

## RE-3 Senators and Officers 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.**

Date/Time Stamp

**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 Aspen Institute, Inc. (Congressional

**Travel Dates:**

August 26-September 4, 2023

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

Margaret Cheney

**Relationship to Traveler:**

Spouse

**Total Expenses**

| Transportation Expenses | Lodging Expenses | Meals Expenses | Other Expenses (Amount & Description) |
|-------------------------|------------------|----------------|---------------------------------------|
| \$9,705                 | \$1,075          | \$560          | \$1,384                               |

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

- The final **Private Sponsor Travel Certification Form** with all attachments
- The final invitation
- The final approved itinerary

*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.*

*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.*

9/26/2023

Peter Welch

Date

Printed Name of Senator/Officer

Signature of 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:





**CONGRESSIONAL  
PROGRAM**  
aspen institute

**The Honorable Peter Welch**

**U.S. Senate  
Washington, DC 20515-0306**

Dear Senator Welch,

I would like to invite you and Margaret to participate in a bipartisan, bicameral congressional conference on ***Energy Security & the New Energy Economy: Overcoming Challenges and Bottlenecks in Oslo, Norway, August 26-September 1, 2023***. Participants would depart the U.S. on Saturday, August 26 and return to the U.S. Friday, September 1. We have limited space, so this invite does not guarantee a seat at the conference table. If you would like to participate, please get back to us **by May 5, 2023**.

2022 thrust energy security to the fore of public consciousness, shining a spotlight on the vulnerability of our allies and raising important questions about how to balance a difficult set of competing demands to ensure uninterrupted and affordable energy for all. Meanwhile, Congress made historic appropriations aimed at ushering forward a new energy future for the United States and reinforcing American clean energy competitiveness while decreasing our energy reliance on foreign powers. In Oslo later this summer, we will confront these issues and explore the various interplays, tradeoffs, and opportunities that they implicate. A detailed agenda is forthcoming.

Attendance is by invitation only, no outside observers, no lobbyists, no congressional staff, and no media. All conference sessions are off-the-record. No foreign governments or special interest funds are accepted to fund the Aspen Institute Congressional Program. As required by the House and Senate ethics rules, we will provide congressional participants with ethics private sponsor forms completed and signed.

Travel expenses, including airfare, meals and lodging will be paid for by the Aspen Institute; no expenses for entertainment or recreation are paid for in compliance with ethics rules.

The Congressional Program is part of the Aspen Institute, Inc. a nonprofit organization founded in 1950. The Congressional Program is celebrating its 40th year this year and was created to promote leadership on public policy by bringing together legislators from both political parties with internationally renowned scholars for high level discussions and analysis. Since our program's inception, more than 497 members of Congress have participated in the 154 domestic and international conferences.

We hope you can join us for this important conference.

Sincerely,

**Charlie Dent**

Charles W. Dent  
Former Member, U.S. Congress (PA-15th, 2005-2018)  
Vice President and Executive Director  
Aspen Institute Congressional Program  
2300 N Street, NW, Suite 700, Washington, DC 20037  
Mobile: (484) 553-1837



## Energy Security & The New Energy Economy: Overcoming Challenges and Bottlenecks

August 28 - September 1, 2023 | Oslo & Bergen, Norway

### AGENDA

#### **SATURDAY, AUGUST 26:**

##### ***Participants depart the US***

*Sen. Peter Welch, and his wife, Margaret Cheney depart Boston at 11:35 pm on Icelandair 632.*

#### **SUNDAY, AUGUST 27:**

##### ***Participants arrive in Oslo***

*Sen. Welch and Ms. Cheney arrive in Oslo at 3:25 pm on Icelandair 322 and join the conference for the first session.*

***5:25-6:25 PM: Executive time and prepare for working dinner***

##### **7 – 9 PM: Working Dinner**

Seating is arranged to expose participants to a diverse range of views and provide the opportunity for a meaningful exchange of ideas. Scholars and lawmakers are rotated daily. Discussions will focus on United States energy policy broadly, and in particular, the ways in which lawmakers play a role in enhancing energy security while advancing decarbonization solutions in parallel, and how these dual imperatives might be complimentary.

