

Employee Post-Travel Disclosure of Travel Expenses

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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.)

American Accountability Foundation, The Heritage Foundation, CPI

Private Sponsor(s) (list all):

December 12-14, 2022

Travel date(s):

Name of accompanying family member (if any): None

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	\$0	\$198	\$107	\$0
☒ Actual Amount				

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.):

Congressional Researcher training to include topics on the oversight process, life as a junior researcher, working with outside sources and organizations, written products, document request & FOIA and the law and oversight.

JAN 3, 2023
(Date)

STASIA ELLIS
(Printed name of traveler)

(Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

JAN 3, 2023
(Date)

(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: Stasia EllisEmploying Office/Committee: Senator Rick ScottPrivate Sponsor(s) (list all): American Accountability Foundation (AAF), The Heritage Foundation (THF), Conservative Partnership Institute (CPI)Travel date(s): December 12-14, 2022*Note: If you plan to extend the trip for any reason you **must** notify the Committee.*Destination(s): Cambridge, MD

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

This training offers the opportunity to learn effective tools and skills needed to conduct sufficient oversight of the Executive branch and inform public policy.

Name of accompanying family member (if any): NoneRelationship to Employee: ☐ Spouse ☐ Child

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

11-9-2022
(Date)

Stasia Ellis
(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, Rick Scott hereby authorize Stasia Ellis
(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) ☐

11-9-2022
(Date)

Rick Scott
(Signature of Supervising Senator/Officer)

Ellis, Stasia (Rick Scott)

From: Thomas Jones <tom@americanaccountabilityfoundation.com>
Sent: Tuesday, November 8, 2022 5:23 PM
To: Krynen, Megan (Rick Scott); Ellis, Stasia (Rick Scott); Beaver, Wilson (SBC); Long, Jackson (Scott); Furnish, Pierson (Hawley)
Cc: Howell, Mike; James Holland
Subject: Researcher Bootcamp - Ethics Paperwork
Attachments: AAF-THF-CPI Senate Addendum.docx; AAF-THF-CPI Senate Sponsor Form.pdf; Congressional Researcher Bootcampv Dec 12 ph.pdf

Follow Up Flag: FollowUp
Flag Status: Flagged

Senate Colleagues --

Thank you for your interest in the AAF /Heritage Foundation / CPI Junior Researcher Bootcamp.

We would like you to join us at the December 12 - 14 Session (returning on the 14th).

Attached you will find Ethics paperwork that you need signed off by your office and SUBMITTED TO ETHICS NO LATER THAN 4:30 PM ON FRIDAY. Ethics can be a bit of a stickler about these things, so please process the paperwork quickly. Not to put too fine a point on it, but Monday is too late. Heritage will follow up with one more Ethics form.

We have an excellent schedule planned for you and a top flight group of teachers teaching (we'll get you the final version soon, as you can imagine there are some schedules to juggle). We are confident it will be an excellent class and will make you a more effective investigator.

Please do not hesitate to contact me if you have any questions,
Tom

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 Accountability Foundation (AAF),
The Heritage Foundation (THF), Conservative Partnership Institute (CPI)
2. Description of the trip: Congressional Researcher Bootcamp
3. Dates of travel: December 12-14, 2022
4. Place of travel: Cambridge, MD
5. Name and title of Senate invitees: See attached
6. I *certify* that the trip fits one of the following categories:
 - ☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
 - OR -
 - ☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
 - AND -
 - ☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I *certify* that:
 - ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
 - AND -
 - ☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. USE ONLY IF YOU CHECKED QUESTION 6(B)

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

- ☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

- OR -

- ☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (see questions 6 and 10).

- OR -

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

10. USE ONLY IF YOU CHECKED QUESTION 9(B)

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

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

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

Each sponsor was involved in organizing the trip by preparing an agenda and indentifying speakers, and

each sponsor will participate in the trip by providing speakers.

