

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.

- Name of Traveler: Richard (RJ) Martin
- a. Name of Accompanying Relative: _____ **OR** None
b. Relationship to Traveler: Spouse Child Other (specify): _____
- a. Dates: Departure: 4/17 Return: 4/19
b. Dates at Personal Expense, if any: _____ **OR** None
- Departure City: DC Destination: Milwaukee/Madison Return City: DC
- Sponsor(s), Who Paid for the Trip: Aspen Institute
- Describe Meetings and Events Attended: Site visit to examine school choice in Wisconsin
- Attached to this form are **each** of the following, *signify that each item is attached by checking the corresponding box*:
 - a completed *Sponsor Post-Travel Disclosure Form*;
 - the *Primary Trip Sponsor Form* completed by the trip sponsor **prior** to the trip, **including all** attachments **and** the *Additional Sponsor Form(s)*;
 - page 2 of the completed *Traveler Form* submitted by the employee; **and**
 - the letter from the Committee on Ethics approving my participation on this trip.
- 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: RJ Martin Date: 4/22/26

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: Chairman Tim Walberg Date: 4-22-26

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.

1. Sponsor(s) who paid or provided in-kind support for the trip: Aspen Institute Education & Society Program

2. Travel Destination(s): Milwaukee, WI & Madison, WI

3. Date of Departure: April 7, 2026 Date of Return: April 9, 2026

4. Name(s) of Traveler(s): Richard John Martin II

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	\$844.81	\$220	200	\$150 for materials and meeting space
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: 4/22/2026

Name: Kaya Henderson Title: Executive VP & Executive Director Rising Generations

Organization: The Aspen Institute

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

Address: 2300 N Street NW, 700, Washington, DC 20037

Telephone: 202-215-2524 Email: Kaya.Henderson@aspeninstitute.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: Richard John (RJ) Martin II

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: RJ Martin

Digitally signed by RJ Martin
Date: 2026.03.02 14:33:08 -05'00'

Name of Signatory (if other than traveler): _____

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

Office Address: 2257 Rayburn House Office Building

Telephone Number: 202 805 0932

Email Address of Contact Person: rj.martin@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: Richard John (RJ) Martin II
2. Sponsor(s) who will be paying or providing in-kind support for the trip: Aspen Institute and Gates Foundation
3. City and State **OR** Foreign Country of Travel: Madison and Milwaukee, WI
4. a. Date of Departure: April 7 Date of Return: April 9
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 Professional Staff Member for K-12 policy and this site visit will explore K-12 policy in Wisconsin.

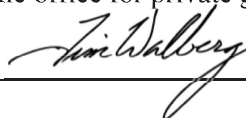
9. **Yes No Is the traveler aware of any registered federal lobbyists or foreign agents involved in planning, organizing, requesting, or arranging the trip?**

10. For staff travelers, to be completed by your employing Member:

ADVANCED AUTHORIZATION OF EMPLOYEE TRAVEL

I hereby authorize the individual named above, an employee of the U.S. House of Representatives who works under my direct supervision, to accept expenses for the trip described in this request. I have determined that the above-described travel is in connection with my employee's official duties and that acceptance of these expenses will not create the appearance that the employee is using public office for private gain.

Signature of Employing Member: _____



Date: March 6, 2026

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 & 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 of staff invited with explanation (note: all are senior education staffers responsible for education policy)

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

6. Date of Departure: April 7, 2026 Date of Return: April 9, 2026

7. a. City of departure: Washington, DC

b. Destination(s): Milwaukee, Wisconsin and Madison, Wisconsin

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:

~~The Aspen Institute's Education and Society Program has a 20-year history of providing non-partisan education programs for Congressional Staff. This trip provides an educational experience to provide insights on how federal education policy, such as the Every Student Succeeds Act, is being implemented at the state and local level; The Aspen Institute Education & Society Program is solely responsible for the organizing and conducting of this trip~~

