RE-2 Employee Post Travel Disclosure of Travel Expenses

Date/Time Stamp

RECEIVED
SECRETARY OF THE SENATE
PUBLIC RECORDS
2023 SEP 15 PM 2:11

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):
Aspen Institute Education and Society Program

Travel Dates:
07/06/2023 to 07/09/2023

Name of accompanying family member (if any):

Relationship to Traveler:

Expenses

Transportation Expenses	Lodging Expenses	Meals Expenses	Other Expenses (Amount & Description)
$2,014.87	$1,023.00	$303.00	$900.00

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.

September 5, 20223
Date

Jessica Cardichon
Printed Name of Traveler

Jessica Cardichon
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.

September 5, 20223
Date

B Sanders
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	$2,014.87	The cost of flight and ubers were estimates based on past travel from DC to Aspen. The cost of the flight was estimated at 850, but due to increased demand, the final cost of flight was $1750.41. Additionally - uber costs were estimates at $60, but ended up being $69.46. All transportation purchased were still economy class, costs have just increased post pandemic so estimates are difficult to confirm in advance.

Were there any changes to the pre-approved itinerary?

○ Yes ● No

Explanation: There were no changes to the pre-approved itinerary.

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

○ Yes ● No

Explanation: There were no additional changes to the pre-approved trip.

RE-1 Employee Pre-Travel Authorization

Date/Time Stamp

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.

Name of Traveler:
Jessica Cardichon

Employing Office/Committee:
HEALTH, EDUC, LAB, AND PENSIONS - DEM

Private Sponsor(s):
Aspen Institute Education and Society Program

Destination(s):
Aspen, Colorado

Travel Dates:
07/06/2023 to 07/09/2023
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.

The purpose of the trip is to identify and begin to build consensus on foundational purposes of public education, including defining an inspiring vision to move public education forward, building bipartisan relationships across lines of difference to advance foundational purposes of public education, identifying opportunities and challenges in the field to orient our systems and structures towards foundational purposes, and understand the communication and political challenges of advancing a new vision for public education that is grounded in foundational purposes - all of which are connected to the work of the HELP committee.

Do you have an accompanying family member or spouse on this trip?
No

Name and Relationship to Traveler:
N/A

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

May 26, 2023
Date

Jessica Cardichon
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)

I Sen. Bernie Sanders hereby authorize Jessica Cardichon
(Print Senator's/Officer's Name) (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)

May 26, 2023
Date

Bernie Sanders
Signature of Supervising Senator/Officer

Aspen Institute Education and Society Program: Aspen Education Policy Workshop

Jessica Cardichon

Title:
None

Employing Office/Committee:
HEALTH, EDUC, LAB, AND PENSIONS - DEM

Duty Station:
WASHINGTON,DC

Destination(s):
Aspen, Colorado

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

The purpose of the trip is to identify and begin to build consensus on foundational purposes of public education, including defining an inspiring vision to move public education forward, building bipartisan relationships across lines of difference to advance foundational purposes of public education, identifying opportunities and challenges in the field to orient our systems and structures towards foundational purposes, and understand the communication and political challenges of advancing a new vision for public education that is grounded in foundational purposes - all of which are connected to the work of the HELP committee.

Name of accompanying family member (if any):
Not Entered

Name and Relationship to Traveler:
None

Organization Information

Organization Name
Aspen Institute Education and Society Program

Is your organization classified as a §501(c)(3)?
○ Yes ● No

§501(c)(3) Organization Type
None

Address
2300 N St. NW

Address 2 (Optional)
None

City, State Zip
Washington, District Of Columbia 20037 United States

Phone Number
5085969774

Organization URL

History of Congressional Travel

The Aspen Institute's Education and Society Program has a 20 year history of providing non-partisan education programs for Congressional staff, through two congressional staff networks, plus external off-the-record events inviting education policy leaders. Aspen Education is solely responsible for organizing and conducting this meeting. The Bill & Melinda Gates Foundation provides funding but no other support.

Educational Activities

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 undeserved students.