#### **MONDAY, AUGUST 28:**

**6:45 – 8 AM: Private breakfast is available**

**8 – 9 AM: Breakfast Conversation with Julio Friedmann, Chief Scientist and Chief Carbon Wrangler, Carbon Direct**

Dr. Julio Friedmann is an internationally recognized expert on carbon management. His work concerns how to reduce and remove carbon dioxide from the air and oceans through investment, science, and business. Dr. Friedmann will outline the topic of carbon management for the conference participants, contextualize the planned site visits, facilitate dialogues about the role of carbon management in climate change policy, and address associated policy questions.

#### **9 – 9:15 AM: Introduction and Framework of the Conference**

This conference is organized into roundtable conversations, working lunches, site visits, and pre-dinner remarks. This segment will highlight how the conference will be conducted, how those with questions will be recognized, and how responses will be timed to allow for as much engagement as possible.

#### **Speaker:**

**Charlie Dent**, *Vice President, Aspen Institute; Executive Director, Congressional Program*

#### **9:15 – 11 AM: Roundtable Discussion**

##### ***Building Cleaner and Faster: Making the Permitting System Work for 21st Century Energy Needs***

Achieving net-zero emissions by 2050 is ecologically essential, technologically feasible, economically achievable, but procedurally impossible. How can Congress reimagine the permitting system to reinforce security and environmental imperatives?

#### **Speakers:**

**Jim Connaughton**, *CEO, Nautilus Data Technologies; Former Chair of the White House Council on Environmental Quality*

**Katie McGinty**, *Vice President & Chief Sustainability, Government & Regulatory Affairs Officer, Johnson Controls; Former Chair of the White House Council on Environmental Quality*

#### **11 – 11:15 AM: Break**

#### **11:15 AM – 1:15 PM: Roundtable Discussion:**

##### ***A Critical Minerals Policy for the United States***

Critical minerals like cobalt, lithium, nickel, and copper (among others) have emerged as key enabling resources for the clean energy transition, but the difficulty of securely accessing these raw materials will be a barrier in the decades to come. These minerals are essential building blocks of wind turbines, electric car batteries, and other clean energy infrastructure, and therefore a steady supply to the West is crucial to meet climate goals. Sustainably and ethically sourcing the minerals necessary to fight climate



change raises a host of challenges related to geopolitical competition, domestic mining and processing, and technological innovation. This session will explore these roadblocks and highlight what actions Congress could take to secure the critical minerals supply necessary for the U.S. new energy economy to thrive.

**Speakers:**

**Frank Fannon**, *Managing Director, Fannon Global Advisors; former Assistant Secretary of State for Energy Resources*

**Jonathan Pershing**, *Program Director, Environment, Hewlett Foundation; Former U.S. State Department Special Envoy for Climate; former Special Envoy for Climate Change, U.S. Department of State*

**1:15 – 2:15 PM: Working Lunch**

During lunch, Members will discuss how permitting challenges and minerals scarcity might be examples of “bottlenecks” preventing progress on advancing the dual imperatives of energy security and addressing climate change. Using these examples as a starting point, members will consider the role that the policy process plays in addressing bottlenecks, and how technological and economic factors could be brought to bear alongside the policy process.

**2:45 – 4 PM: Visit to the Storting, the Norwegian Parliament**

Founded in 1814, Storting is the supreme, unicameral legislature of Norway that: (1) passes new legislation, and amends and repeals existing legislation; (2) determines annual state revenues and expenditures by considering and adopting the Fiscal Budget; (3) supervises the Government and public administration; (4) authorizes plans and guidelines for the activities of the State and debates broader domestic and foreign policy issues. During the visit to the Storting, Members of Congress will have the opportunity to explore the historic building and learn more about their Norwegian counterparts’ work.

**4:20 PM: Group boards buses and is transported to the residence of the U.S. Ambassador to Norway to clear security protocols to enter residence**

**4:40 PM: Bus arrives at the residence and group, all with passports in hand, clear through security in 20 minutes**

**5 – 6:30 PM: Meeting and Standing Light Dinner with the U.S. Ambassador to Norway, Marc Nathanson and Jane Nathanson**

The discussion will focus on issues of interest to members of Congress.

