RE-2 Employee Post Travel Disclosure of Travel Expenses

RECEIVED
SECRETARY OF THE SENATE
PUBLIC RECORDS
2024 APR 19 PM 3:20
Date/Time Stamp

Post Travel Filing Instructions: Complete this form within **30 days** of returning from travel. Submit all forms to the Office of Public Records in 232 Hart Building. **This form is a public disclosure. The form and all attachments will be made publicly available.**

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

Private Sponsor(s):
American Compass

Travel Dates:
04/05/2024 to 04/07/2024

Name of accompanying family member (if any):

Relationship to Traveler:

Expenses

Transportation Expenses	Lodging Expenses	Meals Expenses	Other Expenses (Amount & Description)
$40.62	$598.00	$504.00	$0.00

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.

4/10/2024
Date

David Swegle
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.

4/10/2024
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
There were no changes to pre-approved travel expenses.		

Were there any changes to the pre-approved itinerary?

○ Yes ● No

Explanation: There were no changes to the pre-approved itinerary.

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

○ Yes ● No

Explanation: There were no additional changes to the pre-approved trip.

RE-1 Employee Pre-Travel Authorization

Date/Time Stamp

3/4/24

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:
David Swegle

Employing Office/Committee:
RUBIO, MARCO

Private Sponsor(s):
American Compass

Destination(s):
Cambridge, Maryland

Travel Dates:
04/05/2024 to 04/07/2024
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.

The American Compass Workshop on Conservative Economics is an annual event giving American Compass members the opportunity to encounter political and economic ideas that can help shape a new conservative consensus. We will explore new approaches to industrial policy, labor, family formation, financial regulation, and many other topics essential to developing that new consensus. The event includes panels, guest speakers, and policy modules aimed at increasing the fluency of each participant in these issues so that they are better equipped to engage in a number of ongoing, critical policy debates.

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.

3/4/2024
Date

David Swegle
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)

I Senator Marco Rubio hereby authorize David Swegle
(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)

3/4/2024
Date

Signature of Supervising Senator/Officer

American Compass: American Compass Policy Workshop Retreat 2024

David Swegle

Title:
Legislative Correspondent

Employing Office/Committee:
RUBIO, MARCO

Duty Station:
WASHINGTON,DC

Destination(s):
Cambridge, Maryland

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

The American Compass Workshop on Conservative Economics is an annual event giving American Compass members the opportunity to encounter political and economic ideas that can help shape a new conservative consensus. We will explore new approaches to industrial policy, labor, family formation, financial regulation, and many other topics essential to developing that new consensus. The event includes panels, guest speakers, and policy modules aimed at increasing the fluency of each participant in these issues so that they are better equipped to engage in a number of ongoing, critical policy debates.

Name of accompanying family member (if any):
Not Entered

Name and Relationship to Traveler:
None

Organization Information

Organization Name
American Compass

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)
Public Charity

City, State Zip
Washington DC, District Of Columbia 20003 United States

Phone Number
9196337020

Organization URL

History of Congressional Travel

American Compass was founded in 2020. Since establishing the organization, we have sponsored three retreats for which Senate staffers have been in attendance. They have all been similar in scope and expense to this Retreat, with the event taking place at the exact same location as 2002 and 2023's retreat with an almost identical structure.

Educational Activities

American Compass's educational activities include: hosting lectures, seminars and panels on a wide variety of public policy topics, conducting research to help better inform the ongoing national debate, and producing policy analysis in order to better educate the public on the merits of various approaches to public policy questions.

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.

- [x] 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 be a three day retreat comprised of educational sessions focused on economic policy that supports American families, workers, and industry.

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

American Compass is a 501(c)(3) non-profit organization founded in 2020 whose mission is to restore an economic consensus that emphasizes the importance of family, community and industry to the nation's liberty and prosperity. Our fourth retreat is planned around substantive policy sessions to aid staff (governmental and non-governmental) on key economic policy topics so that they are more ably participate in ongoing public policy debates.

Is your organization the only sponsor for this trip?

- [x] Yes
- [ ] No

Grantmaking Organizations (Optional)

There are no grantmaking organizations.

With or Without Regard for Congressional Participation

The trip is arranged or organized without regard to congressional participation.

