

RE-2 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. **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):

Conservative Partnership Institute

Travel Dates:

2/9/23-2/10/23

Name of accompanying family member (if any):**Relationship to Traveler:****Total Expenses**

Transportation Expenses	Lodging Expenses	Meals Expenses	Other Expenses (Amount & Description)
\$601.80	\$98	\$88.50	\$176.15 Uber expenses

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.

3/2/23

Date

Steve Chartan

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.

3/7/23
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

Were there any changes to the pre-approved itinerary?

☐ Yes ☒ No

Explanation:

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

☐ Yes ☒ No

Explanation:

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: Steven ChartanEmploying Office/Committee: CruzPrivate Sponsor(s) (list all): Conservative Partnership InstituteTravel date(s): February 9-10, 2023*Note: If you plan to extend the trip for any reason you must notify the Committee.*Destination(s): Orlando, FL

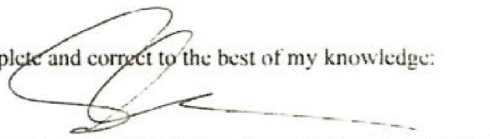
Explain how this trip is specifically connected to the traveler's official or representational duties:

This trip is an educational program to discuss issues facing Congress and will help me to fulfill my official duties. As chief of staff to Sen. Cruz, the trip will allow me to participate in educational sessions to discuss public policy issues and improve collaboration with other Senate and House offices.

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:

1/25/23
(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, Ted Cruz hereby authorize Steven Chartan
(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) ☐

1/25/23
(Date)
(Signature of Supervising Senator/Officer)

(Revised 10/19/15)

Form RF-1

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors): Conservative Partnership Institute (CPI)
2. Description of the trip: To present at the CPI Conservative Member Retreat/Winter Leadership Conference
3. Dates of travel: February 9-12, 2023
4. Place of travel: Orlando, Florida
5. Name and title of Senate invitees: Steve Chertan, Chief of Staff
Senator Cruz
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:

N/A

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

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

CPI is the sole sponsor, responsible for organizing and conducting the trip, working with invitees and speakers.

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

In accordance with its mission of educating, training, and uniting the conservative movement, CPI is sponsoring this travel to educate and equip conservative office holders and to connect conservative leaders at the federal, state, and local levels.

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

CPI has previously sponsored educational and training events for conservative Members of Congress and congressional staff, and has invited Members and staff to attend policy retreats attended by conservative thought leaders and activists.

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

CPJ provides regular briefings and training sessions to congressional staff and conservative leaders and activists.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
☒ Good Faith estimate	\$300	\$495	\$525	\$100 (airport transfers)
☐ 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 Conservative Member Retreat is organized with respect to congressional participation, while the Winter Leadership Conference is organized without respect to congressional participation.

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

Location is easily accessible via direct flights and conducive to supporter conference.

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

Omni Orlando Resort at Championsgate, Championsgate, Florida

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

Hotel has ample meeting space and hotel rooms and is easily accessible by direct flights.

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 lodging cost for the first two nights (Conservative Member Retreat) are at the per diem rate of \$98 per night, while the lodging cost for third night (Winter Leadership Conference) is \$299 per night. Meal costs are consistent with the lodging figures.
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:
Congressional attendees will travel by coach-class airlines.
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 paid for by the sponsor.
25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):
- Signature of Travel Sponsor: _____
- Name and Title: Ed Corrigan, President
- Name of Organization: Conservative Partnership Institute
- Address: 300 Independence Avenue, SE, Washington, DC 20003
- Telephone Number: (202) 680-8746
- Fax Number: _____
- E-mail Address: ecorrigan@cpi.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 February 9-12, 2023 trip
to Orlando, Florida is true, complete, and correct.
Place of Travel

Signature of Travel Sponsor: _____

Name and Title: Ed Corrigan, PresidentName of Organization: Conservative Partnership InstituteAddress: 300 Independence Avenue, SETelephone Number: (202) 680-8746

Fax Number: _____

E-mail Address: ecorrigan@cpi.org

Conservative Members Retreat
Conservative Policy & Strategies for 2023
Omni Orlando at ChampionsGate
February 9-10

Thursday, February 9th

6:30 – 8:00 PM

Dinner

Topic: Welcome Remarks & and Overview of Retreat

Discussion with participants re: introducing themselves and conservative policy priorities for 2nd Session of 118th Congress.

