

Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:

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): Microsoft Corporation

Travel date(s): October 26-28, 2022

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

Relationship to Traveler: ☐ Spouse ☐ Child

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

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☐ Good Faith Estimate	\$1,500	\$464	\$79	
☐ Actual Amount	Airfare- \$1350 Shuttle- \$150			

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.): While at Microsoft Headquarters, we learned about climate change initiatives, artificial intelligence, technology lab capabilities, and

measures to fight cybercrime. They explained how they are using technology to assist Ukraine in their defense against Russia. We also discussed how LinkedIn can be a tool to help constituents in local job markets, as well as how the gaming world is changing to be accessible to those with disabilities.

11-1-22

(Date)

Alexa Green

(Printed name of traveler)

Alexa Green

(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.

11-1-22

(Date)

John P. Rink

(Signature of Supervising Senator/Officer)

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: Alexa GreenEmploying Office/Committee: Senator James E. RischPrivate Sponsor(s) (list all): Microsoft CorporationTravel date(s): October 26-28, 2022

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

Destination(s): Redmond, WA

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

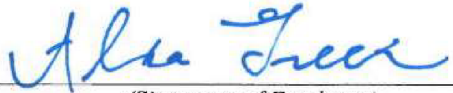
As scheduler, I facilitate all business meetings that the Senator takes. By understanding how Microsoft operates as a company, I will be able to better assist the Senator, as well as my entire office, as I perform my duties as scheduler. I am particularly interested in the tour of the Microsoft Research lab. Understanding the collaborations that must exist to accomplish technology policy goals will allow me to understand the big picture, which government plays a role. The IVAS Demo, an ongoing US Army program, will be neat to see as well. I schedule numerous meetings with US Army officials, and understanding this program will be beneficial.

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:

10-13-22
(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 James E. Risch hereby authorize Alexa Green
(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) ☐

10-13-22
(Date)


(Signature of Supervising Senator/Officer)



Microsoft Campus Visit

- [Details](#)
- [Schedule](#)
- [Staff Biographies](#)

Details

Event	Congressional Staff Delegation Campus Visit	
Date	Wednesday, October 26, 2022 – Friday, October 28, 2022	
Location	Microsoft Campus 1 Microsoft Way Redmond, WA 98052	
Primary Contact	Michaela Berendt +1 (425) 538-7023 Michaela.Berendt@microsoft.com	Whitney Sleigh +1 (425) 395-6717 v-wsleigh@microsoft.com



Schedule

Wednesday, October 26, 2022

Start Time	End Time	Subject/Speaker	Location
5:15 pm	8:35 pm	Alaska Airlines Flight AS0003	DCA to SEA
8:35 pm	8:35 pm	Arrival at SeaTac Airport <i>Meet the shuttle driver at baggage claim for flight AS0003 carrying a "Microsoft" sign.</i>	
8:35 pm	9:15 pm	Shuttle bus to hotel	
9:15 pm		HOTEL: Hyatt Regency Bellevue	Hyatt Regency 900 Bellevue Way NE Bellevue, WA 98004

Thursday, October 28, 2022

Start Time	End Time	Subject/Speaker	Location
8:00 am	8:30 am	Shuttle Departs for Microsoft <i>Meet Libby Fisher-Hunter from Microsoft in the hotel lobby carrying a "Microsoft" sign.</i>	
8:30 am	9:00 am	Opening Remarks & Breakfast Frank Cavaliere, General Manager, Congressional Affairs & Chan Park, Senior Director, Government Affairs	Executive Briefing Center 16070 NE 36th Way Redmond, WA 98052
		<i>Overview of Microsoft including our culture, journey, values, footprint in the Puget Sound, and overview of the presentations and content during the day.</i>	
9:00 am	9:30 am	Digital Transformation #InRealLife Danny Monares, Envisioning Specialist	Executive Briefing Center
		<i>Digital Transformation #InRealLife (DTIRL) brings to life real world customer stories across key solution areas and industries at the Redmond EBC. Participants will watch staff showcase the latest and greatest MS customer stories highlighting our technologies including O365, Azure IoT, HoloLens, Machine learning, and more. Participants will also experience a hands-on demonstration of HoloLens technology.</i>	



