Date/Time Stamp:

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Employee Post-Travel Disclosure of Travel Expenses

Post-Travel Filing Instructions: Complete this form within **30 days** of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building.**

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

☐ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**
☐ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): The Aspen Institute (Education + Society Program)

Travel date(s): February 21-23, 2017

Name of accompanying family member (if any): _____

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING **DID NOT INCREASE** DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☒ Good Faith Estimate ☐ Actual Amount	$54	$188	$147.50	

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☐ Good Faith Estimate ☐ Actual Amount				

Provide a description of all meetings and events attended. *See* Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): I attended a three day meeting that included meals and two netowrks receptions to better understand ESSA implementation in the 50 states.

3/21/17 (Date)

Kara Marchione (Printed name of traveler)

Kara Marchione (Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

3/21/17 (Date)

Patty Murray (Signature of Supervising Senator/Officer)

Date/Time Stamp:

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the Select Committee on Ethics in SH-220. Incomplete and late travel submissions will not be considered or approved. This form must be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

17 JAN 23 PM 5:07

Name of Traveler: Kara Marchione

Employing Office/Committee: Senate Health, Education, Labor and Pensions Committee

Private Sponsor(s) (list all): Aspen Institute Education & Society Program

Travel date(s): February 21-23, 2017

Note: If you plan to extend the trip for any reason you must notify the Committee.

Destination(s): ~~Salamander Resort in Middleburg, VA~~ Warrenton, VA (KM)

Explain how this trip is specifically connected to the traveler's official or representational duties:

The Aspen Institute Education and Society Program will be convening to discuss early lessons from ESSA implementation. I am Education Policy Director for HELP minority and this will help inform my future work on this issue.

Name of accompanying family member (if any):

Relationship to Employee: ☐ Spouse ☐ Child

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

1/23/17
(Date)

Kara Marchione
(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

I, Senator Patty Murray *(Print Senator's/Officer's Name)* hereby authorize Kara Marchione *(Print Traveler's Name)*

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. *(signify "yes" by checking box)* ☐

1/23/17
(Date)

Patty Murray
(Signature of Supervising Senator/Officer)

(Revised 10/19/15)

Form RE-1

THE ASPEN INSTITUTE
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January 10, 2017

Dear Senate Colleague,

We are writing to invite you to participate in an upcoming retreat – ***"Early Lessons from ESSA: State and District Perspectives on Accountability and School Improvement"*** – for the Aspen Senior Congressional Education Staff Network from **12:30 PM Tuesday, February 21** to **1:00 PM Thursday, February 23, 2017** at Airlie House, located 48 miles from Washington, DC.

At this retreat, staffers will hear from state and district leaders on early implementation lessons of the Every Student Succeeds Act. Staffers will explore how states are developing ESSA state plans and accountability systems, including how they are approaching new school-quality and English language proficiency indicators. The retreat will also focus on SEA capacity and the resources needed to support school improvement and provide an opportunity to take a deep dive into selected state ESSA plans. Finally, the retreat will provide an opportunity for staffers to engage in their own learning and build working relationships with colleagues from different parties and chambers and with leading experts in the field.

We fully comply with the rules that have been enacted by the Senate regarding privately-funded travel. Enclosed you will find all the forms necessary for Ethics rules compliance:

- A detailed agenda listing discussion sessions
- A completed Private Sponsor Travel Certification form
- A list of invited staffers
- A blank Employee Pre-Travel Authorization form

You must complete the Employee Pre-Travel Authorization Form and submit it with the enclosed agenda, list of invited staffers, and Private Sponsor Travel Certification form directly to the Senate Ethics Committee (220 Hart) no later than Monday, January 23, 2017. 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 retreat.

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 and the Carnegie Corporation of New York. The Aspen Education & Society Program maintains autonomy over invitations, materials, and the agenda for the retreat.

The retreat will begin at **12:30 PM on Tuesday, February 21, 2017**, at Airlie House, and will conclude at **1:00 PM on Thursday, February 23, 2017**. Please plan your travel accordingly in order to be present for the duration of the retreat. Dress is casual for all meetings.