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

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

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

See attached.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
☒ Good Faith estimate	\$110	\$198	\$120	\$0
☐ Actual Amounts				

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

The trip is organized specifically with regard to congressional participation.

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

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

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

Decoursey Bridge, Cambridge, MD (property owned by trip sponsor CPI)

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

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

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:
The cost of lodging (\$99/night) is less than the federal government per diem rate of \$123/night.
The estimated cost of meals (\$60-day) is less than the federal government per diem rate of \$64/day.
22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:
Sponsors will provide round-trip coach bus transportation to/from the bootcamp location.
23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).
24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:
No entertainment will be provided to, paid for, or reimbursed to Senate invitees.
25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):
Signature of Travel Sponsor: Tom Jones
Name and Title: Tom Jones, President
Name of Organization: American Accountability Foundation
Address: 300 Independence Avenue, SE, Washington, DC 20003
Telephone Number: 2022155258
Fax Number: N/A
E-mail Address: tom@americanaccountabilityfoundation.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 December 12-14, 2022 trip
to Cambridge, MD *Place of Travel* is true, complete, and correct. *Dates of Travel (Month Day, Year)*

Signature of Travel Sponsor: Christopher Byrnes
Name and Title: Christopher Byrnes, General Counsel
Name of Organization: The Heritage Foundation
Address: 214 Massachusetts Avenue, NE, Washington, DC 20002
Telephone Number: (202) 608-6037
Fax Number: _____
E-mail Address: christopher.byrnes@heritage.org

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 12/12 - 12/14, 2022 trip
to Cambridge, MD is true, complete, and correct.
Place of Travel *Dates of Travel (Month Day, Year)*

Signature of Travel Sponsor: Ed Corrigan
Name and Title: Ed Corrigan, President & CEO
Name of Organization: Conservative Partnership Institute
Address: 300 Independence Ave., SE Washington, D.C. 20003
2027428988
Telephone Number: 2025950282
Fax Number: info@cpi.org
E-mail Address:

CONGRESSIONAL RESEARCH BOOTCAMPS

*Presented by the American Accountability Foundation, The Heritage Foundation,
and the Conservative Partnership Institute*

December 12 - 14

DAY ONE

- | | |
|------------------|--|
| 9:00 – 11:00 am | Travel from 300 Independence Ave, SE to Cambridge, MD |
| 11:00 – 12:00 pm | Arrival at CPI Property and Check-in |
| 12:00 – 1:30 pm | Lunch and SESSION 1 – Oversight Process and Organization
<i>Committee structure, staff assignments, hierarchy, parliamentary authority, various committee organizations structure and approach.</i>
Speakers: Staff Director / General Counsel (House or Senate Committee) |
| 1:30 – 2:30 pm | SESSION 2 – Life as a Junior Researcher / Oversight Staffer
<i>Day in the life of a junior researcher / investigator on a committee, what's expected of you, what your workload will look like, and who you'll be working with and for.</i>
Speakers: Staff Director / General Counsel (House or Senate Committee) |
| 2:30 – 3:00 pm | Break |
| 3:00 – 4:00 pm | SESSION 3 – Structure of Congressional Investigations
<i>A walkthrough of the structure and anatomy of a congressional investigation from the conception and presentation of an investigation topic through to the investigation's completion.</i>
Speakers: Former Committee Staff Director |
| 4:00 – 5:30 pm | SESSION 4 – Working with Outside Sources and Organizations
<i>Using and working with outside sources of information and coordinating with outside groups to increase the effectiveness of Congressional investigations</i>
Speakers: Outside Group Leader |
| 5:30 – 7:00 pm | Dinner and Keynote Address
<i>What it is like to be on the receiving end of Congressional Oversight, and how to be effective from someone who has been the subject of Hill attention?</i>
Keynote Speaker: Secretary / DepSec / Assistant Sec (Trump Admin) |

DAY TWO

9:00 – 10:00 am

Breakfast

10:00 – 11:30 pm

SESSION 5 – Staffing the Boss

Ensuring that the Member gets what he needs. Preparing read aheads, briefing the Chairman, staffing them during a hearing / mark-up, and supporting member staff offices.

