RE-2 Employee Post Travel Disclosure of Travel Expenses

RECEIVED
SECRETARY OF THE SENATE
PUBLIC RECORDS
2024 MAY -6 PM 12:51
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):
Aspen Institute Education and Society Program

Travel Dates:
04/02/2024 to 04/04/2024

Name of accompanying family member (if any):

Relationship to Traveler:

Expenses

Transportation Expenses	Lodging Expenses	Meals Expenses	Other Expenses (Amount & Description)
$608.74	$214.00	$145.00	$650.00

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.

5/3/24	Leila Schochet	Leila Schochet
Date	Printed Name of Traveler	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.

5/6/24	Bernard Sanders
Date	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	$608.74	Travel expenses were based on good faith estimates averaged across full group, final transportation costs reflect actual cost of airfare, Ubers, and shuttle transportation for the specific individual. Final costs for each type of transportation is: Airfare: 362.60 Individual Ubers: 57.14 Ground Transportation: 189.00

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:

Leila Schochet

Employing Office/Committee:

HELP Committee Majority

Private Sponsor(s):

Aspen Institute

Destination(s):

Montgomery and Birmingham AL

Travel Dates:

April 2- April 4, 2024

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.

Learning about the science of reading and best practices in AL's education system is relevant to our education work on the HELP Committee.

Do you have an accompanying family member or spouse on this trip? ☐ (signify "yes" by checking box)

Name and Relationship to Traveler:

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

2/29/24 — Date

Leila Schochet — 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 Bernie Sanders (Print Senator's/Officer's Name) hereby authorize Leila Schochet (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)

Date

Bernie Sanders — Signature of Supervising Senator/Officer

Aspen Institute Education and Society Program: Aspen Institute Site Visit to Alabama

Leila Schochet

Title:
Education Policy Director

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

Duty Station:
WASHINGTON,DC

Destination(s):
Montgomery, Alabama
Birmingham, Alabama

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

This trip is related to exploring promising practices in AL's education system. As the Education Policy Director on the Senate HELP Committee, it is relevant to my work.

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
Public Charity

Address
2300 N St. NW

Address 2 (Optional)
Public Charity

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. The purpose of this trip is to provide a site visit and conference to discuss the federal role in supporting state efforts to implement the Science of Reading as well as Numeracy. Aspen Education is solely responsible for organizing and conducting this meeting. The Bill & Melinda Gates Foundation provides funding.

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.

The site visit will focus on visiting schools and engaging with state and local policy makers and practitioners in Birmingham and Montgomery, Alabama. The learning objectives of this trip are to: (1) Gain insight into how the Science of Reading is being implemented across Alabama's education system, focusing on fidelity of implementation, how effectiveness is being measured, teacher training, student literacy outcomes, and opportunities for improvement. (2)Examine the development and implementation of Alabama's recent math legislation, the Alabama Numeracy Act. Assess its initial roll-out, including the availability of relevant research, experts and supporting staff, as well as the overall receptivity of Alabama's education system, particularly in context of the ongoing efforts to implement Science of Reading.

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. Aspen has provided a space for non-partisan learning opportunities for education Congressional Staff for 20 years. The purpose of this learning network is to connect the work happening at the state, district and local level with federal policy, with a specific focus on the Every Student Succeeds Act.

Is your organization the only sponsor for this trip?

☑ Yes ○ No

Grantmaking Organizations (Optional)

1. Bill & Melinda Gates Foundation

With or Without Regard for Congressional Participation

The trip is arranged or organized specifically 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

☑ 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** receive invitations.

The list of invitees is below.

Travel Details

Trip Start Date/Time:
04/02/2024 @ 10:23 AM

⇄

Trip End Date/Time:
04/04/2024 @ 01:26 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: $1,200.00 | Accompanying Family Member: $0.00)

Transportation Type	Class	Amount
Airfare	Coach	$800.00
Note Flight from Washington DC to Birmingham Alabama and from Montgomery Alabama to Washington DC		
Ground Transportation	Coach	$400.00
Note Car/Uber to and from Airport and shuttle transportation on the ground from Birmingham to Montgomery Alabama		

Lodging (Per Member/Officer/Employee: $214.00)

Check-In	Check-Out	Facility	City	State	Country	Nights	Cost/Night	Cost Exceed Per Diem
04/02/2024	04/04/2024	Staybridge Suites Montgomery	Montgomery	Alabama	United States	2	$107.00	No

