 4/3/2026

Name: MaryEllen McGuire Title: President & Founder

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: pnpi@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

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 (PNPI)

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

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

- a. The primary trip sponsor has not accepted from any other source, funds intended directly or indirectly to finance any aspect of the trip; **OR**
- b. The trip is arranged without regard to congressional participation and the primary trip sponsor has accepted funds only from entities that will receive a tangible benefit in exchange for those funds; **OR**
- c. The primary trip sponsor has accepted funds, 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; Lumina Foundation; & Kresge Foundation

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

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

6. Date of Departure: Tuesday, March 31, 2026 Date of Return: Thursday, April 2, 2026

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

b. Destination(s): Richmond, 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.

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): 3/31- \$5; 4/1- \$80; 4/2-\$47

2) Provide the reason for selecting the location of the event or trip: Richmond is home to the FastForward program at the Virginia Community College System.

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

Hotel Name: Hyatt Place Richmond Arboretum City: Richmond, VA Cost Per Night: \$132

Reason(s) for Selecting: The hotel is within walking distance of the Virginia Community College System offices.

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	\$99	\$264	\$132
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	\$33	meeting room rental
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: 2/11/2026
4F6B30068EBF41E...
 Name: MaryEllen McGuire Title: President
 Organization: Postsecondary National Policy Institute
 Address: 1828 L St, 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

Andrew R. Garbarino, New York
Ashley Hinson, Iowa
Nathaniel Moran, Texas
Brad Knott, North Carolina

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

Jordan Downs
Chief of Staff 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>

March 27, 2026

Mr. Isaiah Knox
Committee on Education & the Workforce
2176 Rayburn House Office Building
Washington, DC 20515

Dear Mr. Knox:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to Richmond, Virginia, scheduled for March 31 to April 2, 2026, sponsored by Postsecondary National Policy Institute, and The Kresge Foundation, and The Bill & Melinda Gates Foundation, and Lumina Foundation for Education, Inc..

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 \$525 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:nl

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: Isaiah Knox
2. a. Name of Accompanying Relative: _____ **OR** None
b. Relationship to Traveler: Spouse Child Other (specify): _____
3. a. Dates: Departure: March 31, 2026 Return: April 2, 2026
b. Dates at Personal Expense, if any: _____ **OR** None
4. Departure City: Washington, D.C. Destination: Richmond, 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 Workforce Pell.
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: Isaiah Knox Date: 4/7/2026

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: Tim Walberg Date: 4-9-26

Signature of Supervising Member: Tim Walberg



February 2026

We are writing to invite you to participate in the Postsecondary National Policy Institute's (PNPI) Workforce Pell Seminar March 31-April 2, 2026. This event is designed to deepen your understanding of Workforce Pell. Included with this invitation are the forms necessary for compliance with congressional ethics rules. **By Monday, March 2, 2026, you must submit these included forms and documents directly to the Ethics Committee by emailing them to 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 must complete and submit. **If you do not submit the required paperwork by the Committee's deadline of March 2nd, 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, Lumina Foundation, and the Kresge 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 6:45pm on Tuesday, March 31st from Union Station. If you have any questions about the trip, please do not hesitate to email or call us directly. PNPI's Workforce Pell 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

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

Ruben Cedillo

Legislative Assistant

Solomon Chen

Professional Staff Member

Maren Emmerson

Staff Assistant

Lauren Hassett

Professional Staff Member

Amy Jones

Education and Human Services Policy Director

Allie Pearce

Legislative Assistant

All staff were invited due to their employment with the House Committee on Education and Workforce, with the House Committee on Budget, with a Member who sits on the House Committee on Education and Workforce, or prior participation in PNPI seminars.

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 Workforce Pell. PNPI created the agenda, developed the invitation list, and is managing all event logistics. None of PNPI's funders, the Gates Foundation, Lumina Foundation, or the Kresge Foundation have played a role in organizing the referenced Congressional trip or in the selection of, or inviting of, travel participants. Decisions regarding travel participants were controlled by and remained under the sole discretion of PNPI at all times.