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

Warm regards,

Chris Cross Ross Wiener Danielle Gonzales Marisa Goldstein

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

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1. Sponsor(s) of the trip (please list all sponsors): The Aspen Institute (Education & Society Program)

2. Description of the trip: Aspen Institute-sponsored convening for senior Congressional education staffers on state implementation of the Every Student Succeeds Act.

3. Dates of travel: February 21-23, 2017

4. Place of travel: Warrenton, VA

5. Name and title of Senate invitees: Please see attached roster.

6. I *certify* that the trip fits one of the following categories:

   ☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal **and** do not retain or employ registered lobbyists or agents of a foreign principal **and** no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

   OR

   ☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) *(see question 9)*.

7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.

   AND

   ☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.

8. I *certify* that:

   ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.

   AND

   ☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**
I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and **one** overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

OR

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and **two** overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10).*

OR

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**
If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

The Aspen Institute Education & Society Program facilitates the Aspen Senior Congressional Education Staff Network and organizes convenings to support staffers' professional learning. The Aspen Education & Society Program staff are completely and solely responsible for the retreat's planning and organization.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

The Aspen Education & Society Program seeks to provide a neutral forum to aid education policymakers in their efforts to improve K-12 public education. The purpose of the trip is to conduct a non-partisan educational retreat that encourages off-the-record, candid exchanges of ideas to support staffers' learning

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

The Aspen Institute Education & Society Program has been conducting convenings for Congressional education staff for 11 years.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

The Aspen Institute Education & Society Program works with federal, state, and local education leaders to improve K-12 student achievement, particularly for traditionally underserved students.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
☒ Good Faith estimate ☐ Actual Amounts	$54	$188	$147.50	$186 (mtg room rental and incidentals)

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation **or** b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

B. The trip is organized specifically with regard to Congressional staff participation in order to support their learning on how states are implementing the Every Student Succeeds Act.

18. Reason for selecting the location of the event or trip

The location is close to Washington, DC for easy staffer travel and allows faculty members (external experts brought in to support the retreat) to fly into Dulles and easily travel to the facility.

19. Name and location of hotel or other lodging facility:

Airlie House, 6809 Airlie Rd, Warrenton, VA 20187

20. Reason(s) for selecting hotel or other lodging facility:

The hotel has sufficient meeting space and lodging to support off-the-record, non-partisan exchanges of ideas and professional learning.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

Rooms are $94/day, which reflects the per diem limit.

Meals are $59/day, which reflects the per diem limit.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Transportation is not provided; mileage will be reimbursed for participants' travel by personal car.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

Invitees will participate in a Network reception in order to facilitate informal learning between the staffers and the experts and system leaders who will also participate in the retreat.

25. I hereby *certify* that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.):

Signature of Travel Sponsor: Elliot Gerson

Name and Title: Elliot Gerson, Executive Vice President, Policy & Public Programs

Name of Organization: The Aspen Institute

Address: 1 Dupont Circle NW, Suite 700, Washington, DC 20036

Telephone Number: 202-736-5859

Fax Number: 202-467-0790

E-mail Address: lisa.jones@aspeninstitute.org

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THE ASPEN INSTITUTE
EDUCATION & SOCIETY PROGRAM

Aspen Senior Congressional Education Staff Network Retreat

Early Lessons from ESSA: State and District Perspectives on Accountability and School Improvement

Airlie House
6809 Airlie Road
Warrenton, VA 20187
P: 540-347-1300

February 21-23, 2017

AGENDA

Retreat Goals:

- Understand how state education leaders are developing ESSA state plans and accountability systems, including how SEAs are approaching the new school quality or student success indicator and the English language proficiency indicator.
- Learn about new reporting requirements and discuss SEA capacity to design and implement accountability systems and support school improvement.
- Understand the different approaches states are taking to ESSA implementation, what changes they are considering in transitioning from NCLB, and what factors drive those choices.
- Engage in active learning and build working relationships with education leaders from the field, as well as with colleagues from different parties and chambers.

