RE-2 Employee Post Travel Disclosure of Travel Expenses

Date/Time Stamp

RECEIVED
SECRETARY OF THE SENATE
PUBLIC RECORDS
2026 OCT 15 PM 2:56

Post Travel Filing Instructions: Complete this form within **30 days** of returning from travel. Submit forms to the Office of Public Records in 144 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):
University of Virginia, Batten School of Leadership and Public Policy, The Commonwealth Fund

Travel Dates:
10/05/2026 to 10/07/2026

Name of accompanying family member (if any):

Relationship to Traveler:

Expenses

Transportation Expenses	Lodging Expenses	Meals Expenses	Other Expenses (Amount & Description)
$104.10	$272.00	$296.65	$45.00

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.

10/15/2026
Date

Samantha Koehler
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.

10/15/2026
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
Meals	$296.65	We provided estimated costs. Final amounts varied for some meals.
Transportation	$104.10	Some travelers were unable to attend. The cost per rider for the chartered bus therefore increased.

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.

Dear Samantha,

On behalf of the UVA Frank Batten School of Leadership and Public Policy and in partnership with the Commonwealth Fund, it is my pleasure to invite you to participate in our Congressional Health Policy Staff Retreat on October 5-7 in Charlottesville, Virginia.

This three-day, two-night retreat will convene approximately 30 Congressional health policy staff for a program combining leadership development, policy education, and bipartisan, bicameral engagement. Your voice, experience, and perspective will be invaluable to the retreat. The retreat will feature expert-led workshops on leadership skills, Congressional effectiveness, and critical health policy topics, alongside curated experiences at the University of Virginia's historic Grounds and Monticello. Health policy leaders from across disciplines and institutions will join as speakers and facilitators throughout the retreat. The conversations will be off-the-record with a chance to explore issues from multiple perspectives. I want to assure you that no lobbyists or industry representatives will be present.

The retreat is designed to meet Congressional ethics requirements. The UVA Batten School will provide transportation between DC and Charlottesville, accommodations close to UVA's campus, and all meals. To give you a sense of what we will cover during the retreat, I have attached a draft agenda.

We do hope you can join us for this 3-day retreat. If you have any questions, or would like more information, please don't hesitate to reach out to me. I would be happy to discuss these details with you anytime.

With warm regards,
Melanie

Melanie Anne Egorin, Ph.D.
Professor of Practice
Frank Batten School of Leadership and Public Policy | University of Virginia
Garrett Hall L037 | 434.243.5528 | melanie.egorin@virginia.edu



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:
Samantha Koehler

Employing Office/Committee:
KAINE, TIM

Private Sponsor(s):
University of Virginia, Batten School of Leadership and Public Policy, The Commonwealth Fund

Destination(s):
Charlottesville, Virginia

Travel Dates:
10/05/2026 to 10/07/2026
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.

An event for congressional health policy staff for a program combining leadership development, policy education, and bipartisan, bicameral engagement. The event will feature expert-led workshops on leadership skills, Congressional effectiveness, and critical health policy topics.

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.

9/29/26
Date

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 Senator Tim Kaine
(Print Senator's/Officer's Name)

hereby authorize Samantha Koehler
(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)

9/29/26
Date

Signature of Supervising Senator/Officer

University of Virginia, Batten School of Leadership and Public Policy: 2026 Congressional Staff Health Policy Retreat

Samantha Koehler

Title:
None

Employing Office/Committee:
KAINE, TIM

Duty Station:
WASHINGTON,DC

Destination(s):

Charlottesville, Virginia

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

An event for congressional health policy staff for a program combining leadership development, policy education, and bipartisan, bicameral engagement. The event will feature expert-led workshops on leadership skills, Congressional effectiveness, and critical health policy topics.