Meals (Per Member/Officer/Employee: $145.00)

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem
04/02/2024	$0.00	$17.00	$0.00	$5.00	**$22.00**	Birmingham	Alabama	United States	No
04/02/2024	$0.00	$0.00	$31.00	$0.00	**$31.00**	Montgomery	Alabama	United States	No
04/03/2024	$13.00	$15.00	$26.00	$5.00	**$59.00**	Montgomery	Alabama	United States	No
04/04/2024	$13.00	$15.00	$0.00	$5.00	**$33.00**	Montgomey	Alabama	United States	No

Reasonable Miscellaneous Expenses (Per Member/Officer/Employee: $650.00)

Expense Type	Amount	Notes
Conference Fees	$650.00	Thus includes space rental at the Equal Justice Initiative, A/V services, and cost of meeting materials + shipping.

Additional Attachments

Document Name
There are no additional attachments.

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 Institute Site Visit to Alabama

Travel Date(s): April 2 - April 4, 2024

Travel Destination(s): Birmingham and Montgomery Alabama

Sponsor: The 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)*

February 15, 2024 — *(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: The Aspen Institute, Inc. (Education and Society Program)

Trip Name: Aspen Education Senior Congressional Staff Network Site Visit to Alabama

Travel Date(s): April 2-4, 2024

Destination(s): Birmingham, Alabama and Montgomery, Alabama

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	Senior Program Officer
(Printed name of grantmaking organization representative)	*(Title)*
Kathryn Young Digitally signed by Kathryn Young Date: 2024.02.05 12:50:19 -05'00'	February 5, 2024
(Signature of grantmaking organization representative)	*(Date)*

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Aspen Senior Congressional Education Staff Network Site Visit

Alabama's Educational Leadership: Insights and Innovations in Math, Reading and Workforce Readiness

Birmingham and Montgomery, Alabama
April 2-4, 2024

The Senate employees invited (listed below) are senior education staff responsible for education issues; they are invited specifically because of their education portfolio to meet with leaders and educational experts from states, districts, research, and support organizations to engage in non-partisan dialogue on the impact of federal policy on different levels of the education system.

SENATE CONGRESSIONAL STAFF

Abby Laver
Legislative Aide
Office of Senator Murray

Anne Decesaro
Education Policy Director
Senate Committee on Health, Education, Labor and Pensions

Emily McBride
Senior Policy Advisor
Office of Senator Tuberville

Emily Slack
Professional Staff Member
Senate Appropriations Subcommittee on Labor, HHS & Education

Greg Carter
Oversitte Director
Senate Committee on Health, Education, Labor and Pensions

Hayley Sanon
Education Policy Advisor
Senate Committee on Health, Education, Labor and Pensions

Iris Hinh
Education Policy Advisor
Senate Committee on Health, Education, Labor and Pensions

Iris Hinh
Education Policy Advisor
Senate Committee on Health, Education, Labor and Pensions

Leila Schochet
Education Policy Director
Senate Committee on Health, Education, Labor and Pensions

Maggie McPherson
Legislative Assistant
Office of Senator Britt

Manuel Contreras
Senior Education Policy Advisor
Senate Committee on Health, Education, Labor and Pensions

Mark Laisch
Professional Staff Member
Senate Appropriations Subcommittee on Labor, HHS & Education

Mike Gentile
Clerk
Senate Appropriations Subcommittee on Labor, HHS & Education

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February 9, 2024

Dear Senate Colleague,

We are writing to invite you to participate in an upcoming site visit– ***"Alabama's Educational Leadership: Insights and Innovations in Math, Reading and Workforce Readiness"*** – for the Aspen Senior Congressional Education Staff Network from **11:00 AM Tuesday, April 2, 2024,** to **10:45 AM Thursday, April 4, 2024** in Birmingham and Montgomery, Alabama.