Tuesday, February 21, 2017 — ***All Meeting Sessions in the Meadow Room***

12:00 PM — **Arrival and Check-In**

12:30 – 1:00 PM — **Lunch** — *Airlie Room*

1:15 – 1:45 PM — **Welcome, Overview, and Retreat Objectives**

To guide the retreat's discussion, Congressional staffers will begin by sharing their top two learning objectives for the convening.

1:45 – 3:15 PM — **Session I: Setting the Context – State Capacity**

Debbie Critchfield, *Secretary and Board Member, Idaho State Board of Education*
Betheny Gross, *Research Director and Senior Research Analyst, Center on Reinventing Public Education*

Guiding Questions:

- *Who, within SEAs, is leading the day-to-day ESSA work? What does it look like?*
- *What changes would need to be made within SEAs to fulfill all of ESSA's requirements (i.e., data collection and analysis, reporting, stakeholder engagement, supporting school improvement, using evidence-based interventions) and to ensure that these new roles are sustainable for SEAs?*

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On the development of the state plan, what has been done and what is left to do? How are SEAs coordinating with the legislature, governor, and state board? What is the capacity of state-supported regional education service agencies or centers to support SEAs in this work?

3:15 – 3:45 PM **Break and individual reflection**

3:45 – 5:00 PM **Session II: Supporting Turnaround and Intervention**

***Tiffany Anderson**, Superintendent, Topeka Public Schools*
***Deborah Frison**, Deputy Commissioner of School Improvement and Support, Nebraska Department of Education*
***Carlas McCauley**, Director, Center on School Turnaround*
***Carol Saylor**, Chief Recovery Officer, School District of the City of York*

Guiding Questions:

- *How are SEAs and LEAs thinking about school improvement strategies? What are some of the biggest shifts in school improvement from NCLB to ESSA? What factors are being considered to select these approaches? What evidence exists for these decisions? How are SEAs identifying strategies that meet the requirements of the first three tiers of evidence defined in ESSA and making this information accessible to LEAs?*
  How might SEAs support LEAs that are implementing comprehensive support and improvement plans and monitoring schools' targeted support and improvement plans?

5:00 – 5:20 PM **Taking stock: Staff reflections and feedback to guide remaining discussions**

6:30 PM **Networking Reception with Expert Faculty** *East Room*

Staffers will have the opportunity to network with participants during the reception.

7:00 – 8:30 PM **Dinner with Discussion of Earlier Sessions** *East Room*

Wednesday, February 22, 2017 *All Meeting Sessions in the Meadow Room*

7:30 – 8:30 AM **Breakfast** *Airlie Room*

8:30 – 10:00 AM **Session III: Developing Accountability Systems – New Indicators**

***Debbie Critchfield**, Secretary and Board Member, Idaho State Board of Education*
***Deborah Frison**, Deputy Commissioner of School Improvement and Support, Nebraska Department of Education*
***Scott Marion**, President and Executive Director, National Center for the Improvement of Educational Assessment*

Guiding Questions:

What is the status of the development of the "fifth indicator" of school quality or student success? What has been the process to determine the measures for this indicator?

- *How will the indicators be weighted? What are the biggest shifts from prior accountability systems? What is not changing? What factors are driving these decisions?*

10:00 – 10:15 AM **Break**

10:15 AM – 12:00 PM **Session IV: Work Session – A Deep Dive into Draft State Accountability Models**

In small groups, staffers will have the opportunity to examine components of proposed states accountability systems in two states' draft ESSA plans in order to compare and contrast the systems and compare them against the current accountability models in these states.

Guiding Questions:

What is new or different? What has not changed?

- *What is surprising?*

12:00 – 1:00 PM **Lunch** *Airlie Room*

1:00 – 2:15 PM **Session V: Consultancies**

State and district leaders will present problems of practice related to ESSA and receive feedback from staffers and other faculty members.