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

Name and Relationship to Traveler:
None

Organization Information

Organization Name
University of Virginia, Batten School of Leadership and Public Policy

§501(c)(3) Organization Type
Public Charity

Address 2 (Optional)

Phone Number
(202) 215-7520

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

Address
235 McCormick Rd

City, State Zip
Charlottesville, Virginia 22904-4893 United States

Organization URL
https://batten.virginia.edu

History of Congressional Travel

The UVA Batten School of Leadership and Public Policy has sponsored or hosted Congressional staff delegation travel twice in the past 5 years. The University has hosted Member of Congress and Congressional staff as speakers at events and in courses. The Commonwealth fund has co-sponsored Congressional travel once in the past 5 years.

Educational Activities

As part of the University of Virginia, the mission of the Frank Batten School of Leadership and Public Policy is to develop leaders and generate new knowledge to solve the world's toughest public policy challenges. The school offers bachelors and graduate degrees with a focus an interdisciplinary curriculum where faculty and students lead with purpose, use data to drive decisions and turn ideas in action. The Commonwealth Fund supports independent research on health care issues and making grants to improve health care practice and policy. These grants include developing educational materials and supporting educational events for state and federal policy makers.

Lobbyist and Foreign Agent Registration Information

Lobbyist Registration Status: *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: *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

Signature Page

The signature page is below.

Purpose and Details

Provide a brief description of the trip.

The Frank Batten School of Leadership and Public Policy at the University of Virginia (UVA) in partnership with the Commonwealth Fund are hosting a bipartisan, bicameral Congressional Staff Health Policy Retreat in Charlottesville, Virginia from October 5-7, 2026. This three-day, two-night retreat will convene approximately 30 up-and-coming congressional health policy staff, balanced by party and chamber, for an intensive program combining leadership development, policy education, and bipartisan, bicameral engagement. Health policy leaders from across disciplines and institutions will be invited to participate including as speakers and facilitators. The retreat will feature expert-led workshops on leadership skills, congressional effectiveness, and critical health policy topics, alongside curated experiential learning opportunities at the University of Virginia and Monticello.

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

The University of Virginia (UVA) was founded by Thoman Jefferson to educate citizen leaders for a fledgling democracy. Today, UVA continues to be a public institution of higher learning that serves the Commonwealth of Virginia, the nation and the world by developing citizen leaders and professionals. The mission of the UVA Frank Batten School of Leadership and Public Policy is to develop leaders and generate new knowledge to solve the world's toughest public policy challenges. Providing the opportunity for Congressional staff to develop leadership skills and deeper policy knowledge through the Congressional Staff Health Policy Retreat is aligned with the mission of the Batten school and the University of Virginia.

Is your organization the only sponsor for this trip?

○ Yes ● No

Describe your organization's role in planning the trip.

UVA Batten was responsible for developing the concept and grant proposal for the retreat, contracting with vendors, arranging logistics of travel and accommodations. In addition, the retreat will be hosted on the UVA campus using UVA facilities for policy sessions, most meals, and the hospital site visit. The costs of the retreat are supported by a grant from the Commonwealth Fund. UVA worked with the Commonwealth Fund's staff to develop an agenda. UVA and the Commonwealth fund work together to identify speakers. UVA faculty and Commonwealth Fund leadership are serving as moderators and speakers during the event.

Joint Sponsor: The Commonwealth Fund

Organization Information

Organization Name
The Commonwealth Fund

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

§501(c)(3) Organization Type
Private Foundation

Address
1 E 75th St

Address 2 (Optional)

City, State Zip
New York, New York 10021 United States

Phone Number
(212) 606-3800

Organization URL
https://www.commonwealthfund.org/

History of Congressional Travel

The Commonwealth Fund has a decades-long history of supporting Congressional travel to expose Members of Congress and Congressional staff to facilitate bipartisan conversations and shared experiental learning. Commontwealth Fund supported travel has the hallmark of focussing on academic research and policy experts presenting a range of ideas to help policy makers consider issues from multiple perspectives. In the past we have partnered with organizations such as the Aspen Institue, the Alliance for Health Policy, the National Health Policy Forum and a number of universities.