The site visit offers a comprehensive exploration of Alabama's educational system, focusing on integrating the Science of Reading, the impact of recent math legislation, and the strategic use of ESSER funds. It will include school visits in both Birmingham and Montgomery, including the innovative Alabama Aerospace and Aviation High School. Participants will engage in meaningful discussions with educators, policymakers, and special guests, such as key state leaders from the executive and legislative branches, and representatives from the Alabama State Department of Education. The agenda is thoughtfully structured to provide insights into federal and state educational policies, their implementation at the local level, and how these are shaping student outcomes. On this site visit, staffers will:

1. Gain deeper insights into how the Science of Reading is integrated within Alabama's education system, focusing on its effectiveness, teacher training, and student literacy outcomes.
2. Examine the development and implementation of Alabama's recent math legislation. Assess its early outcomes, including improvements in student proficiency and teacher preparedness in mathematics.
3. Engage in discussions about the federal government's role in shaping education in Alabama, with a specific focus on equity implications, policy impacts, and the balancing of state and federal priorities.
4. Understand how Alabama has strategically utilized Elementary and Secondary School Emergency Relief (ESSER) funds in enhancing its reading and math programs, and evaluate their overall impact on educational reforms and student achievement.
5. Investigate how local schools in Alabama are designing educational programs and school infrastructures in alignment with local workforce and industry demands

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 Signed Senate Grantmaking Organization Certification Form
- 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

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invited staffers, and Primary Trip Sponsor Form and Grantmaking Organization Certification Form via the online ethics portal or as a bundle directly to the Senate Ethics Committee (220 Hart) no later than **Friday, March 1, 2024**. 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 federal 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 retreat promises to be productive and informative. We look forward to seeing you there.

Warm regards,

Ross Wiener Megan Bennett Aisha Zaman Lorén Cox

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Aspen Senior Congressional Education Staff Network
Alabama's Educational Leadership: Insights and Innovations in Reading, Mathematics and Workforce Readiness
Birmingham and Montgomery Alabama
April 2-4, 2024

AGENDA

Alabama's Educational Leadership: Insights and Innovations in Reading, Mathematics, and Workforce Readiness

Site Visit Goals:

- Gain insight into how the Science of Reading is being implemented across Alabama's education system, focusing on fidelity of implementation, how effectiveness is being measured, teacher training, student literacy outcomes, and opportunities for improvement.
- Examine the development and implementation of Alabama's recent math legislation, the Alabama Numeracy Act. Assess its initial roll-out, including the availability of relevant research, experts and supporting staff, as well as the overall receptivity of Alabama's education system, particularly in context of the ongoing efforts to implement Science of Reading.
- Engage in discussions about the federal government's role in shaping education in Alabama, with a specific focus on equity implications, policy impacts, and the balancing of state and federal priorities.
- Understand how Alabama has strategically utilized Elementary and Secondary School Emergency Relief (ESSER) funds in enhancing its reading and math programs, and evaluate the overall impact on educational reforms and student achievement.
- Investigate how local schools in Alabama are designing educational programs and school models to address identified needs in the local workforce and industry trends.

Tuesday, April 2, 2024

10:23 AM — **Arrival in Birmingham Airport**
All flights arriving by 10:23 AM from DCA to BHM

11:30 AM — **Airport Transport to Site Visit at Birmingham City Schools**

Transportation via chartered bus from the airport to Birmingham City Schools, a public school district located at 2015 Park Place N. Birmingham, AL 35203

12:00 - 1:00 PM **Welcome & Lunch with Birmingham School District Leaders**
Lunch to be served in TBD conference room at Birmingham City School building with discussion of the district's successes and challenges, with specific focus on Science of Reading implementation, initial work on the Alabama Numeracy Act (ANA), and student workforce readiness.

Dr. Ann McGough, Principal Academic Coach, Birmingham City Schools
Dr. Mark Sullivan, Superintendent, Birmingham City Schools
Dr. Spencer Horn, Chief of Staff, Birmingham City Schools
Dr. Pamela Williams, Interim Chief Academic and Accountability Officer, Birmingham City Schools

1:00 – 1:30 PM **Transportation to Charles A. Brown Elementary**

Charles A. Brown is a Birmingham City Schools elementary school located at 4811 Court J, Birmingham, AL 35208

1:30 – 2:45 PM School Visit: Charles A. Brown Elementary

1:30 - 2:00: School Tour

2:00 - 2:45: Roundtable discussion with Principal Dr. Janice Sanders Drake and leadership team. Additional invited guests: **Ruth Ann Moss,** Executive Director of Small Magic, a non-profit working to increase early literacy in Birmingham City Schools.