Lobbyist and Foreign Agent Registration Information

Lobbyist Registration Status: *I certify that the sponsor is not a federally registered lobbyist and do not retain or employ a federally registered lobbyist.*

Foreign Agent Registration Status: *I certify that the sponsor is not an agent of a foreign principal and do not retain or employ an agent of a foreign principal.*

Foreign Government Involvement

Foreign Agent Registration Status:

● 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.

Comments

None Entered

Signature Page

The signature page is below.

Purpose and Details

Provide a brief description of the trip.

Summer workshops in Aspen are a unique opportunity for 25 education leaders to immerse themselves in learning and reflection and to develop new ideas and new relationships in an inspiring, intimate, off-the-record setting. The Aspen summer workshop has been an important and meaningful opportunity for processing and thinking about next steps in the work for many education leaders over the years. This year's Workshop will focus on Committing to a Shared Purpose of Public Education to Rebuild a Bipartisan Path Forward. This event is sponsored yearly with or without congressional staff participation.

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. During this yearly workshop, we facilitate deep inquiry and collective learning that enables organic development of new relationships, partnerships, projects, and publications and we rely on workshop to inspire our planning for the year ahead and create connections that allow us to support and influence education leaders.

Is your organization the only sponsor for this trip?

✓ Yes ○ No

Grantmaking Organizations (Optional)

1. The Bill and Melinda Gates Foundation

With or Without Regard for Congressional Participation

The trip is arranged or organized without 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

- ✓ 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

- ✓ 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

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

- ○ 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

○ 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

Certification of No Recreational Activity and No Alcohol

✓ 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.

Invitees

ⓘ Members and staff from the House of Representatives **will not** receive invitations.

The list of invitees is below.

Travel Details

Trip Start Date/Time:
07/06/2023 @ 12:17 PM

⇄

Trip End Date/Time:
07/09/2023 @ 12:17 PM

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

○ Yes ✓ No

Itinerary

The itinerary is below.

Transportation (Per Member/Officer/Employee: $1,110.00 | Accompanying Family Member: $0.00)

Transportation Type	Class	Amount
Airfare	Coach	$850.00
Note Round trip flight from DC to Aspen, CO		
Ground Transportation	Coach	$200.00
Note Shuttle Transportation for full week (per person)		
Ground Transportation	Coach	$60.00
Note Taxi/Uber or other transportation to and from airport		

Lodging (Per Member/Officer/Employee: $1,023.00)

Check-In	Check-Out	Facility	City	State	Country	Nights	Cost/Night	Cost Exceed Per Diem

Check-In	Check-Out	Facility	City	State	Country	Nights	Cost/Night	Cost Exceed Per Diem
07/06/2023	07/09/2023	Aspen Meadows Report	Aspen	Colorado	United States	3	$341.00	Yes

Cost Exceeds Per Diem Reason
This event takes place on Aspen Meadows Campus yearly; this is a "without regard event" and all attendees receive the same lodging.

Meals (Per Member/Officer/Employee: $303.00)

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem
07/06/2023	$0.00	$0.00	$95.00	$3.00	**$98.00**	Aspen	Colorado	United States	Yes

Cost Exceeds Per Diem Reason
The cost for the dinners exceeds the per diem for Aspen; this is reasonable and necessary for an event of this size and caliber. It is the discounted rate contracted for the full event for all participants and attendees for an event that is organized without regard to congressional participation

07/07/2023	$0.00	$0.00	$95.00	$5.00	**$100.00**	Aspen	Colorado	United States	Yes

Cost Exceeds Per Diem Reason
The cost for the dinners exceeds the per diem for Aspen; this is reasonable and necessary for an event of this size and caliber. It is the discounted rate contracted for the full event for all participants and attendees for an event that is organized without regard to congressional participation

07/08/2023	$0.00	$0.00	$95.00	$5.00	**$100.00**	Aspen	Colorado	United States	Yes

Cost Exceeds Per Diem Reason
The cost for the dinners exceeds the per diem for Aspen; this is reasonable and necessary for an event of this size and caliber. It is the discounted rate contracted for the full event for all participants and attendees for an event that is organized without regard to congressional participation

