

**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.

RECEIVED  
SECRETARY OF THE SENATE  
Date/Time Stamp  
2023 MAR 22 PM 5:17

**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):**

**Travel Dates:**

World Vision Inc

February 23-24

**Name of accompanying family member (if any):**

**Relationship to Traveler:**

**Total Expenses**

| Transportation Expenses | Lodging Expenses | Meals Expenses | Other Expenses (Amount & Description) |
|-------------------------|------------------|----------------|---------------------------------------|
| \$382                   | \$159            | \$134.27       | UN security \$198, Room rental \$75   |

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.

3/21/23

Margarita Angel

Date

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.

3-21-23

Date

Signature of Supervising Senator/Officer

Date/Time Stamp:

**EMPLOYEE PRE-TRAVEL AUTHORIZATION**Amended. Originally Submitted  
on January 23, 2023

**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](http://ethics.senate.gov). Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Name of Traveler: Margarita "Maggie" AngelEmploying Office/Committee: Senator Richard J. DurbinPrivate Sponsor(s) (list all): World Vision IncTravel date(s): February 23 and 24, 2023*Note: If you plan to extend the trip for any reason you must notify the Committee.*Destination(s): New York, New York

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

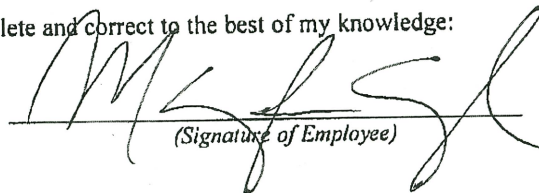
The trip will focus on the work of the United Nations with respect to women, girls and hunger, which are part of the traveler's official policy responsibilities. Policy responsibilities include supporting the Senator's role on state and foreign operations appropriations subcommittee which supports the work of the United Nations in regards to human rights and development aid.

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:

2/7/23  
 (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, Richard J. Durbin hereby authorize Margarita Angel  
 (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) ☐

2-7-23  
 (Date)

  
 (Signature of Supervising Senator/Officer)





January 12, 2023

Maggie Angel  
Legislative Assistant  
Sen. Durbin (D-IL)

Dear Ms. Maggie Angel,

World Vision is pleased to invite you on a bipartisan, bicameral Staff Learning Trip to New York City, where you will have the opportunity to learn more about the role of the United Nations in addressing global poverty, maintaining international peace and security, and promoting human rights, with a particular focus on UN programs addressing the needs of women and children. The trip will take place from **February 23 – 24, 2023**.

As a founding member of the United Nations and host of its headquarters, the United States has played an important leadership role in the organization for more than seventy years. The United States also remains the largest donor to the United Nations, with about one-fifth of the annual U.S. foreign aid budget supporting UN agencies and programs. From peacekeeping missions that promote stability, to its work on nonproliferation, counterterrorism, human rights, and humanitarian relief and development, the UN is a force-multiplier for US foreign assistance.

In New York, you'll have the chance to tour the United Nations, meet with the USUN Mission, and learn more about the work of UN agencies like UNFPA and UNICEF to address the needs of women and children globally. Please see the attached draft trip itinerary for more details and please reach out if you have any questions.

I hope that you will be able to participate in this educational and exciting trip. We kindly ask that you RSVP as soon as possible as we have limited slots. Please RSVP [here](#).

Sincerely,

A handwritten signature in cursive script, appearing to read "Lisa Bos".

Lisa Bos  
Senior Director of Government Relations  
World Vision US

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*World Vision is a Christian humanitarian organization conducting relief, development, and advocacy activities in its work with children, families, and their communities in nearly 100 countries to help them reach their full potential by tackling the causes of poverty and injustice. World Vision serves all people regardless of religion, race, ethnicity, or gender.*

If you have any questions or concerns, please do not hesitate to contact me at [kchibwe@worldvision.org](mailto:kchibwe@worldvision.org) or call on 202-572-6355.

Thank you,

Kasapo

## 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.

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1. Sponsor(s) of the trip (please list all sponsors): World Vision Inc
  2. Description of the trip: The trip will educate staff on the work of the United Nations in women and children's health, which is supported by U.S. foreign assistance.
  3. Dates of travel: February 23-24, 2023
  4. Place of travel: New York, New York
  5. Name and title of Senate invitees: See appendix A
  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:

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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:

World Vision has the sole responsibility of organizing and conducting the trip. Trip expenses are being fully supported through a grant from the Bill & Melinda Gates Foundation, but the foundation has had no role in organizing the trip and will not attend events.

