Date/Time Stamp:

Employee Post-Travel Disclosure of Travel Expenses

Post-Travel Filing Instructions: Complete this form within **30 days** of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building.**

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

☒ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**
☒ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): American Compass

Travel date(s): July 16, 2021 - July 18, 2021

Name of accompanying family member (if any): N/A

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING **DID NOT INCREASE** DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☒ Good Faith Estimate ☐ Actual Amount	$50 (per person cost of charter bus to Charlottesville and DC)	$279/night = $558	$100.85 (3 Meals) Fri: $31.95 Sat: $46.95 Sun: $21.95	$93.76 - Overnight delivery cost to procure Kosher meals

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☐ Good Faith Estimate ☐ Actual Amount				

Provide a description of all meetings and events attended. *See* Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): See attachment.

8/13/21 (Date)

A. Haim Engelman (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.

8/13/21 (Date)

(Signature of Supervising Senator/Officer)

(Revised 1/3/11)

Form RE-2

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

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1. Sponsor(s) of the trip (please list all sponsors): American Compass

2. Description of the trip: American Compass's first members retreat, focused on discussing economic policy that can support legislation that is good for American industries, families, and communities.

3. Dates of travel: 07/16/21 - 07/18/21

4. Place of travel: Charlottesville, Virginia

5. Name and title of Senate invitees: See Attachment

6. I *certify* that the trip fits one of the following categories:

   ☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal **and** do not retain or employ registered lobbyists or agents of a foreign principal **and** no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

   – OR –

   ☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) *(see question 9)*.

7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.

   – AND –

   ☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions 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.

8. I *certify* that:

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

   – AND –

   ☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**
I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in 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.

– OR –

☐ (B) The trip is for attendance or participation in 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 (*see questions 6 and 10)*.

– OR –

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**
If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

American Compass is the sole sponsor and is organizing all aspects of this trip.

American Compass is funding the entire trip.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

See attachment.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

This is our organization's first sponsored trip with congressional invitations.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

See attachment.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
☒ Good Faith estimate ☐ Actual Amounts	$50 (per person cost of charter bus to Charlottesville and DC)	$279/night = $558	$304 (5 meals and 2 snacks) Fri: $72 Sat: $184 Sun: $48	No other expenses

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation **or** b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This workshop is arranged without regard to congressional participation.

18. Reason for selecting the location of the event or trip

American Compass limited the search for an appropriate venue for our program within a two-hour drive of Washington, D.C.

19. Name and location of hotel or other lodging facility:

Boar's Head Inn, Charlottesville, Virginia

20. Reason(s) for selecting hotel or other lodging facility:

The venue provided a secluded location outside of DC with the necessary meeting space to host our program and was the more affordable optin when compared to comparable venues. In particular, this venue provides adequate large, mid-sized, and breakout rooms for our programming.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

See attachment.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

We are providing roundtrip charter bus service to and from Charlottesville.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

None

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Signature of Travel Sponsor: _____

Name and Title: Oren Cass, Executive Director

Name of Organization: American Compass

Address: 300 Independence Avenue SE, Washington, DC 20003

Telephone Number: 413-200-9456

Fax Number: N/A

E-mail Address: oren.cass@americancompass.org

0000000000145 RECEIVED BY: SECRETARY OF THE SENATE Date: August 13, 2021

AMERICAN COMPASS

Workshop on Conservative Economics

Friday, July 16 – Sunday, July 18, 2021

Boar's Head Resort | Charlottesville, VA

FRIDAY, JULY 16, 2021

2:00pm	*Attendees arrive and board bus*	*Union Station*
2:30pm	*Bus departs to Boar's Head Resort*	
4:30pm	*Bus arrives at Boar's Head Resort*	
4:30–6:00pm	**REGISTRATION** *Attendees check-in to overnight rooms*	*Front Lobby*
6:00–7:30pm	**WELCOME RECEPTION** *Expanded window for attendees to arrive by private travel*	*Hearth Room*
7:30–9:30pm	**DINNER DISCUSSION** **Rewriting the Conservative Consensus** Keynote by Oren Cass (Exec Dir, American Compass) *What are neoliberalism and market fundamentalism, where did they come from, and how did they overtake conservative economic thought in America? Which issues facing policymakers today offer the greatest challenge to existing economic orthodoxy and opportunity for restoring a conservative consensus?*	*Hearth Room*

SATURDAY, JULY 17, 2021

7:30–9:30am	**BREAKFAST** Open buffet for attendees to eat at their convenience	*Patio Room*

SESSION I: A REALIGNMENT IN PROGRESS

9:30–1:00pm

Attendees will be polled on a variety of ongoing policy debates to identify those topics that most starkly divide the group. Three of those topics will then be selected for breakout conversations, first in groups of ~6 and then in larger groups to recap conclusions.