9:30 am	9:45 am	Walk to MSFT Treehouses <i>Weather Permitting, if it rains we will stay in the EBC.</i>	
9:45 am	10:45 am	Sustainability at Microsoft Mark Kroese, General Manager, Environmental Sustainability Solutions <i>Mark Kroese will present Microsoft's approach to solve global environmental challenges in the key focus areas of climate, agriculture, water, and biodiversity. Participants will hear a presentation of how our technology AI for Earth works to advance sustainability across the globe.</i>	Treehouse OMS-1
10:45 am	11:00 am	Shuttle to B99	
11:00 am	12:00 am	Tour Microsoft Research Lab Ashley Llorens, VP Distinguished Scientist and Managing Director <i>The Redmond lab is at the hub of Microsoft Research's globe-spanning organization that fosters open collaborations with partners throughout industry and academic institutions as well as Microsoft product teams. Participants will receive a presentation on Microsoft's global Research footprint, will walk through the hardware lab to see the tools used by the team, and see a demonstration of new technologies currently being tested.</i>	B99 Research Lab
12:00 pm	12:10 pm	Walk to Lunch	
12:10 pm	12:50 pm	Lunch in MSFT Microsoft Commons	
1:00 pm	1:45 pm	Gaming Ecosystem Sarah Bond, CVP, Microsoft Gaming <i>Sarah Bond will provide a high level briefing to on the gaming market in light of the Activision Blizzard acquisition.</i>	B92 Visitor's Center Atrium
1:45 pm	2:15 pm	Espresso Break	
2:15 pm	2:45 pm	Responsible AI Briefing Owen Larter, Director of Responsible AI, Public Policy <i>Owen will present and lead a discussion of Artificial Intelligence including facial recognition, ethics, and how this technology is being applied today and in the future. Q&A to follow.</i>	B92 Visitor's Center Atrium
2:45 pm	3:00 pm	Shuttle to Redwest-C	



3:00 pm	3:45 pm	Digital Crimes Unit Tour Amy Hogan-Burney, General Manager, Cyber Policy and Protection <i>Digital Crimes Unit (DCU) is leading the fight against cybercrime to protect customers and promote trust in Microsoft. We fight cybercrime globally through the innovative application of technology, forensics, civil actions, criminal referrals, and public/private partnerships while protecting the security and privacy of our customers. Participants will take a walking tour throughout the facility while presenters discuss Microsoft's work fighting cybercrime in the United States.</i>	
3:45 pm	4:00 pm	Shuttle to B86	
4:00 pm	4:45 pm	Inclusive Tech Lab & Microsoft Accessibility Solomon Romney, Accessibility Program Manager	B86 Inclusive Tech Lab 5074 154 th PI NE Redmond, WA 98052
<i>The Inclusive Tech Lab is a Microsoft space dedicated to inclusive gaming. When people come to the lab, we introduce them to the social model of disability through the lens of gaming. Participants will hear from the presenter Microsoft's story of diversity, inclusion, accessibility, privacy, and online safety. They will see and participate in a hands-on demonstration of the adaptive controller.</i>			
5:00 pm	Depart Microsoft for Hotel		
6:15 pm	Meet in Hotel Lobby Depart for Dinner <i>Meet Libby Fisher-Hunter from Microsoft in the hotel lobby carrying a "Microsoft" sign.</i>		Hyatt Regency 900 Bellevue Way NE Bellevue, WA 98004
6:30 pm	Group Dinner at Black Bottle		Black Bottle Bellevue 919 Bellevue Way NE Bellevue, WA 98004

Friday, October 29, 2022

Start Time	End Time	Subject/Speaker	Location
6:00 am	6:25 am	Shuttle from Hyatt Regency to SeaTac Airport <i>Meet the shuttle driver at the Evergreen Ballroom Entrance of the hotel. The shuttle will be staged there.</i>	
8:25 am	4:32 pm	Depart SeaTac Airport Akaka Airlines Flight AS0004	SEA to DCA



Congressional Staff Biographies



[Jon Adame](#)

General Counsel & Legislative Director, Senator Marsha Blackburn

Jon Adame serves as General Counsel and Legislative Director to Senator Marsha Blackburn (R-TN). In addition to setting strategy and managing the legislative team, Jon focuses on telecommunications and emerging technologies. Prior to serving in the Senate, Jon was Policy Coordinator for the House Energy & Commerce Subcommittee on Communications and Technology; and Legislative Counsel for then-Congressman Blackburn.

After graduating from the University of New Mexico, Jon worked on several Congressional, Senatorial, and Gubernatorial campaigns across the country. He later attended the University of Colorado School of Law, focusing on technology law and policy. In his free time, Jon enjoys traveling with his wife, cooking, and playing guitar.



[Erica Andeweg](#)

Senior Policy Advisory, Senator Deb Fischer

Erica has covered science, technology, and telecommunications policy matters in the Senate and House over the past decade. She is now a Senior Policy Advisor for Senator Deb Fischer, supporting her work as a member of the Senate Committee on Commerce, Science, and Transportation.



