Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:
RECEIVED
SECRETARY OF THE SENATE
PUBLIC RECORDS
2022 MAY -3 PM 5:25

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): 4/22/22 - 4/24/22

Name of accompanying family member (if any): Gabby Orr

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	N/A	$279/night = $558	$450 (6 meals and 1 snack) Fri: $150 Sat: $200 Sun: $100	$30 (Cost of Friday boat ride split among all attendees, all covered by sponsor)

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

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☐ Good Faith Estimate ☐ Actual Amount	N/A	No added cost.	$200 (4 meals) Sat: $100 Sun: $100	$30 (Cost of Friday boat ride split among all attendees, all covered by sponsor)

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

05/03/2022 (Date)

CALEB ORR (Printed name of traveler)

Caleb Orr (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.

05/03/2022 (Date)

M. M (Signature of Supervising Senator/Officer)

(Revised 1/3/11)

Form RE-2

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: Caleb Orr

Employing Office/Committee: Sen. Marco Rubio

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

Travel date(s): 4/22/22 - 4/24/22

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

Destination(s): Hyatt Regency Chesapeake Bay, Cambridge, MD

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

Caleb works on economic issues for Sen. Rubio, which will be a central part of the policy discussion over the weekend.
As senior policy adviser to Senator Rubio, I advise the Senator on economic policy, which is a central focus of American Compass and of the American Compass retreat, in which I will have the opportunity to discuss economic policy matters with subject matter experts.

Name of accompanying family member (if any): _____

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:

04/15/2022
(Date)

Caleb Orr
(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 Marco Rubio hereby authorize Caleb Orr
(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)* ☐

03/21/2022
(Date)

M. R
(Signature of Supervising Senator/Officer)

(Revised 10/19/15)

Form RE-1

0000000001130 RECEIVED BY: SECRETARY OF THE SENATE Date: May 03, 2022

AMERICAN COMPASS

To: Caleb Orr, Sen. Rubio

3/09/22

► American Compass
300 Independence Avenue SE
Washington, DC 20003

► contact@americancompass.org

► www.americancompass.org

Invitation

American Compass Workshop on Conservative Economics

Friday, April 22 – Sunday, April 24, 2021

Hyatt Regency Chesapeake Bay

Cambridge, MD

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 Cambridge, MD and DC.

Sincerely,

Oren Cass
Executive Director

0000000001131 RECEIVED BY: SECRETARY OF THE SENATE Date: May 03, 2022

AMERICAN COMPASS

Workshop on Conservative Economics

Friday, April 22 – Sunday, April 24, 2022

Hyatt Grand Chesapeake Bay | Cambridge, MD

FRIDAY, APRIL 22, 2022

	OPTIONAL: CHARTER BUS	
10:30am	*Attendees arrive and board bus*	
11:00am	*Bus departs to Hyatt Regency Chesapeake Bay*	
1:00pm	*Bus arrives at Hyatt Regency Chesapeake Bay*	
12:00-5:00pm	**REGISTRATION** *Attendees check-in to overnight rooms.*	*Hyatt Regency Chesapeake*
1:00-2:30pm	**OPTIONAL: LOCAL TOUR AND INTRODUCTIONS** Accompanied by Wes Hodges (Coalition Dir, A.C.) *Early arrivers may choose to participate in a boat tour of the area.*	*Hyatt Regency Chesapeake*
3:00-4:30pm	**POLICY WORKSHOP** Moderated by Oren Cass (Exec Dir, A.C.), Chris Griswold (Policy Dir, A.C.), and Wells King (Research Dir, A.C.) *For early arrivers, a roundtable discussion of participants' ongoing policy projects as well as American Compass's recent and upcoming work.*	*Grand Patio*
5:00-6:30pm	**WELCOME RECEPTION** *Expanded window for attendees to arrive by private travel*	*Blue Point Room*
7:30-9:30pm	**DINNER DISCUSSION** **The Conservative Challenge to Globalization** Keynote by Oren Cass (Exec Dir, American Compass) *What are the economic and political assumptions that underlie the 21st-century commitment open flows of people, products, and capital across borders? How should conservative principles apply to these issues?*	*Blue Point Room*

SATURDAY, APRIL 23, 2022

8:00-9:00am	**BREAKFAST** Open buffet for attendees to eat at their convenience	*Windjammer Room*

SESSION I: A REALIGNMENT IN PROGRESS

9:00-12:15pm

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 plenary panels.

