Print This Form... Clear Form

# Employee Post-Travel Disclosure of Travel Expenses

RECEIVED
SECRETARY OF THE SENATE
PUBLIC RECORDS
2022 APR 20 PM 3:29

**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): Senate Working Group

Travel date(s): March 24-26, 2022

Name of accompanying family member (if any): Erin Thielman

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<br>☐ Actual Amount | $275 | $192 | $147 | |

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

| | Transportation Expenses | Lodging Expenses | Meal Expenses | Other Expenses (Amount & Description) |
|---|---|---|---|---|
| ☒ Good Faith Estimate<br>☐ Actual Amount | $0 | $0 | $147 | |

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

4/20/22 (Date) Jason Thielman (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.

4/20/22 (Date) (Signature of Supervising Senator/Officer)

(Revised 1/3/11)

**Form RE-2**

Date/Time Stamp:

originally submitted on 2/1/22 @ 4:44 pm

# EMPLOYEE PRE-TRAVEL AUTHORIZATION

**Pre-Travel Filing Instructions:** Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics** in **SH-220**. Incomplete and late travel submissions will **not** be considered or approved. This form **must** be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Name of Traveler: Jason Thielman FTHTC MAR 17 '22 AM 10:35

Employing Office/Committee: Senator Steve Daines

Private Sponsor(s) (list all): Senate Working Group

Travel date(s): March 24-26, 2022

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

Destination(s): The Greenbrier Resort, White Sulphur Springs, WV

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

As chief of staff to Senator Steve Daines, participating in this symposium with our country's leaders, policy experts, and thought leaders beyond the confines of our nation's capital, will provide me an educational deep dive into the issues affecting our country.

Name of accompanying family member (if any): Erin Thielman

Relationship to Employee: ☒ Spouse ☐ Child

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

January 31, 2022
*(Date)*

*(Signature of Employee)*

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

I, Senator Steve Daines hereby authorize Jason Thielman
*(Print Senator's/Officer's Name)* *(Print Traveler's Name)*

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (*signify "yes" by checking box)* ☒

January 31, 2022
*(Date)*

Steve Daines
*(Signature of Supervising Senator/Officer)*

(Revised 10/19/15) Form RE-1

**From:** James Kimmey <james@senateworkinggroup.org>
**Date:** Tuesday, January 18, 2022 at 4:31 PM
**To:** Jason Thielman <Jason_Thielman@daines.senate.gov>
**Cc:** "Stivender, Walton (Marshall)" <Walton_Stivender@marshall.senate.gov>
**Subject:** Invitation: Republican Chiefs of Staff & Staff Director's Retreat




**Invitation to the *2022 Senate Republican Chiefs of Staff & Committee Staff Director's Retreat***

Dear Jason,

On behalf of Senate Working Group, we would like to cordially invite you and your spouse to the first ever, *Senate Republican Chiefs of Staff & Committee Staff Director's Retreat.* The event will be held **March 24 - 26, 2022 at The Greenbrier Resort in White Sulphur Springs, West Virginia**.

The retreat is the largest concentration of Republican Senate Chiefs of Staff and Committee Staff Directors outside of Washington, D.C. Bringing together our country's leaders, policy experts, and thought leaders beyond the confines of our nation's capital, this retreat serves to provide an educational deep dive into the issues affecting our country. In addition to the Chiefs of Staff, Staff Directors, and their guests, Senate Working Group members will also attend portions of the retreat.

Senate Working Group is a registered 501(c)(4) nonprofit organization dedicated to providing educational resources to Senate Staff. Founded in 2021, Senate Working Group hosts numerous educational trainings, workshops, and networking events throughout the year, including its signature *Retreat*. Senate Working Group does not employ or hire lobbyists and is funded solely by private and corporate donations.

**Step 1: Register for the event!**

Senate Working Group will coordinate all logistical arrangements for the retreat, including room reservations, meals, mileage reimbursement, meetings, and other activities during the retreat. Senate Working Group will happily cover the cost of participation for each invitee and their spouse. You are welcome to bring your children, though you will be responsible for the costs of their participation. All reservations must be made through Senate Working Group.