[Kendal Barker](#)

Legislative Correspondent, Senator Tommy Tuberville

Kendal Barker serves on the legislative team for U.S. Senator Tuberville (AL), covering homeland security, immigration, commerce, technology, education, judiciary, and veterans' affairs issues. During the Trump administration, she worked as the



special advisor to the chief of staff at the U.S. Environmental Protection Agency.

Prior to her roles in the federal government, Kendal led strategic initiatives at a digital marketing firm, which included amplifying the nation's leading rapid-response effort to provide cash assistance to families most affected by the COVID-19 pandemic and collaborating with the U.S. Department of State to provide educational resources to entrepreneurs in developing countries. Kendal is a native of Orlando, Florida, and a graduate of the University of Florida. She is currently pursuing a master's in public policy at Georgetown University.



Danny Butherus

Legislative Aide, Senator Ted Cruz

Danny Butherus as the Legislative Aide for Senator Cruz. In this role, he works on Commerce Committee issues including science and technology, telecommunications, and transportation. Danny graduated from Augustana University in 2017 with a bachelor's degree in economics as well as government/international affairs.



Patrick Fox

Policy Advisor, Senator Bill Cassidy

Policy Advisor for Senator Bill Cassidy, M.D. Patrick is from Shreveport, Louisiana and handles Education, and Tech Policy in the office. He graduated from Birmingham Southern-College and got his master's from University of Washington.



Andrew Gleaton

Legislative Aide; Senator Mike Crapo

Andrew Gleaton is Legislative Aide for Senator Crapo, having joined the Senator's staff in January 2020. He handles issues related to Data & Privacy, Intellectual Property, Bankruptcy and the Second Amendment, as well as Banking, Housing and Telecommunications. He received his bachelor's degree from



Boise State University, and master's degree from The George Washington University.



Alexa Green

Head Scheduler, Senator James E. Risch

Alexa graduated Summa Cum Laude from the University of North Alabama in December 2016 with a degree in Political Science and began working on Capitol Hill for an Alabama Congressman in August 2017. She was promoted to Scheduler and Office Manager before joining the Office of Senator Risch as Head Scheduler in May 2018. Alexa works diligently to schedule meetings and events, acting as the Senator's gatekeeper.

In her free time, she enjoys traveling (the planning is her favorite part), antiquing, baking, and volunteering with N Street Village, Taste of the South, Daughters of the American Revolution, and the Junior League of Washington.



Gabrielle Howard

Senior Legislative Assistant, Congressman Troy Carter

Gabrielle N. Howard serves as Senior Legislative Assistant for Congressman Troy A. Carter, Sr., where she handles the Member's small business committee, transportation & infrastructure committee, energy, environment, banking, taxes, education, health care, racial, social, and environmental justice, and judiciary issues. Gabrielle is especially interested in how these issue areas intersect and impact BIPOC communities.

Gabrielle has always had an interest in fighting against inequality, injustice, and racism and finding policy solutions to combat these issues. This drive brought Gabrielle to Capitol Hill as a fellow in Congressman Filemon Vela's office. Through her current role, she is constantly looking for ways to move the country towards policies that create systemic change, and therefore, create a more just, diverse, equitable, and inclusive society for all.



Jesse Mahan

Legislative Assistant, Senator James Lankford

Jesse Mahan is a Legislative Assistant for Senator James Lankford (R-OK). In this capacity, he oversees Senator Lankford's priorities on the Homeland Security and Governmental Affairs Committee. Jesse focuses on cybersecurity, telecommunication, and critical infrastructure issues.

Since beginning his work in Senator Lankford's office in 2015, he has also handled Senator Lankford's Committee work on the Homeland Security and Financial Services General Government Appropriation Subcommittees. Jesse earned a B.A. in Political Science and International Studies from the University of Oklahoma.



Ariel Marshall

Legislative Director, Senator Jeanne Shaheen

Ariel Marshall serves as the legislative director for Senator Jeanne Shaheen, the senior Senator from New Hampshire. In this position, Ariel develops and implements the Senator's legislative agenda.

Before assuming this role, Ariel served as Senator Shaheen's senior domestic policy advisor, helping to advance the Senator's legislative initiatives in the areas of energy, environment, advanced manufacturing, science and innovation, and additional domestic policy goals. Ariel began her career on Capitol Hill through a congressional fellowship from the American Association for the Advancement of Science, the Optical Society and the International Society for Optics and Photonics. As a fellow, she worked on energy and environment issues for Senator Mark Udall (D-CO) and subsequently for Senator Shaheen.

