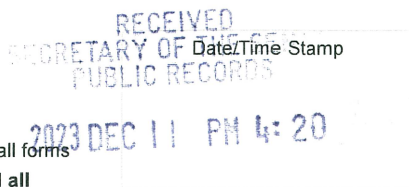


RE-2 Employee Post Travel Disclosure of Travel Expenses

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. **This form is a public disclosure. The form and all attachments will be made publicly available.**



Certification: In compliance with the Regulations Governing Privately Sponsored Travel, Senate Rule 35, and the Honest Leadership and Open Government Act of 2007, I certify that I accepted the following gift of privately sponsored travel:

Private Sponsor(s):
Progressive Policy Institute

Travel Dates:
11/16/2023 to 11/18/2023

Name of accompanying family member (if any):

Relationship to Traveler:

Expenses

Transportation Expenses	Lodging Expenses	Meals Expenses	Other Expenses (Amount & Description)
\$315.00	\$460.00	\$135.00	\$0.00

I also certify that attached to this form are all required documents for post travel disclosure, including:

- The final **Employee Pre-Travel Authorization** (Form RE-1)
- The final **Private Sponsor Travel Certification Form** with all attachments
- The final invitation
- The final approved itinerary

Finally, I certify that all trip information reflected in the attachments above accurately reflects the travel that I accepted. If there were any changes to the trip after I received approval from the Committee, the changes are described in ATTACHMENT 1.

12/11/2023

Date

Jake Lynch

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.

12/11/2023

Date

Signature of Supervising Senator/Officer

ATTACHMENT 1 – CHANGES FROM APPROVED PRE-TRAVEL

Note: Material changes to a trip that occur after the Committee has issued an approval letter may invalidate the Committee's approval. Please contact the Committee with any questions regarding changes to an approved trip.

Were there any changes to the pre-approved travel expenses? (Transportation, Meals, Lodging, Other)?

☐ Yes ☒ No

Expense Change	Revised Amount	Explanation
There were no changes to pre-approved travel expenses.		

Were there any changes to the pre-approved itinerary?

☐ Yes ☒ No

Explanation: There were no changes to the pre-approved itinerary.

Were there any additional changes to the pre-approved trip?

☐ Yes ☒ No

Explanation: There were no additional changes to the pre-approved trip.

RE-1 Employee Pre-Travel Authorization

Date/Time Stamp

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.

Name of Traveler:

Jake Lynch

Employing Office/Committee:

SPECIAL COMMITTEE ON AGING REP

Private Sponsor(s):

Progressive Policy Institute

Destination(s):

New York, New York

Travel Dates:

11/16/2023 to 11/18/2023

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

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

I am a Professional Staff Member (PSM) at the Aging Committee (Minority) who handles banking, housing, and finance policy. This trip provides insights and into critical banking policy and legislative initiatives important to the Aging Committee and the Ranking Member. CDFI's, which is one of the primary focuses of the trip, are an important area of policy and legislative focus for the committee, and is an area I handle as a PSM.

Do you have an accompanying family member or spouse on this trip?

No

Name and Relationship to Traveler:

N/A

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

11/01/2023

Date



Signature of Employee

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER

(President of the Senate, Secretary of the Senate, Sergeant at Arms,
Secretary for the Majority, Secretary for the Minority, and Chaplain)

I, Ranking Member Mike Braun
(Print Senator's/Officer's Name)

hereby authorize

Jake Lynch
(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)

11/01/2023

Date



Signature of Supervising Senator/Officer

Progressive Policy Institute: PPI November Staff Del to New York, NY

 Jake Lynch

Title:
Professional Staff Member (PSM)

Employing Office/Committee:
SPECIAL COMMITTEE ON AGING REP

Duty Station:
WASHINGTON, DC

Destination(s):
New York, New York

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

I am a Professional Staff Member (PSM) at the Aging Committee (Minority) who handles banking, housing, and finance policy. This trip provides insights and into critical banking policy and legislative initiatives important to the Aging Committee and the Ranking Member. CDFI's, which is one of the primary focuses of the trip, are an important area of policy and legislative focus for the committee, and is an area I handle as a PSM.