To register, please click the below link and add the corresponding access code when prompted. Once you answer each question within the registration process, you will be sent a confirmation email with additional details, including a calendar invite.

**Registration link:** https://www.senateworkinggroup.org/chiefs-committee-member-reg
**Access Code:** 2022retreat

**Step 2: Submit Ethics Packet by Friday, February 18, 2022!**

To comply with Ethics' rules, you will need pre-authorization from the Select Committee on Ethics. By following "Step 1" and registering for the event, you will be sent Senate Working Group's **Private Sponsor Travel Certification Form**. Once you receive the form, please submit it along with your completed Employee Pre-Travel Authorization form **by Friday, February 18, 2022**.

Failure to submit your form 30 days prior to the event means we will be unable to cover the cost of your attendance and you would need to cover the cost personally. Please note that the 30th day coincides with President's Day Weekend, so please submit your paperwork no later than **Friday, February 18, 2022.**

Additionally, you must file your Employee Post-Travel Disclosure of Travel Expenses with the Office of Public Records within 30 days of your return – **submit by April 25, 2022**.

Finally, we understand your attendance is pending Ethics' approval. More information on the retreat will be sent to you in the weeks leading up to the event. If you have any questions, concerns, or need additional information, please contact me directly at (858) 336-0293 or james@senateworkinggroup.org.

Thank you for your consideration and I look forward to hearing from you!

Sincerely,

James Kimmey
Executive Director
Senate Working Group
(858) 336-0293
www.senateworkinggroup.org

0000000000792 RECEIVED BY: SECRETARY OF THE SENATE Date: April 20, 2022

SENATE WORKING GROUP.

# 2022 SENATE REPUBLICAN CHIEF-OF-STAFF & COMMITTEE STAFF DIRECTOR'S SYMPOSIUM

## THURSDAY, MARCH 24, 2022

**OPENING DINNER PLENARY**
**6:00 PM – 8:00 PM**
*Cameo Ballroom*

**James Kimmey**
*Executive Director, Senate Working Group*
**The Honorable Jim Justice**
*Governor, West Virginia*
**The Honorable Shelley Moore Capito**
*Senator, West Virginia*
**Mary Katharine Ham *(Moderator)***
*Author and CNN Commentator*

## FRIDAY, MARCH 25, 2022

**INTERPLAY OF CAMPAIGN FINANCE WITH OFFICIAL SENATE DUTIES**
**8:00 AM – 8:45 AM**
*Chesapeake Ballroom*

**The Honorable Sean Cooksey**
*Commissioner, Federal Election Commission (FEC)*
**Ryan Dollar, Esq.**
*General Counsel, National Republican Senatorial Committee*

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**POLICY LIGHTNING ROUND: A DEEPER DIVE INTO KITCHEN TABLE ISSUES**
**9:00 AM – 12:00 PM**
*Chesapeake Ballroom*

**Deroy Murdock**
*Senior Fellow, London Center for Policy Research*
**Daniel Garza**
*President, The Libre Initiative*
**Michael Sobolik**
*Fellow in Indo-Pacific Studies, American Foreign Policy Council*
**Dr. Michael Strain**
*Director of Economic Policy Studies, American Enterprise Institute*

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**EXECUTIVE TIME**
**12:00 PM – 3:00 PM**

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**WOMEN OF THE SENATE ROUNDTABLE**
3:00 PM – 4:00 PM
*Crystal Ballroom*

**Michelle Barlow Richardson**
*Chief of Staff, The Honorable Roger Wicker*
**Allyson Bell**
*Chief of Staff, The Honorable Mike Lee*
**Neri Martinez**
*Minority Staff Director, U.S. Senate Special Committee on Aging*
**Kristin Walker**
*Chief of Staff, The Honorable Cynthia Lummis*
**Mary Katharine Ham *(Moderator)***
*Author and CNN Commentator*

## FRIDAY, MARCH 25, 2022

**SENATE WORKING GROUP RECEPTION**
**5:00 PM – 7:00 PM**
*Trellis Lobby & Cameo Ballroom*

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**DINNER PLENARY SESSION**
**7:00 PM – 10:00 PM**
*Cameo Ballroom*