Ariel holds an undergraduate degree from the University of Central Arkansas and a doctorate degree in chemistry from the Georgia Institute of Technology in Atlanta, GA.



Mike Mets

Legislative Assistant, Senator Susan Collins

Mike Mets has been working for Senator Collins since May 2019. He advises the Senator on legislative matters related to several issues, including telecommunications, tax, and labor. He previously worked on the House side and on several political campaigns. He graduated from Stony Brook University in New York with a BA in Political Science and an MA in Public Policy.



Marlo Meuli

Deputy Chief of Staff, Senator Ron Johnson

Marlo has worked in the U.S. Senate for over 25 years. She came to Washington D.C. for a six-month internship and never left. First starting in an entry-level position, Marlo became interested in technology. She served as system administrator for several Senators, helped start the Senate Systems Administrators Association serving as past president of the association and created the first public website for a Senate Republican office. Marlo was instrumental in creating the Trunkline, an intranet for Senate Republicans. In 2013, she became office manager for Senator Ron Johnson handling both the technology and administrative duties for the office. She became deputy chief of staff in 2015.

Marlo holds a bachelor's degree from the University of California, Santa Barbara and a Master's of Science in Information System Technology from George Washington University. She and her husband, Paul Mann, have two daughters and live in Fredericksburg, VA.



Brandon Palumbo

Legislative Assistant, Senator Ron Johnson

Brandon Palumbo is a Legislative Assistant for Senator Ron Johnson (WI) covering a range of issues including cybersecurity, infrastructure security, and technology policy, and supports Senator Johnson in his position on the Senate Committee on Homeland Security & Governmental Affairs. Previously, he



worked as a Government Relations Manager for a D.C. think tank, The Heritage Foundation, where he led policy advocacy for the organization's Davis Institute for National Security and Foreign Policy. Brandon was also the Correspondence Manager for Senator John N. Kennedy (LA) where he helped establish the office's constituent services program and assisted in researching policy priorities. He holds a Master's in Public Policy from Liberty University.



Duncan Rankin

Legislative Assistant, Senator Ted Cruz

Duncan Rankin is the Legislative Assistant handling the Committee on Commerce, Science, and Transportation legislative portfolio for Senator Cruz, a role he has been in since March of 2019. Prior to this, he served as a Professional Staff Member for the House Committee on Science, Space, and Technology from November of 2017 through January of 2019, a Legislative Correspondent for Senator Luther Strange of Alabama from February of 2017 through November of 2017, and Legislative Correspondent for Congressman Louie Gohmert from January 2016 through January of 2017. Duncan is a native of McAllen, TX and attended Texas A&M University in College Station from 2011-2015.



Jonah Shumate

Chief of Staff, Congressman Rick Crawford

Jonah has served for nearly twelve years as the Chief of Staff for Rep Rick Crawford (AR-01). He is a native of Arkansas where he lived previously before moving to the DC Metro when his boss was elected in 2010. Before working in politics as both the campaign manager and eventual role in Washington, Jonah worked in community and economic development as well as several other areas in the private sector. Most recently, Jonah led a cybersecurity and energy focused team of members that coordinated outreach and information among private sector entities and Hill offices in the wake of the Colonial Pipeline and JBS attacks in 2021.



Mary Silverthorn

Legislative Assistant, Senator Kevin Cramer

Mary Silverthorn is a Legislative Assistant for United States Senator Kevin Cramer (R-ND). In her role, she supports Senator Cramer as a member of the Budget Committee. Additionally, Mary handles both the Judiciary and Indian Affairs portfolios to advance policy on behalf of North Dakota. Originally from North Dakota, Mary attended the University of Minnesota Duluth and earned a degree in Political Science.



Dharamjeet Singh

Legislative Assistant, Congressman Gregory W. Meeks

Dharamjeet Singh is a Legislative Assistant for Congressman Gregory W. Meeks, covering a wide range of policy areas, including Tech, Telecomm, Defense, Transportation, and Infrastructure. Originally from Burma (Myanmar), he immigrated to the United States at the age of 17 in search of a better opportunity and future.

While studying Political Science at the City College at the City University of New York (CUNY), he had his first Hill internship experience at Congressman Meeks' office. Right after the internship, he graduated from City University and was offered a full-time position at the Congressman's office, kickstarting a very exciting and unconventional career path considering his background. He was promoted to his current role as Legislative Assistant in 2021 and is now closing in on nearly four years with the office. When he's not busy working on policy or going to networking receptions on and off the Hill, Dharamjeet enjoys playing golf and exploring the DC food scene.



