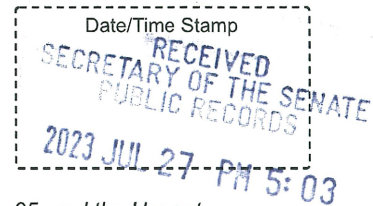


RE-2 Employee Post Travel Disclosure of Travel Expenses

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. **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 m

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.

7/27/23
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.

7/27/23

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

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:

Amended. Originally Submitted on
May 26, 2022

RE-1 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.

Date/Time Stamp

Name of Traveler:

Kara Marchione

Employing Office/Committee:

Appropriations Committee--Senator Murray

Private Sponsor(s):

The Aspen Institute (Education & Society)

Destination(s):

Pittsburg, PA

Travel Dates:

June 27 - 28, 2023

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

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

I work as a Professional Staff Member on the Appropriations Committee and handle children and families issues for Senator Murray. The trip is focused on data integration across sectors to support economic mobility and fits within my portfolio. The trip will provide valuable information on local efforts and how that translates to Federal policy.

Do you have an accompanying family member or spouse on this trip?

Name and Relationship to Traveler:

☐

(signify "yes" by checking box)

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

6/5/23

Date

Kara Marchione

Signature of Employee

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER

(President of the Senate, Secretary of the Senate, Sergeant at Arms,
Secretary for the Majority, Secretary for the Minority, and Chaplain)

Senator 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)

6/5/23

Date

Patty Murray

Signature of Supervising Senator/Officer



May 15, 2023

Dear Kara Marchione,

We are writing to invite you to participate in an upcoming retreat – ***“Economic Mobility and Opportunity through Data Integration and Evaluation: Learning from Local Leaders at the Vanguard.”*** – for the Aspen Senior Congressional Education Staff Network from **11:00 AM Tuesday, June 27, 2023 to 2:30 PM Wednesday, June 28, 2023** at Sheraton Pittsburgh Hotel at Station Square located 245 miles from Washington, DC.

At this convening, staffers will meet with expert faculty to understand how Allegheny County officials, and 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. Staffers will get the chance to

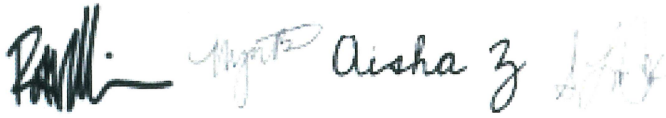
- Engage with beneficiaries to understand their experiences as well as direct service providers, policy experts, state and local leaders, and program administrators to understand how federal policies impact stakeholders at the nexus of mobility, opportunity, and data.
- Examine federal impediments to building cross-program data infrastructure and analytics capacity to effectively support beneficiaries, looking specifically at compliance reporting, privacy statutes, and data capacity.
- 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.

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 retreat.

The site visit will begin at **11:00 AM on Tuesday, June 27, 2023** and will conclude at **2:30 PM on Wednesday, June 28, 2023**. Please plan your travel accordingly in order to be present for the duration of the retreat. We ask that participants arrive at the hotel no later than 11am on June 27, 2023 and plan return travel no earlier than 4:30pm on June 28, 2023. 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,

The image shows four handwritten signatures in black ink. From left to right, they appear to be: Ross Wiener (a stylized 'R' followed by a horizontal line), Lorén Cox (a cursive 'L' followed by 'orén'), Megan Bennett (a cursive 'M' followed by 'egan'), and Aisha Zaman (a cursive 'A' followed by 'isha' and 'Zaman').

Ross Wiener Lorén Cox Megan Bennett Aisha Zaman



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

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

Senate Congressional Staff

Andrew Gradison

Senior Education Policy
Advisor
HELP Committee

Evelyn Bellew

Labor Research Analyst
HELP Committee

James Hiebert

Riecker Michigan Delegation
Fellow
*Homeland Security and
Governmental Affairs
Committee*

Kara Marchione

Senior Advisor
*Appropriations Committee,
Senator Murray*



**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

10:02 AM	Congressional staff arrive at Pittsburgh airport
10:30 – 11:00 AM	Participants arrive Sheraton Station Square Hotel
11:00 - 12:00 PM	Networking Welcome Coffee and Context Setting



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

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

- 12:00 PM:** Aspen staff and participants will depart hotel on chartered bus for Allegheny Department of Human Services
- 12:30 PM** Arrive at 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**
Faculty: Rich Fitzgerald, Allegheny County Executive, Regional Growth and Diversification
After introductions and context-setting, 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 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** **Tour of Allegheny County Department of Human Services and Discussions with DHS Staff and Beneficiaries**



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

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

Key site visit participants: TBD by Allegheny DHS

Guiding questions for panel discussion:

- *What is the history of the Allegheny County Department of Human Services and its adoption of data integration best practices?*
- *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?*

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

7:30 – 9:00 PM

Networking Dinner with Faculty and Local Leaders

Remarks by Local Leaders, TBD by Allegheny DHS

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

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, Kentucky, and Ohio 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 limit state and local capacity to use data to improve outcomes

Location: Sheraton Station Square Hotel

Faculty:

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



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

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

- Jonathan Womer, Senior Advisor and Lead for the State Budgeting Practice, The Policy Lab
- 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:

- Angela Richidi, Senior Fellow and Rowe Scholar, American Enterprise Institute (Invited)

1:15 – 1:45 PM Break

1:45 – 2:30 PM Final Discussion: Looking to August

Congressional staff participants will share their takeaways as well as discuss 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



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

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

7:46 PM

Congressional Staffers Latest Flight take off back to DC