07/09/2023	$0.00	$0.00	$0.00	$5.00	**$5.00**	Aspen	Colorado	United States	Yes

Cost Exceeds Per Diem Reason
The cost for the dinners exceeds the per diem for Aspen; this is reasonable and necessary for an event of this size and caliber. It is the discounted rate contracted for the full event for all participants and attendees for an event that is organized without regard to congressional participation

Reasonable Miscellaneous Expenses (Per Member/Officer/Employee: $900.00)

Expense Type	Amount	Notes
Other (Meeting Package)	$900.00	The Aspen Meadows Resort (our campus) has non-flexible resort cost which includes a per day meeting package cost of $300 (per person) which includes Aspen Meadows Resort conference hosting fees, food and non-alcoholic refreshments for breakfast, lunch, and snacks, facilities setup and breakdown, IT and audio-visual, staffing, and enhanced security for events.

Additional Attachments All additional attachments are below.

Document Name

Document Name

Workshop Invitation

Trip Name: Aspen Education Policy Workshop

Organization Information

Organization Name:
Aspen Institute, Inc (Education & Societ

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, SC 20037

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

Organization URL:
https://www.aspeninstitute.org/programs/educat

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, through two congressional staff networks, plus external off-the-record events inviting education policy leaders. 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 undeserved 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.

Summer workshops in Aspen are a unique opportunity for 25 education leaders to immerse themselves in learning and reflection and to develop new ideas and new relationships in an inspiring, intimate, off-the-record setting. The Aspen summer workshop has been an important and meaningful opportunity for processing and thinking about next steps in the work for many education leaders over the years. This year's Workshop will focus on Committing to a Shared Purpose of Public Education to Rebuild a Bipartisan Path Forward. This event is sponsored yearly with or without congressional staff participation.

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. During this yearly workshop, we facilitate deep inquiry and collective learning that enables organic development of new relationships, partnerships, projects, and publications and we rely on workshop to inspire our planning for the year ahead and create connections that allow us to support and influence education leaders.

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. Bill & 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
- ( ) 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

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:	⇄	Trip End Date/Time:
1:00 PM July 6, 2023		12:00 PM July 9, 2023

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

(●) Yes ( ) No

Transportation (Member/Officer/Employee: $1,110 Accompanying Family Member: $260)

Transportation Type	Class	Amount
Roundtrip Flight	Economy	$850
Shuttle Transporation (full week per person)	Economy	$200
Uber/Taxi to and from airports	Economy	$60

Details (optional)

We do not cover flights for accompanying family members, but do support ground transportation

Lodging (Member/Officer/Employee: $1023 Accompanying Family Member: $0)

Check-In	Check-Out	Facility	City	State	Country
7/6/23	7/9/23	Aspen Meadows Resort	Aspen	CO	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.
3	$341	Yes	This event takes place on Aspen Meadows Campus yearly; this is a "without regard event" and all attendees receive the same lodging.

Check-In	Check-Out	Facility	City	State	Country

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

Check-In	Check-Out	Facility	City	State	Country

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

Meals (Member/Officer/Employee: $303 Accompanying Family Member: $303)

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem (Y/N)
7/6/23		N/A	95	3	98	Aspen	CO	USA	Y
7/7/23	N/A	N/A	95	5	100	Aspen	CO	USA	Y
7/8/23	N/A	N/A	95	5	100	Aspen	CO	USA	Y
7/9/23	N/A	N/A	N/A	5	5	Aspen	CO	USA	Y

If costs exceed the federal per diem, please explain why expenses over the per diem rate are reasonable and necessary.

The cost for the dinners exceeds the per diem for Aspen; this is reasonable and necessary for an event of this size and caliber. It is the discounted rate contracted for the full event for all participants and attendees for an event that is organized without regard to congressional participation.

Reasonable Miscellaneous Expenses

(Member/Officer/Employee: $900 Accompanying Family Member: $900)

Expense Type	Amount	Notes
Meadows Daily Meeting Package	$300/day	

Additional Details (optional)

The Aspen Meadows Resort (our campus) has non-flexible resort cost which includes a per day meeting package cost of $300 (per person) which includes Aspen Meadows Resort conference hosting fees, food and non-alcoholic refreshments for breakfast, lunch, and snacks, facilities setup and breakdown, IT and audio-visual, staffing, and enhanced security for events.