13. **Answer parts a and b. Answer part c if necessary:**
- a. Mode of travel: Air Rail Bus Car Other (specify: passenger van)
 - 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): 4/7 \$60; 4/8 \$80; 4/9 \$60

2) Provide the reason for selecting the location of the event or trip: We are exploring school choice so selected Wisconsin; since it have the first private school choice program (Milwaukee) and to meet with state level policy makers (Madison)

16. Name, nightly cost, and reasons for selecting each hotel or other lodging facility:
- Hotel Name: Embassy Suites by Hilton Madison Downtown City: Madison, WI Cost Per Night: \$110
 Reason(s) for Selecting: close to the State Capitol (meeting locations) and aligned with per diem rates
- 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	\$645	\$220	\$200
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	\$150	Meeting space and materials (name badges, table tents, and binders)
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: _____
 Name: Kaya Henderson Title: EVP and Executive Director Center for Rising Generations
 Organization: Aspen Institute
 Address: 2300 N Street NW, 700, Wasghington, DC 20037
 Email: Kaya.Henderson@aspeninstitute.org Telephone: 202-215-2524

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



Aspen Education Senior Congressional Staff Network Site Visit to Wisconsin

***Exploring Options: A Site Visit on Wisconsin School Choice
Milwaukee & Madison, WI
April 7 -9, 2026***

The House employees invited (listed below) are senior staff responsible for committees that oversee issues affecting K-12 education; they are invited specifically because of their portfolio to meet with leaders and experts from states, municipalities, research, and support organizations to engage in non-partisan dialogue on the impact of federal policy on K-12 education.

HOUSE CONGRESSIONAL STAFF

Rashage Green

Education Policy Director
House Education and Workforce Committee

RJ Martin

Professional Staff Member
House Education and Workforce Committee



Aspen Education Senior Congressional Staff Network Site Visit to Wisconsin

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Milwaukee & Madison, WI
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HOUSE CONGRESSIONAL STAFF

Marquise Banks

Legislative Aide
Rep. Mark Pocan

Kathryn Salmon

Professional Staff Member
House Appropriations Committee

Ilana Brunner

General Counsel
House Education and Workforce Committee

Brad Thomas

Senior Education Policy Advisor
House Education and Workforce Committee

Rashage Green

Education Policy Director
House Education and Workforce Committee

Theresa Thompson

Professional Staff Member
House Education and Workforce Committee

Amy Jones

Education and Human Services Policy
Director
House Education and Workforce Committee

Philip Tizzani

Professional Staff Member
House Appropriations Committee

Emanuel Kimble

Professional Staff Member
House Education and Workforce Committee

Anna Whitwam

Legislative Assistant
Rep. Gwen Moore

RJ Martin

Professional Staff Member
House Education and Workforce Committee

Samantha Wilkerson

Professional Staff Member
House Education and Workforce Committee

Eli Mitchell

Legislative Assistant
House Education and Workforce Committee

AGENDA

Exploring Options: A Site Visit on Wisconsin School Choice

Site Visit Goals:

- Understand the landscape of school choice in Wisconsin by gaining a grounded understanding of Wisconsin's education ecosystem—including public schools, independent charters, private schools, and choice programs—and how these options interact to shape student experiences and outcomes.
- Explore policy and governance structures by engaging with state and local leaders to learn how Wisconsin's policy environment, governance systems, and funding mechanisms influence school choice and program implementation.
- Identify implications for federal policymaking by surfacing insights from educators, policymakers, and community organizations about the opportunities and challenges of school choice that may inform federal policy debates and Congressional staff's work on education and workforce issues.
- Engage in discussions about the federal government's role in shaping education in Wisconsin, with a specific focus on federalism implications, policy impacts, and the balancing of state and federal priorities.