9:00-9:30am	**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*	*Galleon Room*
9:30-10:15am	**PLENARY PANEL I: MEDIA & INSTITUTIONS** Composed of attendee volunteers with subjects determined in the polling exercise. *Moderated by Abigail Salvatore* *(Communications Dir. American Compass)*	*Galleon Room*
10:30-11:15am	**PLENARY PANEL II: CORPORATE GOVERNANCE** Composed of attendee volunteers with subjects determined in the polling exercise. *Moderated by Wells King* *(Research Dir. American Compass)*	*Galleon Room*
11:30-12:15pm	**PLENARY PANEL III: NATIONAL SECURITY & GRAND STRATEGY** Composed of attendee volunteers with subjects determined in the polling exercise. *Moderated by Oren Cass* *(Exec. Dir. American Compass)*	*Galleon Room*
12:30-1:30pm	**LUNCH DEBRIEF** Participants will share reactions to topics debated in the plenary panels.	*Windjammer Room*

SESSION II: GLOBALIZATION

1:30-4:00pm

Attendees will choose a topic (Trade & Finance, Immigration, or National Security) and be assigned to a breakout group to discuss the subject in depth and develop a concrete policy proposal. Volunteers will then take turns sharing their policy formulations with the group.

1:30pm-3:00pm	**SESSION II: SMALL GROUP BREAKOUTS** Each participant will choose a topic (Trade & Finance, Immigration, or National Security) and be assigned to a breakout group to discuss the topic in depth and develop a concrete policy proposal.	*Galleon A/B/C*
3:00pm-4:00pm	**PLENARY: POLICY PROPOSALS** Volunteers from the breakout session take turns sharing their policy formulations with the group.	*Galleon Room*
4:00-6:00pm	**BREAK**	
6:00-8:00pm	**DINNER** Open buffet for attendees to eat at their convenience and discuss the weekend's programming so far.	*Hyatt Chesapeake Clubhouse*
8:00-10:00pm	**PAST AS PROLOGUE** Hosted by Oren Cass (Exec Dir, A.C.) Attendees in small groups will be challenged with trivia about past political realignments and major legislative efforts.	*Hyatt Chesapeake Clubhouse*

SUNDAY, APRIL 24, 2022

8:00-9:00am	**BREAKFAST** Open buffet for attendees to eat at their convenience	*Windjammer Room*
	RELIGIOUS OBSERVANCE & CHECK-OUT	

SESSION III: A REALIGNMENT IN PROGRESS

10:00-12:30pm

Attendees will start in plenary with a discussion on the current political climate. Then the group will divided into thirds to discuss how to formulate the weekend's policy formulations into messaging strategies. The session ends with a plenary with each group presenting their findings.

10:00-10:45am	**PLENARY: POLITICAL ENVIRONMENT** Attendees will volunteer to lead a discussion on the current political climate. *Moderated by Chris Griswold* *(Policy Dir. American Compass)*	*Galleon Room*
11:00-11:45am	**BREAKOUT: MESSAGING STRATEGY** Attendees are divided into three groups to discuss how to translate the ideas shared over the weekend into viable pathways for legislative or regulatory change.	*Galleon A/B/C*
12:00-12:30pm	**PLENARY: MESSAGING PROPOSALS** Volunteers from breakout sessions take turns sharing their messaging formulations with the group.	*Galleon Room*
12:30-1:30pm	**CLOSING LUNCH** Oren Cass synthesizes the ideas of the weekend and offers closing remarks to the group.	*Windjammer Room*
	OPTIONAL: CHARTER BUS	
1:30pm	*Attendees load their luggage onto the charter bus.*	*Front Lobby*
2:00pm	*Bus departs to Union Station*	
4:00pm	*Bus arrives at Union Station*	

0000000001135 RECEIVED BY: SECRETARY OF THE SENATE Date: May 03, 2022

AMERICAN COMPASS

American Compass
Workshop on Conservative Economics
Friday, April 22 – Sunday, April 24, 2022
Boar's Head Resort | Cambridge, 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.

House			
First	**Last**	**Office**	**Position**
Blake	Seitz	Sen. Tom Cotton	Speechwriter/Legislative Assistant
Clare	Basil	Sen. Tom Cotton	Legislative Assistant
Vijay	Menon	Sen. Josh Hawley	Legislative Aide
Tyler	Fagan	Sen. Josh Hawley	Legislative Aide
Caleb	Orr	Sen. Marco Rubio	Senior Policy Adviser
Caleb	Seibert	Sen. Marco Rubio	Legislative Assistant
James	Hitchcock	Sen. Marco Rubio	Legislative Assistant
Ryan	Rasins	Sen. Marco Rubio	Military Legislative Aide

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.

