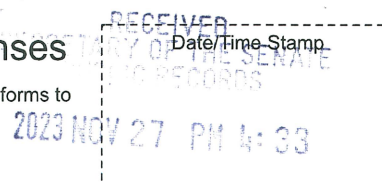


RE-2 Employee Post Travel Disclosure of Travel Expenses

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):

The Pew Charitable Trusts; The Joyce

Travel Dates:

10/27/23-10/29/23

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

Transportation Expenses	Lodging Expenses	Meals Expenses	Other Expenses (Amount & Description)
\$121.40	\$237.54	\$243.42	\$15- Adams County Historical Society

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.

11/27/2023
Date

Melinda Linequist
Printed Name of Traveler

M. Linequist
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.

11/27/2023
Date

Patty Murray
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
Hotel	\$118.77/night w/tax	final actual cost -- includes tax
Adams County Historic: \$15		increased ticket price -- final actual cost

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:

Trip Name: Biannual Bipartisan Chiefs of Staff Leadership Conference**Organization Information****Organization Name:**

The Pew Charitable Trusts

Is your organization classified as a §501(c)(3)?☒ Yes ☐ No**If Yes, §501(c)(3) Organization Type:**☐ Private Foundation ☒ Public Charity**Address:**

901 E Street NW

City, State, Zip:

Washington, DC. 20004

Phone Number:

202/540-6501

Organization URL:

www.pewtrusts.org

History of Congressional Travel

Describe your organization's history of sponsoring congressional travel.

Through information and advocacy work, The Pew Charitable Trusts seeks to advance development of sound public policy in the U.S. and to strengthen institutions that form the foundation of our democracy. A major component of this ongoing strategy has been to help create an environment in which policymakers can productively deliberate important issues of the day. The purpose of this ninth annual Senate Chiefs of Staff Conference hosted by Pew is to provide a collaborative environment for the Chiefs of Staff to learn from experts and discuss strategies for effective leadership, management, mission development and organization.

Educational Activities

Describe the educational activities performed by your organization other than sponsoring congressional travel.

The Pew Charitable Trusts is driven by the power of knowledge to solve today's most challenging problems. Pew applies a rigorous, analytical approach to improve public policy, inform the public and invigorate civic life. We partner with a diverse range of donors, public and private organizations, and concerned citizens who share our commitment to fact-based solutions and goal-driven investments to improve society. Pew issues dozens of research reports each year to educate the public and policy makers, and sponsors convening of researchers and experts to examine various issues of public policy and civic life.

Lobbyist and Foreign Agent Registration Information**Lobbyist Registration Status (Select one):**

- ☐ I certify that the sponsor is not a federally registered lobbyist and does not retain or employ a federally registered lobbyist.
- ☒ I certify that the sponsor is not a federally registered lobbyist but does retain or employ one or more federally registered lobbyists.

Foreign Agent Registration Status (Select one):

- ☒ I certify that the sponsor is not an agent of a foreign principal and does not retain or employ an agent of a foreign principal.
- ☐ I certify that the sponsor is not an agent of a foreign principal but does retain or employ one or more agents of a foreign principal.

Foreign Government Involvement**Foreign Agent Registration Status (Must select all):**

- ☒ 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.

Purpose and Details

Provide a brief description of the trip.

The group will travel to Gettysburg for a two-day conference on leadership and management skills. The Chiefs of Staff will hear from speakers representing the U.S. Army War College, The Gettysburg Foundation and the Lincoln Leadership Institute. A complete itinerary is attached.

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

Through both information and advocacy work, Pew seeks to advance development of sound public policy at home and abroad, and strengthen the institutions that form the foundations of our democracy. The Biannual Bipartisan Conference advances those goals by creating a "Safe Space" for Chiefs of Staff to meet, exchange ideas and learn effective best practices for carrying out their responsibilities.

Is your organization the only sponsor for this trip?

☐ Yes

☒ No

If No, describe your organization's role in planning the trip.