Guiding questions:

- *What does the day-to-day work of the school leadership team look like? Who else exercises leadership in the school and what do they do?*
- *How has the school implemented the Science of Reading and what results is it seeing?*
- *What implications has the implementation of the Science of Reading had for curriculum, professional development, human capital, resource allocation?*
- *Where does the school stand in implementing the Alabama Numeracy Act (ANA)? How does that align with, or complicate, the Science of Reading implementation?*
- *Have ESEA and ESSER investments supported the implementation of the Science of Reading or the ANA?*

2:45 – 3:00 PM **Transportation to Alabama Aerospace and Aviation High School**

The Alabama Aerospace and Aviation High School is a public charter school located 1414 2nd Ave N, Bessemer, AL 35020

3:00 – 4:15 PM School Visit: Alabama Aerospace and Aviation High School

3:00 - 3:30: School Tour

3:30 - 4:15: Roundtable discussion with Founder/CEO Ruben Morris, leadership team, and students.

Guiding questions:

- *What does the day-to-day work of the school leadership team look like? Who else exercises leadership in the school and what do they do?*
- *What led to the creation of the Alabama Aerospace and Aviation High School? Why was aerospace and aviation chosen as the focus of the school?*
- *How does the school prepare students for the workforce?*
- *What partnerships does the school leverage to provide educational and training experiences for students?*
- *Does the school address the Science of Reading and what results is it seeing?*
- *What challenges does the school face in realizing its mission, in education/preparing students, in finding staff, etc.?*
- *Have ESEA and ESSER investments supported the school's mission, goals, outcomes?*

4:15 - 6:00 PM **Transportation to Montgomery, AL via chartered bus**

Staybridge Suites Montgomery
275 Lee St, Montgomery, AL 36104

During the trip, Aspen facilitators will use the time to connect the dots between the two schools visited in the morning. We will make connections between literacy, numeracy, and how they impact Alabama's workforce development.

6:00 - 7:00 PM **Break**

7:00 - 7:15 PM **Walk to Dinner (7 min)**

7:15 – 9:00 PM **Working Dinner**

Dreamland BBQ
12 W. Jefferson St., Montgomery, AL 36104

Aspen facilitators will use this time to set the scene for the next two days, including an overview of the Equal Justice Initiative and an overview of the pre-reading materials. Staffers will be asked to share a reading they found compelling from the pre-reading materials, and to identify a question or pondering they would like answered in the next two days, and what they hope to learn or takeaway from this site visit.

Wednesday, April 3, 2024

7:45 – 8:15 AM **Breakfast**

Staybridge Suites Montgomery
275 Lee St, Montgomery, AL 36104

8:15 – 8:30 AM **Transportation to Alabama Capitol Building**

8:45 – 9:45 AM **Session I: Education Advocacy in Alabama**

Alabama State Capitol Building
600 Dexter Ave, Montgomery, AL 36130

This session will focus on past advocacy work in Alabama around the Science of Reading and the Alabama Numeracy Act (ANA), as well as efforts to increase students' workforce readiness. In addition, this session will discuss future advocacy work, such as the ongoing implementation of the Science of Reading, the new implementation of the ANA, and other topics.

Faculty:

- **Mark Dixon**, President, A+ Alabama
- **Corinn O'Brien**, VP of Policy, A+ Alabama

Guiding questions:

- *What is the historical context in Alabama, from Brown v. Board to the last 20 years, and how has this affected schools, students, staff, and families?*
- *What are the most pressing issues facing schools, students, staff, and families in Alabama? Is the same or different in Montgomery, Birmingham or other parts of Alabama?*
- *What are the greatest successes – and challenges – in the implementation of the Science of Reading? The Alabama Numeracy Act (ANA)?*
- *How can the state education system prepare students for post-secondary success, particularly in workforce readiness?*
- *What are the top priorities for education advocates in the next five years? The next ten?*

9:45 - 10:15 AM **Session II: Conversation with Lt. Gov. Ainsworth**

Alabama State Capitol Building
600 Dexter Ave, Montgomery, AL 36130

This session will focus on the Governor's policy initiatives around the Science of Reading and the recent legislation, the Alabama Numeracy Act (ANA), as well as efforts to increase students' workforce readiness. In addition, this session will discuss the Governor's future policy goals.