**Ryan Munce**
*President and Partner, co/efficient*
**Travis Smith**
*Principal, Creative Direct*
--
**John Ashbrook**
**Michael Duncan**
**Josh Holmes**
**Comfortably Smug**
*The Ruthless Podcast*

## SATURDAY, MARCH 26, 2022

**REDISTRICTING 101: THE LATEST CHALLENGES AND HOW IT IMPACTS THE SENATE**
**8:30 AM – 9:15 AM**
*Chesapeake Ballroom*

**The Honorable Hans von Spakovsky**
*Manager, Election Law Reform Initiative and Senior Legal Fellow, Meese Center for Legal and Judicial Studies, The Heritage Foundation*

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**A DISCUSSION WITH COMMITTEE STAFF DIRECTORS**
**9:15 AM – 10:45 AM**
*Chesapeake Ballroom*

**Brad Grantz**
*Staff Director, Committee on Banking, Housing, and Urban Affairs*
**Neri Martinez**
*Staff Director, Special Committee on Aging*
**Arjun Mody**
*Staff Director. Senate Republican Conference*
**Pam Thiessen**
*Staff Director, Committee on Homeland Security and Governmental Affairs*
**Adam Tomlinson**
*Staff Director, Committee on Environment and Public Works*
**Jon Towers**
*Staff Director, Committee on Veterans' Affairs*
**Mary Katharine Ham *(Moderator)***
*Author and CNN Commentator*

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**SYMPOSIUM CONCLUDES**
**11:00 AM**

# 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): Senate Working Group, Inc. (SWG)

2. Description of the trip: Senate Chiefs of Staff and Staff Director's Symposium. This event will be for senior staff to obtain educational resources and connect with policy experts and thought leaders.

3. Dates of travel: March 24 - 26, 2022

4. Place of travel: The Greenbrier Resort - White Sulphur Springs, West Virginia

5. Name and title of Senate invitees: Please see attached document

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:

Senate Working Group is the sole sponsor for this event, and has financed and organized the symposium.

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

Please see attached document.

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

Senate Working Group is a new organization, created on October 8, 2021. Senate Working Group has not previously sponsored any congressional trips.

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

Senate Working Group plans to provide educational trainings, as well as host widely attended events, throughout the calendar year. These trainings and events will be offered to all Senate staff, from Chiefs of Staff to Senate Interns.

16. Total Expenses for Each Participant:

| | Transportation Expenses | Lodging Expenses | Meal Expenses | Other Expenses |
|---|---|---|---|---|
| ☒ Good Faith estimate | $275 | $192 | $147 | |
| ☐ Actual Amounts | Spouse: $0 | Spouse: $0 | Spouse: $147 | |

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 event was arranged and organized specifically with regard to congressional participation.

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

Given that the event is classified as a symposium, we want the event to be outside of Washington, D.C. However, to ensure attendance and minimal travel costs, we chose having the event in West Virginia.

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

The Greenbrier Resort, 101 W. Main St. White Sulphur Springs, WV 24986

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

We selected the Greenbrier due to its outstanding reputation in hosting similar events and its close proximity to Washington, D.C.

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:

All expenses are at or below per diem

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:

Mileage reimbursed

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: JKimmey

Name and Title: James Kimmey, Executive Director

Name of Organization: Senate Working Group, Inc.

Address: 1825 I Street NW, Suite 900, Washington, D.C. 20006

Telephone Number: (858) 336-0293

Fax Number:

E-mail Address: James@senateworkinggroup.org

Private Sponsor Travel Certification Form
Attachment

**Question 5**

In response to question 5, the following individuals are invited:

Honorable Roger Marshall, Senator (Kansas)
Honorable Shelley Moore Capito, Senator (West Virginia)
Dan Kunsman, Chief-of-Staff, Senator Barrasso
Sean Farrell, Chief-of-Staff, Senator Blackburn
Stacy McBride, Chief-of-Staff, Senator Blunt
Toni-Marie Higgins, Chief-of-Staff, Senator Boozman
Josh Kelley, Chief-of-Staff, Senator Braun
Natasha Hickman, Chief-of-Staff, Senator Burr
James Quinn, Chief-of-Staff, Senator Cassidy
Steve Abbott, Chief-of-Staff, Senator Collins
Beth Jafari, Chief-of-Staff, Senator Cornyn
Doug Coutts, Chief-of-Staff, Senator Cotton
Mark Gruman, Chief-of-Staff, Senator Cramer
Susan Wheeler, Chief-of-Staff, Senator Crapo
Steve Chartan, Chief-of-Staff, Senator Cruz
Jason Thielman, Chief-of-Staff, Senator Daines
Lisa Goeas, Chief-of-Staff, Senator Ernst
Emily Leviner, Chief-of-Staff, Senator Fischer
Richard Perry, Chief-of-Staff, Senator Graham
Aaron Cummings, Chief-of-Staff, Senator Grassley
Adam Telle, Chief-of-Staff, Senator Hagerty
Eric Teetsel, Chief-of-Staff, Senator Hawley
Tony Eberhard, Chief-of-Staff, Senator Hoeven
Doug Davis, Chief-of-Staff, Senator Hyde-Smith
Luke Holland, Chief-of-Staff, Senator Inhofe
Sean Riley, Chief-of-Staff, Senator Johnson
David Stokes, Chief-of-Staff, Senator Kennedy
Michelle Altman, Chief-of-Staff, Senator Lankford

Allyson Bell, Chief-of-Staff, Senator Lee

Brent Robertson, Chief-of-Staff, Senator Marshall

Sharon Soderstrom, Chief-of-Staff, Leader McConnell

Terry Carmack, Chief-of-Staff, Leader McConnell

James Kelly, Chief-of-Staff, Senator Moran

Kaleb Froehlich, Chief-of-Staff, Senator Murkowski

William Henderson, Chief-of-Staff, Senator Paul

Kevin Smith, Chief-of-Staff, Senator Portman

Ryan White, Chief-of-Staff, Senator Risch

Liz Johnson, Chief-of-Staff, Senator Romney

Kyle Chase, Chief-of-Staff, Senator Rounds

Mike Needham, Chief-of-Staff, Senator Rubio

Ray Sass, Chief-of-Staff, Senator Sasse

Craig Carbone, Chief-of-Staff, Senator Rick Scott

Jennifer DeCasper, Chief-of-Staff, Senator Tim Scott

Watson Donald, Chief-of-Staff, Senator Shelby

Larry Burton, Chief-of-Staff, Senator Sullivan

Ryan Nelson, Chief-of-Staff, Senator Thune

Ted Lehman, Chief-of-Staff, Senator Tillis

Dan Brandt, Chief-of-Staff, Senator Toomey

Stephen Boyd, Chief-of-Staff, Senator Tuberville

Michelle Richardson, Chief-of-Staff, Senator Wicker

John Connell, Chief-of-Staff, Senator Young

Neri Martinez, Staff Director, Select Committee on Aging

Fitz Elder, Staff Director, Committee on Agriculture, Nutrition, and Forestry

Shannon Hines, Staff Director, Appropriations Committee

John Wason, Staff Director, Armed Services Committee

Brad Grantz, Staff Director, Committee on Banking, Housing, and Urban Affairs

Nick Myers, Staff Director, Committee on the Budget

John Keast, Staff Director, Committee on Commerce, Science, and Transportation

Richard Russell, Staff Director, Committee on Energy and Natural Resources

Adam Tomlinson, Staff Director, Committee on Environment and Public Works

Gregg Richard, Staff Director, Finance Committee

Arjun Mody, Staff Director, Senate Republican Conference

Chris Socha, Staff Director, Committee on Foreign Relations

David Cleary, Staff Director, Committee on Health, Education, Labor, and Pensions

Pam Thiessen, Staff Director, Committee on Homeland Security & Government Affairs

Brian Walsh, Staff Director, Intelligence Committee

Kolan Davis, Staff Director, Judiciary Committee

William Henderson, Staff Director, Committee on Small Business & Entrepreneurship

Jon Towers, Staff Director, Committee on Veterans' Affairs

Kristi Williams, Staff Director, Committee on Indian Affairs

**Question 13**

In response to question 13, Senate Working Group is a 501(c)(4) nonprofit organization dedicated to providing educational resources to Senate staff. In addition to local trainings and receptions throughout the year, the 2022 Chief-of-Staff and Committee Staff Director's Symposium provides us the ability to connect Senate staff with policy experts and thought leaders in an intimate, off-the-record setting.