Aaron Stanislawski

Counsel, Senator Chris Coons

Aaron Stanislawski is Counsel to Sen. Chris Coons. He covers the Judiciary Committee portfolio, and leads the Senator's work as Chairman of the Judiciary Subcommittee on Privacy, Technology, and the Law. Prior to coming to Capitol Hill, he worked in private practice in New York City.



Sean Sweeney

Legislative Assistant, Senator Mark Warner

Previous Assignments: Government Relations Manager, Accenture; Deputy Director of Intergovernmental Affairs, Office of Governor Ralph Northam (D-VA); Legislative Correspondent and State Scheduler, Office of Senator Mark Warner (D-VA); Research Assistant, Democratic Party of Virginia

Bio: Sean Sweeney serves as a legislative assistant in the Office of Senator Mark Warner (D-VA), where he leads the senator's work on immigration, technology, and telecommunications issues.

Prior to rejoining Senator Warner's staff in November 2021, Sean served as a government relations manager for Accenture, leading the company's government engagement related to artificial intelligence and other emerging technology issues. In February of 2018, Sean was appointed Deputy Director of the Virginia Office of Intergovernmental Affairs by Governor Ralph Northam. In this role, he advised Governor Northam on federal policy issues and acted as a liaison between state government in Richmond and federal stakeholders in Washington. Prior to his role in the Northam Administration, Sean served as a legislative correspondent for Senator Warner and as a research assistant on his 2014 reelection campaign.

Sean is a native of Massachusetts and a graduate of the College of William & Mary, where he studied International Relations. He lives in Alexandria, Virginia with his wife, Sarah.

**Matt Swint***Senior Legislative Correspondent, Senator Ted Cruz*

Matt Swint is the Senior Legislative Correspondent in the office of Senator Ted Cruz, where he works on Commerce Committee issues including aviation, telecommunications, technology, and space. Matt is originally from Marietta, Georgia and graduated from the University of Georgia in 2019 with a degree in Political Science.

First Name	Last Name	Office or Committee	Job Title
Avery	Gardiner	Judiciary	Chief Counsel, Competition and Tech Policy
Sean	Sweeney	Sen. Mark Warner	Legislative Assistant
Chad	Kreikemeier	Senator Shaheen	Chief of Staff
Courtney	Young	Senator Kennedy	Legislative Assistant
Micki	Werner	Senator Marsha Blackburn	Legislative Aide
Lauren	Reamy	Senator Marco Rubio	Legislative Director
Jesse	Mahan	Senator Lankford	Legislative Assistant
Chris	Kelly	Senator Blackburn	Health Legislative Assistant
Andrew	Kelley	Senator Boozman's office	Legislative Assistant
Michael	Mets	Senator Susan Collins	Legislative Assistant
Katherine	Nikas	Senate Judiciary--Senator Graham	Chief Counsel
Rachel	Bissex	Senate Judiciary Committee	Senior Counsel
Samantha	Scoca	Senate Committee on Small Business & Entrepreneurship	Deputy Staff Director
Corey	Sellers	Steve Daines	Policy Advisor
Mary	Silverthorn	Senator Cramer	Legislative Assistant
Bradley	Plunkett	Senator John Boozman	Legislative Correspondent
Luke	Pettit	Senator Hagerty	Senior Policy Advisor
Andrew	Gleaton	Senator Mike Crapo	Legislative Aide
Andrew	Gleaton	Senator Mike Crapo	Legislative Aide
Aaron	Stanislowski	Sen. Chris Coons - Judiciary Committee - Subcommittee on Privacy, Technology, and the Law	Counsel
Michael	Brownlie	Senator Kyrsten Sinema	Deputy Chief of Staff and Legislative Director
Brandon	Palumbo	Office of Senator Ron Johnson (WI)	Legislative Assistant
Jamie	Susskind	Office of Senator Marsha Blackburn	Policy Advisor
Patrick	Fox	US Senator Bill Cassidy	Policy Advisor
Alexa	Green	United States Senator James E. Risch	Scheduler
Marlo	Meuli	Johnson	Admin Director
J.T.	Jezierski	Capito	LD
Brian	Cullen	Senate Foreign Relations Committee	Senior Professional Staff Member
Kendal	Barker	Senator Tuberville	Legislative Correspondent
Addie	Bassali	Senator Shelley Moore Capito	LA
Erica	Andeweg	Senator Deb Fischer	Senior Policy Advisor
Jon	Adame	Senator Blackburn	LD/GC
Andy	Ho	Risch	Legislative Aide

0000000005202

RECEIVED BY: SECRETARY OF THE SENATE

Date: November 01, 2022

Ariel	Marshall	U.S. Senator Jeanne Shaheen	Legislative Director
-------	----------	-----------------------------	----------------------

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): Microsoft Corporation (Microsoft)

 2. Description of the trip: Microsoft is organizing this trip to highlight innovation, showcase emerging technologies, and discuss policy issues important to the technology sector.