Tuesday, April 7, 2026

6:00 - 6:55 AM

Wheels Up from DCA

DCA to MKE: Southwest (6:55 AM - 8:10 AM arrival)

DCA to MKE: Delta (6:00 AM - 8:52 AM arrival, layover in Detroit)

9:00 AM

Arrival at Milwaukee Airport

9:00 - 9:45 AM

Airport Transport to Site Visit to Howard Fuller Collegiate Academy

Transportation via chartered bus from the airport to Howard Fuller Collegiate Academy, 2212 N. Vel R. Phillips Ave., Milwaukee, WI 53212

9:45 - 10:15 AM

School Visit: Howard Fuller Collegiate Academy

Participants will explore Howard Fuller Collegiate Academy through a student-led tour, offering an on-the-ground look at the school's learning environment, classrooms, and culture — providing firsthand insight into the experience of students attending an independent charter school in Milwaukee. Howard Fuller Collegiate Academy's conversion from a private school to an independent charter makes it a compelling example of the diverse school choice models at the center of this site visit, illustrating how different governance and funding structures shape the options available to Milwaukee families.

10:15 - 11:15 AM Howard Fuller & School Leadership Discussion

Location: ThriveOn King, N Martin Luther King Jr Dr, Milwaukee, WI 53212

Participants will sit down with Dr. Howard Fuller, Distinguished Professor Emeritus of Education at Marquette University and one of the most influential figures in the Milwaukee school choice movement, alongside school leadership from Howard Fuller Collegiate Academy. Dr. Fuller will provide historical context on the origins and evolution of school choice in Milwaukee, one of the nation's longest-running and most closely watched school choice landscapes. Middle School Principal LaQuasha Logan and High School Principal Philip Smith will then discuss the school's conversion from a private school to an independent charter, sharing insights into how that transition has shaped governance, funding, student outcomes, and attendance, grounding federal policy debates in the realities faced by school leaders on the ground.

Dr. Howard Fuller, Distinguished Professor Emeritus of Education, Marquette University, Retired

Guiding Questions:

- *What were the driving forces behind Howard Fuller Collegiate Academy's conversion from a private school to a charter school, and how has that shift affected the school's mission, culture, and relationship with its community?*
- *How has the conversion affected student outcomes, attendance, and financial sustainability?*
- *What does the Milwaukee experience teach us about how charter authorization and oversight structures either enable or constrain school leaders' ability to serve their students?*
- *What are the lessons learned from the Milwaukee (and Wisconsin) school choice experience?*
- *What are your views on the growth and types of school choice across the states?*

11:15 - 12:15 PM Expanding the Landscape: Panel with Community Members

Location: ThriveOn King

This panel broadens the school choice conversation beyond school walls, bringing together community and civic leaders to explore how school choice is experienced and understood across Milwaukee's broader

ecosystem. Participants will hear from Dale Kooyenga, President of the Milwaukee Metro Chamber of Commerce, on the intersection of school choice and workforce development; Colleston Morgan, Jr., Executive Director of City Forward Collective, on how choice programs are shaping educational equity and community outcomes; and Kole Knueppel, Executive Director of St. Marcus Ministries, on the role faith-based institutions play in Milwaukee's choice landscape. Together, these perspectives offer congressional staff a multidimensional view of school choice — moving beyond policy mechanics to examine how families, businesses, and community organizations experience and engage with the options available to them.

Colleston Morgan, Jr., Executive Director, City Forward Collective
Kole Knueppel, Executive Director at St. Marcus Ministries

Guiding Questions:

- *How has Milwaukee's school choice landscape shaped workforce readiness, community cohesion, and neighborhood vitality over the past two decades?*
- *Where do you see genuine alignment and/or tension between the interests of families, employers, and community organizations in how choice programs are structured and funded?*
- *What are the biggest gaps or inequities in Milwaukee's current choice ecosystem, and which of those could be addressed through federal policy levers?*
- *What role have non-governmental actors, such as chambers of commerce, nonprofits, faith communities, played in Milwaukee's school choice options? What role have these groups played in policy and funding discussion?*

12:15 - 1:00 PM

Working Lunch at ThriveOn King

Aspen facilitators will guide congressional staff through a structured reflection on the morning's visits and conversations, drawing connections between the student experience at Howard Fuller Collegiate Academy and the broader community perspectives shared by Milwaukee's civic and business leaders. Participants will be encouraged to surface early observations, identify points of tension or alignment across what they've heard, and begin connecting on-the-ground realities to the federal policy questions most relevant to their work.