Speakers: Mark Meadows, Senior Partner, CPI
Congressman Scott Perry, PA-10
Keynote: Tucker Carlson, Fox News (invited)

Friday, February 10th

7:00 AM

Breakfast Buffet opens

7:30 AM

Morning Devotional

8:15 – 9:45 AM

Session #1 – What's on the Agenda for the 118th Congress?

Current and former members of Congress discuss potential issues on the agenda of the 118th Congress – and issues that should be on that agenda..

Speakers: Mark Meadows, Senior Partner, CPI
Congressman Scott Perry, PA-10

9:45 – 11:00 AM

Session #2 – Building a Stronger America: Conservative Policy Solutions

Leading movement voices present creative ways to address election & immigration reform, censorship, antitrust, and economic growth.

Speakers: Mark Meadows, Senior Partner, CPI
Congressman Scott Perry, PA-10
Ed Corrigan, CEO, CPI
Russ Vought, President, Center for Renewing America

11:00 – 11:15 PM

- Break -

11:15 – 12:15 PM

Session #3 – Advancing Conservative Policies Through a Unified National Policy Agenda

Hear advice from current and former CPI experts on working with outside organizations and allies to increase public support for conservative ideas.

Speakers: Mark Meadows, Senior Partner, CPI
Congressman Scott Perry, PA-10
Russ Vought, President, Center for Renewing America
Rachel Bovard, Executive Director, Senate Steering Committee (invited)

12:15

Lunch buffet open

12:15 - 12:30 PM - Break -

12:30 - 2:00 PM Session #4 - Learning the Rules and Procedures of the House
Learn from experts the best practices and lessons learned on legislative process and ideas for reforms - including oversight, investigations, and governing & accountability.

Speakers: Ed Corrigan, CEO, CPI
Congressman Scott Perry, PA-10
Steve Chartan, Chief of Staff, Senator Ted Cruz
Tom Jones, President, American Accountability Foundation

1:45 - 2:00 PM - Break -

2:15 - 4:00 PM Session #5 - Communicating with Constituents, the Media, and the Public
Communications experts share practices for effectively communicating with your constituents, the media, and others, including lessons that can be learned from previous conservative policy victories.

Speakers: Congressman Scott Perry, PA-10
Congresswomen Lauren Boebert, CO-3
Scott Parkinson, Vice President, Club for Growth
Russ Vought, President, Center for Renewing America

4:00 - 6:00 PM Session #6 - How Conservative Policies Can Win in the 118th Congress
Building on the information shared throughout the retreat, these experts discuss strategies for advancing conservative policies in the new Congress.

Speakers: Mark Meadows, Senior Partner, CPI
Congressman Scott Perry, PA-10
Stephen Miller, President, America First Legal (invited)
Andy Roth, President, State Freedom Caucus Network
David Bozell, President, For America (invited)

6:00 PM - Retreat concludes -

CONSERVATIVE PARTNERSHIP INSTITUTE

You're Invited

CONSERVATIVE MEMBERS RETREAT



February 9th & 10th

ORLANDO, FLORIDA

Omni Champaaigne hotel

The Conservative Partnership Institute
invites you to a Conservative Members
Retreat to learn about important
issues facing Congress.

2023 Winter Leadership Conference
"Courage is in Session"
February 10-12

Friday, February 10th

6:30 PM Welcome Reception

7:30-9:30 PM Welcome Dinner: Celebrating Conservative Opportunities
Remarks by DeMint, DeSantis, and Meadows about the importance of engaging in cultural battles and standing up to the left's aggressive tactics—from censorship to blacklisting.
Intro: Jim DeMint, Chairman, CPI
Speaker: Cleta Mitchell, President, Election Integrity Network
Keynote Intro: Mark Meadows, Senior Partner, CPI
Keynote: Governor Ron DeSantis, R-FL (invited)

Saturday, February 11th

Morning free

12:00 — 1:00 PM Welcome Lunch: CPI Update & 2023 Outlook
CPI's successes in 2022, insight into upcoming programs and movement efforts, and a closer look at Patriots' Row and Camp Rydin.
Video: Earned media and 2022 successes, including Camp Rydin highlights.

