

COVER SHEET FOR AMENDMENT OF POST-TRAVEL SUBMISSION

Date/Time Stamp
RECEIVED
SECRETARY OF THE SENATE
PUBLIC RECORDS
2023 AUG 11 PM 1:36

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: Senate Appropriations Committee (Senator Patty Murray)

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

Travel Date(s): June 27-28, 2023

Description/Title of Attached Forms: Amended RE-2 form, final agenda, and sponsor certification form.

Purpose of Amendment (describe the reason for amending original submission): The RE-2 form needed to be amended to included an explanation for the change in cost for the transportation expenses. I also needed to include a final copy of the agenda and the sponsor certification form.

8/10/23

(Date)

Kara Marchione

(Signature of Traveler)

RE-2 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. **This form is a public disclosure. The form and all attachments will be made publicly available.**

Certification: *In compliance with the Regulations Governing Privately Sponsored Travel, Senate Rule 35, and the Honest Leadership and Open Government Act of 2007, I certify that I accepted the following gift of privately sponsored travel:*

Private Sponsor(s):

The Aspen Institute

Travel Dates:

June 27 - June 28, 2023

Name of accompanying family member (if any):**Relationship to Traveler:**

Total Expenses

Transportation Expenses	Lodging Expenses	Meals Expenses	Other Expenses (Amount & Description)
461.81	124	115	250 (onsite meeting materials and meeting space rentals)

I also certify that attached to this form are all required documents for post travel disclosure, including:

- The final **Employee Pre-Travel Authorization** (Form RE-1)
- The final **Private Sponsor Travel Certification Form** with all attachments
- The final invitation
- The final approved itinerary

Finally, I certify that all trip information reflected in the attachments above accurately reflects the travel that I accepted. If there were any changes to the trip after I received approval from the Committee, the changes are described in ATTACHMENT 1.

8/10/23

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.

8/10/23

Date

Patty Murray

Signature of Supervising Senator/Officer

ATTACHMENT 1 – CHANGES FROM APPROVED PRE-TRAVEL

Note: Material changes to a trip that occur after the Committee has issued an approval letter may invalidate the Committee's approval. Please contact the Committee with any questions regarding changes to an approved trip.

Were there any changes to the pre-approved travel expenses? (Transportation, Meals, Lodging, Other)?

☒ Yes ☐ No

Expense Change	Revised Amount	Explanation
Transportation	461.81	This expense change was due to the higher than expected flight cost, due to a variety of factors.

Were there any changes to the pre-approved itinerary?

☐ Yes ☒ No

Explanation:

Were there any additional changes to the pre-approved trip?

☐ Yes ☒ No

Explanation:

Trip Name: Aspen Education Economic Mobility Congressional Site Visit on Data Integration

Organization Information

Organization Name:

The Aspen Institute, Inc (Education & Society)

Is your organization classified as a §501(c)(3)?



Yes



No

If Yes, §501(c)(3) Organization Type:



Private Foundation



Public Charity

Address:

2300 N St. NW, Suite 700

City, State, Zip:

Washington, DC 20037

Phone Number:

(202) 736-5859 (Lisa Jones, Dep Gen Counsel)

Organization URL:

<https://www.aspeninstitute.org/programs/education>

History of Congressional Travel

Describe your organization's history of sponsoring congressional travel.

The Aspen Institute's Education and Society Program has a 20 year history of providing non-partisan education programs for Congressional staff. The purpose of this trip is to provide a site visit and conference to discuss the federal role in data integration to improve economic and social outcomes. Aspen Education is solely responsible for organizing and conducting this meeting. The Bill & Melinda Gates Foundation provides funding but no other support.

Educational Activities

Describe the educational activities performed by your organization other than sponsoring congressional travel.

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.

Lobbyist and Foreign Agent Registration Information

Lobbyist Registration Status (Select one):



I certify that the sponsor is not a federally registered lobbyist and does not retain or employ a federally registered lobbyist.



I certify that the sponsor is not a federally registered lobbyist but does retain or employ one or more federally registered lobbyists.

Foreign Agent Registration Status (Select one):



I certify that the sponsor is not an agent of a foreign principal and does not retain or employ an agent of a foreign principal.



I certify that the sponsor is not an agent of a foreign principal but does retain or employ one or more agents of a foreign principal.

Foreign Government Involvement

Foreign Agent Registration Status (Must select all):



I certify that the sponsor is not a foreign government.



I certify that the sponsor is not an entity that is owned or operated by a foreign government.



I certify that the sponsor does not receive funding from a foreign government.