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

World Vision is a child-focused international humanitarian and development organization working in nearly 100 countries. In many countries, World Vision partners with U.N. agencies. World Vision seeks through this trip to educate staff on the mission and work of the U.N. and how it aligns with World Vision's work.

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

World Vision has sponsored several international trips for congressional staff over the past 7-8 years, most recently to Malawi (2019). World Vision sponsored a congressional trip similar to this trip in October 2021.

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

World Vision engages on a broad range of educational activities directed toward Congressional staff,

including educational briefings, one on one meetings, policy papers, and learning trips. The Gates

Foundation does not lobby but similarly engages in educational meetings with Congressional offices.

16. Total Expenses for Each Participant:

|                                                                                                        | Transportation Expenses                                                          | Lodging Expenses | Meal Expenses | Other Expenses              |
|--------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------|------------------|---------------|-----------------------------|
| <input checked="" type="checkbox"/> Good Faith estimate<br><br><input type="checkbox"/> Actual Amounts | \$410:<br>\$310 (Amtrak roundtrip train ticket) \$100 (Van transport within NYC) | \$159            | \$180         | \$185 (Room rental and A/V) |

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:

This trip has been arranged specifically with regard to congressional participation.

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

New York City is the location of the U.N. headquarters and related offices/agencies.

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

Westin New York Grand Central, 212 East 42nd Street, New York, NY 10017

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

It is within walking distance of UN headquarters and aligned with GSA domestic per diem requirements

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:

Lodging expenses will be aligned with the per diem rate for FY2023 (\$159). We estimate we will be slightly over the maximum per diem for meals and incidentals.

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:

Round-trip transportation will be provided between Washington DC and NYC on Amtrak Acela business class. In New York, the means of transportation will be via a rented van that can accomodate the group

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

None

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Signature of Travel Sponsor: Lisa Bos

Name and Title: Lisa Bos, Senior Director of Government Relations

Name of Organization: World Vision Inc

Address: 300 I Street NE, Washington, DC 20002

Telephone Number: 202-294-5955

Fax Number: \_\_\_\_\_

E-mail Address: lbos@worldvision.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 23-24, 2023 trip

to New York, NY *Dates of Travel (Month Day, Year)*  
*Place of Travel* is true, complete, and correct.

Signature of Travel Sponsor: 

Name and Title: Senior Program Officer

Name of Organization: Bill & Melinda Gates Foundation

Address: 1300 I St NW, Washington, DC 20005

Telephone Number: 615-504-2842

Fax Number: \_\_\_\_\_

E-mail Address: true.pfeifer@gatesfoundation.org



**World Vision NYC Congressional Staff Learning Trip:**  
**February 23 and 24, 2023**

**February 23, 2023**

12:00 p.m. – Amtrak Acela Departs Union Station. Pre-reads available to review on train.

2:47 p.m. – Arrival at Moynihan Train Hall, New York City

3:00 p.m. – 4:00 p.m. – Transit to hotel and check in  
Westin New York Grand Central  
212 East 42nd Street  
New York NY 10017

4:30 p.m. – 5:30 p.m. – Welcome session: group introductions, review of the agenda. (Westin, Track 61 Conference Room)

6:00 p.m. – 7:30 p.m. – Working dinner. Discussion topic: The Work of the United Nations in Addressing the Needs of Women and Children. Participants in the dinner will hear from World Vision, United Nations Population Fund (UNFPA), and the United Nations Children's Fund (UNICEF) about their work in meeting the needs of vulnerable women and girls around the world.

Speakers –

Lisa Bos, Senior Director of Government Relations, World Vision

Mike Beard, Executive Director, UN Foundation Advocacy

Sarah Craven, Director, United Nations Population Fund Washington Office

Aisha Sabar, Senior Advisor and Team Lead, Public Partnership Division, UNICEF

Additional speakers TBC

Overnight – Westin New York Grand Central

**February 24, 2023**

8:00 a.m. – Meet in hotel lobby, room check out. Walk to UN building, Delegates Dining Room.

8:45 a.m. – 10:00 a.m. – Working breakfast with U.S. United Nations (USUN) Mission. Congressional staff will learn more about the role of the USUN mission and current U.S. government priorities within the United Nations, including women and girls and recent conflicts/crisis.