Welcome: Jim DeMint, Chairman, CPI
Prayer: Bret Bernhardt, Board of Trustees, CPI
Speakers: Jim DeMint, Chairman, CPI
Mark Meadows, Senior Partner, CPI
Ed Corrigan, President & CEO, CPI

1:00-1:15 PM - Break -

1:15 — 2:15 PM Session #1: Conservative Policy Priorities for the 118th Congress
Conservative Members of Congress discuss policy priorities for 2023.

Moderator: Mark Meadows, Senior Partner, CPI
Panel: Congressman Scott Perry, PA-10
Congressman Bob Good, VA-5
Congressman Ralph Norman, SC-5

2:15-2:30 PM - Break -

2:30-3:30 PM

Session #2: Meet the New Freedom Fighters in Washington

Hear from newly elected conservative Members of Congress who will discuss legislative priorities and goals for this session. Corrigan will also provide a recap of Operation Midterm Draft – an effort to staff new offices.

Moderator: Ed Corrigan, President, CPI
Panel: Anna Paulina Luna, FL-13
Andy Ogles, TN-5
Josh Brecheen, OK-2
Eric Burlison, MO-7
Eli Crane, AZ-2

3:30-4:15 PM

Session #3: CPI Academy & Coalitions: Creating a Conservative Fighting Force

An introduction to CPI's new Academy for congressional staff and members, taught from the expanded CPI headquarters on Patriots' Row. Government Relations Director Hugh Fike will share CPI's plan for building stronger coalitions.

Video: CPI Academy

Moderator: Mark Meadows, Senior Partner, CPI
Panel: Rachel Bovard, Executive Director, Senate Steering Committee
Hugh Fike, Director of Government Relations, CPI
Wesley Denton, COO, CPI

4:15-6:30 PM

-Afternoon Break-

6:30-7:15 PM

Reception**Topic: Building a Winning Conservative Culture in Washington**

Remarks: Jim DeMint, Chairman, CPI

7:15-9:30 PM

Dinner**Creating a New Generation of Conservatives**

Remarks by Kirk, Meadows, and DeMint about building a new and lasting conservative movement starting with young people.

Intro: Senator Jim DeMint, Chairman, CPI
Speaker: Senator Mike Lee, R-UT (invited)
Keynote Intro: Mark Meadows, Senior Partner, CPI
Keynote: Charlie Kirk, President, TPUSA
Closing: Mark Meadows, Senior Partner, CPI

Sunday, February 12th

8:15 AM Breakfast buffet opens.

8:30 AM Morning Devotional by Jeff Trimbath, M.Div.

8:35-9:35 AM Session #4: Seizing Opportunities for Transparency in the 118th Congress: A Discussion with U.S. Congress
Hear from members of Congress about opportunities that exist, and which can be created, to demand transparent and accountable government during the 118th Congress.

Moderator: Tom Jones, President, American Accountability Foundation
Panel: Congressman Dan Bishop, NC-9
Congressman Michael Cloud, R-TX
Congressman Alex Mooney, WV-2

9:35-9:50 AM - Break -

9:50-11:00 AM Session #5 Conservative Messaging in the Age of Big Tech
Digital communications experts share their insights on conveying conservative messages in a digital landscape. Discussion begins with CPI's Movement Communications Initiative and the use of polling data and talking points.

Moderator: Wesley Denton, COO, CPI
Panel: Benny Johnson, Chief Creative Officer, TPUSA (invited)
Gaston Mooney, CEO, Blaze Media
Robbie Myers, Digital Dir., Office of FL Gov. Ron DeSantis (invited)

11:00-11:10 AM - Break -

11:10-12:10 PM Session #6: Conservative Innovators
Hear from conservatives who have found new and innovative ways to advance conservative principles and stop the woke agenda.