**Senate Working Group**
**2022 Senate Republican Chief-of-Staff & Committee Staff Director's Symposium**
**March 24-26, 2022**

## Thursday, March 24, 2022

**6:00 PM - 8:00 PM - Opening Dinner Plenary**
*This two-hour, opening dinner plenary session will examine the issues that are driving constituents back home and how Senate members can work alongside one another to bring light to these issues. Whether it's the economy or education, Americans are increasingly concerned over the issues that impact them the most. The purpose of this session is to examine those issues and get diverse perspectives from the state and federal level officials.*

Speakers: James Kimmey, Executive Director, Senate Working Group
Honorable Jim Justice, Governor, West Virginia
Honorable Shelley Moore Capito, Senator (West Virginia)
Mary Katharine Ham, Moderator

## Friday, March 25, 2022

**8:00 AM – 9:00 AM**
**Interplay of Campaign Finance with Official Senate Duties** (1 hour)
*There are always questions on what can and cannot be done when working in the Senate. The purpose of this session is to break down the senate ethics rules along with an explanation on how to comply with campaign finance regulations while carrying out official Senate duties during the 2022 election cycle.*

Speaker(s): Ryan Dollar, Esq., National Republican Senatorial Committee
Honorable Sean Cooksey, Commissioner, Federal Election Commission

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**9:00 AM - 12:00 PM - Morning Plenary Session**
**Policy Lighting Round: A Deeper Dive into Kitchen Table Issues** (3 hours)
*This three-hour, morning brunch plenary will go deeper into the "kitchen table issues" which were introduced the night prior. Kitchen Table issues are issues that are of concern to the average person that might be discussed by the family around a kitchen table. Featuring policy experts from various prominent think-tanks, we will look into Education, specifically the Critical Race Theory, Immigration, Foreign Policy, specifically U.S. – China relations, and the Economy, specifically the impact of inflation. Each topic will be broken down into 45-minute segments. Each segment will give the speaker 20 - 30 minutes to introduce and discuss the issue, then will leave 15 or more minutes to take questions from the audience.*

Speaker(s): Deroy Murdock, Senior Fellow at the London Center for Policy Research
Education and Critical Race Theory
9:00 AM – 9:45AM

Daniel Garza, The Libre Institute
Immigration
9:45 AM – 10:30 AM

Michael Sobolik, American Foreign Policy Council
Foreign Policy: U.S. – China Relations
10:30 AM – 11:15 AM

Dr. Michael Strain, American Enterprise Institute
Inflation and the Economy
11:15 AM – 12:00 PM

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**12:00PM - 3:00PM – Executive Time**

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**3:00PM – 4:00 PM – Women of the Senate Roundtable** (1 hour)
*The purpose of the roundtable is to discuss the challenges/ opportunities women senior staff members encounter while working on the Hill along with a discussion on increasing diversity among Senate members and how an increase in female voices will positively impact various pieces of legislation.*

Speakers: Kristin Walker, Chief of Staff
Allyson Bell, Chief of Staff
Michelle Barlow Richardson, Chief of Staff
Neri Martinez, Staff Director
Mary Katharine Ham, Moderator

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**5:00PM - 7:00PM - Reception** (2 hours)
*The purpose of this reception is for each attendee to network with other attendees and speakers. There will be no speakers for this reception, if announcements need to be made, they will be made by James Kimmey, Executive Director of Senate Working Group.*

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**7:00pm - 10:00PM - Dinner Plenary Session** (3 hours)

**7:00PM – 7:15PM – Welcome remarks by James Kimmey, Senate Working Group**

**7:15PM – 8:15PM – How the Issues Are Received at Home**
Whether it's the economy, education, voting rights or immigration, there are many legislative issues on the front of many American's minds. The purpose of this session is to examine the key legislative issues that are important to American voters. This session will focus on regional and national trends and how the Senate can influence those issues. Please note that there will be no

discussion on campaign-related activity at this seminar.