Speaker – Amb. Lisa Carty, Representative of the United States of America to the Economic and Social Council of the United Nations and Alternate Representative of the United States to the Sessions of the General Assembly of the United Nations

10:15 a.m. – 11:45 a.m. – Presentations from UNFPA on their mission and work around the world. Staff will learn more about how UNFPA responds to the critical needs of women and girls, including through partnerships with faith-based organizations.

Speaker – Dr. Leila Joudane, UNFPA Representative to UNFPA Philippines

12:00 p.m. – 1:15 p.m. – Working lunch. Discussion topic: How the hunger crises is impacting women and girls. Congressional staff will hear how the current global hunger crises is having a

significant impact on women and girls from increased child marriage to nutritional outcomes and programs that are working to address growing needs.

Speakers –

Jacob Watson, Program Manager and Global Hunger Response Lead, World Vision

Aisha Sabar, Senior Advisor and Team Lead, Public Partnership Division, UNICEF

Additional speakers TBC

1:15 p.m. – 2:00 p.m. – Brief educational tour of U.N. building, including the General Assembly.

2:00 p.m. – 2:30 p.m. – Transit to New York Penn Station/Moynihan Train Hall

3:00 p.m. – Depart on Acela back to DC

5:54 p.m. – Arrival in DC, Union Station

| <i>Staff Name</i>                            | <i>Office</i>           |
|----------------------------------------------|-------------------------|
| Abbie Killian (LA, Women's Issues)           | Rep. Allred (D-TX)      |
| Thomas Kim (LC)                              | Sen. Merkley (D-OR)     |
| Arion Laws (LA)                              | Rep. Jacobs (D-CA)      |
| Sophia Schilling (LA)                        | Rep. McCollum (D-Minn)  |
| John-Mark Kolb (LD)                          | Rep. Salazar (R-FL)     |
| Troy Dougall (Senior LA)                     | Rep. Curtis (R-UT)      |
| Michael McLaughlin                           | Rep. Connolly (D-VA)    |
| Maggie Angel (LA, FP)                        | Sen. Durbin (D-IL)      |
| Amelia Faraco-Hadlock                        | Rep. Wexton (D-VA)      |
| Alec Daman                                   | Rep. Huizenga (R -MI)   |
| Meghan Gallagher (committee staff)           | HFAC Minority           |
| Mary Vigil (committee staff)                 | HFAC Minority           |
| Sarita Vanka (committee staff)               | SFOPS minority          |
| Katherine Hitchcock                          | Sen. Young (R-IN)       |
| Nathan Heiman (LD, FP, Women's Issues)       | Sen. Moran (R-KS)       |
| Zachary Hosford (National Security Advisor)  | Sen. Schatz (D-HI)      |
| Salvador Ortega (FP LA)                      | Sen. Boozman (R-AR)     |
| Adam Kozloski                                | Sen. Ernst (R-IA)       |
| Molly Joseph (FP LA)                         | Rep. Wagner (R-MO)      |
| Thomas Carnes                                | Rep. Andy Kim (D-NJ)    |
| Rachel Emmons (LA Women's Issues)            | Rep. Perry (R-PA)       |
| Sarah Markley                                | HFAC Minority           |
| Sarah Seitz                                  | Sen. Lankford (R-OK)    |
| Jimmy Stringer (Senior Policy Advisor, FP)   | Sen. Hyde-smith (R-MS)  |
| Dana Richter (Senior Policy Advisor, health) | Sen. Capito (R-WV)      |
| Maggie Angel (LA, FP)                        | Sen. Durbin (D-IL)      |
| Joel Hirst (FP)                              | Sen. Bill Cassidy       |
| Megan Ruane (LA, FP, Women's Issues)         | Rep. Dean (D-PA)        |
| Hunt VanderToll (LD, FP)                     | Rep. Andy Barr (R-KY)   |
| Caitriona Rafferty (Women's Issues LA)       | Rep. Waltz (R-FL)       |
| Anna May, LA                                 | Rep. Guest (R-MS)       |
| Michael DeFilippis (LD, FP)                  | Rep. Malliotakis (R-NY) |
| Will Strother (Senior LA, FP)                | Rep. Burchett (R-TN)    |
| William Crouch                               | Sen. Tillis (R-NC)      |
| Robert Zarate (NS advisor)                   | Sen. Hagerty (R-TN)     |
| Jessica Elledge (Senior Adviser, FP)         | Sen. Murphy (D-CT)      |
| Morgan Murphy (LA, FP)                       | Sen. Tuberville (R-AL)  |
| Josh Altman (LA, FP)                         | Sen. Ossoff (D-GA)      |
| Gabriella Vesey                              | Sen. Warnock (D-GA)     |
| Charles E. Cogar (LD)                        | Sen. Tim Scott (R-SC)   |
| Amelia Faraco-Hadlock                        | Rep. Wexton (D-VA)      |
| Kat Cosgrove (LD)                            | Rep. Houlahan (D-PA)    |
| Giselle Reynolds                             | Rep. Mario Diaz-Balart  |
| Dan Adelstein                                | Sen. Rounds (R-SD)      |
| Alex Igleheart                               | Rep. Wenstrup (R-OH)    |