Pew has planned the entirety of the itinerary and agenda of the conference.

If there are multiple sponsors, each sponsor must submit Organization Information (Page 1 of the Private Sponsor Travel Certification Form) and a Signature Page Form.

Grantmaking Organizations (Optional)

If you have a Grantmaking Organization, you must attach a Grantmaking Organization Certification Form.

1. **The Joyce Foundation**

2.

3.

With or Without Regard to Congressional Participation (Select one):

- ☐ The trip is arranged or organized without regard to congressional participation.
- ☒ The trip is arranged or organized 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 (Must select all):

- ☒ 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 (Select one):

- ☒ 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 (Select one):

- ☐ No sponsor retains or employs a registered lobbyist or agent of a foreign principal, 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

Required if selecting the third option in either column - Please explain why the second overnight stay is practically required and necessary to accomplish the purpose of the trip.

Certification of No Recreational Activity and No Alcohol (Must select all):

- ☒ 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 list

- ☒ A list of all Senate invitees is attached to this form (required).
- ☐ Members and staff from the House of Representatives will also receive invitations.

Travel Details (Submit additional pages as needed)

Trip Start Date/Time:
10/27/23, 12 noon



Trip End Date/Time:
10/29/23, 2 pm

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

☐ Yes ☒ No

Transportation (Member/Officer/Employee: \$ 144.38 Accompanying Family Member: \$)

Transportation Type	Class	Amount
Motor Coach (r/t to Gettysburg and throughout)	Coach	\$144.38

Details (optional)

estimated per person cost of 25 chiefs attending

Lodging (Member/Officer/Employee: \$ 214 Accompanying Family Member: \$ 0)

Check-In	Check-Out	Facility	City	State	Country
10/27/23	10/29/23	Wyndham Hotel	Gettysburg	PA	USA

Nights	Cost/Night	Cost Exceed Per Diem (Yes/No)	If Yes, please explain why expenses over the per diem rate are reasonable and necessary.
2	\$107	No	

Check-In	Check-Out	Facility	City	State	Country
----------	-----------	----------	------	-------	---------

Nights	Cost/Night	Cost Exceed Per Diem (Yes/No)	If Yes, please explain why expenses over the per diem rate are reasonable and necessary.
--------	------------	-------------------------------	--

Check-In	Check-Out	Facility	City	State	Country
----------	-----------	----------	------	-------	---------

Nights	Cost/Night	Cost Exceed Per Diem (Yes/No)	If Yes, please explain why expenses over the per diem rate are reasonable and necessary.
--------	------------	-------------------------------	--

Meals (Member/Officer/Employee: \$261.50 Accompanying Family Member: \$)

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem (Y/N)
10/27/23		23.50	95		118.50	Gettysburg	PA	USA	Y
10/28/23	14	35	80		129	Gettysburg	PA	USA	Y
10/29/23	14	35			49	Gettysburg	PA	USA	N

If costs exceed the federal per diem, please explain why expenses over the per diem rate are reasonable and necessary.

Negotiated rates charged by the Gettysburg Foundation for dinners still exceed per diem

Reasonable Miscellaneous Expenses

(Member/Officer/Employee: \$9.00 Accompanying Family Member: \$)

Expense Type	Amount	Notes
Admission Adams Co. "Beyond the Battle" Museum	9.00	

Additional Details (optional)

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: Biannual Bipartisan Senate Chiefs of Staff Conference
Travel Date(s): October 27-29, 2023
Travel Destination(s): Gettysburg, PA
Sponsor: The Pew Charitable Trusts

LAURIE BOEDER*(printed name of sponsor representative)*ACTING SENIOR DIRECTOR*(title)*
*(signature of sponsor representative)*10/18/23
(date)

Grantmaking Organization Certification Form

Instructions: If a sponsor receives funds from a grantmaking organization, the sponsor must disclose this on the *Private Sponsor Travel Certification Form*, and the grantmaking organization must complete the *Grantmaking Organization Certification Form*. The completed *Grantmaking Organization Certification Form* must be submitted to the Senate Select Committee on Ethics by the trip sponsor at least 30 days prior to the travel departure date.