1:00 – 1:15 PM

Travel to Milwaukee Public Schools

Transportation via chartered bus from Howard Fuller Collegiate Academy to Academia de Lenguaje y Bellas Artes (ALBA School).

1:15 – 1:45 PM

Milwaukee Public Schools Visit, ALBA School

Academia de Lenguaje y Bellas Artes (ALBA) is a Milwaukee Public School serving students in grades K3–8 through an innovative dual-language model that delivers rigorous instruction in both English and Spanish. Founded on the belief that bilingual students reach their full potential when challenged academically in both languages, ALBA

integrates culturally relevant curriculum, fine arts, and bilingual education to build academic excellence and cultural identity. As a charter school operating within the Milwaukee Public Schools district, ALBA represents an important dimension of Milwaukee's broader school choice landscape — illustrating how charter designation can enable a district school to innovate and specialize while remaining anchored in the public system. Congressional staff will tour the school to see this model in action, observing classrooms and interacting with students and staff firsthand.

1:45 – 2:45 PM

Milwaukee Public Schools Panel

Following the school tour, participants will engage in a roundtable discussion with Milwaukee Public Schools leadership and ALBA's principal to unpack what they observed and connect it to the broader policy landscape. The conversation will explore how Milwaukee Public Schools is innovating and adapting in the context of one of the nation's most expansive school choice environments — examining the implications of choice programs on district enrollment, funding, and resource allocation. Panelists will discuss how district and charter schools like ALBA are finding ways to differentiate and serve their communities, while also addressing the federal policy and funding questions that shape the choices available to Milwaukee families. This discussion offers congressional staff a candid, ground-level perspective on the opportunities and challenges facing a large urban district navigating the intersection of local innovation and federal policy.

Dr. Brenda Casellius, Superintendent, Milwaukee Public Schools
Bridget Schock, Director, Contracted School Services, Milwaukee Public Schools

Regina Navejar, Principal, ALBA

Chris Thiel, Legislative Policy Director, Milwaukee Public Schools

Dr. Natalie Collins, Director of Research and Assessment, Milwaukee Public Schools

Guiding questions:

- *How has the Milwaukee school choice landscape shaped MPS's enrollment, budget, and programmatic decisions over time?*
- *Has/what are innovations that MPS has pursued in response to the choice environment, and what resources or policy changes would enable the district to scale those innovations more broadly?*
- *How do federal funding streams, such as Title I, IDEA, Title II-A, etc., interact with Wisconsin's choice funding mechanisms?*
- *Do federal requirements (funding or policy) create friction or unintended consequences at the district level?*
- *As a district leader, what role should the state – or federal government – play in ensuring equitable and successful student outcomes in such a diverse delivery system?*

2:45 – 3:00 PM

Transfer to United Community Center Charter School

Transportation via chartered bus from MPS school to United Community Center Charter, 1028 S 9th St, Milwaukee, WI 53204

3:00 – 3:30 PM United Community Center Charter School Tour

30 Minute School Tour - visit classrooms and talk with teachers, staff, and students

3:30 – 4:15 PM United Community Center Panel

United Community Centers' mission is to transform the lives of Hispanics, families, and individuals of all ages by providing the highest quality comprehensive services in education, human services, health, community development, and cultural arts. As part of their work in South Milwaukee, they operate a network of charter schools, supporting students from 6 weeks old to college-aged. This visit will feature a panel of their school leaders and dive into the unique services provided to their students and families.