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: 12:00 PM Sunday, July 9, 2023

Travel Date(s): July 6 - July 9

Travel Destination(s): Aspen, Colorado

Sponsor: Aspen Institute, INC (Education and Society Program

Elliot Gerson — *(printed name of sponsor representative)*

EVP of Policy & Public Prograr — *(title)*

Elliot Gerson — *(signature of sponsor representative)*

May 25, 2023 — *(date)*

Grantmaking Organization Certification Form

Instructions: If a sponsor receives funds from a grantmaking organization, the sponsor must disclose this on the *Private Sponsor Travel Certification Form*, and the grantmaking organization must complete the *Grantmaking Organization Certification Form.* The completed *Grantmaking Organization Certification Form* must be submitted to the Senate Select Committee on Ethics by the trip sponsor at least 30 days prior to the travel departure date.

Grantmaking Organization: Bill & Melinda Gates Foundation

Private Sponsor: Aspen Institute Education & Society Program

Trip Name: Aspen Summer Workshop

Travel Date(s): July 6, 2023 - July 9, 2023

Destination(s): Aspen, CO

In compliance with the *Regulations Governing Privately Sponsored Travel*, I certify the following:

- ☑ The grantmaking organization is a § 501(c)(3) organization.
- ☑ The grantmaking organization is not a lobbyist, lobbying firm, or foreign agent, nor an entity that retains or employs a lobbyist or foreign agent.
- ☑ The grantmaking organization provides funds under an established grant program, or in a manner that is otherwise consistent with the mission and practices of the organization.
- ☑ The grantmaking organization is not involved, directly or indirectly, in organizing and conducting the trip. This includes selecting participants for a trip.
- ☑ The grantmaking organization does not directly pay or reimburse travel expenses for any Senate Member, officer, or employee.

Kathryn Young — *(Printed name of grantmaking organization representative)*

Senior Program Officer — *(Title)*

Kathryn Young Digitally signed by Kathryn Young Date: 2023.05.24 16:10:56 -04'00' — *(Signature of grantmaking organization representative)*

05/24/2023 — *(Date)*

EDUCATION & SOCIETY
aspen institute

Aspen Education Policy Workshop

Committing to a Shared Purpose of Public Education to Rebuild a Bipartisan Path Forward

Aspen Meadows Resort
Aspen, CO

July 6-9, 2023

The Senate employees invited (listed below) are senior staff responsible for committees that oversee issues affecting education; they are invited due to their portfolio and with the goal of convening diverse leaders with divergent perspectives to make progress on policies and related coalitions that can rebuild bipartisanship for public education.

SENATE CONGRESSIONAL STAFF

Anne DeCesaro
Education Policy Director
Senate HELP Committee

Jessica Cardichon
Education Policy Director
Senate HELP Committee

EDUCATION & SOCIETY
aspen institute

May 26, 2023

Dear Senate Colleague,

We are writing to invite you to participate in an upcoming Aspen Education Policy Workshop – "Committing to a Shared Purpose of Public Education to Rebuild a Bipartisan Path Forward" – Starting 1:00 PM Thursday, July 6, 2023 to 12:00 PM Sunday, July 9, 2023 at Aspen Meadows campus in Aspen, Colorado.

Summer workshops in Aspen are a unique opportunity for busy leaders to immerse themselves in learning and reflection and to develop new ideas and new relationships in an inspiring, intimate setting.We do not design the workshop to achieve a predetermined outcome; we facilitate deep inquiry and collective learning that enables organic development of new relationships, partnerships, projects, and publications – and we rely on workshop to inspire Aspen's planning for the year ahead, too. The Aspen summer workshop has been an important and meaningful opportunity for processing and thinking about next steps in the work for many education leaders over the years. The entire workshop is off-the-record.