Grantmaking Organization: The Joyce Foundation

Private Sponsor: The Pew Charitable Trusts

Trip Name: The Biannual Bipartisan Leadership Conference

Travel Date(s): October 27-29, 2023

Destination(s): Gettysburg, PA

In compliance with the *Regulations Governing Privately Sponsored Travel*, I certify the following:

- ☒ The grantmaking organization is a § 501(c)(3) organization.
- ☒ The grantmaking organization is not a lobbyist, lobbying firm, or foreign agent, nor an entity that retains or employs a lobbyist or foreign agent.
- ☒ The grantmaking organization provides funds under an established grant program, or in a manner that is otherwise consistent with the mission and practices of the organization.
- ☒ The grantmaking organization is not involved, directly or indirectly, in organizing and conducting the trip. This includes selecting participants for a trip.
- ☒ The grantmaking organization does not directly pay or reimburse travel expenses for any Senate Member, officer, or employee.

Kathleen Clarke

(Printed name of grantmaking organization representative)

Chief Operating Officer

(Title)

Kathleen Clarke

(Signature of grantmaking organization representative)

Digitally signed by Kathleen Clarke
 DN: cn=Kathleen Clarke, o=The Pew Charitable Trusts, c=US, email=kclark@pewtrusts.org
 Reason: I am approving this document
 Date: 2023.10.27 11:12:09 -04'

10/22/2023

(Date)

From: GR Responses grresponses@pewtrusts.org
Subject: [Test]:Bipartisan Senate Chiefs of Staff Conference (Oct. 27-29, 2023)
Date: July 3, 2023 at 12:37 PM
To: John Schueler jschueler@pewtrusts.org



[EXTERNAL EMAIL]: This message is from an external sender. Verify the sender and exercise caution when clicking links or opening attachments.

[View in web browser](#)



The Pew Charitable Trusts
invites you and your significant other
to the ninth biennial

Senate Chiefs of Staff Management and Leadership Conference

Gettysburg, PA
October 27-29, 2023

REGISTER WITH .GOV EMAIL

The Pew Charitable Trusts will host a conference for the Senate Chiefs of Staff October 27-29, 2023, in Gettysburg, PA. It promises to be an engaging and informative weekend where you will learn from noted speakers about management and leadership. A copy of the agenda is available [here](#).

We will depart from the Senate side in a motor coach Friday, October 27, at noon and return Sunday, October 29, at 2 p.m.

The chiefs' expenses (minus alcohol) are covered by The Pew

CHRISTOPHER A. COONS, DELAWARE, CHAIRMAN
JAMES LANKFORD, OKLAHOMA, VICE CHAIRMAN

BRIAN SCHATZ, HAWAII
JEANNE SHAHEEN, NEW HAMPSHIRE

JAMES E. RISCH, IDAHO
DEB FISCHER, NEBRASKA

SHANNON HAMILTON KOPPLIN, CHIEF COUNSEL AND STAFF DIRECTOR
WILLIAM B. CABLE, CHIEF CLERK

HART SENATE OFFICE BUILDING, ROOM 220
SECOND AND CONSTITUTION AVENUE, NE
WASHINGTON, DC 20510-6425

TELEPHONE: (202) 224-2981
FACSIMILE: (202) 224-7416
TDD: (202) 228-3752

United States Senate

SELECT COMMITTEE ON ETHICS

October 24, 2023

Melinda Linquist
Office of Senator Patty Murray
United States Senate
Washington, DC 20510

Dear Ms. Linquist:

This responds to your recent correspondence requesting approval from the Select Committee on Ethics (the Committee) to accept an invitation you received to travel to the *Biannual Bipartisan Senate Chiefs of Staff Leadership Conference* in Gettysburg, PA, on October 27–29, 2023, sponsored by Pew Charitable Trusts (Pew). Provided that you adhere to the guidance set forth below, it appears that it is permissible for you to accept necessary expenses from Pew in connection with this trip.

