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COVER SHEET FOR AMENDMENT OF POST-TRAVEL SUBMISSION

Instructions: Use this form as a cover sheet for any paperwork you may need to submit to the **Office of Public Records** in order to make your Privately Sponsored Post-Travel Submission complete in accordance with Rule 35. **Only complete this form if you need to submit an amendment to a post-travel filing you have already submitted.**

SUBMIT DIRECTLY TO THE **OFFICE OF PUBLIC RECORDS IN 232 HART BUILDING**

Name of Traveler: Kara Marchione

Employing Office/Committee: Senator Patty Murray, HELP Committee

Travel Expenses Paid by (List all sources): The Aspen Institute (Education & Society)

Travel Date(s): Oct. 2-3, 2019

Description/Title of Attached Forms: Invitation and Invitee list

Purpose of Amendment (describe the reason for amending original submission): I included an outdated invitation and invitee list. The correct forms are now included.

12/6/19
(Date)

Kara Marchione
(Signature of Traveler)

(Revised 4/19/2010)

THE ASPEN INSTITUTE

EDUCATION & SOCIETY PROGRAM

August 22, 2019

Dear Senate Colleague,

We are writing to invite you to participate in an upcoming retreat: "***One Community's Efforts to Increase Mobility with a Focus on Housing and Social Capital***" for the Aspen Senior Congressional Staff Network on Mobility from Poverty. The retreat starts on **Wednesday, October 2nd, 2019** at the The Renaissance West Community Initiative at 11:30 AM. The retreat will conclude on **Thursday, October 3rd** at 4:00 PM.

In addition to a site visit to the Renaissance West Community Initiative, we will be joined by interdisciplinary and diverse panels of policy experts and practitioners for facilitated discussions of issues related to mobility from poverty. This convening will provide staff with an off-the-record opportunity to learn about and discuss a set of issues related to mobility from poverty with a focus on the Charlotte community's efforts to understand and address structural and intergenerational barriers to escaping poverty, including the roles of affordable housing and social capital. In addition, senior staffers will have the opportunity to engage in active learning and build working relationships with scholars and practitioners in the field, with state and local officials, and with colleagues from different parties and chambers. Staff will also have time to explore potential roles for Congress and Executive Branch agencies in increasing mobility from poverty.

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

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

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 Senate Ethics Committee on Ethics (220 Hart) no later than **Friday, August 30, 2019**. 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 retreat invitations, materials, and agenda.

If you have any questions in advance of the retreat, please do not hesitate to contact Doug Mesecar at (703) 887-3738. The retreat promises to be productive and informative. We look forward to seeing you in Charlotte, NC on Wednesday, October 2nd.

Warm regards,

Ross Wiener

Doug Mesecar

The Aspen Institute Education & Society Program
Appendix to Private Sponsor Travel Certification Form
Senior Mobility from Poverty Retreat, October 2-3, 2019.

Question 5. Name and title of Senate invitees.

Jeff Wrase	Deputy Staff Director	Senate Finance Committee
Jennifer Kuskowski	Policy Advisor	Senate Major Leader McConnell
Ryan Martin	Senior Human Services Advisor	Senate Finance Committee
Amy Marie Pellegrino	Health Policy Director	Senate Special Committee on Aging
Tim Carlton	Policy Advisor	Senator Cassidy
Scott Winship	Executive Director	Senate Joint Economic Committee
Charles Cogar	Legislative Director	Senator Scott
Beth Nelson	Senior Health Policy Advisor	Senate HELP Committee
Marisa Morin	Professional Staff	Senate Finance Committee
Gabriella Camozzi	Legislative Assistant	Senator Durbin
Beth Cooper	Professional Staff	Senate Banking Committee
Nikki McKinney	Professional Staff	Senate HELP Committee
Kara Marchione	Director of Education Policy	Senate HELP Committee
Jordan Hynes	Professional Staff	Senate HELP Committee
Courtney Temple	Legislative Director	Sen. Tillis
Dabney Hegg	Professional Staff	Senate Appropriations Committee

Question 12. Briefly describe the role of each sponsor in organizing and conducting the trip (response continued) -- The Bill & Melinda Gates Foundation is not a sponsor of this trip and did not play a role in organizing, planning or conducting the trip. The Foundation provided grant funding to support the Aspen Institute Education & Society Program, including the Aspen Senior Congressional Education Staff Network; however, the Foundation did not earmark any funding for this trip.

Questions 13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to the mission (response continued) – The Aspen Institute Education and 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.

Question 15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips) (response continued) – The Aspen Institute organizes numerous educational activities, including educational briefings, roundtables, forums and conferences for a diverse range of attendees including federal and state policymakers, business and organizational leaders, members of the press and the general public. The Aspen Institute Education and Society Program works with federal, state and local education leaders to improve K-12 student achievement, particularly for underserved students.

Question 18. Reason for selecting the location of the event or trip (response continued) -- Staff will hear from Charlotte leaders about their response to this finding and what factors contributed to the ranking.

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