The workshop is small, including a maximum of 25 participants plus three Aspen staff. We ask participants to active participation throughout the duration of the workshop, which is crucial to building trust for vulnerable conversations across lines of difference and to creating an environment where each of us can get the most out of the diversity of the group

For ethics purposes, please note this trip/invitation is considered a "Without Regard" event. We invite 25 education policy focused participants every year, and move forward with the event regardless of congressional staff participation. We are committed to working with you and the Senate Ethics Committee to ensure compliance with the Senate rules regarding privately-funded sponsored travel, but given that this event was designed without regard to congressional staff participation, we have added additional information about costs and programming that align with the objective of the event. Enclosed you will find all the forms necessary for filing the trip with the Ethics Committee:

- A detailed agenda listing discussion sessions
- A completed Primary Trip Sponsor Form
- A list of invited Senate staffers
- A Traveler Form [Staffer needs to complete]
- Completed Grantmaking 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 Senate Ethics Committee (220 Hart) no

later than **Monday, June 5, 2023**. 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 Workshop

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

Warm regards,

Ross Wiener Lorén Cox Megan Bennett Aisha Zaman

0000000006611 RECEIVED BY: SECRETARY OF THE SENATE Date: September 05, 2023

EDUCATION & SOCIETY
aspen institute

The Aspen Meadows Resort
845 Meadows Road
Aspen, CO 81611
P: 970-300-2786

Aspen Institute Summer Workshop

Rebuilding Bipartisan Support for Public Education | July 5-9

WORKSHOP GOALS AND OUTCOMES

- *Identify and begin to build consensus on foundational purposes of public education*
- *Define a inspiring vision to move public education forward*
- *Build relationships across lines of difference to advance foundational purposes of public education*
- *Identify opportunities and challenges in the field to orient our systems and structures towards foundational purposes*
- *Understand the communication and political challenges of advancing a new vision for public education that is grounded in foundational purposes*

Participants will work toward these goals and outcomes in a mix of formats, including whole- and small- group discussions, text-based inquiry, and individual reflections.

All sessions below are facilitated by Aspen Institute Staff: Ross Wiener and Lorén Cox. Other participants are listed in a separate document.

AGENDA

Thursday, July 6, 2023

7:35 AM	**Flight Departs**	**Washington, DC**
12:06 PM	**Flight Lands**	**Aspen/Pitkin County Airport**
12:30 - 1:30 PM	**Working Lunch**	***Walter Isaacson Center - Davis Commons***
	Discussions from the earlier sessions continue over lunch	
1:30 - 1:50 PM	**Resetting & Introductions**	***Boettcher Bldg - Hudson Commons***

As we return from lunch we will pause to welcome congressional participants. We will then set context for small group activity. *We ask that each participant comes prepared to share an example of bipartisan work that they were able to advance and/or where an effort broke down because of partisan challenges.*

1:50 - 3:30 PM **Small Group Work & Share Outs** ***Boettcher Bldg - Hudson Commons***

Participants will split into groups of four and discuss the examples that they were asked to prepare in advance.
Guiding Questions:

- What were the enabling conditions for the success of your work?
- Where were there roadblocks or failures?
- Did coalitions play a role in your example? If so, how did those coalitions come together?
- What communications were necessary to advance your work?
- What themes emerged across groups?

Each group will select a person to share themes in the full group. Participants are encouraged to respond and react to themes as they arise.

3:30 - 4:30 PM **Framing the Current Political Moment *Boettcher Bldg - Hudson Commons***

The Aspen team will frame the current political moment as it relates to public education and the challenges that it creates for schools and for society overall. We will ask for group to discuss the following questions:

- Where is there currently bipartisan support for education policies?
- What is being stalled because of partisan politics?
- How do we create a frame that encourages nuance in education policy?
- What do we think our biggest challenges will be over the next three-to-five years?

4:30 - 5:30 PM **Break**

5:30 PM **Walking Group Departs to Travel to Dinner**

Please meet in the lobby of the Walter Isaacson Center. Note that it is a 1.6 mile walk (approx. 35 min.) with varied terrain.

5:45 PM **Shuttle Group Departs to Travel Dinner**

Please meet in the lobby of the Walter Isaacson Center.

6:00 PM **Dinner** ***Aspen Center for Environmental Studies (ACES)***
100 Puppy Smith St, Aspen, CO 81611

Dinner is outdoors. Please bring a warm sweater or jacket. There will be an opportunity for a short walk around the nature preserve with an ACES Naturalist.

Discussions from the earlier sessions continue over dinner.

Friday, July 7, 2023

7:00- 8:15 AM	**Breakfast**	***Walter Isaacson Center - Davis Commons***
8:30 - 10:00 AM	**Three Foundational Purposes of Education Deep Dive**	***Boettcher Bldg - Hudson Commons***

We will start the morning with a review of the themes from the previous day.

Then we will deep dive into the three foundational purposes of education, inviting select participants to frame each purpose for five minutes, followed by full group discussion.

10:00 - 10:15 AM **Break**

10:15 - 12:00 PM	**Three Foundational Purposes of Education**	***Boettcher Bldg - Hudson Commons***

Each participant will pick one of three small groups to participate in based on a foundational purposes of education: (1) Healthy Sense of Self, (2) Future of Work and (3) Future of Democracy.

Each group will imagine what public education will look like if it was structured around this foundational purpose. Themes and ideas will be displayed on chart paper.

12:00 - 1:30 PM	**Working Lunch**	***Walter Isaacson Center - Davis Commons***

Discussions from the earlier sessions continue over lunch

1:30 - 1:45 PM	**Gallery Walk**	***Boettcher Bldg - Hudson Commons***

As we return from lunch, participants will review the themes and ideas from other groups.

1:45 - 2:15 PM	**Small Group Share Outs**	***Boettcher Bldg - Hudson Commons***

Each group will present their vision for public education framed around their foundational purpose of education.

2:15 - 2:45 PM	**Vision Mapping: Where do our Visions Overlap?**	***Boettcher Bldg - Hudson Commons***

We will discuss where the three different visions for public education overlap and what themes or ideas are consistent across all three small groups. We will ask what needs to be true about public education for our shared vision to happen.

2:45 - 3:15 PM	**Pair Walk**	***Aspen Meadows Campus***

We will break into self-selected pairs to discuss and digest the day's content.

3:15 - 4:30 PM	**Future of Democracy**	***Boettcher Bldg - Hudson Commons***

We will have a texted-based discussion on the Future of Democracy, using event binder materials to guide the conversation.

4:30 - 5:30 PM **Break**

5:30 PM **Walking Group departs to travel to dinner**
Please meet in the lobby of the Walter Isaacson Center. Note that it is a 1.2 mile walk (approx. 25 min.) with varied terrain.

5:45 PM **Shuttle Group departs to travel dinner**
Please meet in the lobby of the Walter Isaacson Center.

6:00 PM	**Dinner**	***Mi Chola*** *411 East Main Street,* *Aspen, CO 81611*

Discussions from the earlier sessions continue over dinner.

Saturday, July 8, 2023

7:00- 8:15 AM	**Breakfast**	***Walter Isaacson Center - Davis Commons***
8:30 - 10:30 AM	**What is Our "Why": Crafting an Inspirational Vision for Public Education**	***Boettcher Bldg - Hudson Commons***

We will start the morning with a review of the themes from the previous day.

We will discuss how we create a compelling vision with our foundational purposes of education and how we create momentum and buy-in for why we need to reimagine public education.

10:30 - 10:45 AM **Break**

10:45 - 1:00 PM **Small Group Work and Lunch: Operationalizing Our Vision** ***Boettcher Bldg - Hudson Commons***

Each participant will pick a small group to discuss one of the following areas:

- Communication Strategy: what are the implications for communicating this vision and who are the likely critics?
- Measurement and Accountability: how do these change or adapt for the three foundational purposes of education?
- Coalition Building: what groups do you envision moving forward with this work?
- Areas of Tension: What is contentious even in this group? What portion of our strategy is not viable in this current political climate or is the most partisan?

Note: We will be working through lunch and meals will be provided in our meeting space.

1:00 - 1:30 PM **Break**

1:30 - 3:30 PM **Small Group Share Out & Discussion** ***Boettcher Bldg - Hudson Commons***

Each group discusses their takeaways from their focus area and we will discuss implications and next steps.