Faculty:

- **Lt. Gov. Ainsworth**, Alabama
- **Nick Moore**, Education Policy Advisor & Coordinator Governor's Office of Education & Workforce Transformation, Office of Gov. Kay Ivey

Guiding questions:

- *What is the historical context in Alabama, from Brown v. Board to the last 20 years, and how has this affected schools, students, staff, and families?*
- *What are the most pressing issues facing schools, students, staff, and families in Alabama? Is the same across the different regions and cities in Alabama?*

- *How can the state education system prepare students for post-secondary success, particularly in workforce readiness?*
- *What are the top priorities for education policy and legislation in the next 1-2 years? Next 5-10?*
- *What is your view of ESSA and ESSER in supporting – or hindering – Alabama's efforts to improve its education system for all students?*

10:15 – 10:30 AM **Break**

10:30 – 11:30 AM **Session III: Policymaker Perspectives on the Science of Reading, the Alabama Numeracy Act, and Workforce Readiness**

Alabama State Capitol Building
600 Dexter Ave, Montgomery, AL 36130

This session will focus on past policy initiatives around the Science of Reading and the recent legislation, the Alabama Numeracy Act, as well as efforts to increase students' workforce readiness. In addition, this session will discuss future policy goals for the state.

Faculty:

- **State Representative Alan Baker**, Vice Chair, Education Policy Committee
- **State Representative Terri Collins**, Chair, House Education Policy Committee
- **State Representative Barbara Drummond**, Ranking Minority Member, Education Policy Committee
- **State Representative Danny Garrett**, Chair, House Ways and Means, Education Committee

Guiding questions:

- *What is the historical context in Alabama, from Brown v. Board to the last 20 years, and how has this affected schools, students, staff, and families?*
- *What are the most pressing issues facing schools, students, staff, and families in Alabama? Is the same across the different regions and cities in Alabama?*
- *How can the state education system prepare students for post-secondary success, particularly in workforce readiness?*
- *What are the top priorities for education policy and legislation in the next 1-2 years? Next 5-10?*
- *What is your view of ESSA and ESSER in supporting – or hindering – Alabama's efforts to improve its education system for all students?*

11:30 – 11:45 AM **Break**

11:45 – 12:45 PM **Lunch**

During Lunch, Aspen Staff will set the stage for a discussion of the Federal Role in Equity in Education. Facilitators will clarify questions from the pre-readings on equity and civil rights in education and will set the state for the afternoon sessions.

12:45 – 1:45 PM **Session IV: Panel Discussion on the Federal Role in Equity and Education**

This session will focus on the historical and contemporary efforts by the federal government to require equitable access to education for all students regardless of race, color or creed and to create the conditions for equitable opportunity for all through court cases, legislation, and policy.

Faculty:

- **Thomas Rains**, Executive Director, The Judge Frank M. Johnson, Jr. Institute
- **Bryan Stevenson**, Founder and Executive Director of the Equal Justice Initiative (invited)
- **Stephanie Johnson Monore**, former Assistant Secretary for Civil Rights, U.S. Department of Education
- **Gini Pupo-Walker**, Executive Director, The Education Trust-Tennessee

Guiding questions:

- *How does the legacy of the Civil Rights movement, Brown v. Board, the Elementary and Secondary Education Act, and other federal civil rights legislation and jurisprudence still shape the context of providing education to Alabama's Black and minority students?*
- *What obstacles remain in realizing the promise of equal access and opportunity for Alabama's Black and minority students?*
- *Have subsequent reauthorizations of the Elementary and Secondary Education Act, including the most recent – the Every Student Succeeds Act – helped to address the historic inequities in educational access and outcomes in Alabama?*
- *What more can and should be done to continue building on the legacy of the Civil Rights movement in addressing racism, inequity, and increasing opportunity for Alabama's Black and minority students?*

1:45 – 2:00 PM **Transfer from the State House to the Alabama State Department of Education**
Alabama State Department of Education – 50 North Ripley Street
Montgomery AL 36130

2:00 – 2:45 PM **Session V: Meeting with Alabama State Department of Education**

This session will focus on the implementation of policy initiatives, including the Science of Reading and the Alabama Numeracy Act (ANA), as well as efforts to increase students' workforce readiness. In addition, this session will discuss future policy goals for the education system in the state of Alabama.