Educational Activities

Almost since its founding, the Commonwealth Fund has invested in tomorrow's leaders including 5 fellowship programs, conferences, and educational series to support a broader understanding of health policy. The Commonwealth Fund supports policy retreats and expert convenings as well as widely attended hour-long briefings for Congressional staff and other Federal Policy makers.

Lobbyist and Foreign Agent Registration Information

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

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

Signature Page

The signature page is below.

Grantmaking Organizations (Optional)

There are no grantmaking organizations.

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
- ○ 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.

- ○ 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

- 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:
10/05/2026 @ 10:00 AM

Trip End Date/Time:
10/07/2026 @ 06:00 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: $100.00 | Accompanying Family Member: $0.00)

Transportation Type	Class	Amount
Ground Transportation	N/A	$40.00

Note
A bus will take participants from Washington DC to Charlottesville on October 5, 2026. The bus will depart Washington DC at 10:00 am and arrive at UVA between 12:30 pm and 1 pm depending on traffic. The per person cost of the rental is approximately $40.

Ground Transportation	Coach	$40.00

Note
A bus will take participants from Charlottesville to Washington, DC on October 7, 2026. The bus will depart Charlottesville at 3:00 pm and arrive in Washington DC between 5:30 pm and 6 pm depending on traffic. The per person cost of the rental is approximately $40.

Ground Transportation	N/A	$20.00

Note
Shuttle to and from The Graduate Hotel, Charlottesville to Monticello on October 6th for the "Found Friends; Founding Foes" tour of Thomas Jefferson's home and Feast of Reason dinner.

Lodging (Per Member/Officer/Employee: $272.00)

Check-In	Check-Out	Facility	City	State	Country	Nights	Cost/Night	Cost Exceed Per Diem
10/05/2026	10/07/2026	The Graduate Hotel	Charlottesville	Virginia	United States	2	$136.00	No

Meals (Per Member/Officer/Employee: $269.00)

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem
10/05/2026	$0.00	$20.00	$40.00	$0.00	**$60.00**	Charlottesville	Virginia	United States	No

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem
10/06/2026	$5.00	$10.00	$164.00	$0.00	**$179.00**	Charlottesville	Virginia	United States	Yes

Cost Exceeds Per Diem Reason

A "Feast of Reason" is a gathering inspired by Thomas Jefferson's historic dinner parties at Monticello, where guests share a multi-course meal and engage in group-focused dialogue about history, democracy, and community using a specialized set conversation prompts. Developed by Jefferson and Politics scholars, the conversation aims to break down ideological barriers with a different conversation topic introduced at each course. Hosting the event at Jefferson Library at Monticello allows for a facilitated conversation led by the scholars who developed this approach to civil discourse. Having professional facilitation allows for deeper understanding of process and to address any issues that might arise. Hosting the event at another location would have incurred costs of facilitation and rentals. There is only one approved cater, given the historic nature of the facility. UVA selected least costly dinner option.

10/07/2026	$10.00	$20.00	$0.00	$0.00	**$30.00**	Charlottesville	Virginia	United States	No

Reasonable Miscellaneous Expenses (Per Member/Officer/Employee: $45.00)

Expense Type	Amount	Notes
Other (Tour Fee)	$45.00	The cost of the tour and facilitated discussion for the Founding Friends; Founding Foes tour of Monticello. Monticello's Founding Friends, Founding Foes Tour explores how Jefferson and Adams became allies in 1776, bitter rivals in an age of partisanship, and friends again in retirement. By considering the challenges and triumphs of the American Revolution and the early United States, this tour reveals how ordinary people became leaders and encourages visitors to consider how a democracy was born through disagreement, civil discourse, and dedication to shared values.