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

- [x] 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

- [x] The trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
- [x] 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

- [x] 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:
04/05/2024 @ 10:30 AM

⇄

Trip End Date/Time:
04/07/2024 @ 04:30 PM

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: $40.62 | Accompanying Family Member: $0.00)

Transportation Type	Class	Amount
Ground Transportation	Charter	$40.62

Note
We've chartered a bus to take participants from Union Station to the hotel on April 5th and back again on April 7th. I would note that not every attendee is availing themselves of the bus and all participants, regardless of employment, were extended the offer of riding the bus.

Lodging (Per Member/Officer/Employee: $598.00)

Check-In	Check-Out	Facility	City	State	Country	Nights	Cost/Night	Cost Exceed Per Diem
04/05/2024	04/07/2024	Hyatt Regency Chesapeake Bay	Cambridge	Maryland	United States	2	$299.00	Yes

Cost Exceeds Per Diem Reason
We've used this facility in previous years. It is a sufficiently secluded location outside of DC with the necessary meeting space to host our program, and it was more affordable when compared to comparable venues. This venue provides adequate large, midsized, and breakout rooms for our programming.

Meals (Per Member/Officer/Employee: $504.00)

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem
04/05/2024	$0.00	$10.00	$135.00	$0.00	**$145.00**	Cambridge	Maryland	United States	Yes

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem

Cost Exceeds Per Diem Reason

Our projected meal costs are higher than the GSA per diem. We found these costs necessary to book a meeting space that was large enough, private, and had adequate breakout space. The Hyatt Regency Chesapeake hotel has proved to be the more affordable option when compared to comparable venues in driving distance of DC. Hill staffers are receiving no preferential treatment and are being provided the same accommodations as the other attendees. This event would still be hosted without congressional participation, although we hope those we have invited can attend.

04/06/2024	$46.00	$68.00	$135.00	$0.00	**$249.00**	Cambridge	Maryland	United States	Yes

Cost Exceeds Per Diem Reason

Our projected meal costs are higher than the GSA per diem. We found these costs necessary to book a meeting space that was large enough, private, and had adequate breakout space. The Hyatt Regency Chesapeake hotel has proved to be the more affordable option when compared to comparable venues in driving distance of DC. Hill staffers are receiving no preferential treatment and are being provided the same accommodations as the other attendees. This event would still be hosted without congressional participation, although we hope those we have invited can attend.

04/07/2024	$46.00	$64.00	$0.00	$0.00	**$110.00**	Cambridge	Maryland	United States	Yes

Cost Exceeds Per Diem Reason

Our projected meal costs are higher than the GSA per diem. We found these costs necessary to book a meeting space that was large enough, private, and had adequate breakout space. The Hyatt Regency Chesapeake hotel has proved to be the more affordable option when compared to comparable venues in driving distance of DC. Hill staffers are receiving no preferential treatment and are being provided the same accommodations as the other attendees. This event would still be hosted without congressional participation, although we hope those we have invited can attend.

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.

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: American Compass Policy Workshop 2024

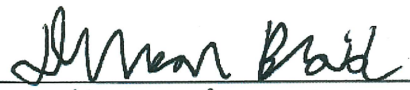
Travel Date(s): 4/5/24-4/7/24

Travel Destination(s): Hyatt Regency Chesapeake Bay Cambridge, MD

Sponsor: American Compass

Duncan Braid — *(printed name of sponsor representative)*

Coalition Director — *(title)*



(signature of sponsor representative)

2/19/24 — *(date)*

About the invitees: The following individuals were extended an invitation to the American Compass Conservative Economics Retreat due to their interest in conservative economic policy.