Laura Gutiérrez, Chief Executive Officer, UCC Schools
Shaba Martinez, Chief Academic Officer, UCC Schools
Santiago Navarro, Principal, Bruce-Guadalupe Middle School

Guiding questions:

- *How does UCC's model of integrating education with health, human services, and cultural programming serve students and families in ways that a standalone schools don't?*
- *Does UCC's approach have implications for how we think about school quality and student support more broadly?*
- *What are the specific funding and policy mechanisms that make UCC's cradle-to-college continuum possible?*
- *How has UCC navigated serving a primarily Latino community within a broader school choice system that was not necessarily designed with that community's needs in mind?*
- *What aspects of a community-based charter operator and the families they serve that isn't captured in the typical school performance data?*

4:15 – 5:30 PM Diverse Voices in School Choice Panel

This panel brings together practitioners and advocates representing communities whose experiences are often overlooked in school choice debates, including rural families, students with disabilities, and parents navigating complex choice systems. Panelists will share frontline perspectives on the opportunities and barriers these populations encounter, grounding the broader policy conversation in the diverse realities of the school choice landscape.

Latoya Woods, Parent Engagement Coordinator, City Forward Collective
Dr. Julie Mead, Emeritus Professor, University of Wisconsin, Madison

Guiding questions:

- *Does the school choice infrastructure in Wisconsin, including availability of information, transportation, and enrollment processes work for families? What about for rural areas or families of students with disabilities? Where does it break down?*
- *How do the accountability and service requirements under IDEA interact with private school choice programs, and what risks or protections should federal policymakers be aware of?*
- *What does meaningful school choice require (beyond the existence of options) for families that have limited access to information, transportation, or actual choices?*
- *If families exercise a choice option, but find that that option is not a good fit for their student(s), what options do they have to return to their original school or make a different school choice option?*

5:30 – 5:45 PM

Travel to Dinner

Transportation via chartered bus from United Community Center Charter to Cafe Hollander

6:00 – 7:30 PM

Working Dinner

*Location: Cafe Hollander - Tosa Village
7677 W State St, Wauwatosa, WI 53213*

Panelists from the day are invited to join for dinner to continue the conversation around school choice in Milwaukee

7:30 – 9:00 PM

Transfer to Madison & check into hotel

Transportation via chartered bus from dinner to Embassy Suites By Hilton Madison Downtown

Wednesday, April 8, 2026

7:30 – 9:00 AM

Breakfast

*Embassy Suites By Hilton Madison Downtown
231 S. Pinckney Street, Madison, Wisconsin, 53709*

9:00 – 9:30 AM

Travel to State Capitol

2 East Main St., Madison, Wisconsin

9:30 - 11:30 AM

Policymaker Perspectives on School Choice in Wisconsin with State Legislators

330SW Conference Room in the State Capitol Building.

Discussion with members of the Wisconsin State Senate and Assembly members about the state of education policy and funding in Wisconsin, with a focus on school choice programs, and an examination of the role of federal policy and funding.

David Fladeboe, Chief of Staff to Senator John Jagler(R-Watertown), Chair, Wisconsin Senate Education Committee

Representative Joel Kitchens (R-Sturgeon Bay), Chair, Wisconsin Assembly Education Committee

Representative Angelina Cruz (D-Racine), Member, Wisconsin Assembly Education Committee

11:30 – 12:00 PM Discussion with Gov. Tony Evers

Governor's 8th Floor Conference Room in the State Capitol Building.

Conversation with the governor about the state of education policy and funding in Wisconsin, with a focus on importance of funding public schools and the critical role public schools play in serving all students, and an examination of the role of federal policy and funding.

Governor Tony Evers, State of Wisconsin

12:00 - 12:30 PM Transition to Lunch

12:30 - 1:30 PM Working Lunch

Location: The Old Fashioned, 23 N Pinckney St #1, Madison, WI 53703

Following a packed morning at the State Capitol, Aspen facilitators will lead congressional staff through a structured debrief drawing connections between the policymaker perspectives heard from state legislators and Governor Evers. Participants will reflect on the themes, tensions, and takeaways emerging from those conversations, identifying areas of bipartisan agreement, points of contention, and implications for federal education policy, as they prepare for the afternoon's deeper dive with the Wisconsin Department of Public Instruction.