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: Congressional Health Policy Staff Retreat

Travel Date(s): October 5-7, 2026

Travel Destination(s): Charlottesville, VA

Sponsor: Commonwealth Fund

Rachel Nuzum — *(printed name of sponsor representative)*

SVP, Policy — *(title)*

rachel nuzum — *(signature of sponsor representative)*

8/21/2026 — *(date)*

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: Congressional Staff Health Policy Retreat

Travel Date(s): October 5-7, 2026

Travel Destination(s): Charlottesville, VA

Sponsor: University of Virginia, Frank Batten School of Leadership and Public Policy

Melanie Anne Egorin — *(printed name of sponsor representative)*

Professor — *(title)*



(signature of sponsor representative)

19 August 2026 — *(date)*

Invited Senate Staff

2026 Bipartisan Congressional Staff Health Policy Retreat

Monday, October 5th – Wednesday October 7th
University of Virginia

Name	Title	Office/Committee
Mariah Baker	Health Policy Advisor	Patty Murray (WA)
Kathleen Bochow	Legislative Assistant	John Boozman (AR)
Jillian Cantrell	Legislative Assistant	Bill Hagerty (TN)
Maddison Dillon	Health Policy Analyst	Republican Policy Committee
Samantha Koehler	Senior Health Policy Advisor	Tim Kaine (VA)
Amy Nabozny	Senior Health Policy Advisor	Senate Finance Committee
Ardeshir Pirzadeh	Legislative Correspondent	Ben Ray Lujan (NM)
Amber Ray	Deputy Legislative Director	Lisa Blunt Rochester (DE)
Alexandra (Lexi) Shimanovksy	Health Policy Analyst	Senate Finance Committee
Gabriella Vesey	Health Legislative Assistant	Raphael Warnock (GA)
Lilly Walsh	Legislative Assistant	John Thune (SD)
Max Seltzer	Health Policy Director	Roger Marshall (KS)
Meghan McCully	Health Policy Advisor	Tim Scott (SC)
Andrew Murray	Legislative Assistant	Todd Young (IN)
Elizabeth Murphy	Staff Assistant	Dave McCormick (PA)
Dana Richter	Senior Policy Advisor	Shelly Moore Capito (WV)

UNIVERSITY of VIRGINIA | FRANK BATTEN SCHOOL of LEADERSHIP and PUBLIC POLICY

The Commonwealth Fund

2026 Bipartisan Congressional Staff Health Policy Retreat

Monday, October 5th – Wednesday, October 7th
University of Virginia

RETREAT GOALS: By investing in the professional development of Congressional health policy staff, this convening aims to strengthen bipartisan capacity for evidence-based health policymaking in Congress and build a durable network of informed, collaborative legislative professionals. The Congressional Staff Health Policy Retreat aims to 1) deepen health policy knowledge; 2) foster bipartisan, bicameral relationship-building; 3) develop professional skills through targeted workshops on leadership, policy development, and congressional effectiveness; and 4) build capacity for future evidence-based policy making. The retreat experts reflect diversity of experience (e.g., researchers and practitioners), health policy focus (e.g., innovation and federal spending), academic discipline (e.g. economists, sociologists, and social psychologists), and political perspectives.

RELEVANCE TO OFFICIAL DUTIES: The health policy and leadership topics as well as hands on experiences of this retreat are important to the knowledge and professional skills of Congressional staff working on health policy issues.

LOCATION: The purpose of travel is to The University of Virginia, a public research university founded by Thomas Jefferson in 1819 with the primary goal to educate leaders for American democracy and public service. The retreat activities will primarily be hosted at the UVA Frank Batten School of Leadership and Public Policy and UVA Hospital complex.