3:30 - 4:30 PM **Break**

4:30 PM **Optional: Shuttle Guided Hike** ***Walter Isaacson Center***

An optional scenic low-impact group hike will be organized that will lead to Pine Creek Cookhouse (dinner location). *Participants will be invited to sign up on Thursday morning,* which is necessary to arrange for buses that will depart from the Walter Isaacson Center. Please note participants who participate in this hike will go straight to dinner, we will not be returning to Aspen Meadows Campus until after dinner. Participants are also welcome to explore Aspen and enjoy biking or walking into town, in lieu of the hike.

6:00 PM **Shuttle Departs for Dinner** ***Walter Isaacson Center***
[For those not hiking]

6:30 PM **Dinner** ***Pine Creek Cookhouse***
2500 Castle Creek Rd, Aspen, CO 81611

Discussions from the earlier sessions continue over dinner.

Sunday, July 9, 2023

7:00- 8:00 AM	**Breakfast**	***Walter Isaacson Center - Davis Commons***

Please check-out and drop off luggage at the front desk during breakfast.

8:00 - 10:00 AM	**Small Group Consultancies and Closing Conversations**	***Boettcher Bldg - Hudson Commons***

We will start the morning with a review of the themes from the previous day.

We will engage in a series of small group consultants. A consultancy is a structured process for helping an individual or a team think more expansively about a particular, concrete dilemma. Consultancy topics will be selected through discussion during the week, or volunteered by select participants. We will break into groups to hold consultancies for each volunteer to provide solutions for their dilemma.

We will wrap up the workshop with final reflections, commitments, and advice to the Aspen team on next steps and its role in this work.

10:00 AM	**Adjournment**	***Boettcher Bldg - Hudson Commons***
11:32 AM	**Plane Departs**	**Aspen/Pitkin County Airport**
7:30 PM	**Plane Lands**	**Washington, DC**

EDUCATION & SOCIETY
aspen institute

May 26, 2023

Dear Senate Colleague,

We are writing to invite you to participate in an upcoming Aspen Education Policy Workshop – "Committing to a Shared Purpose of Public Education to Rebuild a Bipartisan Path Forward" – Starting 1:00 PM Thursday, July 6, 2023 to 12:00 PM Sunday, July 9, 2023 at Aspen Meadows campus in Aspen, Colorado.

Summer workshops in Aspen are a unique opportunity for busy leaders to immerse themselves in learning and reflection and to develop new ideas and new relationships in an inspiring, intimate setting.We do not design the workshop to achieve a predetermined outcome; we facilitate deep inquiry and collective learning that enables organic development of new relationships, partnerships, projects, and publications – and we rely on workshop to inspire Aspen's planning for the year ahead, too. The Aspen summer workshop has been an important and meaningful opportunity for processing and thinking about next steps in the work for many education leaders over the years. The entire workshop is off-the-record.

The workshop is small, including a maximum of 25 participants plus three Aspen staff. We ask participants to active participation throughout the duration of the workshop, which is crucial to building trust for vulnerable conversations across lines of difference and to creating an environment where each of us can get the most out of the diversity of the group

For ethics purposes, please note this trip/invitation is considered a "Without Regard" event. We invite 25 education policy focused participants every year, and move forward with the event regardless of congressional staff participation. We are committed to working with you and the Senate Ethics Committee to ensure compliance with the Senate rules regarding privately-funded sponsored travel, but given that this event was designed without regard to congressional staff participation, we have added additional information about costs and programming that align with the objective of the event. Enclosed you will find all the forms necessary for filing the trip with the Ethics Committee:

- A detailed agenda listing discussion sessions
- A completed Primary Trip Sponsor Form
- A list of invited Senate staffers
- A Traveler Form [Staffer needs to complete]
- Completed Grantmaking 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 Senate Ethics Committee (220 Hart) no

later than **Monday, June 5, 2023**. 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 Workshop

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

Warm regards,

Ross Wiener Lorén Cox Megan Bennett Aisha Zaman