 3. Dates of travel: October 26-28, 2022

 4. Place of travel: Redmond, WA

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

 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:

Attendees are flying from the east coast to the west coast and in order to participate in a full day of

sessions they must arrive the day before and depart the day after.

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:

Microsoft is organizing and conducting this trip to highlight innovation, showcase emerging

technologies and discuss policy issues important to the technology sector. As the Sponsor, Microsoft

has planned the agenda, speaker sessions, and tours on the Microsoft Campus along with trip logistics.

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

Microsoft's mission is to empower every person and every organization on the planet to achieve more,

particularly through Information Technology. This trip allows Microsoft to educate and engage Senate

Staff on the policy implications of technology, with the goal to empower and enrich the lives of others.

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

Microsoft hosted a trip earlier this summer, June 29 - July 1, 2022.

Microsoft also hosted a yearly trip between 2015-2019 and previously hosted trips in the early 2000s.

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

Microsoft hosts various events (forums, receptions, roundtable discussions, internship programs, and Tours) on its multiple campuses that educate and bring together business partners, employees, students, & the public focusing on areas of IT innovation, computer science education, products/devices, and more.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
☒ Good Faith estimate ☐ Actual Amounts	\$1,500 Breakout per participant: Airfare \$1,350 Shuttle Bus \$150	\$464 \$232 per night per participant; 2 nights of lodging per participant	\$79	\$0

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:

B - arranged specifically with regard to congressional participation.

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

Redmond, WA is the Global Headquarters for Microsoft and allows staff to meet with Microsoft researchers and technologists while also visiting/participating in tours like the innovation lab.

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

Hyatt Regency Bellevue

900 Bellevue Way NE, Bellevue, WA 98004

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

Hotel fits within the locales per diem allowance and close to Microsoft campus.

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:

Daily meal expenses and lodging expenses will meet the per diem for June for official Federal

Government travel. Estimated food costs are \$79.00 per day and lodging costs are estimated to be

\$232 per 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:

Microsoft is providing round-trip coach airfare per participant. Ground transportation is being provided

with private shuttle bus service to/from airport and Microsoft campus.

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: Michaela Berendt

Name and Title: Michaela Berendt; Business Operations Associate

Name of Organization: Microsoft

Address: One Microsoft Way, Redmond, WA 98052

Telephone Number: +1 425.538.7023

Fax Number: _____

E-mail Address: michaela.berendt@microsoft.com

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

SIGNATURE PAGE FOR ADDITIONAL SPONSOR

(to be completed by each additional sponsor)

I hereby *certify* that the information contained on pages 1-4 of the certification form and any accompanying addenda, all submitted in connection with the _____ trip
Dates of Travel (Month Day, Year)
to _____ is true, complete, and correct.
Place of Travel

Signature of Travel Sponsor: _____

Name and Title: _____

Name of Organization: _____

Address: _____

Telephone Number: _____

Fax Number: _____

E-mail Address: _____

Instructions

(Do not file the Instructions with OPR)

General Instructions

- The Senate Select Committee on Ethics (“Ethics Committee”) has developed guidelines for evaluating privately-sponsored trips and for judging whether trip expenses are reasonable. Trip sponsors should consult the *Senate Select Committee on Ethics’ Regulations and Guidelines for Privately-Sponsored Travel*, including the *Glossary of Terms*, prior to filling out the *Private Sponsor Travel Certification Form* and contact the Ethics Committee at (202) 224-2981 with any additional questions. The Ethics Committee will make the final determination as to whether the expenses incurred during a privately-sponsored trip are reasonable.
- If there are multiple sponsors, they should jointly complete one *Private Sponsor Travel Certification Form* for the trip. Each travel sponsor should complete the signature block.
- When evaluating a trip proposal and judging the reasonableness of expenses, the Ethics Committee will consider the following factors:
 - a. the stated mission of the organization sponsoring the trip;
 - b. the organization’s prior history of sponsoring congressional trips, if any;
 - c. other educational activities performed by the organization besides sponsoring congressional trips;
 - d. whether any trips previously sponsored by the organization led to an investigation by the Select Committee on Ethics;
 - e. whether the length of the trip and the itinerary is consistent with the official purpose of the trip;
 - f. whether there is an adequate connection between a trip and official duties;
 - g. the reasonableness of the total amount spent by a sponsor of the trip;
 - h. whether there is a direct and immediate relationship between a source of funding and an event;
 - i. the maximum *per diem* rates for official Federal Government travel published annually by the General Services Administration, the Department of State, and the Department of Defense;
 - j. whether travel to a location or event is arranged or organized without regard to congressional participation, or whether it is specifically organized for Congressional staff; and
 - k. any other factor deemed relevant by the Select Committee on Ethics.