1:30 - 1:45 PM Travel to Wisconsin Department of Public Instruction

Wisconsin Department of Public Instruction building, 201 W Washington Ave, Madison, WI 53703

1:45 - 3:45 PM Meeting with Department of Public Instruction

Wisconsin Department of Public Instruction building, 201 W Washington Ave, Madison, WI 53703

Participants will meet with Wisconsin Department of Public Instruction leadership for an in-depth conversation on the state of education policy

and funding in Wisconsin. This discussion will build on the morning's legislative conversations, offering a state agency perspective on how Wisconsin's school choice programs are administered, funded, and evaluated, and how federal policy and funding streams intersect with state priorities. DPI leaders will speak to the opportunities and challenges of overseeing a diverse education ecosystem that includes public, charter, and private choice programs, providing congressional staff with a comprehensive view of how state-level implementation shapes the policy landscape that federal legislation must ultimately account for.

Tom McCarthy, Deputy State Superintendent, Wisconsin Department of Public Instruction

Guiding Questions:

- *How does DPI balance its statutory obligations to oversee and support all students in Wisconsin with the reality that significant portions of the student population are educated outside of public schools?*
- *What data does DPI currently collect on student outcomes, demographic participation, and fiscal information across public, charter, and choice programs? Where are there gaps that make evidence-based policymaking harder?*
- *How has the federal role in Wisconsin education evolved over recent years? Are there areas where federal requirements or funding conditions are misaligned with the realities of administering education in a high-choice state?*
- *What should federal policymakers understand about the fiscal and operational pressures facing state education agencies as they administer an increasingly complex, multi-sector education system?*

3:45 - 4:00 PM

Travel back to Hotel

*Embassy Suites By Hilton Madison Downtown
231 S. Pinckney Street, Madison, Wisconsin, 53709*

4:00 - 5:00 PM

Discussion with State Education Organizations

Embassy Suites By Hilton Madison Downtown

Participants will hear from leaders of Wisconsin's foremost school choice advocacy and membership organizations, offering a perspective that complements the governmental voices heard earlier in the day. Katie Scott of the Wisconsin Council of Religious & Independent Schools (WCRIS), Jim Bender of the Wisconsin Independent Charter School Association, and Andrew Neuman of School Choice Wisconsin will speak to how their respective sectors — religious and independent schools, charter schools, and the broader choice movement — experience and engage with Wisconsin's policy and funding landscape. This conversation will surface

the priorities, challenges, and federal policy considerations most pressing to the organizations actively shaping and supporting school choice in Wisconsin, rounding out the day's multidimensional look at the state's education ecosystem.

Katie Scott, Executive Director, Wisconsin Council of Religious & Independent Schools (WCRIS)

Jim Bender, Executive Director, Wisconsin Independent Charter School Association

Andrew Neuman, Board Member, School Choice Wisconsin

Guiding questions:

- *What is the current state of Wisconsin's private school choice and independent charter sectors in terms of school quality, participation rates, and fiscal sustainability? What policy conditions have been most consequential in shaping that trajectory?*
- *What is your view of the role of the Wisconsin state government in supporting (or inhibiting) the growth of school choice in Wisconsin?*
- *How do federal programs and funding intersect with what Wisconsin has already built, and what do you see as the opportunities and risks?*
- *What accountability frameworks do you believe best protect students and families in choice programs without undermining the autonomy and innovation that make those programs attractive in the first place?*

5:00 – 6:15 PM **Break**

6:15 – 6:30 PM **Walk to Reception & Dinner**

Location: Graze Restaurant 1 S Pinckney St, Madison, WI 53703

6:30 – 8:00 PM **Working Reception & Dinner with Faculty, Local Education Leaders**