2:15 – 2:30 PM **Break**

2:30 – 3:00 PM **Debrief Consultancies**

3:00 – 4:45 PM **Session VI: State Accountability Systems – Equity, Reporting, and Utility**

***Debbie Critchfield**, Secretary and Board Member, Idaho State Board of Education*
***Scott Marion**, President and Executive Director, National Center for the Improvement of Educational Assessment*

Guiding Questions:

How are SEAs integrating English learner proficiency into state accountability systems? What is SEA and LEA capacity in this area, and what resources are available to them?

- *How are SEAs approaching ESSA's public reporting and report card requirements? What is SEA and LEA capacity in this area? What are the challenges?*

What measures can provide the most useful information to teachers, parents, and communities? How do you know? How is this information best communicated?

6:15 PM **Networking Reception with Expert Faculty** *Audubon Room*

Staffers will have the opportunity to network with participants during the reception.

7:00 – 8:30 PM **Dinner with Discussion of Earlier Sessions** *Audubon Room*

Thursday, February 23, 2017 — *All Meeting Sessions in the Meadow Room*

7:30 – 8:30 AM	**Breakfast**	*Airlie Room*
8:30 – 8:45 AM	**Staff reflections and feedback to guide remaining discussions**	
8:45 – 10:30 AM	**Session VII: Federal Supports and Oversight for ESSA Implementation**	

***Betheny Gross**, Research Director and Senior Research Analyst, Center on Reinventing Public Education*
***Scott Marion**, President and Executive Director, National Center for the Improvement of Educational Assessment*
***Carlas McCauley**, Director, Center on School Turnaround*
***Carol Saylor**, Chief Recovery Officer, School District of the City of York*

Guiding Questions:

- *Are federal support organizations, such as labs and centers, providing assistance to SEAs and LEAs on ESSA implementation? How and of what nature? What support is most needed?*
- *What supports or resources are SEAs and LEAs likely to seek from the U.S. Department of Education to help implement, monitor, and evaluate ESSA? What other related issues are on the horizon (e.g., Title II, Title IV, assessment flexibility, etc.)?*

10:30 – 10:45 AM	**Complete Retreat Evaluation**	
10:45 – 11:00 AM	**Break**	
11:00 – 11:30 AM	**Final Observations from Expert Faculty**	
11:30 – 12:00 PM	**Taking Stock: Staff Reflections and Feedback to Guide Next Steps for the Network**	
12:00 – 1:00 PM	**Lunch and Adjourn**	*Airlie Room*

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EDUCATION & SOCIETY PROGRAM

Aspen Senior Congressional Education Staff Network Retreat

Early Lessons from ESSA: State and District Perspectives on Accountability and School Improvement

Airlie House
6809 Airlie Road
Warrenton, VA 20187
Phone: (540) 341-3288

February 21-23, 2017

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**Unable to attend*

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**Unable to attend*

000004

Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:

Post-Travel Filing Instructions: Complete this form within **30 days** of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building.**

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

☒ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**
☒ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): The Aspen Institute (Education + Society Program)

Travel date(s): February 21-23, 2017

Name of accompanying family member (if any): _____
Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING **DID NOT INCREASE** DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	**Lodging Expenses**	**Meal Expenses**	**Other Expenses (Amount & Description)**
☒ Good Faith Estimate ☐ Actual Amount	$54	$188	$147.50	

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	**Lodging Expenses**	**Meal Expenses**	**Other Expenses (Amount & Description)**
☐ Good Faith Estimate ☐ Actual Amount				

Provide a description of all meetings and events attended. *See* Senate Rule 35.2(c)(6). (Attach additional pages if necessary.):
I attended a three day meeting that included meals and two networking receptions to better understand ESSA implementation in the states

3/20/17 (Date) Kara Marchione (Printed name of traveler) Kara Marchione (Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

_____ (Date) _____ (Signature of Supervising Senator/Officer)