Purpose and Details**Provide a brief description of the trip.**

Participants will visit the Allegheny Department of Human Services and engage with local officials to learn more about the County's leading efforts in data integration. Staffers will engage with officials representing urban and rural areas in other states across multiple sectors – education, housing, nutrition, criminal justice, physical and behavioral health – are using integrated data infrastructure and analytics capacity to improve program outcomes, coordinate care, improve management, and foster research, advancing local and regional efforts to improve economic mobility and opportunity. This event is an opportunity for senior congressional education staff to have a sustained, focused dialogue on vital issues confronting the sector. 

Explain how the purpose of the trip relates to your organization's mission.

Aspen's Education & Society Program's mission is to improve public education by inspiring, informing, and influencing education leaders to take action across policy and practice, with an emphasis on achieving equity for students of color and children from low-income backgrounds. As part of our education work, we are working to decrease policy silos, both horizontally (across difference sectors and focus areas) and vertically (federal, state and local). Better data integration is integral for understanding input indicators for students and their families and breaking down silos.

Is your organization the only sponsor for this trip?

☒ Yes ☐ No

If No, describe your organization's role in planning the trip.

If there are multiple sponsors, each sponsor must submit Organization Information (Page 1 of the Private Sponsor Travel Certification Form) and a Signature Page Form.

Grantmaking Organizations (Optional)

If you have a Grantmaking Organization, you must attach a Grantmaking Organization Certification Form.

1. The Bill and Melinda Gates Foundation
- 2.
- 3.

With or Without Regard to Congressional Participation (Select one):

- ☐ The trip is arranged or organized without regard to congressional participation.
- ☒ The trip is arranged or organized with regard to congressional participation.

Lobbyist/Foreign Agent Involvement in Planning, Organizing, Requesting or Arranging

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

Lobbyist/Foreign Agent Financing (Must select all):

- ☒ The trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
- ☐ No funds or in-kind contributions were 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.

Lobbyist/Foreign Agent Accompaniment

Complete if all sponsors are §501(c)(3) organizations (Select one):

- ☒ The trip is limited to three days (for trips inside the continental United States) or seven days (for trips outside the continental United States), and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip
- ☐ The trip is limited to 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
- ☐ The trip is limited to 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

Complete if any of the sponsors is not a §501(c)(3) organizations (Select one):

- ☐ The trip is limited to three days (for trips inside the continental United States) or seven days (for trips outside the continental United States), and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip
- ☐ The trip is limited to 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
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Certification of No Recreational Activity and No Alcohol (Must select all):

- ☒ Travel expenses paid for will not include expenditures for recreational activities.
- ☒ Travel expenses paid for will not include expenditures for alcohol, except as permitted by the Regulations Governing Privately Sponsored Travel.

Will members and staff from the House of Representatives receive invitations?

- ☒ Yes ☐ No

Travel Details (Submit additional pages as needed)

Trip Start Date/Time:

6/27/23 at 11:00am



Trip End Date/Time:

6/28/23 at 2:30pm

Will the traveler be accompanied by a family member for whom the sponsor will pay travel expenses?

☐ Yes

☒ No

Transportation (Member/Officer/Employee: \$³²⁵ Accompanying Family Member: \$)

Transportation Type	Class	Amount
Plane	coach	\$250
Shuttle	coach	\$75

Details (optional)

Lodging (Member/Officer/Employee: \$¹²⁴ Accompanying Family Member: \$⁰)

Check-In	Check-Out	Facility	City	State	Country
6/27/23	6/26/23	Sheraton Pittsburgh Hotel	Pittsburgh	PA	USA

Nights	Cost/Night	Cost Exceed Per Diem (Yes/No)	If Yes, please explain why expenses over the per diem rate are reasonable and necessary.
1	\$124	No	

Check-In	Check-Out	Facility	City	State	Country
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Nights	Cost/Night	Cost Exceed Per Diem (Yes/No)	If Yes, please explain why expenses over the per diem rate are reasonable and necessary.
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Check-In	Check-Out	Facility	City	State	Country
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Nights	Cost/Night	Cost Exceed Per Diem (Yes/No)	If Yes, please explain why expenses over the per diem rate are reasonable and necessary.
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[illegible]

All costs are consistent with per diem for first and last day travel expenses (\$48)

Expense Type	Amount	Notes
Meeting Materials + Space Rental	\$250	

PRIVATELY SPONSORED TRAVEL

SPONSOR SIGNATURE PAGE

I hereby certify that the information submitted in connection with the trip listed below is true, complete, and correct to the best of my knowledge and belief.