---

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

2. Description of the trip: American Compass's second annual member's retreat, focused on discussing economic policy that benefits American families, communities, and industry.

3. Dates of travel: 04/22/22 - 04/24/22

4. Place of travel: Hyatt Regency Chesapeake Bay, Cambridge, MD

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 second sponsored trip with congressional invitations.

The first trip was a policy workshop held over a weekend last year, 7/16/21 to 7/18/21.

The itinerary for this trip is based off that one.

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 Cambridge, MD and DC)	$279/night = $558	$450 (7 meals and 1 snack) Fri: $150 Sat: $200 Sun: $100	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:

Hyatt Regency Chesapeake Bay Resort, Cambridge, Maryland

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 option 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 Cambridge, MD.

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

0000000001140 RECEIVED BY: SECRETARY OF THE SENATE Date: May 03, 2022

ATTACHMENT TO EMPLOYEE POST-TRAVEL DISCLOSURE OF TRAVEL EXPENSES

American Compass, Economics Workshop April 22-24, 2022

Re: Description of all meetings and events attended.

FRIDAY, APRIL 22, 2022

LOCAL TOUR AND INTRODUCTIONS

- *Leaving from the hotel dock, attendees will participate in a short tour of the area by exploring its waterways, moving down the Choptank River and to the mouth of Chesapeake Bay and then returning to the Hyatt dock. This is our first formal part of the weekend's program, meant to welcome attendees, have them learn about the local history, and to unpack and absorb the registration materials we provide them, including a list of discussion questions, panel descriptions, and readings.*

POLICY WORKSHOP

- Moderated by Oren Cass (Exec Dir, A.C.), Chris Griswold (Policy Dir, A.C.), and Wells King (Research Dir, A.C.)
- *Roundtable discussion of participants' ongoing policy projects as well as American Compass's recent and upcoming work.*

DINNER DISCUSSION

- **The Conservative Challenge to Globalization**
- Keynote by Oren Cass (Exec Dir, American Compass)
- *What are the economic and political assumptions that underlie the 21st-century commitment open flows of people, products, and capital across borders? How should conservative principles apply to these issues?*

SATURDAY, APRIL 23, 2022

POLLING FOR GROUP EXERCISE BREAKOUTS

- 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*

PLENARY PANEL I: MEDIA & INSTITUTIONS

- Composed of attendee volunteers with subjects determined in the polling exercise.
- *Moderated by Abigail Salvatore (Communications Dir. American Compass)*

0000000001141 RECEIVED BY: SECRETARY OF THE SENATE Date: May 03, 2022

PLENARY PANEL II: CORPORATE GOVERNANCE

- Composed of attendee volunteers with subjects determined in the polling exercise.
- *Moderated by Chris Griswold (Policy Dir. American Compass)*

PLENARY PANEL III: NATIONAL SECURITY & GRAND STRATEGY

- Composed of attendee volunteers with subjects determined in the polling exercise.
- *Moderated by Oren Cass (Exec. Dir. American Compass)*

SESSION II: SMALL GROUP BREAKOUTS

- Each participant will choose a topic (Trade & Finance, Immigration, or National Security) and be assigned to a breakout group to discuss the topic in depth with panel experts and develop a concrete policy proposal. Discussion questions will be provided.

PLENARY: POLICY PROPOSALS

- Volunteers from the breakout session take turns sharing their policy formulations with the group.

PAST AS PROLOGUE TRIVIA EXERCISE

- Hosted by Oren Cass (Exec Dir, A.C.)
- Attendees in small groups will be challenged with trivia about past political realignments and major legislative efforts.

SUNDAY, APRIL 24, 2022

PLENARY: COMMUNICATION CHALLENGES

- The goal of this session is to discuss challenges that arise in the translation from the problems and priorities of the typical American family to the policymaking work that occurs in Congress.
- *Moderated by Wells King (Research Dir. American Compass)*

BREAKOUT: COMMUNICATING PRIORITIES

- The goal of this breakout session is to apply the insights from the plenary session to the range of concrete issues discussed throughout the weekend (e.g., family and labor policy, corporate governance, national security, and globalization).

PLENARY: MESSAGING PROPOSALS

- Volunteers from breakout sessions take turns sharing their messaging formulations with the group.

See itinerary in the ethics packet for timing and location information.

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.

---

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

2. Description of the trip: American Compass's second annual member's retreat, focused on discussing economic policy that benefits American families, communities, and industry.

3. Dates of travel: 04/22/22 - 04/24/22

4. Place of travel: Cambridge, Maryland

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 second sponsored trip with congressional invitations.

The first trip was a policy workshop held over a weekend last year, 7/16/21 to 7/18/21.