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 credential and a sustaining career. Toward that end, it is important to help policymakers better understand pathways to credentials and public and private efforts supporting access, affordability, and completion.

The Kresge Foundation is committed to increasing opportunities for low-income students and students of color to access and succeed in postsecondary education. As Workforce Pell is developed and implemented, a clear understanding of its design, eligibility criteria, funding structure, and accountability measures will be critical to ensuring the policy expands access to quality workforce pathways and delivers meaningful outcomes for students.

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 Workforce Pell policy and implementation.



Workforce Pell Seminar
March 31-April 2, 2026

Location: Virginia Community College System, Richmond, VA

AGENDA

Tuesday, March 31, 2026

6:45-8:30 pm **Travel from Washington, D.C. to Richmond, VA**

8:30-9:00 pm **Check In at Hotel & Registration**

Wednesday, April 1, 2026

8:00-8:30 am **Breakfast at Hotel**

8:30-9:00 am **Travel to Virginia Community College System (VCCS)**

9:00-10:30 am **Welcome & Overview of Workforce Pell**

Speakers: David Dore, Virginia Community College System; MaryEllen McGuire, Postsecondary National Policy Institute (PNPI); Betsy Prueter, PNPI; Carrie Warick-Smith, Association of Community College Trustees (ACCT); & Wesley Whistle, New America

This session will provide an overview of Workforce Pell.

10:30-10:45 am **Break**

10:45 am-12:00 pm **Workforce Interactions**

Speaker: Kermit Kaleba, Lumina Foundation

This session will explore how Workforce Pell intersects with existing workforce policy, funding, and delivery systems, including WIOA and Perkins.

12:00-1:00 pm **Working Lunch**

This session will provide participants with an opportunity to ask additional questions of the morning's presenters.

1:00-2:15 pm **Operationalizing Workforce Pell: Roles & Capacity**
Speaker: Corey Gheesling, State Higher Education Executive Officers Association (SHEEO)

This session will examine the distinct roles various actors play in Workforce Pell implementation, including governors, workforce boards, federal agencies, accreditors, and states.

2:15-2:30 pm **Break**

2:30-3:45 pm **Data & Accountability**
Speakers: Mark D'Amico, UNC-Charlotte & Kate Tromble, Data Quality Campaign

This session will assess what data systems states already have, where gaps exist, and how new measures may interact with existing accountability frameworks. The session will also address federal and state data access and privacy and implementation considerations.

3:45-5:00 pm **Return to Hotel & Break**

5:00-7:00 pm **Working Dinner & Negotiated Rulemaking Recap**
Speaker: Preston Cooper, American Enterprise Institute (AEI) & Jill Desjean, National Association of Student Financial Aid Administrators (NASFAA)

This session will be a recap of the most recent Workforce Pell negotiated rulemaking discussions, highlighting key issues debated and unresolved questions.

Thursday, April 2, 2026

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

9:00-10:30 am **State Perspectives on Workforce Pell**
Speakers: Andrea DeSantis, North Carolina Department of Commerce & Rachel Parker, Governor's Workforce Development Board (Maryland)

This roundtable will bring together representatives from states, institutions, and workforce systems to share how Workforce Pell is being interpreted and planned for on the ground.

10:30-11:00 am **Travel to Virginia Community College System**

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 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 Date: 2/3/2026

Name: Kathryn Young Title: Senior Program Officer

Organization: Gates Foundation

Address: 1300 I St, NW, Washington, DC 20005

Telephone: (206) 660-1785 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

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

2. Name of your organization: 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 provided on this form is true, complete, and correct to the best of my knowledge.

Signature: Reuben Kapp Date: 2/6/2026

Name: Reuben Kapp Title: Program Officer

Organization: The Kresge Foundation

Address: 3215 W Big Beaver Road, Troy, MI 48084

Telephone: 248-643-9630 Email: rckapp@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

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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

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: 2/6/2026

Name: Michelle Asha Cooper Title: VP of Public Policy and Executive

Organization: Lumina Foundation for Education, Inc.

Address: 1730 M Street NW, Suite 410, Washington, DC 20036

Telephone: 317-954-0448 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.