Trip Name: Aspen Education Economic Mobility Congressional Site Visit
Travel Date(s): June 27-28, 2023
Travel Destination(s): Pittsburgh, PA

Sponsor: The Aspen Institute, Inc (Education & Society Program)

Elliot Gerson

(printed name of sponsor representative)

EVP of Policy & Public Program

(title)



(signature of sponsor representative)

5/12/2023

(date)



**Aspen Institute's Senior Economic Mobility Network:
Site Visit for Congressional Staff**

Sheraton Station Square Hotel
Pittsburgh, PA
June 27-28, 2023

Agenda

***Economic Mobility and Opportunity Through Data Integration and Evaluation:
Learning from Local Leaders at the Vanguard***

Retreat Goals:

- Understand how Allegheny County officials across multiple sectors – education, housing, nutrition, criminal justice, physical and behavioral health – are using integrated data infrastructure and analytics capacity to improve program outcomes, coordinate care, improve management, and foster research, advancing local and regional efforts to improve economic mobility and opportunity.
- Engage with beneficiaries to understand their experiences as well as direct service providers, policy experts, state and local leaders, and program administrators to understand how federal policies impact stakeholders at the nexus of mobility, opportunity, and data.
- Examine federal impediments, both perceived and real, to building cross-program data infrastructure and analytics capacity to effectively support beneficiaries, looking specifically at compliance reporting, privacy statutes, and data capacity.
- Identify federal actions that would accelerate state and local development of integrated data analytics capacity with a high return on investment for taxpayers.
- Engage in active learning and build working relationships with experts and practitioners from various fields of expertise, as well as with colleagues from different parties and chambers.

Tuesday, June 27, 2023

8:22 AM	Congressional staff depart from Reagan National Airport
10:00 AM	Congressional staff arrive at Pittsburgh International Airport
10:30 – 11:00 AM	Participants arrive at Sheraton Station Square Hotel <i>For participants arriving the morning of the event, luggage can be stored in the Brighton Room, Second Floor.</i>



**Aspen Institute's Senior Economic Mobility Network:
Site Visit for Congressional Staff**

Sheraton Station Square Hotel
Pittsburgh, PA
June 27-28, 2023

- 11:00 - 12:00 PM Networking Welcome Coffee and Context Setting**
Location: Sheraton Station Square Hotel, Fountainview Room
- Aspen Staff will welcome staffers and faculty members and give an overview of the event schedule and provide participants the opportunity to network and ask initial questions.*
- 12:00 PM Aspen staff and participants will depart hotel on chartered bus for Allegheny County Department of Human Services (DHS)**
- 12:30 PM Site Visit at Allegheny County Department of Human Services**
Location: 1 Smithfield St, Pittsburgh, PA 15222
- 12:30 - 1:45 PM Working Lunch at DHS office – Welcome, Introductions, Overview of Convening**
Location: Liberty Room, Allegheny DHS
Faculty:
- Rich Fitzgerald, Allegheny County Executive, Regional Growth and Diversification
- County Executive Rich Fitzgerald will give opening remarks, including an overview of the work Allegheny County has done on integrating data systems. After the remarks Aspen staff will lead introductions and context-setting. Then Congressional staff and faculty members will share two learning objectives for the convening.*
- 1:45 – 2:00 PM Break**
- 2:00 PM – 3:15 PM Session I: Understanding exemplary practices in Allegheny County – how local officials are using data integration and evaluation to improve outcomes across key sectors impacting mobility and opportunity**
- Faculty and key participants:
- Erin Dalton, Director of the Allegheny County Department of Human Services
- Guiding questions:
- *What is the history of the Allegheny County Department of Human*



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Services and its adoption of data integration best practices?

- *What are the biggest successes and learnings in this work? What are the biggest challenges in advancing mobility and opportunity in Allegheny County, and what lessons would you share with others who want to advance a mobility agenda?*
- *What are the governance, technology, acquisition, and financing solutions being used to achieve these outcomes?*
- *How can the Federal government support this kind of work? What were/are some of the biggest barriers to implementation as it relates to federal requirements?*

3:15 – 3:30 PM

Break

3:30 – 5:00 PM

**Session II: Allegheny County Department of Human Services
Discussions with DHS Staff and Beneficiaries: Spotlight on Hello
Baby**

Key site visit participants:

- Erin Dalton, Director of the Allegheny County Department of Human Services
- Amy Malen, Assistant Deputy Director of the Allegheny County Department of Human Services
- Hello Baby Beneficiaries

Allegheny County Officials will lead a deep dive session into how the *Hello Baby* program has benefited from their data integration efforts. Beneficiaries from the program will also share their experiences.

Guiding questions for panel discussion:

- *How has Allegheny County utilized data integration for this program? What data sources were integrated for this work?*
- *What were some of the key challenges and opportunities to implement data integration for Hello Baby?*
- *How do beneficiaries describe and evaluate the services being provided and the impact they're having on their lives?*
- *How has the mix of beneficiaries changed over time and what are the steps that have been taken to identify those most in need and the best combination of services? How has the county's data facilitated those efforts?*



**Aspen Institute's Senior Economic Mobility Network:
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Sheraton Station Square Hotel
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June 27-28, 2023

- 5:00 – 5:30 PM Transportation to Hotel**
- Location: Sheraton Station Square Hotel
- 5:30 – 6:30 PM Break**
- 6:30 – 6:45 PM Transportation to Dinner**
- Location: Café Momentum, 268 Forbes Ave., Pittsburgh, PA 15222
- 6:45 - 7:30 pm Networking Reception with Faculty and Local Leaders**
- Remarks by Michelle McMurray, Vice President, Program and Community Engagement, The Pittsburgh Foundation, supporter of the Human Services Integration Fund
- Participants will hear from a key funder for the Allegheny County data integration work. After remarks, congressional staffers will have the opportunity to network with site visit faculty, as well as local leaders from Allegheny County.*
- 7:30 – 9:00 PM Networking Dinner with Faculty and Local Leaders**
- Remarks by Café Momentum Student Staff
- Café Momentum provides a transformative experience through a paid internship program designed to provide 12-months of curriculum for justice-involved youth, ages 15-19. A member of the Café Momentum team will kick-off dinner with a few remarks on their work. Student servers will be invited to join each table for dessert, and congressional staff will have the opportunity to ask them questions about their internship experience.*
- 9:00 – 9:30 PM Transportation to Hotel**

Wednesday, June 28, 2023



**Aspen Institute's Senior Economic Mobility Network:
Site Visit for Congressional Staff**

Sheraton Station Square Hotel
Pittsburgh, PA
June 27-28, 2023

8:00 – 9:00 AM Breakfast at Hotel

9:00 – 10:15 AM Session III: A Broader Perspective – Local Officials from Indiana and Connecticut on lessons learned from data integration and evaluation efforts

Location: Sheraton Station Square Hotel

Faculty:

- Scott Gaul, Chief Data Officer, Connecticut Office of Policy Management (Invited)
- Jessica Cunningham, Vice President of State Programs, Coleridge Initiative, INC
- Josh Martin, Chief Data Officer, State of Indiana

Guiding questions:

- *How is what participants have learned from Allegheny County officials, beneficiaries, policy-makers and others mirrored in your states? What are key differences and what conclusions can we extrapolate from both the differences and similarities?*
- *What architecture is in place to sustain these systems and what funding streams have been utilized to create your data systems? How sustainable are existing mechanisms and systems?*
- *How can state and local governments measure the performance of third-party service providers and technology partners on actual outcomes? What governance and technology solutions are most likely to lead to actionable information to better serve client needs?*

10:15 – 10:30 AM Break

10:30 – 11:45 AM Session IV: Understanding perceived and real Federal policy barriers that impact state and local capacity to use data to improve outcomes

Location: Sheraton Station Square Hotel

Faculty:

- Amy Hawn Nelson, Director of Training & Technical Assistance, Actionable Intelligence for Social Policy



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Site Visit for Congressional Staff**

Sheraton Station Square Hotel
Pittsburgh, PA
June 27-28, 2023

- Jonathan Womer, Director, Rhode Island State Department of Administration
- Jane Wiseman, Innovations in Government Fellow, Ash Center for Democratic Governance and Innovation

Guiding questions:

- *How are existing statutes, regulations, and administrative requirements impacting state and local efforts to share and better utilize data?*
- *What federal cross-agency efforts are you aware of that would help state and local governments overcome barriers and strengthen their data and analytics capacity?*
- *What federal budgetary and organizational structures undermine cross-program coordination, and stymie efforts to build common data and analytics infrastructure?*
- *How are reporting requirements getting in the way of meaningful outcome measurement and evaluations that would help programs improve? How can existing program funding be used to build data and analytics capacity and are federal grant recipients aware?*

11:45 – 1:15 PM

Working Lunch: A National Perspective on Data Integration, Evaluation, and Improved Mobility Outcomes

Location: Sheraton Station Square Hotel

Faculty:

- Jane Wiseman, Innovations in Government Fellow, Ash Center for Democratic Governance and Innovation

Jane Wiseman will lead a lunchtime discussion on the trends in data integration and evaluation nationally, with space for Q&A.

1:15 – 1:45 PM

Break

1:45 – 2:30 PM

Final Discussion: Reflection and Looking Forward to August*

Congressional staff participants will share their takeaways as well as discuss:



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Pittsburgh, PA
June 27-28, 2023

1. *What they would like to learn building off Tuesday's and Wednesday's panel discussions;*
2. *What their ideal takeaways would be from the August convening*;*
3. *Whether executive branch agency engagement could prove beneficial for discussions in August and, if so, what agencies, and*
4. *Any other issues they would like to identify for next steps.*

2:30 PM Adjourn

3:06 - 7:46 PM All Congressional Staff depart from Pittsburgh International Airport

8:47 PM Final Congressional staffers arrive at Reagan National Airport

*Aspen is hosting a one day seminar in Washington, DC that will deep dive into the federal role in data-integration and will pull themes from this site visit.