9:30–10:00am	**POLLING FOR GROUP EXERCISE BREAKOUTS** Polling administered by Wes Hodges (Coalition Dir, American Compass) Policy subjects to be polled for discussion: *election integrity, tax reform, industrial policy, the environment, immigration, judicial priorities, the two-party system, family policy, labor, modern monetary theory, higher education, workforce development, algorithmic advertising, data privacy, declensionism, healthcare, and attendee-generated submissions*	*The Ballroom*
10:00–11:00am	**SMALL GROUP BREAKOUTS** Each participant will choose a topic and be assigned to a small breakout group to discuss the topic in depth.	*Albemarle, Blue Ridge and Commonwealth Rooms*
11:00–12:00pm	**LARGE GROUP READOUTS** Moderated by Oren Cass (Exec Dir, A.C.), Chris Griswold (Policy Dir, A.C.), and Wells King (Research Dir, A.C.) Small groups will reconvene in larger groups of 15 to 20 to share conclusions from their conversations and identify areas of consensus and disagreement.	*Albemarle, Blue Ridge and Commonwealth Rooms*
12:00–1:00pm	**LUNCH DEBRIEF** Participants from the morning session's different topic groups will share conclusions with each other.	*The Ballroom*
1:00pm–2:30pm	**SESSION II: HEALTHCARE DEBATE** Moderated by Oren Cass (Exec Dir, A.C.) Attendees will participate in an Oxford-style debate led by two teams of two participants on the question of whether healthcare reform should emphasize greater government involvement and support or greater reliance on market forces and individual choice.	*The Ballroom*
2:30–3:00pm	**BREAK / AFTERNOON SNACK**	*The Ballroom*

3:00–4:30pm	**SESSION III: POLICY WORKSHOP** Moderated by Oren Cass (Exec Dir, A.C.) Volunteers from among the attendees will present ambitious policy proposals and arguments that they have been working on, for testing and refinement by small panels of other attendees.	*The Ballroom*
4:30–6:00pm	**BREAK**	
6:00–8:00pm	**DINNER** Open buffet for attendees to eat at their convenience and discuss the weekend's programming so far	*Patio Room*
8:00–9:30pm	**SESSION IV: PAST AS PROLOGUE** Hosted by Oren Cass (Exec Dir, A.C.) Attendees in small groups will use trivia about past political realignments and major legislative efforts as a jumping off point for discussion about parallels to and differences in the current environment, and implications for their own work.	*Hearth Room*

SUNDAY, JULY 18, 2021

8:30–9:30am	**BREAKFAST** Open buffet for attendees to eat at their convenience	*Patio Room*
9:30–10:00am	**SESSION V: CHARTING A COURSE** Remarks by Oren Cass synthesizing key takeaways from the weekend's discussions, highlighting areas for further debate and research, and proposing areas for potential progress by policymakers.	*Hearth Room*
10:00–11:00am	**SESSION VI: THE COMING YEAR IN FOCUS** American Compass shares its upcoming projects and highlights opportunities for attendees to continue to participate and refine their policy ideas.	*Hearth Room*

10:00–10:30am	**The Legislative Pipeline** Chris Griswold (Policy Dir, American Compass) *What policy areas will American Compass emphasize in the coming year? Which major legislative fights on tap in Congress are likely to present the best opportunity for advancing a conservative economic agenda? And which issues not yet on the docket may begin coming into focus?*	*Hearth Room*
10:30–11:00am	**Our Research Agenda** Wells King (Research Dir, American Compass) How will American Compass continue to develop the case for conservative economics in areas like industrial policy, family policy, labor policy, and financial regulation? In which new areas will American Compass begin to do work? And what other topics require greater attention from others involved in law, journalism, and policymaking?	*Hearth Room*
11:00–11:45am	**CHECK OUT & BOARD CHARTER BUS** *Attendees check-out of their rooms and load their luggage onto the charter bus.*	*Front Lobby*
12:00pm	*Bus departs to Union Station*	*Front Lobby*
2:00pm	*Bus arrives at Union Station*	*Union Station*