Senate Staffers			
First Name	**Last Name**	**Office**	**Role**
Robert	Orr	Sen. Vance	Legislative Assistant
Alex	Gorman	Sen. Hawley	Legislative Correspondent
Hannah	Rawles	Sen. Rubio	Digital Media Manager
Kylie	Bohman	Sen. Hawley	Legislative Aide
Luis	Hinojos	Sen. Rubio	Legislative Aide
Robert	Ordway	Sen. Braun	Senior Policy Advisor
Wells	King	Sen. Vance	Senior Policy Advisor
Robert (Will)	Green	Sen. Rubio	Foreign Policy Advisor
Ryan	Neuhaus	Sen. Lee	Legislative Director
Ryan	Raisins	Sen. Lankford	Legislative Assistant
Charles	Correll	Sen. Barrasso	Chief Speechwriter
Benjamin	Esposito	Sen. Hawley	Legislative Aide
David	Swegle	Sen. Rubio	Legislative Correspondent
Patrick	MacDonnell	Sen. Cotton	Speechwriter/Legislative Assistant
Robby	Saunders	Sen. Rick Scott	Senior Policy Advisor
Sophie	Delquie	Sen. Barrasso	Strategic Communications Advisor
Blake	Seitz	Sen. Rubio	Senior Policy Advisor
Faith	Dynneson	Sen. Braun	Legislative Correspondent
William	Martin	Sen. Vance	Communications Director

AMERICAN COMPASS

American Compass
300 Independence Avenue SE
Washington, DC 20003

www.americancompass.org

To: David Swegle

2/20/24

Invitation
American Compass Workshop on Conservative Economics
Friday, April 5 – Sunday, April 7, 2024
Hyatt Regency Chesapeake Bay
Cambridge, MD

The American Compass Workshop on Conservative Economics is an annual event our organization holds to provide American Compass members with the opportunity to encounter political and economic ideas that can help shape a new conservative consensus. At the workshop, we will explore new approaches to industrial policy, labor, family formation, financial regulation, and many other topics essential to developing that new consensus. Via our panels, guest speakers, and policy modules, we will endeavor to increase the fluency of each participant in these issues so that they are better equipped to engage in a number of ongoing, critical policy debates.

You are being invited because of your interest in conservative economic policy. If you choose to attend, we will cover your lodging, meals, and provide a charter bus between Cambridge, MD and DC.

Sincerely,

Oren Cass
Executive Director

American Compass Employees Attending:

Oren Cass, Executive Director

Emily Davis, Chief Of Staff

Chris Griswold, Policy Director

Abigail Salvatore, Communications Director

Duncan Braid, Coalition Director

Oliver Traldi, Editor

Mark Diplacido, Policy Advisor

American Compass Conservative Economics Workshop

Friday, April 5 – Sunday, April 7, 2024

Hyatt Chesapeake Bay | Cambridge, MD

Retreat Programing

Friday April 5

	CHARTER BUS (IF RIDING)	*Union Station*
10:30am	*Attendees arrive and board bus*	
11:00am	*Bus departs to Hyatt Regency Chesapeake Bay*	
1:00pm	*Bus arrives at Hyatt Regency Chesapeake Bay*	
1:00pm-5:00pm	**REGISTRATION**	
2:00pm-4:00pm	**COMPASS WORKSHOPS** *Attendees will be divided into groups; half will focus initially on "Peer Review" and half will focus on "On the Horizon," then they will rotate.*	
2:00pm-3:00pm	**Peer Review** We'll be going around the horn, inviting each attendee to share what they're working on and everyone else to provide feedback. Participants will also be tasked with providing additional topics for discussion at our Conservative Economics Roundtables. *Moderated by Chris Griswold & Duncan Braid*	
3:00pm-4:00pm	**On the Horizon** Compass staff will present on the organization's key 2024 initiatives, including the launch of a new magazine and regular public opinion surveying. Participants will be broken into groups to discuss a number of relevant policy debates and asked to identify key open questions that could be answered with better research. *Moderated by Oren Cass & Oliver Traldi*	
3:00pm-5:00pm	**CHECK-IN**	
5:00pm-6:30pm	**WELCOME RECEPTION**	

6:30pm-8:30pm **DINNER**

A Vision for Modern Conservatism

Executive Director Oren Cass gives a keynote address on the translation of conservative economics into a message and vision that addresses the economic and cultural concerns of ordinary Americans.

Remarks by Oren Cass

8:30pm-11:00pm **NIGHTCAP & FELLOWSHIP**

An opportunity for attendees to gather and share a drink if they so choose before ending the day.

Saturday, April 6

8:00am-9:00am **BREAKFAST**

SESSION I: COMING INTO ALIGNMENT

9:00am-12:30pm

After real-time polling to determine the sense of the group on a variety of issues, and a review of the feedback from the prior day, we'll hear from a special guest Rick Santorum and then divide into small groups to deliberate on key facets of a modern conservative vision.