Consult the *Senate Select Committee on Ethics’ Regulations and Guidelines for Privately-Sponsored Travel*, including the *Glossary of Terms*, for further discussion of these factors.

- Responses to each question should be brief, consistent with the requirement to provide all relevant information. Attach additional pages, as necessary.
- To allow sufficient time for the Ethics Committee to review requests for privately sponsored travel, the participating Senate Members, officers, and employees must submit the completed form to the Ethics Committee at least **thirty (30) days** before the date of the proposed trip.

Filling out the Private Sponsor Travel Certification Form (Question by Question Instructions)

1. *Sponsor(s) of the trip (please list all sponsors):* A sponsor of a trip is any person, organization, or other entity contributing funds or in-kind support for the trip. A sponsor must have a significant role in organizing and conducting a trip and must have a specific organizational interest in the purpose of the trip. If Members, officers, and employees are participating in an event or fact-finding trip in connection with their duties, they may accept necessary travel expenses only from the event or trip sponsor.
2. *Description of the trip:* Provide a brief statement about the purpose of the trip.
3. *Dates of travel:* Provide the dates of departure and return.
4. *Place of travel:* Provide the destination(s) for the trip.
5. *Name and titles of Senate invitees:* Provide the name and title for each Senate Member, officer, or employee who is invited on the trip.
6. *I certify that the trip fits one of the following categories:* A Senate Member, officer, or employee may accept privately sponsored travel only from sponsor(s) of a trip that fits one of the categories listed. Consult the instructions for question 9 to determine if the trip meets the lobbyist accompaniment standard.
7. *Financing of the trip, earmarked funds and in-kind contributions:* Senate Members, officers, and staff may not accept privately-sponsored travel funded by a registered lobbyist or foreign agent. Members, officers, and staff may not participate in privately-sponsored travel when the sponsors accept funds or in-kind contributions earmarked for this particular 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. Earmarking includes any direction, agreement, or suggestion -- formal or informal -- to use donated funds, goods, services, or other in-kind contributions for a particular trip or purpose.
8. *Lobbyist/agent of a foreign principal involvement:* Senate invitees may not participate in trips planned, organized, arranged, or requested by a lobbyist or foreign agent in more than a *de minimis* way, which means negligible or inconsequential. It would be considered inconsequential for one or more lobbyists or foreign agents to serve on the board of an organization that is sponsoring travel, as long as the lobbyists or foreign agents are not involved in the trip. It is also permissible for a lobbyist to respond to a trip sponsor's request to identify Senate invitees with interest in a particular issue relevant to a planned trip. However, a lobbyist is not allowed to solicit or initiate communication with a trip sponsor, have control over which Senate employees are invited on a trip, extend or forward an invitation to a participant, determine the trip itinerary, or be mentioned in the invitation.

Example: A trip sponsor that is a § 501(c)(3) non-profit organization asks a lobbyist to recommend staffers who might be most interested in joining a trip to the U.S.-Mexican border. If a lobbyist knows a staffer who has a particular interest in the DEA's activities at the border, then providing that information (in light of the trip sponsor's request), in and of itself, would not exceed a *de minimis* level of participation, and would be permitted. However, it would not be permissible for the lobbyist to initiate contact with the trip sponsor to suggest that a particular Senate staffer be invited or forward an invitation to that staffer. Consult the instructions for question 9 to determine if the trip meets the lobbyist accompaniment standards.

9. *Lobbyist/agent of a foreign principal accompaniment standards:* Senate Members, officers, and staff may not accept privately-sponsored travel from an entity that retains or employs one or more federally-registered lobbyists or foreign agents unless one of the listed scenarios applies. *At any segment of the trip* means lobbyists may not accompany the Senate invitee for parts of the travel to and from the event (not at the event itself or the location being visited). *At any point throughout the trip* means lobbyists may not accompany Senate invitees at any point to and from the event, at the event itself, or at the location being visited, other than in a *de minimis* way. This is a broader prohibition than the *at any segment of a trip* standard.