**6:30 – 7 PM: Group boards buses and returns to hotel**

**TUESDAY, AUGUST 29:****7-8:20 AM: Breakfast****8:30 - 9:45 AM: Roundtable Discussion:*****Norwegian Energy Leadership: How Norway's Success Informs America's Energy Transition***

Norway is successfully transitioning into green energy, while continuing to generate traditional energy sources. The country is also far advanced in managing carbon. The Ministers of Petroleum & Energy and Trade & Industry will share their experiences.

**Speakers:**

**Bjelland Eriksen**, *State Secretary Andreas, the Ministry of Petroleum and Energy of Norway*

**Jan Christian Vestre**, *Minister of Trade and Industry of Norway*

**9:45 – 9:55 AM: Break****9:55 – 11 AM: Roundtable Discussion*****Geopolitics of Energy: Reinforcing Allies' Energy Independence***

In many NATO member countries, the Russian invasion of Ukraine and the subsequent chaos in world energy markets thrust into the forefront of public consciousness the risks posed by energy supply chains that are vulnerable to disruptions in geopolitical equilibrium. This session will address in what ways the United States might be positioned to reinforce allies' energy security and deprive adversaries of opportunities to use energy flows as an instrumentality of pressure.

**Speaker:**

**Jason Bordoff**, *Founding Director, Center on Global Energy Policy; Professor of Professional Practice, Columbia SIPA; Co-Founding Dean, Columbia Climate School*

**11 – 11:45: Working Lunch**

Discussion continues between members of Congress and scholars, focusing on the transatlantic energy relationship between the United States and its allies, including Norway. Members will consider how recent global events have changed some of the fundamental assumptions that have underpinned the energy system, and the ways in which newly reinvigorated transatlantic ties present policy opportunities for addressing the dual imperatives of energy security and addressing climate change.

**11:45 AM – Noon: Group boards buses and departs at noon for Brevik, Norway**

**Noon – 2:15 PM: Travel to Heidelberg Materials Sement Norge – Brevik Carbon Capture and Storage (CCS)**

**2:30 – 3:30 PM: Educational Site Visit**

**Heidelberg Materials Sement Norge – Brevik Carbon Capture and Storage**

Cement production is a major contributor to global greenhouse gas emissions, both from the release of carbon dioxide contained in limestone (one of the key ingredients of cement) and the energy needed to heat the limestone during the cement manufacturing process. We will visit an innovative cement manufacturing facility, the first industrial-scale carbon capture and storage (CCS) project at a cement production facility. The Northern Lights facility, which we will visit later in the week, is the ultimate destination for this captured carbon.

**3:45 – 5:45 PM: Group returns to Oslo**

**6 – 7 PM: Electric Ferry – New Energy Efficient Mode of Water Transport**

Critical to success in the energy transition will be the electrification of the transportation sector, including short-haul maritime vessels like ferries. The world's first electric ferry was put into operation in Norway in 2015 with the manufacturer projecting emissions to be cut by 95 percent and costs by 80 percent compared to a fuel-powered ferry. Today, Norway has about 80 electric commuter ferries in operation and built and operates the first high-speed ferry, a multi-stop commuter route, which reduces emissions in the region the equivalent of taking 60 buses off the road. Participants will ride an electric ferry to dinner with commentary by a local expert.

**7 – 9 PM: Working Dinner**

Seating is arranged to expose participants to a diverse range of views and provide the opportunity for a meaningful exchange of ideas. Scholars and lawmakers are rotated daily. Members today have seen examples of electrification and carbon management, which are two of many essential tools that will be necessary for the new energy economy of the future. What other ways do conference attendees view as essential for the new energy economy? How might new approaches enhance energy security in the process?

**WEDNESDAY, AUGUST 30: (Overnight in Bergen)**

**7 – 8:30: Breakfast Available**



**8:30 – 10:15 AM: Roundtable Discussion**  
***U.S. Leadership in Clean Energy Innovation***

The United States has emerged as a leader in clean energy innovation, pioneering cutting edge technologies that will help define the energy system of the future. Adding to the momentum is recently enacted, robustly bipartisan legislation which has made unprecedented investments in clean energy demonstration and development, world class universities that train the next generation of scientists and engineers, and the United States National Laboratories which have embraced a clean energy innovation agenda. This session will seek to address what it will take for the United States to maintain and expand on its status as a world leader in clean energy innovation.

**Speakers:**

**Robin Millican**, *Senior Director, Breakthrough Energy*

**Rich Powell**, *CEO, ClearPath*

**10:15 – 10:45 AM: Break and check out of hotel**

**10:45 – 11:45 AM: Working Lunch**

Discussion continues between members of Congress and scholars on clean energy innovation. Members will discuss how the United States can (continue to) lead global energy innovation, positioning the United States as a key engine of new opportunities in the energy transition and the energy economy of the future. In what ways can energy innovation enhance the national security of the United States?

**Noon: Bus departs for Oslo airport to fly to Bergen**

**1 – 2 PM: Clear Oslo airport security and prepare to board flight**

**2:50 PM: SAS Flight 269G departs Oslo**

**3:40 PM: SAS Flight 269G Arrives in Bergen**

**3:40 – 5 PM: Group exits airport and boards buses for transport to hotel**

**5 – 6 PM: Group is transported to Bergen hotel and completes hotel check-in**

**8 – 10 PM: Working Dinner**

Seating is arranged to expose participants to a diverse range of views and provide the opportunity for a meaningful exchange of ideas. Scholars and lawmakers are rotated

daily. Discussions will focus on how policymakers might navigate the emergent tension between the need for global cooperation to combat climate change and increasingly pressing global power competition. In what ways does this tension influence American energy security and climate change imperatives?

### **THURSDAY, AUGUST 31: (Overnight in Bergen)**

**6:30 – 8:34 AM: Breakfast Available**

#### **9 – 10:30 AM: Roundtable Discussion**

##### ***A New Era of Global Competition: Trade, Climate Cooperation, and National Security***

The United States' trade agenda is undergoing a period of historic upheaval. Globalization seems to now be disfavored relative to new "America First" strategies (exemplified in particular by the array of recently passed historic subsidies for domestic clean energy investment). Abroad, some believe the relevance of the World Trade Organization continues to decline, and European allies have announced a "border carbon adjustment mechanism." All the while, multilateral, bilateral, and regional trading regimes are emerging as the new trade world order. In what ways is the United States well positioned to leverage trade opportunities to reinforce energy security and climate change imperatives? How might policymakers balance conflicting energy imperatives that favor global competition, but also simultaneously necessitate cooperation?

#### **Speakers:**

**Sonia Aggarwal**, CEO, Energy Innovation; former Special Assistant to President Biden for Climate Policy, Innovation, and Deployment

**Maureen Hinman**, Co-Founder and Chairman of Silverado Policy Accelerator

**10:30 – 10:45 AM: Break**

#### **10:45 AM – 1 PM: Policy Reflections for Members of Congress**

***All attendees can remain in the meeting room, however, this session is only for Members of Congress to discuss ideas and policies.***

This time is set aside for members of Congress to reflect on what they have learned during the conference and discuss their views on implications for U.S. policy. Members of Congress have seen and learned a lot this week. Drawing on the full range of conversations and site visits throughout the week, members will seek to identify for each other the most promising takeaways for the United States policy process, with a special focus on opportunities for bipartisan cooperation and agreement enhancing United

States energy security while addressing climate change. This is a members-only conversation.

**1-2 PM: Working Lunch**

**2-2:30 PM: Group boards buses and travels to Northern Lights company**

**3- 4:45 PM: Educational Site Visit**

**Northern Lights (an open-source carbon management facility)**

We will visit the world's first open-source carbon dioxide transport and storage infrastructure, which delivers carbon storage as a service. The goal of this service is to help emitters stop emissions that cannot be avoided in other ways from reaching the atmosphere and to provide a safe and permanent storage option for CO<sub>2</sub> that is removed from the air. Carbon dioxide is received in liquid form transported by ship, offloaded into a terminal (which we will tour), and then eventually injected through undersea pipelines into permanent geologic undersea storage.

**5 – 6 PM: Group boards buses and returns to hotel**

**7:30 – 9 PM: Working Dinner**

Seating is arranged to expose participants to a diverse range of views and provide the opportunity for a meaningful exchange of ideas. Scholars and lawmakers are rotated daily. Discussions will focus on the specific role that carbon management might play in addressing climate change. Carbon management is thought by some to distract from other important climate change agendas, while others maintain that carbon management is a necessary and indispensable tool when deployed alongside a full-spectrum approach to addressing climate change. How might member views on carbon management influence the federal policy process?

**FRIDAY, SEPTEMBER 1:**

**Breakfast available at 6:30 AM**

**Participants depart the hotel for the airport at various times from early morning to early afternoon to return to the U.S.**

*Sen. Welch and Ms. Cheney continue travel at personal expense*

**SATURDAY, SEPTEMBER 2:**

*Sen. Welch and Ms. Cheney continue travel at personal expense*

**SUNDAY, SEPTEMBER 3:**

*Sen. Welch and Ms. Cheney continue travel at personal expense*

**MONDAY, SEPTEMBER 4:**

*Sen. Welch and Ms. Cheney continue travel at personal expense.*

*They depart Oslo at 4:35 pm on Icelandair 323.*

*Sen. Welch arrives in Washington, DC at 10:10 pm on Icelandair 649.*

*Ms. Cheney arrives in Boston at 9:50 pm on Icelandair 633*



**Trip Name:** Energy Security and the New Energy Economy**Organization Information****Organization Name:**

The Aspen Institute, Inc. (Cong.Prog.)

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

2300 N Street, NW

**City, State, Zip:**

Washington, DC 20037

**Phone Number:**

202-736-5859

**Organization URL:**<https://www.aspeninstitute.org/>**History of Congressional Travel**

Describe your organization's history of sponsoring congressional travel.

Aspen Institute Congressional Program (AICP) has conducted international and domestic conferences for members of Congress for 40 years. On occasion, other policy programs of The Aspen Institute, Inc. sponsor conferences that involve members of Congress.

**Educational Activities**

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

The Aspen Institute, Inc. holds numerous educational activities including conferences, roundtable briefings, and other nonpartisan forums on critical issues facing the U.S. and the world. AICP, specifically, offers nonpartisan educational events for members of Congress and senior congressional staff members, with each event offering a leading scholar on a key domestic or international issue.

**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 conference will take an in depth look at U.S. national security and economic interests focusing on energy and the emerging new energy economy. Sessions and site visits will look at critical minerals which are key to enabling clean energy options. The conference will also look at the impact of the Russian invasion of Ukraine and the risks that imposes on energy supply chains and how the U.S. may be positioned to reinforce allies' energy security. Norway is successfully transitioning to clearer energy sources while also using traditional energy sources and the intent is to understand Norway's success in this area and what the U.S. can observe and learn.

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

The Aspen Institute, Inc., is a non-profit organization, and its broad mission is conducting nonpartisan forums and the exchange of ideas on issues impacting the U.S. and the world. AICP is a program of the Aspen Institute, Inc. that provides nonpartisan educational conferences and educational forums for members of Congress and senior congressional staff members. The Norway conference will look at new and developing energy sources, the impact on the U.S. and globally in terms economic and national security and allow participating members of Congress to discuss and see successful Norwegian projects.

**Is your organization the only sponsor for this trip?**

☒ Yes ☐ No

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

**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. Breakthrough Energy**
- 2. Climate Imperative**
- 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):

- ☐ 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 (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.

## Will members and staff from the House of Representatives receive invitations?

- ☒ Yes ☐ No

## Travel Details (Submit additional pages as needed)

Trip Start Date/Time:

August 26, 2023



Trip End Date/Time:

Sept. 1, 2023

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



Yes



No

Transportation (Member/Officer/Employee: \$ 5,205 Accompanying Family Member: \$ 4500 )

| Transportation Type        | Class    | Amount             |
|----------------------------|----------|--------------------|
| commercial airline         | business | \$4,505-Sen. Welch |
| commercial airline         | business | \$3800-Ms.Cheney   |
| ground transport in Norway | coach    | \$700 per traveler |

Details (optional)

Air fare costs include coach commercial flight from Oslo to Bergen

Lodging (Member/Officer/Employee: \$ \$1,075 Accompanying Family Member: \$ 0 )

| Check-In | Check-Out  | Facility                      | City                                                                                         | State | Country |
|----------|------------|-------------------------------|----------------------------------------------------------------------------------------------|-------|---------|
| 8/27/23  | 8/30/23    | Grand Hotel                   | Oslo                                                                                         |       | Norway  |
| Nights   | Cost/Night | Cost Exceed Per Diem (Yes/No) | If Yes, please explain why expenses over the per diem rate are reasonable and necessary.     |       |         |
| 3        | \$215      | yes                           | Cost is \$20 more than per diem and is reasonable and necessary to stay in a secure facility |       |         |
| Check-In | Check-Out  | Facility                      | City                                                                                         | State | Country |
| 8/30/23  | 9/1/23     | Clarion Havenkontoret         | Bergen                                                                                       |       | Norway  |
| 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        | \$215      | yes                           | Cost is \$20 more than per diem and is reasonable and necessary to stay in a secure facility |       |         |
| 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: \$ 280 Accompanying Family Member: \$ 280 )

| Date    | Breakfast | Lunch | Dinner | Incidentals | Total | City        | State | Country | Cost Exceeds Per Diem (Y/N) |
|---------|-----------|-------|--------|-------------|-------|-------------|-------|---------|-----------------------------|
| 8/27/23 | NA        | NA    | \$50   | NA          |       | Oslo        |       | Norway  | Y                           |
| 8/28/23 | NA        | NA    | \$50   | NA          |       | Oslo        |       | Norway  | Y                           |
| 8/29/23 | NA        | NA    | \$50   | NA          |       | Oslo        |       | Norway  | Y                           |
| 8/30/23 | NA        | NA    | \$50   | NA          |       | Oslo/Bergen |       | Norway  | Y                           |
| 8/31/23 | NA        | \$30  | \$50   | NA          |       | Bergen      |       | Norway  | Y                           |
| 9/1/23  | NA        | NA    | NA     | NA          |       | Bergen      |       | Norway  | Y                           |
|         |           |       |        |             |       |             |       |         |                             |

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

The accommodation costs in Oslo and Bergen include breakfast.

The daily meeting fee in Oslo includes lunch and snacks.

#### Reasonable Miscellaneous Expenses

(Member/Officer/Employee: \$ 692 Accompanying Family Member: \$ 692 )

| Expense Type                                  | Amount | Notes      |
|-----------------------------------------------|--------|------------|
| Audio visual, conference and room rental fees | \$692  | per person |
|                                               |        |            |
|                                               |        |            |
|                                               |        |            |

#### Additional Details (optional)

## PRIVATELY SPONSORED TRAVEL

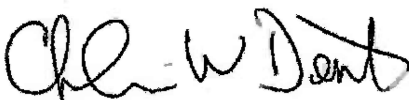
## SPONSOR SIGNATURE PAGE

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: Energy Security and the New Energy Economy  
Travel Date(s): August 26-September 1, 2023  
Travel Destination(s): Oslo and Bergen, Norway  
  
Sponsor: Aspen Institute, Inc. (Congressional Program)

Charles W. Dent  
*(printed name of sponsor representative)*

VP-Aspen Institute, Inc.  
*(title)*

  
*(signature of sponsor representative)*

July 26, 2023  
*(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: Breakthrough Energy Foundation

Private Sponsor: The Aspen Institute, Inc. (Congressional Program)

Trip Name: " Energy Security and the New Energy Economy"

Travel Date(s): August 26-September 1, 2023

Destination(s): Oslo and Bergen, Norway

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.

Shawn Liu

*(Printed name of grantmaking organization representative)*

Legal Director

*(Title)*

DocuSigned by:

*Shawn Liu*

*(Signature of grantmaking organization representative)*

7/19/2023

*(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: Climate Imperative

Private Sponsor: The Aspen Institute, Inc. (Congressional Program)

Trip Name: Energy Security and the New Energy Economy

Travel Date(s): August 26-September 1, 2023

Destination(s): Oslo and Bergen, Norway

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.

Sonia Aggarwal

*(Printed name of grantmaking organization representative)*

Vice President

*(Title)*

Sonia Aggarwal

Digitally signed by Sonia Aggarwal  
Date: 2023.07.20 12:52:35 -07'00'

*(Signature of grantmaking organization representative)*

07/20/2023

*(Date)*



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

BRIAN SCHATZ, HAWAII  
JEANNE SHAHEEN, NEW HAMPSHIRE

JAMES E. RISH, 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

August 16, 2023

The Honorable Peter Welch  
United States Senate  
Washington, DC 20510

Dear Senator Welch:

This responds to your recent correspondence requesting approval from the Select Committee on Ethics (the Committee) to accept an invitation you and your spouse received to travel to Energy Security & The New Energy Economy: Overcoming Challenges and Bottlenecks in Oslo and Bergen, Norway, on August 26–September 1, 2023, sponsored by the Aspen Institute Congressional Program (Aspen Institute). Provided that you adhere to the guidance set forth below, it appears that it is permissible for you to accept necessary expenses from the Aspen Institute in connection with this trip.

#### Background

Based on your communication with the Committee, the background in this matter is as follows.<sup>1</sup> The Aspen Institute invited you and your spouse to travel to Energy Security & The New Energy Economy: Overcoming Challenges and Bottlenecks in Oslo, Norway, on August 26–September 1, 2023. The Aspen Institute 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. The Aspen Institute 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>

Additionally, you inform the Committee that you plan to extend your trip for a personal purpose. Based on the information you submitted, the Committee understands that, for a personal purpose, you intend to extend your trip for 3 days after the completion of officially related events. You must personally pay the cost of any additional expenses incurred as a result of extending your trip.

---

<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* at 10-13.

<sup>3</sup> The term “any point throughout your trip” has a specific definition. See *Select Committee on Ethics Regulations and Guidelines for Privately Sponsored Travel* at 15.

### 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.

The Committee's approval process is governed by the *Regulations and Guidelines for Privately Sponsored Travel (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 foreign trips for up to seven days. The seven-day limitation means seven 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>

The Committee has determined that § 501(c)(3) non-profit organizations that are classified as private foundations, as opposed to public charities, may not pay for transportation from the United States to a foreign country.<sup>6</sup> However, the Aspen Institute represented to the Committee that it is a § 501(c)(3) public charity, as opposed to a private foundation, pursuant to the Internal Revenue Code.<sup>7</sup>

Under Senate Rule 35, a Senator or officer who receives payment or reimbursement for necessary expenses related to fact-finding travel must disclose those expenses to the Secretary of the Senate by filing the completed *Senators and Officers Post-Travel Disclosure of Travel Expenses* (Form RE-3), along with a copy of the *Private Sponsor Travel Certification Form*, and

---

<sup>4</sup> The term "*de minimis*" has a specific definition. See *Select Committee on Ethics Regulations and Guidelines for Privately Sponsored Travel* at 6-8.

<sup>5</sup> See *Select Committee on Ethics Regulations and Guidelines for Privately Sponsored Travel* at 6-10.

<sup>6</sup> See 26 U.S.C. § 4941 et seq. Section 501(c)(3) of the Internal Revenue Code broadly defines non-profit, charitable, tax-exempt organizations. These § 501(c)(3) organizations are then further defined or designated as "public charities" and "private foundations."

<sup>7</sup> 26 U.S.C. § 501(c)(3).

all relevant attachments (e.g., the private sponsor's invitation and itinerary) **within 30 days of the conclusion of Privately Sponsored Travel.**<sup>8</sup>

Consistent with these standards, Committee precedent, the Aspen Institute's factual representations, and the guidance contained in this letter regarding extending your trip for a personal purpose, it appears that it is permissible for you to accept necessary expenses from the Aspen Institute 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). Necessary expenses may include travel expenses for the spouse of a Member if the Member determines that the attendance of the spouse is appropriate to assist in the representation of the Senate.

Please be advised that the United States Constitution prohibits the acceptance of any gift, including a meal, from a foreign government without the consent of Congress. In the Foreign Gifts and Decorations Act (FGDA), Congress consented to the acceptance by federal government officials of: (1) gifts of minimal value and (2) travel or the expenses for travel taking place entirely outside the United States, from a foreign government (which includes those acting as a representative or agent of a foreign government).<sup>9</sup> The Senate has defined minimal value as \$100 or less. Further, pursuant to FGDA, there are certain reporting and procedural requirements that are imposed upon Members, officers, and employees who accept gifts from a foreign government. Please review the Committee's "Dear Colleague" letter of January 11, 2019, setting forth the items to be included in filing that report.

Finally, Senate Rule 34 requires a Member, 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 \$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: Member and Officer Privately Sponsored Travel Checklist

---

<sup>8</sup> Trip extensions for any purpose do not extend this deadline.

<sup>9</sup> 5 U.S.C. § 7342.