Location: Graze Restaurant 1 S Pinckney St, Madison, WI 53703

The day's conversations continue over a working reception and dinner, bringing together congressional staff and the educators, policymakers, and organizational leaders from across the day's sessions. This informal setting offers a valuable opportunity for staff to step outside the structured dialogue, deepen relationships with speakers, and follow up on the threads and questions that emerged throughout the day. Aspen facilitators will help animate the conversation, drawing connections across the diverse perspectives heard — from the State Capitol to the Department of Public Instruction to Wisconsin's leading school choice organizations — and helping participants synthesize their learning as the Madison portion of the visit draws to a close.

Thursday, April 9, 2025

7:30 – 9:00 AM **Breakfast**

*Embassy Suites By Hilton Madison Downtown
231 S. Pinckney Street, Madison, Wisconsin, 53709*

9:00 – 9:15 AM **Travel to Spring Harbor Middle School**

Location: 1110 Spring Harbor Drive, Madison WI 53705

9:15 – 11:00 AM **Madison Public Schools Meeting**

11:30 - 12:15: School Tour: Spring Harbor Middle School

Participants will have the opportunity to walk through an example of Madison Public Schools with school staff, getting an on-the-ground look at the learning environment, facilities, and programming that define the Madison Public Schools experience. This tour offers a firsthand glimpse into how the district is translating its broader vision into everyday practice — and sets the context for the conversation to follow.

12:15 – 1:30: Roundtable discussion

This roundtable brings participants into a candid conversation with Madison Public Schools leaders about the district's evolving landscape. Topics will include the local political dynamics shaping charter school policy in Madison, recent trends in enrollment growth, and the district's "Building for the Future" plan — a forward-looking framework for how the district is investing in its schools, students, and communities. Participants are encouraged to come with questions and engage directly with the leaders navigating these challenges and opportunities in real time.

Dr. Carlettra Stanford, Assistant Superintendent of Office of Schools and Learning

Guiding Questions:

- *How does Madison's school choice landscape differ from Milwaukee's in terms of scale, governance, and community politics? Specifically, how do Magnet schools fit into that landscape and fill an unmet need?*
- *What does that tell us about how local context shapes the implementation and impact of statewide choice policy?*
- *What is the district's "Building for the Future" capital and programming plan, and how does it account for ongoing competition from charter and private school options?*
- *From the district's perspective, what is the appropriate state role in supporting urban public school systems that are navigating both the opportunities and fiscal pressures of a choice environment?*
- *How do federal funding streams, such as Title I, IDEA, Title II-A, etc., interact with Wisconsin's choice funding mechanisms?*
- *Do federal requirements (funding or policy) create friction or unintended consequences at the district level?*

11:00 – 11:30 AM Travel to Lighthouse Christian School

Location: 6402 Schroeder Rd, Madison, WI 53714

11:30 – 1:30 PM School Visit: Lighthouse Christian School

9:15 - 9:45: School Tour

Participants will tour Lighthouse Christian School, a private faith-based school serving students in grades PreK–5. As the first and only private school in Dane County participating in Wisconsin's Parental Choice Program, Lighthouse offers a compelling window into how the state's voucher program operates in practice — expanding access to bilingual, multicultural education for low-income and minority families who might not otherwise have access to a private school option.

9:45 – 11:00: Roundtable discussion with Principal and leadership team

Following the tour, participants will hear from school leadership to have a conversation on the school's experience participating in Wisconsin's Parental Choice Program. The discussion will explore how voucher funding has shaped the school's growth, its model of bilingual and faith-based instruction, and what school choice means for the diverse Madison families Lighthouse serves — offering congressional staff a firsthand perspective on how state choice programs reach underserved communities.