|                          |                             |
|--------------------------|-----------------------------|
| Troy Dougall             | Rep. Curtis (R-UT)          |
| Danielle Stoebe          | Rep. Tenney (R-NY)          |
| Katie Wallacch           | Rep. Jackson (R-TX)         |
| Caleb Kostreva           | Rep. Buck (R-CO)            |
| Nicolas Widmyer          | Rep. Spanberger (D-VA)      |
| Kit Devine               | Rep. Costa (D-CA)           |
| Joel Cohen               | Rep. Dina Titus (D-NV)      |
| Matthew Wall             | Rep. Jerry Carl (AL-01)     |
| Caroline Bender          | Rep. Juan Ciscomani (AZ-06) |
| Abby McHan               | Rep. Michael Cloud (TX-27)  |
| Dawn-Marie Sullivan      | Rep. Andrew Clyde (GA-09)   |
| Don Barber               | Rep. Jake Ellzey (TX-06)    |
| Andrew Korst             | Rep. Scott Franklin (FL-18) |
| Elizabeth Joseph         | Rep. Michael Guest (MS-03)  |
| Jake Middlebrooks        | Rep. Jake LaTurner (KS-02)  |
| Ben VanSickle            | Rep. Ryan Zinke (MT-01)     |
| Thomas Kim (LC)          | Sen. Merkley (D-OR)         |
| Molly Cole               | Sen. Van Hollen (D-MD)      |
| Trevor Tenbrink          | Rep. Huizenga (R -MI)       |
| Dylan Frost (LA)         | Rep. Hill (R-AR)            |
| Leafaina Tavai Yahn (LA) | Radewagen (R-AS)            |
| Addy Allegretti (LA)     | Davidson (R-OH)             |
| Tanner Brown             | Baird (R-IN)                |
| Mary Ellen Richardson    | LaHood (R-IL)               |
| Sophia Schilling         | Rep. McCollum (D-Minn)      |