Moderator: Russ Vought, President, Center for Renewing America
Panel: Sean Davis, CEO & Co-Founder, The Federalist
Andy Roth, President, State Freedom Caucus Network
Nate Fischer, New Founding and American Reformer (invited)

12:10-12:25 PM - Break -

12:10 PM - Lunch opens -

12:25-1:30 PM

Lunch**Topic: Restoring a Safe and Secure America: A Talk on the Border and Crime***Hear from conservative leaders who have experienced the fallout from failed liberal border and law enforcement policies firsthand and learn about the changes that are needed in border states and crime-ridden cities nationwide to restore a safe and secure America.***Intro:** Stephen Miller, President, AFL (invited)**Keynote #1:** Congressman Chip Roy, TX-21**Intro:** Mark Meadows, Senior Partner, CPI**Keynote #2:** Dan Bongino, The Dan Bongino Show (invited)

1:30-1:45 PM

Closing Discussion of CPI's Work to Advance Conservative Policies in 2023*A recap on the conference and a look into CPI goals for 2023 & beyond.***Speakers:** Jim DeMint, Chairman, CPI

Mark Meadows, Senior Partner, CPI

1:45 PM

- Conference Concludes -



CONSERVATIVE PARTNERSHIP INSTITUTE

Please Join Us

2023 WINTER LEADERSHIP CONFERENCE



February 10th-12th

ORLANDO, FLORIDA
Omni Championsgate Hotel



Join us and hear from some of
the sharpest minds leading
the conservative movement.

Chartan, Steve (Cruz)

From: Steve Chartan <schartan@tedcruz.org>
Sent: Monday, January 30, 2023 12:34 PM
To: Chartan, Steve (Cruz)
Subject: Fwd: Invitation to Speak at CPI's Conservative Members Retreat

Begin forwarded message:

From: Jackie Fowler <jfowler@cpi.org>
Date: January 25, 2023 at 3:44:17 PM EST
To: Steve Chartan <schartan@tedcruz.org>
Subject: Invitation to Speak at CPI's Conservative Members Retreat

Dear Steve,

It is our pleasure to invite you to participate in the Conservative Partnership Institute's **2023 Conservative Members Conference on February 9 & 10, 2023, & Winter Leadership Conference on February 10-12, 2023.**

We would be thrilled if you would speak on panel during the Conservative Member's Retreat on February 10th at 12:30-2pm title Session 4: Learning the Rules and Procedures of the House

With gratitude,

Senator Jim DeMint & Mark Meadows
Conservative Partnership Institute



--
Jackie Fowler
Director of Member Relations
Conservative Partnership Institute
E: jfowler@cpi.org | C: 202-320-2700

Conservative Members Retreat & Winter Leadership Conference
Conservative Policy & Strategies for 2023
Omni Orlando at ChampionsGate
February 9-12

Thursday, February 9th

3:33 PM Steve Chartan arrival via JetBlue flight 1923

6:30 – 8:00 PM Conservative Members Retreat Welcome Dinner
Topic: Welcome Remarks & and Overview of Retreat
Discussion with participants re: introducing themselves and conservative policy priorities for 2nd Session of 118th Congress.

Speakers: Mark Meadows, Senior Partner, CPI
Congressman Scott Perry, PA-10

Friday, February 10th

7:00 AM Breakfast Buffet opens

7:30 – 8:00 AM Morning Devotional led by Congressman Bob Good

8:15 – 9:45 AM Session #1 – What's on the Agenda for the 118th Congress?
Members of Congress discuss potential issues on the agenda of the 118th Congress – and issues that should be on that agenda.

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11:00 – 11:15 PM - Break -

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Congressman Scott Perry, PA-10
Russ Vought, President, Center for Renewing America

12:15 PM Lunch buffet opens

12:15 – 12:30 PM - Break -

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2:00 – 2:15 PM - Break -

2:15 – 4:00 PM Session #5 – Communicating with Constituents, the Media, and the Public
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Senator Mike Lee, R-Utah

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Speakers: Mark Meadows, Senior Partner, CPI
Congressman Scott Perry, PA-10
Stephen Miller, President, America First Legal
Andy Roth, President, State Freedom Caucus Network
David Bozell, President, For America

6:00 PM - Retreat concludes -

6:30 PM Steve Chartan departure via JetBlue flight 24