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 Cambridge, MD and DC)	$279/night = $558	$450 (7 meals and 1 snack) Fri: $150 Sat: $200 Sun: $100	$30 (Cost of Friday boat ride split among all attendees, all covered by sponsor)

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:

Hyatt Regency Chesapeake Bay Resort, Cambridge, Maryland

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 option 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 Cambridge, MD.

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

ATTACHMENT TO PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

American Compass, Economics Workshop April 22-24, 2022

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 second 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. Seasonally, we release a series of essays and reports that challenge and explore policy areas, such as labor, tech, finance, and manufacturing. Regularly, we host public and invitation-only panels that iterate on these ideas. Online, we publish a podcast and stream interviews with experts we agree and disagree with to further develop and distribute our ideas.

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. The Hyatt Regency Chesapeake hotel proved to be the more affordable option when compared to comparable venues in driving distance of DC. Hill staffers are receiving no preferential treatment and are being provided the same accommodations as the other attendees. This event would still be hosted without congressional participation, although we hope those we have invited can attend.

0000000001147 RECEIVED BY: SECRETARY OF THE SENATE Date: May 03, 2022

AMERICAN COMPASS

To: Caleb Orr, Sen. Rubio

4/13/22

► American Compass
300 Independence Avenue SE
Washington, DC 20003

► contact@americancompass.org

► www.americancompass.org

Revised Invitation

American Compass Workshop on Conservative Economics

Friday, April 22 – Sunday, April 24, 2022

Hyatt Regency Chesapeake Bay

Cambridge, MD

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 Cambridge, MD and DC.

Sincerely,

Oren Cass
Executive Director

0000000001148 RECEIVED BY: SECRETARY OF THE SENATE Date: May 03, 2022

AMERICAN COMPASS

American Compass
Workshop on Conservative Economics
Friday, April 22 – Sunday, April 24, 2022
Boar's Head Resort | Cambridge, 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.

House			
First	**Last**	**Office**	**Position**
Blake	Seitz	Sen. Tom Cotton	Speechwriter/Legislative Assistant
Clare	Basil	Sen. Tom Cotton	Legislative Assistant
Vijay	Menon	Sen. Josh Hawley	Legislative Aide
Tyler	Fagan	Sen. Josh Hawley	Legislative Aide
Stephen	Newton	Sen. Mitt Romney	Senior Policy Advisor
Caleb	Orr	Sen. Marco Rubio	Senior Policy Adviser
Caleb	Seibert	Sen. Marco Rubio	Legislative Assistant
James	Hitchcock	Sen. Marco Rubio	Legislative Assistant
Michael	Needham	Sen. Marco Rubio	Chief of Staff
Ryan	Rasins	Sen. Marco Rubio	Military Legislative Aide

0000000001149 RECEIVED BY: SECRETARY OF THE SENATE Date: May 03, 2022

AMERICAN COMPASS

Workshop on Conservative Economics

Friday, April 22 – Sunday, April 24, 2022
Hyatt Grand Chesapeake Bay | Cambridge, MD

FRIDAY, APRIL 22, 2022

	CHARTER BUS WITH BOXED LUNCHES	*Union Station*
10:30am	*Attendees arrive and board bus*	
11:00am	*Bus departs to Hyatt Regency Chesapeake Bay*	
1:00pm	*Bus arrives at Hyatt Regency Chesapeake Bay*	
1:00pm	**ARRIVAL & REGISTRATION** *Attendees check-in to overnight rooms.*	*Hyatt Regency Chesapeake*
1:00-2:30pm	**LOCAL TOUR AND INTRODUCTIONS** Accompanied by Wes Hodges (Coalition Dir, A.C.) *Leaving from the hotel dock, attendees will participate in a short tour of the area by exploring its waterways, moving down the Choptank River and to the mouth of Chesapeake Bay and then returning to the Hyatt dock. This is our first formal part of the weekend's program, meant to welcome attendees, have them learn about the local history, and to unpack and absorb the registration materials we provide them, including a list of discussion questions, panel descriptions, and readings.*	*Hyatt Regency Chesapeake*
3:00-4:30pm	**POLICY WORKSHOP** Moderated by Oren Cass (Exec Dir, A.C.), Chris Griswold (Policy Dir, A.C.), and Wells King (Research Dir, A.C.) *For early arrivers, a roundtable discussion of participants' ongoing policy projects as well as American Compass's recent and upcoming work.*	*Grand Patio*
5:00-6:30pm	**WELCOME RECEPTION** *Attendees will greet and speak with the weekend's panelists, beginning policy conversations.*	*Blue Point Room*
7:30-9:30p	**DINNER DISCUSSION** **The Conservative Challenge to Globalization** Keynote by Oren Cass (Exec Dir, American Compass) *What are the economic and political assumptions that underlie the 21st-century commitment open flows of people, products, and capital across borders? How should conservative principles apply to these issues?*	*Blue Point Room*

SATURDAY, APRIL 23, 2022

8:00-9:00am	**BREAKFAST** Open buffet for attendees to eat at their convenience	*Windjammer Room*

SESSION I: A REALIGNMENT IN PROGRESS

9:00-12:15pm

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 plenary panels.