Name of accompanying family member (if any):
Not Entered

Name and Relationship to Traveler:
None

Organization Information

Organization Name
Progressive Policy Institute

Is your organization classified as a §501(c)(3)?
☒ Yes ☐ No

§501(c)(3) Organization Type
Public Charity

Address
1156 15th St NW

Address 2 (Optional)
Public Charity

City, State Zip
Washington, District Of Columbia 20005 United States

Phone Number
8147957652

Organization URL

History of Congressional Travel

The Progressive Policy Institute (PPI) has sponsored several Congressional staff and member delegations since its founding in 1989. These educational trips have focused on a wide variety of policy areas and they aim to explore how the issues moving on Capitol Hill have an impact on the real world. PPI last sponsored Senate travel in October 2023.

Educational Activities

As a non-profit 501 (c) (3) think-tank, the nature of PPI's work is educational. We release dozens of reports, research, and other policy analysis work annually. PPI also hosts public forums, Congressional staff and member briefings webinars, roundtables, and other events around issue education.

Lobbyist and Foreign Agent Registration Information

Lobbyist Registration Status: *I certify that the sponsor is not a federally registered lobbyist and do not retain or employ a federally registered lobbyist.*

Foreign Agent Registration Status: *I certify that the sponsor is not an agent of a foreign principal and do not retain or employ an agent of a foreign principal.*

Foreign Government Involvement

Foreign Agent Registration Status:

- ☒ I certify that the sponsor is not a foreign government.
- ☒ I certify that the sponsor is not an entity that is owned or operated by a foreign government.
- ☒ I certify that the sponsor does not receive funding from a foreign government.

Comments

None Entered

Signature Page

The signature page is below.

Purpose and Details

Provide a brief description of the trip.

This is a bipartisan, bicameral congressional staff delegation trip to New York, NY to meet with leading financial experts. The meetings on this trip will relate directly to PPI's research and the attending congressional staff's policy portfolios. Specifically, we will explore policies surrounding Community Development Financial Institutions (CDFIs) and other related policy issues on generating economic growth and opportunity in distressed communities.

Explain how the purpose of the trip relates to your organization's mission.

PPI has been conducting policy work and facilitating educational dialogues on fiscal and monetary issues since in 1989. The bipartisan nature of the trip also reflects PPI's commitment to the development of pragmatic policy that can help break through partisan gridlock.

Is your organization the only sponsor for this trip?

☒ Yes ☐ No

Grantmaking Organizations (Optional)

There are no grantmaking organizations.

With or Without Regard for Congressional Participation

The trip is arranged or organized specifically with regard to congressional participation.

Lobbyist/Foreign Agent Involvement in Planning, Organizing, Requesting or Arranging

- ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal, other than de minimis involvement.

Lobbyist/Foreign Agent Financing

- ☒ The trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
- ☒ No funds or in-kind contributions were 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.

Lobbyist/Foreign Agent Accompaniment

Complete if all sponsors are §501(c)(3) organizations

- ☒ The trip is limited to three days (for trips inside the continental United States) or seven days (for trips outside the continental United States), and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip
- ☐ The trip is limited to 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
- ☐ The trip is limited to 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

Complete if any of the sponsors is not a §501(c)(3) organizations.

- ☐ The trip is limited to three days (for trips inside the continental United States) or seven days (for trips outside the continental United States), and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip
- ☐ The trip is limited to 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
- ☐ The trip is limited to 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

Certification of No Recreational Activity and No Alcohol

- ☒ Travel expenses paid for will not include expenditures for recreational activities.

- ☒ Travel expenses paid for will not include expenditures for alcohol, except as permitted by the Regulations Governing Privately Sponsored Travel.

Invitees

- i** Members and staff from the House of Representatives **will** receive invitations.

The list of invitees is below.

Travel Details

Trip Start Date/Time:
11/16/2023 @ 01:10 PM



Trip End Date/Time:
11/18/2023 @ 11:05 AM

Will the traveler be accompanied by a family member for whom the sponsor will pay travel expenses?

☐ Yes ☒ No

Itinerary

The itinerary is below.