9:00am-9:30am **REAL-TIME POLLING**

Attendees will respond via their mobile devices to a variety of poll questions, seeing the group's responses in real-time. We will also see how the group fixed the federal budget.

9:30am-10:00am **REMARKS BY RICK SANTORUM**

The political environment in Washington today is often discouraging, and the 2024 election cycle promises to be stressful and chaotic. How should conservatives understand and find meaning in their work and what goals should they set for the short-, medium-, and long-term?

10:00am-12:30pm **CONSERVATIVE ECONOMICS ROUNDTABLES**

Attendees will participate in facilitated discussions on the key elements of a new conservative vision and agenda. In addition to pre-planned topics listed below, participants will have the opportunity to suggest additional topics during "On the Horizon" the day before. Results of these discussions will be synthesized into a document that forms

the basis of a presentation and discussion the following morning. Each attendee will participate in two 70-minute discussions, separated by a 10-minute break.

Topics will include:

- Defining the Challenge—narratives of American distress, diagnoses of underlying problems, identification of key culprits
- Core Principles—conservative values, non-negotiables, the contours of a coalition
- Goals and Aspirations—the vision for flourishing families, vital communities, and a strong nation
- Government's Role—the American tradition, what government is good for, reinforcing the constitutional order
- A New Agenda—categories and framework, top priorities, opportunities to define the debate

Moderated by Oren Cass, Duncan Braid, Chris Griswold, Oliver Traldi and Abigail Salvatore, as well as attendees whose proposed topics are selected

12:30pm-1:30pm **LUNCH DEBRIEF**

Participants will share reactions to topics discussed in the panels. Discussion questions will be provided.
Hosted by Duncan Braid

SESSION II: POLICY MAKING IN PRACTICE

1:30pm-4:30pm

Attendees will participate in an American Compass program on negotiation, attempting to forge an agreement on a hypothetical legislative package.

1:30pm-1:45pm **PLENARY: THE HOUSE WILL COME TO ORDER**

An introduction to the simulation and brief explanation of rules and scoring.

1:45pm-4:30pm **BREAKOUT: HOW HARD COULD IT REALLY BE?**

A challenge in all policy making is aligning the interests of the necessary stakeholders. In groups of 10 to 12, attendees will engage in a simulated exercise where they will attempt to reach an agreement necessary to pass a hypothetical package of legislation. They will be assigned roles of key parts of a hypothetical political coalition, including leaders of political factions in the government, industry associations, and outside pressure groups each with different and, at times, conflicting priorities. The simulation will be scored, and there will be prizes.
Hosted by Duncan Braid

4:30pm-6:00pm **BREAK**

6:00pm-8:00pm **DINNER**

Open buffet for attendees to eat at their convenience and discuss the weekend's programming so far.

8:00pm-10:00pm **PAST AS PROLOGUE**

Attendees in small groups will be challenged with trivia about past political realignments, major legislative efforts, and other miscellany.
Hosted by Oren Cass

10:00pm-11:00pm **NIGHTCAP & FELLOWSHIP**

An opportunity for attendees to gather and share a drink if they so choose before ending the day.

Sunday, April 7

8:00am-9:00am	**BREAKFAST**	
9:00am-10:00am	**EXECUTIVE TIME**	
10:00am-11:00am	**SESSION III: SHOP TALK** Attendees in small groups apply insights from the previous sessions to their own careers and consider how they might help or be helped by colleagues in other professions. *Moderated by Oren Cass, Duncan Braid, Chris Griswold, Oliver Traldi and Abigail Salvatore*	
11:00am-11:10am	**BREAK**	
11:10am-12:30pm	**SESSION IV: CROSS POLLINATION** Attendees will reconvene as a group to review the synthesized results from deliberations in the Conservative Economics Roundtables, vote recommendations up and down via a live polling exercise, and discuss areas for further research and refinement. *Moderated by Oren Cass*	
12:30pm-1:30pm	**CLOSING LUNCH**	
	CHARTER BUS (IF RIDING)	*Front Lobby*
1:30pm	*Attendees load their luggage onto the bus.*	
2:00pm	*Bus departs to Union Station*	
4:00pm	*Bus arrives at Union Station*	