9:00-9:30am	**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*	*Galleon Room*
9:30-10:15am	**PLENARY PANEL I: MEDIA & INSTITUTIONS** Composed of attendee volunteers with subjects determined in the polling exercise. *Moderated by Abigail Salvatore* *(Communications Dir. American Compass)*	*Galleon Room*
10:30-11:15am	**PLENARY PANEL II: CORPORATE GOVERNANCE** Composed of attendee volunteers with subjects determined in the polling exercise. *Moderated by Chris Griswold* *(Policy Dir. American Compass)*	*Galleon Room*
11:30-12:15pm	**PLENARY PANEL III: NATIONAL SECURITY & GRAND STRATEGY** Composed of attendee volunteers with subjects determined in the polling exercise. *Moderated by Oren Cass* *(Exec. Dir. American Compass)*	*Galleon Room*
12:30-1:30pm	**LUNCH DEBRIEF** Participants will share reactions to topics debated in the plenary panels. Discussion questions will be provided.	*Windjammer Room*

SESSION II: GLOBALIZATION

1:30-4:00pm

Attendees will choose a topic (Trade & Finance, Immigration, or National Security) and be assigned to a breakout group to discuss the subject in depth and develop a concrete policy proposal. Volunteers will then take turns sharing their policy formulations with the group.

1:30pm-3:00pm	**SESSION II: SMALL GROUP BREAKOUTS** Each participant will choose a topic (Trade & Finance, Immigration, or National Security) and be assigned to a breakout group to discuss the topic in depth with panel experts and develop a concrete policy proposal. Discussion questions will be provided.	*Galleon A/B/C*
3:00pm-4:00pm	**PLENARY: POLICY PROPOSALS** Volunteers from the breakout session take turns sharing their policy formulations with the group.	*Galleon Room*
4:00-6:00pm	**EXECUTIVE TIME** Attendees may use this time to catch up on personal correspondence.	
6:00-8:00pm	**DINNER** Open buffet for attendees to eat at their convenience and discuss the weekend's programming so far.	*Hyatt Chesapeake Clubhouse*
8:00-10:00pm	**PAST AS PROLOGUE** Hosted by Oren Cass (Exec Dir, A.C.) Attendees in small groups will be challenged with trivia about past political realignments and major legislative efforts.	*Hyatt Chesapeake Clubhouse*

SUNDAY, APRIL 24, 2022

8:00-9:00am	**BREAKFAST** Open buffet for attendees to eat at their convenience	*Windjammer Room*
	RELIGIOUS OBSERVANCE & CHECK-OUT	

SESSION III: A REALIGNMENT IN PROGRESS

10:00-12:30pm

Attendees will start in plenary with a discussion on the current political climate. Then the group will divided into thirds to discuss how to formulate the weekend's policy formulations into messaging strategies. The session ends with a plenary with each group presenting their findings.

10:00-10:45am	**PLENARY: COMMUNICATION CHALLENGES** The goal of this session is to discuss challenges that arise in the translation from the problems and priorities of the typical American family to the policymaking work that occurs in Congress. *Moderated by Wells King* *(Research Dir. American Compass)*	*Galleon Room*
11:00-11:45am	**BREAKOUT: COMMUNICATING PRIORITIES** The goal of this breakout session is to apply the insights from the plenary session to the range of concrete issues discussed throughout the weekend (e.g., family and labor policy, corporate governance, national security, and globalization).	*Galleon A/B/C*
12:00-12:30pm	**PLENARY: MESSAGING PROPOSALS** Volunteers from breakout sessions take turns sharing their messaging formulations with the group.	*Galleon Room*
12:30-1:30pm	**CLOSING LUNCH** Oren Cass synthesizes the ideas of the weekend and offers closing remarks to the group.	*Windjammer Room*
	CHARTER BUS DEPARTURE	*Lobby*
1:30pm	*Attendees board bus*	
2:00pm	*Bus departs to Union Station*	
4:00pm	*Bus arrives at Union Station*	