Faculty:

- **Dr. Eric Mackey**, Alabama State Superintendent of Education
- **Angela Martin**, Deputy State Superintendent of Education
- **Bonnie Short,** Coordinator, Alabama Reading Initiative

- **Dr. Karen Anderson,** Director, Office of Mathematics Improvement
- **Dr. Jimmy Hull**, Assistant State Superintendent of Education, CTE/Workforce Development (invited)

Guiding questions:

- *What does the Alabama Reading Initiative do in support of the implementation of the Science of Reading? What are its successes and challenges?*
- *Describe the efforts of the Alabama State Department of Education to lead and support the implementation of the ANA.*
- *What are the most pressing issues facing schools, students, staff, and families in Alabama? Is the same across the different regions and cities in Alabama?*
- *How can the state education system prepare students for post-secondary success, particularly in workforce readiness?*
- *What are the top priorities for education policy in the next 1-2 years? Next 5-10?*
- *What is your view of ESSA and ESSER in supporting – or hindering – Alabama's efforts to improve its education system for all students?*
- *Are there other federal laws, policies, supports, and research that could assist Alabama in achieving its goals and initiatives?*

2:45 – 3:00 PM **Transportation to the Legacy Museum**

450 North Court Street, Montgomery, AL 36104

3:00 – 5:00 PM **Self-Guided Tour of the Equal Justice Initiative Legacy Museum**

450 North Court Street, Montgomery, AL 36104

This tour will directly tie in the role of federal policy in the work of state and local education in Alabama. The tour will help link the 12:45 Federal Policy Panel session with the work that is currently happening in Alabama. Congressional staff will be prompted with questions after the panel to consider while they engage with the content of the tour. While the tour is self-guided, the full group will stay together and Aspen facilitators will connect the learning from the museum with the role federal policy makes in education equity,

5:00 – 5:15 PM **Walk Back to Hotel (10 min) and Break**

6:00 – 6:15 PM **Walk to Reception & Dinner (5 min)**

Central: 129 Coosa St. Montgomery, AL 36104

6:15 – 8:00 PM **Reception & Dinner with faculty, local education leaders**

Dinner will feature follow-up discussion with panelists from the earlier sessions, including Alabama A+ Staff, the State Legislators, the Lt. Governor, and the Federal Policy Panelists. Congressional Staffers will be asked to draw from the tour at the Equal Justice Initiative and will be given the opportunity to ask additional questions from panelists to round out the learning for the day,

Thursday, April 4, 2024

8:00 – 8:30 AM **Breakfast**

Staybridge Suites Montgomery
275 Lee St, Montgomery, AL 36104

8:30 – 8:45 AM **Transportation to Nixon Elementary School Visit**

1000 Edgar D Nixon Ave, Montgomery, AL 36104

8:45 – 10:15 AM School Visit: Nixon Elementary School (planned)

8:45 - 9:15: School Tour

9:15 – 10:15: Roundtable discussion with Principal and leadership team. Additional invited guests: Dr. Ann McGough.

Guiding questions:

- *What does the day-to-day work of the school leadership team look like? Who else exercises leadership in the school and what do they do?*
- *How has the school implemented the Science of Reading and what results is it seeing?*
- *What implications has the implementation of the Science of Reading had for curriculum, professional development, human capital, resource allocation?*
- *Where does the school stand in implementing the Alabama Numeracy Act (ANA)? How does that align with, or complicate, the Science of Reading implementation?*
- *Have ESEA and ESSER investments supported the implementation of the Science of Reading or the ANA?*

10:15 - 10:45 AM **Final Reflections**

Nixon Elementary School

1000 Edgar D Nixon Ave, Montgomery, AL 36104

Guiding questions:

- *What strategies, tactics, and/or processes at the different districts and schools seem promising – or problematic?*
- *Is there alignment between the state policymakers' views, policies, and investments with what is happening on the ground in districts and schools? How would you characterize the relationship between the SEA and LEAs and schools?*
- *Is the state's educational system trying to do too much – or too little – and is it organized for and supporting a coherent approach to improving both reading and math?*
- *Is Alabama doing enough to prepare its students for postsecondary success?*

- *Does Alabama's implementation of its Science of Reading initiative hold lessons for other states? For future federal policy?*
- *Are there challenges that practitioners are anticipating that federal policy or investments can help address?*
- *Are there federal supports and research that could assist Alabama in achieving its goals and initiatives?*

10:45 – 11:00 AM **Meeting Ends & Transportation to Montgomery Airport**

12:06 - 1:26 PM **Departures to Washington, DC**

Staffers are departing on two flights from Montgomery to DCA

12:06 PM Flight: Irish Hihn and Abby Laver

1:26 PM Flight: Manuel Contreras, Leila Schochet, Hayley Sanon, Emily McBride