Background

Based on your communication with the Committee, the background in this matter is as follows.¹ You are employed as the Chief of Staff for the Office of Senator Patty Murray. Pew invited you to travel to the *Biannual Bipartisan Senate Chiefs of Staff Leadership Conference* in Gettysburg, PA, on October 27–29, 2023. Pew certified to the Committee that it will pay the necessary expenses² related to the travel and that it is neither a lobbyist, lobbying firm, agent of a foreign principal, or otherwise acting as a representative or agent of a foreign government. Although Pew retains or employs a federally registered lobbyist or foreign agent, Pew has certified that it is an organization designated under § 501(c)(3) of the Internal Revenue Code³ and that no registered lobbyist or agent of a foreign principal will accompany you at any point throughout your trip.⁴

Discussion

Privately sponsored travel includes any gift of travel and travel-related expenses for travel outside the Senate duty station, including transportation, lodging, food and refreshments, and conference fees and materials, whether paid for directly, reimbursed, or provided directly,

¹ If this letter does not correctly recite the facts, contact the Committee immediately.

² The term “necessary expenses” has a specific definition. See *Select Committee on Ethics Regulations and Guidelines for Privately Sponsored Travel – Glossary of Terms* at 8.

³ 26 U.S.C. § 501(c)(3).

⁴ The term “any point throughout your trip” has a specific definition. See *Select Committee on Ethics Regulations and Guidelines for Privately Sponsored Travel – Glossary of Terms* at 2-3.

from a private individual or entity, in connection with a Member's, officer's, or employee's official Senate duties. Incorporating reforms from the Honest Leadership and Open Government Act of 2007 (HLOGA), Pub. L. 110–81 (2007), Senate Rule 35.2 permits Members, officers, and employees to accept privately sponsored travel only with the prior written approval of the Committee.

The Committee's approval process is governed by the *Regulations and Guidelines for Privately Sponsored Travel and Glossary of Terms* (collectively, *Travel Regulations*). The *Travel Regulations* contain detailed requirements regarding who may sponsor travel; time limits for trips; and the type and amount of expenses that can be reimbursed.

Entities that do not retain or employ a lobbyist or foreign agent and all non-profit organizations designated as tax-exempt organizations under § 501(c)(3) of the Internal Revenue Code of 1986, regardless of whether they retain or employ a lobbyist or foreign agent, may sponsor domestic trips for up to three days. The three-day limitation means three 24-hour periods, calculated from the time of arrival in the trip location to the time of departure from the trip location. For such trips, neither lobbyists nor foreign agents may accompany a Senate invitee at any point throughout the trip, other than in a *de minimis* way.⁵ This means that neither lobbyists nor foreign agents may accompany Senate invitees at any point to and from the event, at the event itself, or at the location being visited.⁶

Under Senate Rule 35, Senate staff must receive advance authorization signed by the Member or officer under whose direct supervision the individual works in order to accept payment or reimbursement for necessary expenses related to fact-finding travel. Further, such authorization and expenses must be disclosed to the Secretary of the Senate by filing the completed *Employee Pre-Travel Authorization* and the *Employee Post-Travel Disclosure of Travel Expenses* (Form RE-1 and Form RE-2), along with a copy of the *Private Sponsor Travel Certification Form*, and all relevant attachments (e.g., the private sponsor's invitation and itinerary) **within 30 days of the conclusion of Privately Sponsored Travel**.

Consistent with these standards and Committee precedent, Pew's factual representations, it appears that it is permissible for you to accept necessary expenses from Pew in connection with this trip, provided that the actual travel and travel-related expenses conform to the information and materials you provided, and the travel and all required documents are disclosed to the Secretary of the Senate (Office of Public Records).