Transportation (Per Member/Officer/Employee: \$315.00 | Accompanying Family Member: \$0.00)

Transportation Type	Class	Amount
Ground Transportation	N/A	\$20.00
Note Taxi/rideshare		
Train	N/A	\$20.00
Note Subway		
Train	Coach	\$275.00
Note Amtrak roundtrip WAS - NYP		

Lodging (Per Member/Officer/Employee: \$460.00)

Check-In	Check-Out	Facility	City	State	Country	Nights	Cost/Night	Cost Exceed Per Diem
11/16/2023	11/18/2023	DoubleTree by Hilton New York Downtown	New York	New York	United States	2	\$230.00	No

Meals (Per Member/Officer/Employee: \$135.00)

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem
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Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem
11/16/2023	\$0.00	\$0.00	\$40.00	\$5.00	\$45.00	New York	New York	United States	No
11/17/2023	\$15.00	\$15.00	\$35.00	\$5.00	\$70.00	New York	New York	United States	No
11/18/2023	\$15.00	\$0.00	\$0.00	\$5.00	\$20.00	New York	New York	United States	No

Reasonable Miscellaneous Expenses (Per Member/Officer/Employee: \$0.00)

Expense Type	Amount	Notes
There are no miscellaneous expenses.		

Additional Attachments

Document Name
There are no additional attachments.

PRIVATELY SPONSORED TRAVEL

SPONSOR SIGNATURE PAGE

I hereby certify that the information submitted in connection with the trip listed below is true, complete, and correct to the best of my knowledge and belief.

Trip Name: PPI November StaffDel to New York, NY
November 16, 2023 - November 18, 2023
Travel Date(s):
New York, NY
Travel Destination(s):

The Third Way Foundation (Progressive Policy Institute is a project of The Third Way Foundation)

Sponsor:

Lindsay Lewis

Executive Director

(printed name of sponsor representative)

(title)



10/16/23

(signature of sponsor representative)

(date)

U.S. Senate Staff Invitees

PPI StaffDel to New York, NY - November 16-18, 2023

Connor DiRusso

Legislative Correspondent

U.S. Senator Mark Warner

Cassie Brzezinski

Policy Adviser

U.S. Senator Chris Van Hollen

John Conrad

Legislative Correspondent and Special Assistant

U.S. Senator John Hickenlooper

Kossi Anyinefa

Legislative Assistant

U.S. Senator Brian Schatz

Madison Moskowitz

Senior Advisor for Economic Development

U.S. Senator Ron Wyden

Melissa Sanchez

Policy Adviser

U.S. Senator Cory Booker

Jake Lynch

Policy Adviser

U.S. Senator Mike Braun

Kelsey Pristach

Senior Policy Adviser

U.S. Senator Cynthia Lummis

Bill Birisic

Legislative Assistant

U.S. Senator Roger Wicker

Alex Thiessen

Legislative Correspondent

U.S. Senator Eric Schmitt



1156 15th Street NW, Ste 400
Washington, DC 20005
Tel: 202-525-3926
Fax: 202-525-3941
info@ppionline.org

October 16, 2023

Jake Lynch
U.S. Senate Special Committee on Aging
Washington, DC 20510

Dear Jake,

On behalf of the Progressive Policy Institute (PPI), I'd like to invite you to join us and fellow policy experts for a bipartisan congressional staff delegation trip to New York, NY focusing on Community Development Financial Institutions (CDFIs) and related policy issues on generating economic growth and opportunity in distressed communities. **The trip is scheduled to depart on the afternoon of Thursday, November 16, and return on the morning of Saturday, November 18.**

Over the years, PPI has sponsored dozens of bipartisan congressional staff delegation trips to help inform the work of policymakers in Washington by exploring issues in the real world. This trip to New York City will entail a comprehensive schedule of meetings with leading financial analysts and others experts at mission-driven financial institutions, including:

- A briefing and floor tour of the New York Stock Exchange (NYSE)
- A visit to the NY Federal Reserve Bank of New York's and discussion with CDFI working groups
- A meeting at the World Trade Center with representatives from Moody's CORE program and local CDFIs in NYC.

You have been invited to join us because of your policy portfolio and your boss' efforts on these issues. We believe the high-level meetings and informative discussions on this trip will be a tremendous resource as you continue to support this important work in Congress.