Speakers: Ryan Munce, co/efficient
Travis Smith, Creative Direct

**8:15PM – 9:45PM – The Impact of New Media**
*As #1 political podcast in America, the hosts of The Ruthless Podcast will share their experience utilizing new media to connect with millions of Americans and how it impacted the way people view politics. As former Hill Staffers, they will share their experience both on and off the Hill, and how their podcast impacts the national political conversation.*

Speakers: James "Josh" Holmes, The Ruthless Podcast
Michael Duncan, The Ruthless Podcast
Shashank Tripathi, The Ruthless Podcast
John Ashbrook, The Ruthless Podcast
Brent Robertson, Chief of Staff, Moderator

**9:45PM – 10:00PM –** James Kimmey, Executive Director of Senate Working Group will close out the dinner by giving closing remarks, thanking those in attendance, and provide information on future Senate Working Group events.

## Saturday, March 26, 2022

**8:30 AM – 9:15 AM**
**Redistricting 101: The Latest Challenges and How It Impacts the Senate** (45 min.)
*The purpose of this 45-minute presentation is to explain the new congressional maps created as a result of the 2020 census. The speaker will explain the various metrics that went into the creation of the maps, i.e., makeup of state legislatures, non-partisan commissions, etc., and then show how it will impact the incoming Congress. Please note that there will be no discussion on campaign-related activity at this seminar.*

Speaker: Honorable Hans von Spakovsky, The Heritage Foundation

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**9:15 AM – 10:45 AM**
**A Discussion with Committee Staff Directors**
*Transparency and communication is important, our hope is that this session provides each attendee an opportunity to hear from the various Committee Staff Director's in attendance, better understand their role, and ways each office can work the committees to better serve their members and constituents.*

Speaker(s): Jon Towers, Staff Director
Pam Thiessen, Staff Director

Arjun Mody, Staff Director
Brad Grantz, Staff Director
Adam Tomlinson, Staff Director
Neri Martinez, Staff Director
Mary Katharine Ham (Moderator)

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**10:45 AM – 11:00 AM**
**Farewell Remarks**
Speaker: James Kimmey, Executive Director, Senate Working Group

**Symposium concludes at 11:00 AM**

0000000000805 RECEIVED BY: SECRETARY OF THE SENATE Date: April 20, 2022

CHRISTOPHER A. COONS, DELAWARE, CHAIRMAN
JAMES LANKFORD, OKLAHOMA, VICE CHAIRMAN

BRIAN SCHATZ, HAWAII
JEANNE SHAHEEN, NEW HAMPSHIRE
JAMES E. RISCH, IDAHO
DEB FISCHER, NEBRASKA

SHANNON HAMILTON KOPPLIN, CHIEF COUNSEL AND STAFF DIRECTOR
WILLIAM B. CABLE, CHIEF CLERK

HART SENATE OFFICE BUILDING, ROOM 220
SECOND AND CONSTITUTION AVENUE, NE
WASHINGTON, DC 20510-6425

TELEPHONE: (202) 224-2981
FACSIMILE: (202) 224-7416
TDD: (202) 228-3752

# United States Senate

SELECT COMMITTEE ON ETHICS

March 22, 2022

Jason Thielman
Office of Senator Steve Daines
United States Senate
Washington, DC 20510

Dear Mr. Thielman:

This responds to your recent correspondence requesting approval from the Select Committee on Ethics (the Committee) to accept an invitation you and your spouse received to travel to the *2022 Senate Republican Chief of Staff and Committee Staff Director's* Symposium in White Sulphur Springs, West Virginia, on March 24–26, 2022, sponsored by Senate Working Group. Provided that you adhere to the guidance set forth below, it appears that it is permissible for you to accept necessary expenses from Senate Working Group in connection with this trip.

