Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:

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SECRETARY OF THE SENATE
PUBLIC RECORDS
2022 JUL 20 PM 4:19

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): Conservative Partnership Institute

Travel date(s): June 22 - June 24

Name of accompanying family member (if any): _____
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	$100	$198	$118	

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.):

ATTACHED

7/19/22 (Date) Jason Hoffman (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.

7/20/22 (Date)

(Signature of Supervising Senator/Officer)

(Revised 1/3/11)

Form RE-2

Attended the CPI Senate Procedure Training. The training was held at CPI's property in MD and consisted of several sessions over a 3 day period. The sessions discussed the role of the parliamentarian, Senate calendars, the hotline process, holds and cloture, the amendment process, germaneness, Senate rules, and motions.

Date/Time Stamp:

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 Hoffman

Employing Office/Committee: Sen. Hagerty

Private Sponsor(s) (list all): Conservative Partnership Institute

Travel date(s): 6/22/22 - 6/24/22

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

Destination(s): Cambridge, MD

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

The symposium will educate staff on Senate practices, procedure, and strategy that directly relate to the official responsibilities of staff.

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

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:

5/23/2022
(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, Bill Hagerty hereby authorize Jason Hoffman

(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*) ☐

5/23/22
(Date)

(Signature of Supervising Senator/Officer)

(Revised 10/19/15)

Form RE-1

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): Conservative Partnership Institute (CPI)

2. Description of the trip: Senate Procedure and Strategy Symposium

3. Dates of travel: June 22 - 24

4. Place of travel: Cambridge, MD

5. Name and title of Senate invitees: See attached.

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:
CPI is solely responsible for organizing and conducting this trip.

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

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

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

See attached.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
☒ Good Faith estimate ☐ Actual Amounts	$100	$198	$118	

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:

The trip is organized specifically with regard to congressional participation.

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

Location is owned by the trip sponsor CPI, economical, and conducive to education and training.

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

3675 Decoursey Bridge Rd, Cambridge, MD 21613

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

Location is owned by the trip sponsor CPI, economical, and conducive to education and training.

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:

The cost of lodging ($99/night) is less than the federal government per diem rate of $121/night.

The estimated cost of meals ($59/day) is less than the federal government per diem rate of $64/day.

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:

Sponsors will provide round-trip bus transportation to/from the training location.

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:

No entertainment will be provided to, paid for, or reimbursed to Senate invitees.

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: Ed Corrigan

Name and Title: Ed Corrigan

Name of Organization: Conservative Partnership Institutte

Address: 300 Independence Avenue, SE, Washington, DC 20003

Telephone Number: (202) 742-8988

Fax Number: (202) 595-0282

E-mail Address: info@cpi.org

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

The Conservative Partnership Institute's mission includes creating an infrastructure to work with conservative Members of Congress, congressional staff, and conservative leaders to enhance their ability to articulate and advance conservative principles in the national's capital. The symposium offers an opportunity to train congressional staff to promote these conservative principles.

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

The Conservative Partnership Institute has previously sponsored educational and training events for Members of Congress and congressional staff, and has invited Members and staff to attend policy training conferences and symposiums attended by conservative thought leaders and activists.

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

The Conservative Partnership Institute provides regular educational briefings and training sessions to congressional staff and conservative leaders and activists. These training programs focus on House and Senate operations, communications, and other tools needed by Members of Congress and staff to become better public servants.

0000000002348 RECEIVED BY: SECRETARY OF THE SENATE Date: July 20, 2022

CPI's Senate Procedure & Strategy Training

June 22nd – 24th

Wednesday

11:00 am	**Arrive at CPI Retreat Property—Cambridge, MD**
12:00 – 1:00 pm	**Lunch and Welcome Session, speaker to be announced**
1:00 – 3:00 pm	**SESSION 1 – The Basics** *The Senate floor, role of the parliamentarian, Senate calendars, regular order, unanimous consent, hotlines, Senate rules vs precedents.*
3:00 – 3:30 pm	**Break**
3:30 – 5:30 pm	**SESSION 2 – The Senate's Rules: Digging In** *Holds, cloture & the filibuster, Rule 22 germaneness, the nuclear option.*
6:00 – 7:30 pm	**Dinner & Discussion**

Thursday

8:30 am	**Breakfast**
10:00 – 12:00 pm	**SESSION 3 – Amending in the Senate** *Drafting, filing, and offering amendments, types of amendments, amendment trees.*
12:00 – 1:00 pm	**Lunch**
1:00 – 3:00 pm	**SESSION 4 – Appropriations & Rule 16** *Drafting amendments for appropriations, Rule 16 germaneness, defense of germaneness.*
3:00 – 4:00 pm	**Break**
4:00 – 6:00 pm	**SESSION 5 – The Wrap Up** *Amending conference rules, resolving differences between the bodies, motions to divide & the clay pigeon.*
6:00 – 7:30 pm	**Dinner & Discussion**

Friday

8:30 am	**Breakfast & Wrap-up Session**

Hoffman, Jason (Hagerty)

From: Jason Hoffman <
Sent: Wednesday, June 1, 2022 3:03 PM
To: Hoffman, Jason (Hagerty)
Subject: Fwd: You're Invited -- CPI Senate Procedure Training
Attachments: CPITrainingAgenda.pdf

---------- Forwarded message ---------
From: **Rachel Bovard** <rbovard@cpi.org>
Date: Tue, May 3, 2022 at 4:16 PM
Subject: You're Invited -- CPI Senate Procedure Training
To: Rachel Bovard <rbovard@cpi.org>
Cc: James Holland <jholland@cpi.org>

Good afternoon,

CPI is hosting our very first offsite Senate Procedure training from June 22-24, and you've been recommended to attend!

The training will be held in Cambridge, MD, and I've attached an agenda for what we plan to cover. Per Senate rules, this trip needs to be approved by ethics, and I've cc-ed James Holland who will be following up with the paperwork. James will also be your point person for logistics.

The training will be instructed by CPI's president (and longtime Senate veteran) Ed Corrigan along with additional guest speakers.

We are very excited to kick this off with some of the sharpest Hill staff we know, which is you guys! Please let me know ASAP if you're interested and can make it!

My best,
Rachel

First	Last	Position	Office
Jack	Heekin	General Counsel	Sen. Rick Scott
Christina	Salazar	General Counsel	Sen. Rand Paul
Mark	Wait	Scheduler	Sen. Mike Lee
Ethan	Ashley	Legislative Assistant	Sen. Mike Braun
Hailey	Hamel	Legislative Aide	Sen. Ted Cruz
Kendall	Moore	Legislative Assistant	Sen. Cindy Hyde-Smith
Jason	Hoffman	Legislative Assistant	Sen. Bill Hagerty
Alex	Moree	Legislative Correspondent	Sen. Marco Rubio
Alexa	Henning	Deputy Chief	Sen. Ron Johnson
Corinne	Day	Deputy Communications Director	Sen. Ron Johnson
Alexis	Alber	Legislative Counsel	Sen. Ron Johnson
Chris	Kelly	Legislative Assistant	Sen. Marsha Blackburn