Speakers: Staff Director / Deputy Staff Director (Senate or House Committee)

11:30 – 12:30 pm

SESSION 6 – The Written Product

Focused overview of what is expected from written products produced for committee work including, various briefing memoranda, committee reports, preservation and demand letters, effective questions for the record, draft questions for members, hearing binders, and other written products essential to the committee process.

Speakers: Committee General Counsel (Former Senate / House Committee Staffer)

12:30 – 2:30 pm

Lunch and SESSION 7 – The Law and Oversight

Discussion of the constitutional authority for Congressional oversight, relevant case law, and common legal issues encountered while conducting oversight.

Speakers: Former or Current General Counsel

2:30 – 3:00 pm

Break

3:00 – 4:30 pm

SESSION 8 – Working with Outside Investigators

Understanding how to liaise with and utilize the expertise and records produced by outside investigators such as Inspectors General, Government Accountability Office investigators, and State Attorneys General.

Speakers: Former Inspector General

4:30 – 6:30 pm

SESSION 9 – Deposing / Interview a Witness

Best practices for deposing or interviewing a witness. Mock interviews with reluctant / recalcitrant witnesses.

Speakers: Former Senior Law Enforcement

6:30 – 7:00 pm

Break

7:00 – 8:30 pm

Lessons Learned from Previous Investigation

How oversight is game changing, experiences and insights from previous practitioners who held the administration accountable.

Guest Speaker: Former Member / Hill Staff Director who Led Significant Investigation

DAY THREE

8:30 am

Breakfast & Checkout

9:30 – 11:30 am

Travel from Cambridge, MD to 300 Independence Ave., SE

Question 5.

Megan Krynen	Office of Senator Rick Scott	Legislative Correspondent
Stasia Ellis	Senator Rick Scott	Coast Guard Fellow
Wilson Beaver	Senator Rand Paul	Policy Advisor
Jackson Long	Senator Tim Scott	Staff Assistant
Pierson Furnish	Senator Josh Hawley	Legislative Correspondent
	Senate Committee on Small Business and	
Lucia Geddes	Entrepreneurship	Research Assistant

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

The American Accountability Foundation is a non-profit organization that produces original research relating to policymakers and policies to better inform leaders and the American people. AAF conducts extensive public records research, original investigations, and policy research for publication on its websites and through broadcast and print publications. The retreat offers an opportunity to share its expertise and experience with congressional oversight staff.

The Heritage Foundation's mission is to formulate and promote public policies based on the principles of free enterprise, limited government, individual freedom, traditional American values, and a strong national defense. The Heritage Foundation recognizes that effective oversight of the Executive Branch is a necessary tool to inform public policy based on these principles.

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

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

The American Accountability Foundation has not previously sponsored any congressional trips.

The Heritage Foundation has previously sponsored several trips for staff of both the U.S. House of Representatives and Senate. Recent trips include a Marshall Fellowship overnight trip to Lexington, VA (2021), Heritage Congressional Fellowship day trip to Mount Vernon (2017, 2018), and Emerging Leaders trip to New Bedford, Pennsylvania (2018).

The Conservative Partnership Institute has previously sponsored educational and training events for Members of Congress and congressional staff, and has invited Members and staff to attend policy retreats attended by conservative thought leaders and activists. Most recently, CPI sponsored a Senate Procedure training event for Senate staff on September 1-3, 2022.

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

The American Accountability Foundation is a non-profit organization that produces original research relating to policymakers and policies to better inform leaders and the American people. AAF conducts extensive public records research, original investigations, and policy research for publication on its websites and through broadcast and print publications.

The Heritage Foundation is a 501(c)(3) organization whose core mission is education. We perform this education in a variety of ways, to include regular programming, policy briefings for staff and Members of Congress, and circulating policy papers to the public.

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