Rev. Tia Sierra, Principal and Co-Pastor of Lighthouse Christian School

Guiding questions:

- *What does participating in Wisconsin's school choice program mean for Lighthouse Christian School in terms of who you can serve, how you operate, and whether it has required you to make any tradeoffs with your school's mission or identity?*
- *Private religious schools have been at the center of significant federal court decisions in recent years around funding access and state Blaine Amendment restrictions. How has the legal and policy environment shaped your school's ability to participate in choice programs, and what do you think federal policymakers most misunderstand about the experience of faith-based schools in these systems?*
- *What does accountability look like from your vantage point? To families, to the state, and how do you think about the balance between demonstrating results and preserving the distinctives that make your school a meaningful choice for families?*
- *Having spent two and a half days visiting public schools, charter schools, and community-based schools across Milwaukee and Madison, what would you most want Congressional staff to*

understand about how a school like Lighthouse fits into and contributes to Wisconsin's broader education landscape?

1:30 - 2:00 PM Boxed Lunch & Travel to Madison Airport

4:12 - 5:20 PM Depart Madison, Wisconsin

MSN to DCA: American (4:12 PM - 7:29 PM)

MSN to DCA: Delta (5:20 PM - 8:18 PM)

7:29 - 8:18 PM Land in DC

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: Aspen Institute Education & Society Program
2. Name of your organization: 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: 02/20/2026

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.

Michael Guest, Mississippi
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Mark DeSaulnier, California
Ranking Member

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ONE HUNDRED NINETEENTH CONGRESS

U.S. House of Representatives

COMMITTEE ON ETHICS

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<https://ethics.house.gov>

April 7, 2026

Mr. Richard Martin
Committee on Education and Workforce
2257 Rayburn House Office Building
Washington, DC 20515

Dear Mr. Martin:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to Madison, Wisconsin, scheduled for April 7 to 9, 2026, sponsored by Aspen Institute, Inc. and 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 \$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:rp



February 16, 2026

Dear House Colleague,

We are writing to invite you to participate in an upcoming site visit – *“Exploring Options: A Site Visit on Wisconsin School Choice”* – for the Aspen Senior Congressional Education Staff Network from **Tuesday, April 7, 2026, to Thursday, April 9, 2026** in **Milwaukee and Madison, Wisconsin**.

At this convening, staffers will meet with expert faculty, school leaders, policymakers, and community organizations to understand how Wisconsin’s education ecosystem—including public schools, independent charters, private schools, and choice programs—interact to shape student experiences and outcomes. Staffers will get the chance to:

- Understand the landscape of schools in Wisconsin by gaining a grounded understanding of Wisconsin’s education ecosystem—including public schools, independent charters, private schools, and choice programs—and how these options interact to shape student experiences and outcomes.
- Explore policy and governance structures by engaging with state and local leaders to learn how Wisconsin’s policy environment, governance systems, and funding mechanisms for public schools, school choice programs, including short and long-term changes in implementation and outcomes.
- Identify any implications for federal policymaking by surfacing insights from educators, policymakers, and community organizations about the implications and impacts of school choice that may inform federal policy discussions and Congressional staff’s work on education and workforce issues.
- Engage in discussions about the federal government’s role in shaping education in Wisconsin, with a specific focus on policy impacts, funding levels, and changes, as well as the balancing of state and federal priorities.

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 and school visits
- A completed Primary Trip Sponsor Form
- A list of invited House staffers
- A Traveler Form [must be filled out by Staffer]
- Completed Grantmaking Organization Additional Trip 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 6, 2026**. 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 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 site visit.

The site visit will begin the morning of **Tuesday, April 7, 2026, in Milwaukee** and will conclude the afternoon of **Thursday, April 9, 2026, in Madison**. Please plan your travel accordingly in order to be present for the duration of the convening. Participants should arrive in Milwaukee no later than the morning of April 7, 2026, and plan return travel no earlier than late afternoon on April 9, 2026. Dress is business casual for all meetings.

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

Warm regards,

Brittany Mauney

Megan Bennett

Hilton Etienne

Tay Moore