## Background

Based on your communication with the Committee, the background in this matter is as follows.[1] You are employed as chief of staff in the Office of Senator Steve Daines. Senate Working Group invited you and your spouse to travel to the *2022 Senate Republican Chief of Staff and Committee Staff Director's* Symposium in White Sulphur Springs, West Virginia, on March 24–26, 2022. Senate Working Group certified to the Committee that it will pay the necessary expenses[2] related to the travel and that it is neither a lobbyist, lobbying firm, agent of a foreign principal, or otherwise acting as a representative or agent of a foreign government. Senate Working Group has also certified that it does not retain or employ a registered lobbyist or agent of a foreign principal and that no registered lobbyist or agent of a foreign principal will accompany you at any point throughout your trip.[3]

## Discussion

Privately-sponsored travel includes any gift of travel and travel-related expenses for travel outside the Senate duty station, including transportation, lodging, food and refreshments, and conference fees and materials, whether paid for directly, reimbursed, or provided directly, from a private individual or entity, in connection with a Member's, officer's, or employee's official Senate duties. Incorporating reforms from the Honest Leadership and Open Government

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[1] If this letter does not correctly recite the facts, contact the Committee immediately.

[2] The term "necessary expenses" has a specific definition. *See Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel – Glossary of Terms* at 8.

[3] The term "any point throughout your trip" has a specific definition. *See id.* at 2.

Act of 2007 (HLOGA), Pub. L. 110–81 (2007), Senate Rule 35.2 permits Members, officers, and employees to accept privately-sponsored travel only with the prior written approval of the Committee.

The Committee's approval process is governed by the *Regulations and Guidelines for Privately-Sponsored Travel and Glossary of Terms* (collectively, *Travel Regulations*). The *Travel Regulations* contain detailed requirements regarding who may sponsor travel; time limits for trips; and the type and amount of expenses that can be reimbursed.

Entities that do not retain or employ a lobbyist or foreign agent and all non-profit organizations designated as tax-exempt organizations under § 501(c)(3) of the Internal Revenue Code of 1986, regardless of whether they retain or employ a lobbyist or foreign agent, may sponsor domestic trips for up to three days. The three-day limitation means three 24-hour periods, calculated from the time of arrival in the trip location to the time of departure from the trip location. For such trips, neither lobbyists nor foreign agents may accompany a Senate invitee at any point throughout the trip, other than in a *de minimis* way.[4] This means that neither lobbyists nor foreign agents may accompany Senate invitees at any point to and from the event, at the event itself, or at the location being visited.[5]

Under Senate Rule 35, Senate staff must receive advance authorization signed by the Member or officer under whose direct supervision the individual works in order to accept payment or reimbursement for necessary expenses related to fact-finding travel. Further, such authorization and expenses must be disclosed to the Secretary of the Senate by filing the completed *Employee Pre-Travel Authorization* and the *Employee Post-Travel Disclosure of Travel Expenses* (Form RE-1 and Form RE-2), along with a copy of the *Private Sponsor Travel Certification Form,* and all relevant attachments (e.g., the private sponsor's invitation and itinerary) **within 30 days of the conclusion of Privately-Sponsored Travel**.

Consistent with these standards and Committee precedent, and Senate Working Group's factual representations, it appears that it is permissible for you to accept necessary expenses from Senate Working Group in connection with this trip, provided that the actual travel and travel-related expenses conform to the information and materials you provided, and the travel and all required documents are disclosed to the Secretary of the Senate (Office of Public Records). Necessary expenses may include travel expenses for the spouse of a Senate employee if the supervising Member determines that the attendance of the spouse is appropriate to assist in the representation of the Senate.

Finally, Senate Rule 34 requires a reporting individual[6] on their Financial Disclosure Report, to make an annual disclosure of the receipt of payments or reimbursements under Senate

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[4] The term "*de minimis*" has a specific definition. *See Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel – Glossary of Terms* at 3.

[5] *See Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel* at 5; *see also Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel – Glossary of Terms* at 2-3.

[6] A reporting individual is someone whose salary equals or exceeds 120% of the basic rate of pay for GS-15 ($135,468 for CY 2022) or is a political fund designee and is required to file Financial Disclosure Reports.

Rule 35 from a private sponsor for officially-related travel expenses where, in the aggregate, travel expenses exceed $415 from that sponsor during a calendar year. However, if a Member, officer, or employee properly reports the receipt of necessary expenses for such travel to the Secretary of the Senate within 30 days of the travel, as discussed above, the travel expenses need not be disclosed a second time on their Financial Disclosure Report.

I hope you find this information helpful. If you have any additional questions, please do not hesitate to contact the Committee.

Sincerely,

Shannon Hamilton Kopplin
Chief Counsel and Staff Director

Enclosure: Travel Checklist