Finally, Senate Rule 34 requires a reporting individual⁷ on their financial disclosure report, to make an annual disclosure of the receipt of payments or reimbursements under Senate Rule 35 from a private sponsor for officially-related travel expenses where, in the aggregate,

⁵ The term "*de minimis*" has a specific definition. See *Select Committee on Ethics Regulations and Guidelines for Privately Sponsored Travel – Glossary of Terms* at 3.

⁶ See *Select Committee on Ethics Regulations and Guidelines for Privately Sponsored Travel* at 5; see also *Select Committee on Ethics Regulations and Guidelines for Privately Sponsored Travel – Glossary of Terms* at 2-3.

⁷ A reporting individual is someone whose salary equals or exceeds 120% of the basic rate of pay for GS-15 (\$141,022 for CY 2023) or is a political fund designee and is required to file financial disclosure reports.

travel expenses exceed \$480 from that sponsor during a calendar year. However, if a Member, officer, or employee properly reports the receipt of necessary expenses for such travel to the Secretary of the Senate within 30 days of the travel, as discussed above, the travel expenses need not be disclosed a second time on their financial disclosure report.

I hope you find this information helpful. If you have any additional questions, please do not hesitate to contact the Committee.

Sincerely,



Shannon Hamilton Kopplin
Chief Counsel and Staff Director

Enclosure: Travel Checklist

CHRISTOPHER A. COONS, DELAWARE, CHAIRMAN
JAMES LANKFORD, OKLAHOMA, VICE CHAIRMAN

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United States Senate

SELECT COMMITTEE ON ETHICS

October 24, 2023

Melinda Linquist
Office of Senator Patty Murray
United States Senate
Washington, DC 20510

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from a private individual or entity, in connection with a Member's, officer's, or employee's official Senate duties. Incorporating reforms from the Honest Leadership and Open Government Act of 2007 (HLOGA), Pub. L. 110–81 (2007), Senate Rule 35.2 permits Members, officers, and employees to accept privately sponsored travel only with the prior written approval of the Committee.

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Under Senate Rule 35, Senate staff must receive advance authorization signed by the Member or officer under whose direct supervision the individual works in order to accept payment or reimbursement for necessary expenses related to fact-finding travel. Further, such authorization and expenses must be disclosed to the Secretary of the Senate by filing the completed *Employee Pre-Travel Authorization* and the *Employee Post-Travel Disclosure of Travel Expenses* (Form RE-1 and Form RE-2), along with a copy of the *Private Sponsor Travel Certification Form*, and all relevant attachments (e.g., the private sponsor's invitation and itinerary) **within 30 days of the conclusion of Privately Sponsored Travel**.

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⁷ A reporting individual is someone whose salary equals or exceeds 120% of the basic rate of pay for GS-15 (\$141,022 for CY 2023) or is a political fund designee and is required to file financial disclosure reports.

travel expenses exceed \$480 from that sponsor during a calendar year. However, if a Member, officer, or employee properly reports the receipt of necessary expenses for such travel to the Secretary of the Senate within 30 days of the travel, as discussed above, the travel expenses need not be disclosed a second time on their financial disclosure report.

I hope you find this information helpful. If you have any additional questions, please do not hesitate to contact the Committee.

Sincerely,



Shannon Hamilton Kopplin
Chief Counsel and Staff Director

Enclosure: Travel Checklist

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:

Melinda (Mindi) Linquist

Employing Office/Committee:

Senator Murray

Private Sponsor(s):

Pew Charitable Trust

Destination(s):

Gettysburg, PA

Travel Dates:

October 27-29

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. This trip will teach me lessons in leading a team, working collaboratively with other offices. It is also important to build relationships and this weekend will help me do that as well.

Do you have an accompanying family member or spouse on this trip? **Name and Relationship to Traveler:**

☐

(signify "yes" by checking box)

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

10/23/20

Date

Oct 23, 2023

Signature of Employee

M. Linquist

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)

Patty Murray

(Print Senator's/Officer's Name)

hereby authorize

Melinda Linquist

(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)

Oct 23, 2023

Date

Patty Murray

Signature of Supervising Senator/Officer