“De minimis” exception: Both lobbyist/agent of a foreign principal “accompaniment” prohibitions include a *de minimis* exemption. *De minimis* means negligible or inconsequential. The mere coincidental presence of a lobbyist or foreign agent at an event would likely be considered *de minimis*. But in making the final determination, the Ethics Committee will consider the totality of the circumstances, including the amount of time lobbyists or foreign agents are present at the event; the amount of direct contact they have with Senate invitees; and the amount of control a trip sponsor has over their presence or contact with Senate guests. For example, if the trip includes attendance at an event considered widely-attended under Rule 35(1)(c)(18), the trip sponsor is unlikely to know all attendees present. Thus, it is likely to be permissible for such widely-attended events to include both a Senate guest and a lobbyist. Similarly, an organization cannot possibly know all the other passengers taking the same flight or other common carrier to a given destination. Accordingly, the sponsor does not need to certify that it knows for certain that no lobbyist or foreign agent will be on such a common carrier.

10. *If travel includes two overnight stays:* The Ethics Committee may approve two overnight stays for trips sponsored by an entity that employs or retains one or more lobbyists or foreign agents under certain conditions. Consult Committee regulations for additional information.
11. *An itinerary for the trip is attached to this form:* The Ethics Committee will not review the trip request without a detailed (hour-by-hour), complete and final itinerary for the trip. As a general matter, the Ethics Committee advises that each travel day contain a minimum of 6 hours of officially-related activities for Senate invitees.
12. *Briefly describe the role of each sponsor in organizing and conducting the trip:* A sponsor must have a significant role in organizing and conducting a trip and must have a specific organizational interest in the purpose of the trip.
13. *Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:* Provide a brief description of the stated mission of each sponsor and how it relates to the trip.
14. *Briefly describe each sponsor’s prior history of sponsoring congressional trips:* Provide a brief discussion of the sponsor’s history of sponsoring congressional travel. It is not necessary to list every trip.
15. *Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):* Provide a brief description of the educational activities performed by each sponsor. It is not necessary to list every individual activity; the description may be by kind or category of educational activity involved.
16. *Total expenses for each participant:* Indicate whether the figures provided are actual amounts or good faith estimates by checking the appropriate box. All trip expenses should be included. Expenses other than those for transportation, lodging, and meals must be individually listed and specified. Attach additional pages as necessary.

17. *Congressional participation:* For events that are arranged without regard to congressional participation (for example, annual meetings, conferences, seminars, and symposiums of trade associations, professional societies, business associations, and other membership organizations), the Ethics Committee may, but is not required to, allow Senate Members, officers, and employees to accept lodging and meal expenses that are commensurate with what is customarily provided to non-congressional attendees in similar circumstances. For events specifically arranged around congressional participation, lodging, meal expenses and other expenses must be “reasonable” in accordance with Ethics Committee regulations.
18. *Reason for selecting the location of the event or trip:* The location of the trip *must be related to its purpose*. A brief but detailed description of the reason for the selection of the location must be provided.
19. *Name and location of hotel or other lodging facility:* Include the exact name and address of the hotel or other lodging facility.
20. *Reasons for selecting hotel or other lodging facility:* Provide an explanation of the sponsor’s rationale for selecting the particular lodging, include information such as proximity to the airport or site to be visited.
21. *Describe how the daily expenses for lodging, meals, and other expenses provided to trip participant compare to the maximum per diem rates for official Federal Government travel:* Where feasible and available, trip expenses for lodging and meals should generally be comparable to the government *per diem* rates. The circumstances surrounding a particular trip may legitimately require lodging and meal expenses to exceed these rates. Consult the Ethics Committee regulations for additional information.
22. *Describe the type and class of transportation being provided:* While coach or business-class fare may be accepted, first-class fare for any mode of transportation may be permitted only under limited conditions and only with specific prior written approval by the Ethics Committee. Transportation on a private or charter aircraft is not permitted for privately-sponsored travel under any circumstances.
23. *Expenses for recreational activity, alcohol, or entertainment:* The only recreational or entertainment activities that will be approved by the Ethics Committee are those that are provided to all attendees and are an integral part of an event. Alcoholic beverages are not considered to be a reasonable expense.
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:* Entertainment expenses that are not provided to all attendees and deemed an integral part of the event will not be approved by the Ethics Committee.
25. *Certification:* The trip sponsor *must* sign the form and certify that the information is true, complete, and correct. For trips with more than one sponsor, each additional sponsor *must* complete its own signature page and certify that the information contained in the form is true, complete, and correct.