PPI is a non-profit 501 (c) (3) organization with a mission of providing educational programming on current policy issues. This trip will comply with all U.S. House and Senate ethics rules.

We hope that you will be able to join us for what promises to be an insightful and valuable trip. **We kindly ask that you RSVP no later than Tuesday, October 17** in order to ensure compliance with congressional ethics rules. Space is limited; please contact Stuart Malec at 860-508-8554 or smalec@ppionline.org if you have questions.

Regards,

A handwritten signature in dark ink, appearing to read "LM", is positioned above the typed name of the sender.

Lindsay M. Lewis, PPI Executive Director



PPI StaffDel to New York, NY – November 16-18, 2023

Thursday, November 16, 2023

1:10 - 4:42 pm

Train: 148 Northeast Regional from WAS to NYP

Train departure from Union Station, Washington DC at 1:10 pm

Train arrival at Penn Station, NYC at 4:42 pm

5:00 pm

Travel to hotel - subway/taxi

6:00 pm

Check in at hotel, drop bags

DoubleTree by Hilton New York Downtown

7:00 - 10:00 pm

Dinner discussion with PPI

Location: Fraunces Tavern, 54 Pearl St, New York, NY 10004

Dinner discussion on PPI fiscal policy work and mission of PPI's Center for Funding America's Future, lead by:

- Ben Ritz, Director of PPI's Center for Funding America's Future

Friday, November 17, 2023

7:00 - 8:30 am

Breakfast with PPI

Location: DoubleTree by Hilton New York Downtown

Briefing to prepare for upcoming meetings. PPI participants:

- Stu Malec, National Political Director
- Riley Burke, Political Outreach Manager
- Amelia Fox, National Press Secretary

8:30 am

Travel to meeting - walk

9:00 - 11:00 am

Tour of New York Federal Reserve Bank and Meeting with Community Development Team

Location: 33 Liberty Street, New York, NY 10045

Tour of the bank and meeting to discuss the New York Fed's work in Community Development Finance and how it supports the transformation of low- and moderate-income communities in the region.

Participants:

- Jacob Scott (Community Development team),
- Maria Carmelita Recto (Community Development team)

11:00 am

Travel to meeting - walk



11:30 am - 12:30 pm

Lunch briefing: Goldman Sachs 10K Small Businesses Team

Location: 200 West St, New York, NY 10282

Discussion on Goldman Sachs 10K Small Business Program and community development finance.

Speaker:

- Anne Welde, Executive Director, 10K Small Business Program

12:30 pm

Travel to meeting - walk

1:00 - 2:45 pm

Meeting with Moody's CORE Program and CDFI representatives

Location: Moody's, 7 World Trade Center, 250 Greenwich St, New York, NY 10007

Discussion on how CORE program can assist community development financial institutions and work being done by local CDFIs in NYC. Participants:

- Greg Robinson – Moody's Analytics MD Acquisitions and Market Intel & Moody's CORE Lead (Moderator)
- Blair Duncan – President and CEO of the Upper Manhattan Empowerment Zone Development Corporation (UMEZ)
- Carlos Naudon – President and CEO Ponce Financial Group and COO of Ponce Bank
- Valerie White – Senior Executive Director (LISC)

2:45 pm

Travel to meeting - walk

3:00 - 4:30 pm

Tour of New York Stock Exchange floor and CDFI meeting

Location: NYSE, 11 Wall St, New York, NY 10005 (enter at 18 Broad Street & Exchange Place Corner)

Tour of the trading floor and discussion on CDFIs and the New York Stock Exchange with:

- Tim Bowler, President, ICE Mortgage Technology

4:30 pm

Travel to hotel - walk/taxi

6:00 - 8:00 pm

Closing dinner and recap of trip with PPI

Location: Antica Ristorante, located in hotel

PPI participants:

- Stu Malec, National Political Director
- Riley Burke, Political Outreach Manager
- Amelia Fox, National Press Secretary



Saturday, November 18, 2023

11:05 - 2:28 pm

Train: 195 Northeast Regional from NYP to WAS

Train departure from Penn Station, NYC at 11:05 am

Arrival at Union Station, Washington, DC at 2:28 pm