Monday, October 5

10:00 a.m.	Chartered Bus leaves Washington, DC Departure Location: Folger Shakespeare Library 201 East Capitol Street Washington, DC 20003 Congressional attendees will be joined by Melanie Anne Egorin from UVA Batten and Kathy Rowings and Sophie Petti from the Commonwealth Fund
12:45 p.m.	Bus arrives UVA Grounds
12:45 p.m.-1:00 p.m.	Transition from bus to meeting room in Garrett Hall
1:00 p.m.-2:00 p.m.	**Working Lunch and Orientation to UVA Grounds**

After introductions, retreat participants will participate in level-setting conversations about the retreat's goals and expectations. While walking to the UVA Simulation Collaborative, participants will be provided a tour of the UVA Academical Village designed by Thomas Jefferson to focus on the importance of education and public service.

The working lunch and walking tour will provide a strong foundation of the purpose of the trip situated in the importance of an educated citizenry and deliberate policy making while building bipartisan, bicameral relationships.

Facilitators:
1. Melanie Anne Egorin, UVA Batten School
2. Rachel Nuzum, The Commonwealth Fund

Tour Leads: UVA students

Location: UVA Batten School of Leadership and Public Policy
Garrett Hall
235 McCormick Rd
Charlottesville, VA

2:00 p.m.-4:00 p.m. **UVA Simulation Collaborative (School of Medicine/School of Nursing)**

Congressional staff will participate in 4 simulation modules used to train medical and nursing students to understand the role technology plays in health workforce education, patient safety, and health outcomes.

This hands-on experience is relevant to the goals of the trip because it deepens knowledge and understanding of how health professionals are trained and the role of technology in health care delivery. These are on-going and long-term policy discussions for Congressional staff.

Facilitator: Ryne Ackard, Director University of Virginia Simulation Collaborative

Location: Medical Simulation Center, University of Virginia School of Medicine
Claude Moore Medical Education Building
200 Jeanette Lancaster Way
Charlottesville, Virginia

4:00 p.m.-6:00 p.m. Walk to Graduate Hotel, check-in, walk to Pavillion VII on UVA Grounds

Participants will walk from the UVA simulation lab to the hotel to claim luggage and check in to the hotel and then walk to Pavilion VII for welcome conversation and dinner. Staff will also have the ability to check in with their offices, respond to pressing requests, etc.

This transition time recognizes the walk time as well as the time it will take to facilitate participants checking into their rooms. In an effort to have staff be fully present during presentations, we will encourage them to use this time to complete any work tasks (e.g. check-in with their office, respond to emails).

Location: The Graduate Hotel
1309 West Main Street
Charlottesville, Virginia

6:00 p.m.-7:00 p.m. **Welcome Conversation with UVA Leadership and Faculty**

UVA Leadership and faculty will share their professional and policy experiences and engage with Congressional staff to have them think about long-term leadership skills and professional expertise development. This session provides an opportunity for Congressional staff to hear from UVA faculty about their areas of expertise and for staff to ask questions that will help them develop deeper understanding of an issue or discuss gaps in research that could help further policy development.

This welcome conversation is relevant to Congressional staff as they develop their leadership skills, consider the role of expertise in policy making, and build capacity for future evidence-based policy making.

Speakers:
1. Lori McMahon, UVA Vice President of Research
2. Jay Shimshack, Associate Dean UVA Batten School of Leadership and Public Policy

Other Participants:
Retreat speakers
Commonwealth staff
UVA Leadership
Faculty from UVA Batten School of Leadership and Public Policy
Faculty from UVA Health Policy Hub

Location:
Pavilion VII, West Lawn
University of Virginia
Charlottesville, Virginia

7:00 p.m.-9:00 p.m. **Working Dinner & Opening Discussion**

Dinner Discussion: Leadership Journeys and the Role of Clinical and Research Insights in Policymaking

This working dinner will focus on the role of clinical and research work on policy making. Dr. Betancourt and Dr. Webb have both served in a number of policy-making roles while also caring for patients and conducting academic research.

This session is important to staff understanding the clinical as well as state and local impacts of policy making. This session will deepen knowledge of policy making impacts and build capacity for future health policy development.

The entirety of the allotted time for the working dinner will be spent covering officially connected activity.

Speakers:
1. Cameron Webb, State Health Commissioner, Virginia Department of Health
2. Joseph Betancourt, President, The Commonwealth Fund

Moderator: Peggy Hamburg, Board Chair, The Commonwealth Fund, former FDA Commissioner

Other Participants:
Retreat speakers
Commonwealth Fund staff
UVA Leadership and Faculty

Tuesday, October 6

8:00 a.m.-8:30 a.m. Walk to UVA Batten, Garrett Hall

8:30 a.m.-9:00 a.m. **Welcome and Charge for the Day**

Dean Chou is an award-winning scholar of organizational behavior who studies the social psychological and organizational mechanisms that shape leadership, cooperation, and decision making. Dean Chou will provide a short presentation to frame the day's varied sessions in light of her work on leadership.

This session is important because it will help attendees make connections between the numerous sessions in how they develop professional and policy skills.

Speaker: Interim Dean Eileen Chou, UVA Batten School of Leadership and Public Policy

Location: UVA Batten School of Leadership and Public Policy
Garrett Hall
235 McCormick Rd
Charlottesville, VA

9:00 a.m.-10:30 a.m. **Negotiation Workshop**

This session will be a 90-minute facilitated workshop on negotiation skills led by Professor Ben Converse, an expert on how people achieve personal and collective goals in a resource-constrained and social world.

Given the important role negotiation plays in the work of Congressional staff, this session will develop professional skills and build capacity for future evidence-based policy making.

Speaker: Ben Converse, UVA Batten School of Leadership and Public Policy

Location: UVA Batten School of Leadership and Public Policy

Garrett Hall
235 McCormick Rd
Charlottesville, VA
Location: Garrett Hall

10:30 a.m.-10:45 a.m. Transition and Break

This break will allow staff to shift from the workshop interactive component of the day to the subject-specific sessions. In an effort to have staff be fully present during presentations, we will encourage them to use this time to complete any work tasks (e.g. check-in with their office, respond to emails).

10:45 a.m.-12:00 p.m. **Rural Health: Federal, State and Local Efforts to Expand Access to High Quality, Cost Effective Care**

This session will focus on the federal, state, and local efforts to address rural health policy problems. The speakers will provide perspectives from state-level leaders and on-the-ground physicians trying to address the needs of rural communities in Virginia.

Given the focus on rural health care among policy makers, this session will deepen knowledge of policy making impacts and build capacity for future health policy development.

Speakers:
1. Marvin Figueroa, Secretary of Health and Human Resources, Commonwealth of Virginia
2. Sanjay Kishore, UVA School of Medicine

Moderator: Kevin Bennett, University of South Carolina

Location: UVA Batten School of Leadership and Public Policy
Garrett Hall
235 McCormick Rd
Charlottesville, VA

12:00 p.m.-1:30 p.m. **Working Lunch Keynote: AI &Technology Tools to Improve Patient Care, Improve Access, and Lower Costs**

This session will focus on the role of technology, the future of AI, and the technical resources available through the National Academy of Medicine (NAM). The speaker will present on the long-standing work of NAM to improve clinical decision making through the appropriate adoption of technology. The speaker will also address the role of innovation to improve patient care and lower costs.

Given the focus on technology among policy makers, this session will deepen knowledge of policy making impacts and build capacity for future health policy development.

The entirety of the allotted time for the working lunch will be spent covering officially connected activity.

Speaker: Monica Bertagnolli, President, National Academy of Medicine

Moderator: Joseph Betancourt, President, The Commonwealth Fund

Location: UVA Batten School of Leadership and Public Policy
Garrett Hall
235 McCormick Rd
Charlottesville, VA

1:30 p.m.-2:45 p.m. **Trends in Market Consolidation and the Role of Private Equity**

This session will focus on recent trends in health care market consolidation and the role of private equity. The speakers will discuss the latest research on these issues and the impacts on affordability, access, and quality of care.

Given the focus on the role of corporate and investment in the health care ecosystem, which often limits access or increases costs, this session will deepen knowledge of policy making impacts and build capacity for future health policy development.

Speakers:

1. Benedic Ippolito, AEI
2. Yashaswini Singh, Brown University

Moderator: Jonathan Crowe, UVA School of Medicine

Location: UVA Batten School of Leadership and Public Policy
Garrett Hall
235 McCormick Rd
Charlottesville, VA

2:45 p.m.-3:30 p.m. **Late Breaking Issues in Health Policy**

This session will focus on policy issues raised by attendees to help them prepare for more immediate law making and policy debates at the end of the Congress. The speakers, all long-time policy professionals with decades of federal policy experience, will provide context and resources. The speakers will facilitate conversation among participants to share perspectives and knowledge.

Given the nature of the work of Congressional staff, this session is designed to be responsive to their short-term policy making and intellectual curiosity and as such this session will deepen knowledge of policy making.

Speakers:
1. Sheila Burke, Baker Donelson, former Secretary of the Senate
2. Melanie Anne Egorin, UVA Batten School of Leadership and Public Policy
3. Rachel Nuzum, The Commonwealth Fund

Location: UVA Batten School of Leadership and Public Policy
Garrett Hall
235 McCormick Rd
Charlottesville, VA

3:30 p.m.-4:30 p.m. Walk back to the Graduate Hotel and Break

Participants will walk back to the Graduate Hotel to meet the bus. In an effort to have staff be fully present during presentations, we will encourage them to use this time to complete any work tasks (e.g. check-in with their office, respond to emails).

4:30 p.m.-5:00 p.m. Travel to Monticello (bus pick up from hotel)

5:00 p.m.-6:30 p.m. **Monticello Tour: Founding Friends, Founding Foes - Jefferson and Adams**

Monticello's Founding Friends, Founding Foes Tour explores President Adams and President Jefferson's complicated relationship. Participants will learn how these founders became allies in 1776, bitter rivals in an age of partisanship, and friends again in retirement. By considering the challenges and triumphs of the American Revolution and the early United States, this tour reveals how ordinary people became leaders and encourages visitors to consider how a democracy was born through disagreement, civil discourse, and dedication to shared values.

This tour fosters bipartisan, bicameral relationship-building skills and builds capacity for future policy making by offering Congressional staff a chance to consider our nation's founding values and how to work with those of different ideological principles.

Location: Monticello
1050 Monticello Loop
Charlottesville, VA

6:30 p.m.-6:45 p.m. Travel to Jefferson Library

6:45 p.m.-9:00 p.m. **Introduction to Jefferson Library and Feast of Reason**

Attendees will receive an introduction to the Jefferson Library and the scholarship around the founding of the nation. Then attendees will participate in a professionally facilitated Feast of Reason Dinner, a civics and dialogue program inspired by Thomas Jefferson's historic dinner parties. This facilitated, structured program uses specialized conversation card decks to foster civil discourse, meaningful community connection, and discussions on democracy over food and drink. Attendees will explore their own views and values as well as work to understand the perspectives of others.

At a time of hyper-partisanship, this dinner offers Congressional staff an opportunity to foster bipartisan, bicameral relationships. It also allows staff to

understand their personal values and policy perspectives, which is a key feature of developing leadership skills.

Location: Jefferson Library at Monticello
1329 Kenwood Farm, VA-53
Charlottesville, VA

Wednesday, October 7

8:00 a.m.-8:30 a.m. Walk from hotel to Garrett Hall

8:30 a.m.-9:30 a.m. **Working Breakfast Keynote: Policymaking from the Executive Branch – What Congressional Staff Need to Know**

Participants will hear from a senior Administration official about policy making and statute implementation by the executive branch. Deputy Commissioner Graham will share lessons she has learned since leaving Capitol Hill for the Administration.

This session will further knowledge about working with the executive branch to increase congressional effectiveness, build capacity for further policy making, and provide a chance to talk about leadership skills translation between roles.

The entirety of the allotted time for the working breakfast will be spent covering officially connected activity.

Speaker: Grace Graham, Deputy Commissioner for Policy, Legislation, and International Affairs at FDA and Senior Counselor to the Secretary, UVA Alumna

Moderator: Melanie Anne Egorin, UVA Batten School

Location: UVA Batten School of Leadership and Public Policy
Garrett Hall
235 McCormick Rd
Charlottesville, VA

9:30 a.m.-10:30 a.m. **Trends in Hospital and Drug Pricing**
This session will focus on the recent trends in hospital and drug pricing. The speakers will discuss the latest research on these issues and the impacts on affordability, access, and quality of care.

Given the focus on affordability for consumers and the impact of costs on federal health care programs, this session will deepen knowledge of policy making impacts and build capacity for future health policy development.

Speakers:
1. Mike Chernew, Harvard University
2. Kristi Martin, Highway 136 Consulting

Moderator: Lovisa Gustaffson, The Commonwealth Fund

Location: UVA Batten School of Leadership and Public Policy
Garrett Hall
235 McCormick Rd
Charlottesville, VA

10:30 a.m.-11:30 a.m. **Effective Law Making**

This session will focus on scholarly research regarding effective lawmaking to help Congressional staff understand trends, tactics, and considerations for developing a successful legislative agenda for a Congressional office.

Drawing on the scholarly research, this session will develop professional skills and build capacity for future evidence-based policy making.

Speakers:
1. Craig Volden, UVA Batten School and Co-Director of the Center for Effective Lawmaking
2. SoRelle Gaynor, UVA Batten School

Moderator: Rachel Nuzum, The Commonwealth Fund

Location: UVA Batten School of Leadership and Public Policy
Garrett Hall
235 McCormick Rd
Charlottesville, VA

11:30 a.m.-12:15 p.m. **Wrap Up Conversation and Lunch**

After the didactic portion of the sessions are complete, retreat participants will participate in summary conversations to identify key themes and make connections back to the retreat goals and expectations. Participants will have the opportunity to discuss next steps and additional resources.

This working lunch is an opportunity for Congressional staff to synthesize the information from the 3 days and consider how they will apply this to improving leadership skills and future health-policy making.

The entirety of the allotted time for the working lunch will be spent covering officially connected activity.

Facilitators:
3. Melanie Anne Egorin, UVA Batten School
4. Rachel Nuzum, The Commonwealth Fund

Location: UVA Batten School of Leadership and Public Policy
Garrett Hall
235 McCormick Rd
Charlottesville, VA

12:15 p.m.-12:30 p.m.	Walk to UVA Hospital
12:30 p.m. -2:30 p.m.	**UVA Health University Hospital Site Visit** Participants will have a guided site visit of UVA University Hospital to discuss policy issues at the forefront of health care delivery and the impact on large health care systems, such as UVA Health. Conversation with health systems leadership will begin the site visit and then participants will have the opportunity to learn more about health care delivery in specific hospital departments (emergency medicine, infection control, radiation oncology, and ob-gyn). This site visit is useful for Congressional staff as it is a chance to directly observe health care delivery and how hospitals implement federal, state, and local requirements. This site visit provides first-hand knowledge to deepen health policy knowledge and build capacity for future evidence-based policy making. Speaker: Mitch Rosner, UVA Executive Vice President for Health Affairs and Chief Executive Officer of UVA Health Site Visit Tour Leads: UVA Health staff Location: UVA University Hospital 1215 Lee St Charlottesville, VA
2:30 p.m.	Adjourn & return to hotel to pick up luggage Location: The Graduate Hotel 1309 West Main Street Charlottesville, Virginia
3:00 p.m.	Bus from Charlottesville to Washington DC