0000000000149 RECEIVED BY: SECRETARY OF THE SENATE Date: August 13, 2021

AMERICAN COMPASS

American Compass
Workshop on Conservative Economics

Friday, July 16 – Sunday, July 18, 2021

Boar's Head Resort | Charlottesville, VA

- **American Compass**
  300 Independence Avenue SE
  Washington, DC 20003
- contact@americancompass.org
- www.americancompass.org

Invitation List

About the List:

The following individuals were extended an invitation to the American Compass Workshop on Conservative Economics due to their interest in conservative economic policy.

Senate			
Haim	Engelman	Sen. Marco Rubio	Legislative Assistant
Sam	Mulopulos	Homeland Security and Governmental Affairs Committee	Professional Staff Member
Mike	Needham	Sen. Marco Rubio	Chief of Staff
Jacob	Stubbs	Homeland Security and Governmental Affairs Committee	Professional Staff Member
James	Hitchcock	Sen. Marco Rubio	Speechwriter
Caleb	Orr	Sen. Marco Rubio	Senior Policy Adviser
Vijay	Menon	Sen. Josh Hawley	Legislative Aid

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AMERICAN COMPASS

To: Haim Engelman, Sen. Marco Rubio

6/13/21

American Compass
300 Independence Avenue SE
Washington, DC 20003

contact@americancompass.org

www.americancompass.org

Invitation

American Compass Workshop on Conservative Economics

Friday, July 16 – Sunday, July 18, 2021

Boar's Head Resort

Charlottesville, VA

The purpose of this trip is to provide interested policy professionals with the opportunity to encounter new political and economic ideas that can help shape a conservative consensus that emphasizes the importance of family, community, and industry to the nation's liberty and prosperity. This will include industrial policy, labor, family formation, financial regulation, and many more topics that participants have contributed to and learned from over the past year.

You are being invited because of your interest in conservative economic policy. If you choose to attend, we will cover your lodging, meals, and provide a charter bus to and from Charlottesville and DC.

Sincerely,

Oren Cass
Executive Director

0000000000151 RECEIVED BY: SECRETARY OF THE SENATE Date: August 13, 2021

ATTACHMENT TO EMPLOYEE POST-TRAVEL DISCLOSURE FORM

American Compass, Economics Workshop July 16-18, 2021

6. Describe Meetings and Events Attended:

American Compass convened a group of 40 policy professionals in the House, Senate, journalism, and nonprofits for the following activities:

Friday: Arrived via bus and attended a keynote exploring the changing landscape of conservative economics.

Saturday: Participated in a polling exercise that led to discussion on domestic, foreign, and social policy; witnessed a debate on healthcare policy, attended a policy proposal workshop where ideas were examined by a panel of attendee peers, and joined for dinner and a public policy trivia session in the evening.

Sunday: American Compass gave closing remarks, observations from the weekend, and communicated its priorities for the year. Amb. Robert Lighthizer spoke on international trade and his experience in the White House. I left via bus at noon.

ATTACHMENT TO PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

American Compass, Economics Workshop July 16-18, 2021

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

American Compass is a 501(c)(3) non-profit organization founded in 2020 whose mission is to restore an economic consensus that emphasizes the importance of family, community, and industry to the nation's liberty and prosperity. Our first workshop is planned around substantive policy sessions to aid staff. We aid legislative staff via research projects on economic issues, acting as a forum for new proposals, and a bridge for multiple offices to connect and work together.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

We are a leading resource for elected officials, their staff and the media, who rely on our regular policy reports, essays, discussions, and debates to help policymakers navigate the limitations that markets and government each face in promoting the general welfare and the nation's security.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

Our nightly rate is higher than the GSA per diem. Our projected meal costs are higher than the GSA per diem. We found these costs necessary to book a meeting space that was large enough, private, and had adequate breakout space. Boar’s Head proved to be the more affordable option when compared to comparable venues in driving distance of DC.