**Email**[abbie.killian@mail.house.gov](mailto:abbie.killian@mail.house.gov)[Thomas\\_Kim@merkley.senate.gov](mailto:Thomas_Kim@merkley.senate.gov)[Arion.Laws@mail.house.gov](mailto:Arion.Laws@mail.house.gov)[sophia.schilling@mail.house.gov](mailto:sophia.schilling@mail.house.gov)[JohnMark.Kolb@mail.house.gov](mailto:JohnMark.Kolb@mail.house.gov)[Troy.Dougall@mail.house.gov](mailto:Troy.Dougall@mail.house.gov)[Matthew.McLaughlin@mail.house.gov](mailto:Matthew.McLaughlin@mail.house.gov)[maggie\\_angel@durbin.senate.gov](mailto:maggie_angel@durbin.senate.gov)[amelia.faraco-hadlock@mail.house.gov](mailto:amelia.faraco-hadlock@mail.house.gov)[Alec.Daman@mail.house.gov](mailto:Alec.Daman@mail.house.gov)[Meghan.Gallagher@mail.house.gov](mailto:Meghan.Gallagher@mail.house.gov)[mv.vigil@mail.house.gov](mailto:mv.vigil@mail.house.gov)[sarita\\_vanka@appro.senate.gov](mailto:sarita_vanka@appro.senate.gov)[katherine\\_hitchcock@young.senate.gov](mailto:katherine_hitchcock@young.senate.gov)[nathan\\_heiman@moran.senate.gov](mailto:nathan_heiman@moran.senate.gov)[zachary\\_hosford@schatz.senate.gov](mailto:zachary_hosford@schatz.senate.gov)[salvador\\_ortega@boozman.senate.gov](mailto:salvador_ortega@boozman.senate.gov)[adam\\_kozloski@ernst.senate.gov](mailto:adam_kozloski@ernst.senate.gov)[molly.joseph@mail.house.gov](mailto:molly.joseph@mail.house.gov)[tom.carnes@mail.house.gov](mailto:tom.carnes@mail.house.gov)[rachel.emmons@mail.house.gov](mailto:rachel.emmons@mail.house.gov)[sarah.markley@mail.house.gov](mailto:sarah.markley@mail.house.gov)[sarah\\_seitz@lankford.senate.gov](mailto:sarah_seitz@lankford.senate.gov)[jimmy\\_stringer@hydesmith.senate.gov](mailto:jimmy_stringer@hydesmith.senate.gov)[dana\\_richter@capito.senate.gov](mailto:dana_richter@capito.senate.gov)[maggie\\_angel@durbin.senate.gov](mailto:maggie_angel@durbin.senate.gov)[joel\\_hirst@cassidy.senate.gov](mailto:joel_hirst@cassidy.senate.gov)[megan.ruane@mail.house.gov](mailto:megan.ruane@mail.house.gov)[hunt.vandertoll@mail.house.gov](mailto:hunt.vandertoll@mail.house.gov)[caitrona.rafferty@mail.house.gov](mailto:caitrona.rafferty@mail.house.gov)[anna.may@mail.house.gov](mailto:anna.may@mail.house.gov)[michael.defilippis@mail.house.gov](mailto:michael.defilippis@mail.house.gov)[will.strother@mail.house.gov](mailto:will.strother@mail.house.gov)[william.crouch@tillis.senate.gov](mailto:william.crouch@tillis.senate.gov)[robert\\_zarate@hagerty.senate.gov](mailto:robert_zarate@hagerty.senate.gov)[jessica\\_elledge@murphy.senate.gov](mailto:jessica_elledge@murphy.senate.gov)[morgan\\_murphy@tuberville.senate.gov](mailto:morgan_murphy@tuberville.senate.gov)[josh\\_altman@ossoff.senate.gov](mailto:josh_altman@ossoff.senate.gov)[Gabriella\\_Vesey@warnock.senate.gov](mailto:Gabriella_Vesey@warnock.senate.gov)[charles\\_cogar@scott.senate.gov](mailto:charles_cogar@scott.senate.gov)[amelia.faraco-hadlock@mail.house.gov](mailto:amelia.faraco-hadlock@mail.house.gov)[Kat.Cosgrove@mail.house.gov](mailto:Kat.Cosgrove@mail.house.gov)[Gisselle.Reynolds@mail.house.gov](mailto:Gisselle.Reynolds@mail.house.gov)[dan\\_adelstein@rounds.senate.gov](mailto:dan_adelstein@rounds.senate.gov)[alex.igleheart@mail.house.gov](mailto:alex.igleheart@mail.house.gov)

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## United States Senate

### SELECT COMMITTEE ON ETHICS

February 9, 2023

Margarita Angel  
Office of Senator Richard J. Durbin  
United States Senate  
Washington, DC 20510

Dear Ms. Angel:

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 Staff Learning Trip in New York, NY, on February 23–24, 2023, sponsored by World Vision Inc. Provided that you adhere to the guidance set forth below, it appears that it is permissible for you to accept necessary expenses from World Vision Inc. in connection with this trip.

### Background

Based on your communication with the Committee, the background in this matter is as follows.<sup>1</sup> You are employed as a Legislative Assistant in the Office of Senator Richard J. Durbin. World Vision Inc. invited you to travel to the Staff Learning Trip in New York, NY, on February 23–24, 2023. World Vision Inc. certified to the Committee that it will pay the necessary expenses<sup>2</sup> 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. World Vision Inc. has also certified that it does not retain or employ a registered lobbyist or agent of a foreign principal and that no registered lobbyist or agent of a foreign principal will accompany you at any point throughout your trip.<sup>3</sup>

### 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, 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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<sup>1</sup> If this letter does not correctly recite the facts, contact the Committee immediately.

<sup>2</sup> 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.

<sup>3</sup> The term “any point throughout your trip” has a specific definition. *See id.* at 2.



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.<sup>4</sup> 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.<sup>5</sup>

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, and World Vision Inc.'s factual representations, it appears that it is permissible for you to accept necessary expenses from World Vision Inc. 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).

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<sup>4</sup> 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.

<sup>5</sup> 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.



Finally, Senate Rule 34 requires a reporting individual, 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, travel expenses exceed \$415 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

## 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                                     |
|----------------|----------------|-------------------------------------------------|
| Meals          | \$134.27       | Beverage by consumption additional costs        |
| Other          | \$273          | UN in session resulted in higher security costs |

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: