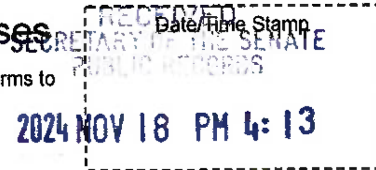


RE-2 Employee Post Travel Disclosure of Travel Expenses

Post Travel Filing Instructions: Complete this form within **30 days** of returning from travel. Submit all forms to the Office of Public Records in 144 Hart Building. **This form is a public disclosure. The form and all attachments will be made publicly available.**



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

Private Sponsor(s):

Conservative Partnership Institute

Travel Dates:

10/28/2024 - 10/30/2024

Name of accompanying family member (if any):

n/a

Relationship to Traveler:

n/a

Total Expenses

Transportation Expenses	Lodging Expenses	Meals Expenses	Other Expenses (Amount & Description)
\$10	\$198	\$120	n/a

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.

11/18/24

Joel Gardner

Joel Gardner

Digitally signed by Joel Gardner
Date: 2024.11.18 16:04:20
-05'00'

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.

11/19/2024

Date

Signature of Supervising Senator/Officer

ATTACHMENT 1 – CHANGES FROM APPROVED PRE-TRAVEL

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

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

☐ Yes ☒ No

Expense Change	Revised Amount	Explanation

Were there any changes to the pre-approved itinerary?

☐ Yes ☒ No

Explanation:

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

☐ Yes ☒ No

Explanation:

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:

Joel Gardner

Employing Office/Committee:

ROUNDS, MIKE

Private Sponsor(s):

Conservative Partnership Institute

Destination(s):

Cambridge, Maryland

Travel Dates:

10/28/2024 to 10/30/2024

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 symposium will be highly beneficial to my role as an AI fellow, providing a deeper understanding of important AI policy and national security issues. The sessions covering the AI economy, privacy, and the AI arms race with China will be especially helpful, offering valuable insights into the economic and geopolitical impacts of AI. Additionally, discussions on fortifying the U.S. defense industrial base and the role of open-source AI will enhance my ability to engage in policy debates related to AI's integration into defense and the broader economy.

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

No

Name and Relationship to Traveler:

N/A

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

9/23/24

Date


Signature of Employee**TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER**(President of the Senate, Secretary of the Senate, Sergeant at Arms,
Secretary for the Majority, Secretary for the Minority, and Chaplain)**MIKE ROUNDS**
(Print Senator's/Officer's Name)

hereby authorize

JOEL GARDNER
(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)

9/23/2024
Date
Signature of Supervising Senator/Officer

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

BRIAN SCHATZ, HAWAII
JEANNE SHAHEEN, NEW HAMPSHIRE

JAMES E. RISCH, IDAHO
DEB FISCHER, NEBRASKA

SHANNON HAMILTON KOPFLIN, CHIEF COUNSEL AND STAFF DIRECTOR
WILLIAM R. CARLE, CHIEF CLERK

U.S. SENATE OFFICE BUILDING, ROOM 220
SECOND AND CONSTITUTION AVENUE, N.E.
WASHINGTON, DC 20510-6425

TELEPHONE: (202) 224-7901
FACSIMILE: (202) 224-7416
TDD: (202) 224-3752

United States Senate

SELECT COMMITTEE ON ETHICS

October 22, 2024

Joel Gardner
Office of Senator Mike Rounds
United States Senate
Washington, DC 20510

Dear Mr. Gardner:

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 *Artificial Intelligence Symposium* in Cambridge, Maryland on October 28-30, 2024, sponsored by the Conservative Partnership Institute (CPI). Provided that you adhere to the guidance set forth below, it appears that it is permissible for you to accept necessary expenses from CPI 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 an Artificial Intelligence Fellow in the Office of Senator Mike Rounds. CPI has invited you to travel to its *Artificial Intelligence Symposium* in Cambridge, Maryland on October 28-30, 2024. CPI 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. CPI 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.³

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

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* at 10-13.

³ 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.

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 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.⁴ 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.⁵

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.**

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

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

Finally, Senate Rule 34 requires a reporting individual⁶ 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: Employee Privately Sponsored Travel Checklist

⁶ A reporting individual is someone whose salary equals or exceeds 120% of the basic rate of pay for GS-15 (\$147,649 for CY 2024) or is a political fund designee and is required to file financial disclosure reports.

webmail.senate.ussenate.us/owa/projection.aspx

Reply all | Delete | Junk | ...



Lauren Baldwin <lbaldwin@cpi.org>

Reply

Mon 9/23/2024 3:29 PM

To: Lauren Baldwin <lbaldwin@cpi.org>

Archive

You replied on 9/23/2024 5:44 PM.



Agenda Artificial Intellig...

92 KB

Show all 1 attachments (92 KB) Download

Good Afternoon all,

CPI is thrilled to invite you to participate in our inaugural **Artificial Intelligence Symposium over October 28-30th at our lodge at Camp Rydin.**

What does a conservative AI policymaking approach look like? How does the US maintain supremacy in the AI arms-race with China? Who are the key players in the AI economy? How can AI contribute to the rebuilding of the U.S. defense industrial base? Join us as we'll be discussing the answers to these and many other questions and more! Our goal for this trip is to allow you to connect with AI experts whom you can lean on as a resource, build relationships with fellow conservatives, strategize, and improve your policy making skills.

If you wish to attend, please **RSVP by responding to this email**. If you are House/Senate staff, please note that you will need to submit Ethics paperwork prior to COB September 30th.

Attached, you will find a preliminary agenda (there will be additional surprise speakers). Camp Rydin, is located on Maryland's lovely Eastern Shore (~2 hr drive from Capitol Hill). CPI will provide your transportation to/from the lodge, overnight lodging at the property, and meals.

If you have any questions regarding the trip, please let me know. Also please note that we are limited on space so spots are on a first-come, first-served basis. We hope you can join us!

Thanks in advance,

--

Lauren Baldwin
Government Relations Coordinator
(858) 519-7452



Conservative Partnership Institute: Conservative Partnership Institute's Artificial Intelligence Symposium

 Joel Gardner

Title:

Joel Gardner

Employing Office/Committee:

ROUNDS, MIKE

Duty Station:

None

Destination(s):

Cambridge, Maryland

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

This symposium will be highly beneficial to my role as an AI fellow, providing a deeper understanding of important AI policy and national security issues. The sessions covering the AI economy, privacy, and the AI arms race with China will be especially helpful, offering valuable insights into the economic and geopolitical impacts of AI. Additionally, discussions on fortifying the U.S. defense industrial base and the role of open-source AI will enhance my ability to engage in policy debates related to AI's integration into defense and the broader economy.

Name of accompanying family member (if any):

Not Entered

Name and Relationship to Traveler:

None

Organization Information

Organization Name

Conservative Partnership Institute

Is your organization classified as a §501(c)(3)?

☒ Yes ☐ No

§501(c)(3) Organization Type

Public Charity

Address

300 Independence Ave SE

Address 2 (Optional)

None

City, State Zip

Washington, District Of Columbia 20003 United States

Phone Number

8585197452

Organization URL

History of Congressional Travel

The Conservative Partnership Institute provides regular educational briefings and trainings sessions to conservative leaders, congressional staff, and activists.

Educational Activities

The educational activities performed by CPI include regular trainings, procedural classes, collaborative sessions, and broad educational programming.

Lobbyist and Foreign Agent Registration Information

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

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

Foreign Government Involvement

Foreign Agent Registration Status:

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

Comments

None Entered

Signature Page

The signature page is below.

Purpose and Details

Provide a brief description of the trip.

This trip will provide an opportunity for Senate legislative staff to hear and learn from legislative experts on how to improve their policymaking skills as it relates to artificial intelligence policy.

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

In accordance with its mission of educating and training the conservative movement, CPI is sponsoring this travel to educate and equip legislative staffers with the skills and tools to more effectively assist their boss.

Is your organization the only sponsor for this trip?

☒ Yes ☐ No

Grantmaking Organizations (Optional)

There are no grantmaking organizations.

With or Without Regard for Congressional Participation

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

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

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

Lobbyist/Foreign Agent Financing

- ☒ The trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
- ☒ No funds or in-kind contributions were earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.

Lobbyist/Foreign Agent Accompaniment

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

- ☒ The trip is limited to three days (for trips inside the continental United States) or seven days (for trips outside the continental United States), and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip
- ☐ The trip is limited to a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip
- ☐ The trip is limited to a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip

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

- ☐ The trip is limited to three days (for trips inside the continental United States) or seven days (for trips outside the continental United States), and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip
- ☐ The trip is limited to a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip
- ☐ The trip is limited to a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip

Certification of No Recreational Activity and No Alcohol

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

Invitees

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

The list of invitees is below.

Travel Details

Trip Start Date/Time:
10/28/2024 @ 09:00 AM



Trip End Date/Time:
10/30/2024 @ 11:00 AM

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

☐ Yes ☒ No

Itinerary

The itinerary is below.

Transportation (Per Member/Officer/Employee: \$10.00 | Accompanying Family Member: \$0.00)

Transportation Type	Class	Amount
Ground Transportation	Coach	\$10.00
Note Coach class van is owned by CPI.		

Lodging (Per Member/Officer/Employee: \$198.00)

Check-In	Check-Out	Facility	City	State	Country	Nights	Cost/Night	Cost Exceed Per Diem
10/28/2024	10/30/2024	CPI-owned campus	Cambridge	Maryland	United States	2	\$99.00	No

Meals (Per Member/Officer/Employee: \$120.00)

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem
10/28/2024	\$0.00	\$10.00	\$40.00	\$0.00	\$50.00	Cambridge	Maryland	United States	No
10/29/2024	\$10.00	\$10.00	\$40.00	\$0.00	\$60.00	Cambridge	Maryland	United States	No
10/30/2024	\$10.00	\$0.00	\$0.00	\$0.00	\$10.00	Cambridge	Maryland	United States	No

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

Expense Type	Amount	Notes
There are no miscellaneous expenses.		

Additional Attachments

Document Name

There are no additional attachments.

1. Will Mascaro (Senator Mike Lee)
2. Emme James (Senator Mike Lee)
3. Michael Marn (Senator Marsha Blackburn)
4. Blake Seitz (Senator Marco Rubio)
5. Taylor LaJoie (Senator Roger Marshall)
6. Lauren Hickey (Senator Mike Braun)
7. Callum Case (Senator Rand Paul)
8. Kylie Bohman (Senator Josh Hawley)
9. Austin Walton (Senator Eric Schmitt)
10. Clayton Stein (Senator Rick Scott)
11. Logan Warberg (Senator Cynthia Lummis)
12. Scott Rausch (Senator Ron Johnson)
13. Matthew Mittlestaedt (Senator JD Vance)
14. Andrew Dziedzic (Senator Eric Schmitt)
15. Wendy Baig (Senator Mike Lee)
16. Robby Saunders (Senator Rick Scott)
17. Conner Brown (Senator Cynthia Lummis)
18. Tom DeMatteo (Senator Mike Lee)
19. Brian Oakes (Senator JD Vance)
20. Sean Carver (Senator Eric Schmitt)
21. Stephanie Mertz (Senator Ted Cruz)
22. Jade Winfree (Senator Ted Cruz)
23. Joel Gardner (Senator Rounds)
24. Duncan Wright (Senator Young)
25. Willey Chertman (Senator Young)
26. Karina Mariotti (Senator Lee)
27. Jake Chebowski (Senatore Mike Braun)
28. Christine Lewis (Senator Cruz)
29. J.D. Logan (Senator Mike Lee)
30. Evan DiPetrillo (Senator Young)

**Conservative Partnership Institute's (CPI)
Artificial Intelligence (AI) Symposium
October 28-30, 2024**

All programming, meals, and lodging will take place at CPI-owned campus in Cambridge, Maryland.

Monday, October 28th, 2024:

- 9:00 am** **Depart by shuttle bus provided by CPI from Washington, D.C. 20003**
- 11:00 am** **Arrive at Cambridge, MD 21613**
- 11:00 - 12:00 pm** **Check-in and Orientation**
- 12:00 – 1:00 pm** **Lunch and Welcome**
CPI's Policy Director and former Senate Legislative Director will discuss the goals for the symposium as well as provide an initial framework to view AI policy.
Speaker: Rachel Bovard, Conservative Partnership Institute
- 1:00 – 2:00 pm** **SESSION 1: The Basics of AI**
A brief history of AI and an accessible introduction to the basics of deep learning and neural networks, exploring how they work, their limitations, and where the technology is trending.
Speaker: Nick Whitaker, The Manhattan Institute
- 2:00 – 3:00 pm** **Executive Time**
- 3:00 – 4:00 pm** **SESSION 2: State of Play: AI Legislation in the 118th Congress and Beyond**
An overview of recent AI legislation that has moved through the 118th Congress and the state of AI legislation moving into the next Congress.
Speaker: Christy Lewis, Senate Commerce Committee
- 4:00 – 5:00 pm** **SESSION 3: Reforming Environmental Permitting**
As AI innovation increases, experts predict a need for abundantly available sources of energy in the near future to maintain American supremacy in the AI race. How should conservative policy makers approach energy procurement?
Speaker: Thomas Hochman, Foundation for American Innovation
- 5:00 – 5:30 pm** **Executive Time**
- 5:30 – 7:30 pm** **Keynote Dinner: Privacy, Censorship and the Surveillance State**
A discussion of ways in which policymakers can guard against enabling an AI leviathan, and ensure AI develops in a way consistent with American's privacy and civil liberties.
Speaker: Mike Benz, Foundation for Freedom Online

Tuesday, October 29th, 2024:

- 9:15 – 10:00 am** **Breakfast Buffet**

- 10:00 – 11:30 am** **SESSION 4: AI Arms-Race with China**
The United States is the world leader in AI research, development, and commercialization. But with China nipping at our heels, how do we keep it that way? What are the core national security dimensions of AI and computer infrastructure? And how can we contain China's ambitions through tools such as export controls?
Speakers: Mark Beall, The American Security Fund
- 11:30 – 12:00 pm** **Executive Time**
- 12:00 – 1:30 pm** **Lunch & SESSION 5: Fortifying the U.S. Defense Industrial Base**
How can AI contribute to the rebuilding and fortification of the U.S. defense industrial base? With new tools being unlocked by AI and software-native defense startups, we cannot count on the big defense primes for our military readiness. What new capabilities are on the horizon, from autonomous drones to Iron Domes, and what reforms are needed to realize those capabilities within our armed forces?
Speaker: Will Thibeaue, The Claremont Institute
- 1:30 – 3:30 pm** **Executive Time**
- 3:30 – 5:00 pm** **SESSION 6: Big Tech vs Open Source**
Will the AI economy let a thousand flowers bloom, or will Big Tech monopolists acquire unprecedented market power through winner-take-all effects? This session will explore the antitrust and market power issues surrounding AI, the essential role of open source in checking Big Tech's growing power, and strategies for ensuring AI empowers America's small businesses.
Speaker: Mark Meador, The Heritage Foundation
- 5:00 – 5:30 pm** **Executive Time**
- 5:30 – 6:30 pm** **Dinner**
- 6:30 – 8:00 pm** **Fireside Chat: To Regulate or Not to Regulate?**
Does unregulated AI progress pose significant societal risks? How should conservatives, if at all, approach regulating emerging technologies? This moderated discussion will explore two different approaches.
Speaker: Dean Ball, George Mason University's Mercatus Center & Will Mascaro, Senate Steering
- 8:00 – 9:00 am** **Wednesday, October 30th, 2024:
Breakfast & Check Out**
- 9:00 am** **Travel by shuttle bus provided by CPI from Cambridge, MD 21613**
- 11:00 am** **Arrive at Washington, D.C. 20003**