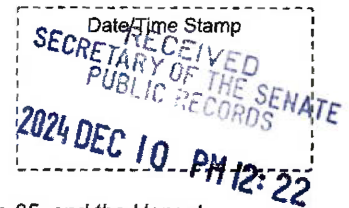


RE-2 Employee Post Travel Disclosure of Travel Expenses

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):

Institute of Politics at Harvard Kennedy School

Travel Dates:

December 9, 2024

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

Transportation Expenses	Lodging Expenses	Meals Expenses	Other Expenses (Amount & Description)
485.76	0	65.50	0

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.

12/10/24

William Dauster

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.

Date

12/10/24

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

\$131.06 increase \$551.26

revised to reflect actual costs

Were there any changes to the pre-approved itinerary?

☐ Yes ☒ No

Explanation:

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

☐ Yes ☒ No

Explanation:

RE-1 Employee Pre-Travel Authorization

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.

Date/Time Stamp

Name of Traveler:

Bill Dauster

Employing Office/Committee:

Senate HELP Committee

Private Sponsor(s):

The Institute of Politics at the Harvard
Kennedy School of Government

Destination(s):

Cambridge, MA

Travel Dates:

12/9/24

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 Institute of Politics at the Harvard Kennedy School requests that I come to the Bipartisan Program for Newly Elected Members of Congress to serve as a panelist for a discussion on Budgeting, Appropriations, Revenue, Spending.

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

☐

(signify "yes" by checking box)

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

11/1/24

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)

Bernard Sanders

hereby authorize

Bill Dauster

(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)

11/1/24

Date



Signature of Supervising Senator/Officer

Dauster, Bill (HELP Committee)

From: Conderacci, Annie <aconderacci@hks.harvard.edu> on behalf of HKS-RSVP IOP <RSVP_IOP@hks.harvard.edu>
Sent: Wednesday, September 18, 2024 11:05 AM
To: Dauster, Bill (HELP Committee)
Subject: Invitation: Bipartisan Program for Newly Elected Members of Congress at Harvard

Follow Up Flag: Follow up
Flag Status: Flagged

Dear Bill,

The Institute of Politics at the Harvard Kennedy School (HKS) will host the **Bipartisan Program for Newly Elected Members of Congress** from **December 8-10, 2024**. We would like to invite you to participate in a panel during the conference. My colleague, Annie Conderacci, will follow up with you soon regarding this invitation and the panel.

As you may know, the *Bipartisan Program for Newly Elected Members of Congress* is nationally recognized as the preeminent educational and preparatory program for new members of the House. It is designed to help members successfully make the transition from campaign to Congress. Nearly 700 hundred current and former representatives have attended the program since its inception in 1972.

In the meantime, should you have any questions, please feel free to contact Annie or me at RSVP_IOP@hks.harvard.edu.

On behalf of the Institute of Politics, I sincerely hope that you will be able to join this important discussion.

Thank you for your consideration.
Sincerely,
Setti D. Warren
Director, Institute of Politics

Harvard University Institute of Politics: New Members of Congress Conference

 Bill Dauster

Title:

Deputy Staff Director

Employing Office/Committee:

HEALTH, EDUC, LAB, AND PENSIONS - DEM

Duty Station:

WASHINGTON,DC

Destination(s):

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

The Institute of Politics at the Harvard Kennedy School requests that I come to the Bipartisan Program for Newly Elected Members of Congress and serve as a panelist for a discussion entitled, "Budgeting, Appropriations, Revenue, Spending" at a closed session during the afternoon of Monday, December 9, 2024.

Name of accompanying family member (if any):

Not Entered

Name and Relationship to Traveler:

None

Organization Information

Organization Name

Harvard University Institute of Politics

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

☒ Yes ☐ No

§501(c)(3) Organization Type

Public Charity

Address

79 JFK St

Address 2 (Optional)

None

City, State Zip

Cambridge, Massachusetts 02138 United States

Phone Number

9089221208

Organization URL

History of Congressional Travel

This organization has sponsored congressional travel for the new members program which offers one of the few opportunities new members have to get acquainted with colleagues from both sides of the aisle in a neutral environment.

Educational Activities

The IOP also offers wide-ranging opportunities for students to practice, get inspired, and gain the skills for a future in public service. Sixteen programs available to students include the Harvard Public Opinion Project, a nationwide survey project of young adults' political views; and the Women's Initiative in Leadership, created to address the interest and importance of female students at Harvard in developing leadership skills. Students are also offered wide-ranging internship and career opportunities, including 100 paid public-service summer internships around the world. In addition, the Institute offers conferences for new members of Congress and newly elected mayors, and, after each Presidential election, brings together campaign managers and strategists to analyze the race. The IOP provides avenues for practical experience and encourages students to examine critically and think creatively about politics and public issues.

Lobbyist and Foreign Agent Registration Information

Lobbyist Registration Status: *I certify that the sponsor is not a federally registered lobbyist but retain or employ one or more federally registered lobbyists.*

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.

The new members program which offers one of the few opportunities new members have to get acquainted with colleagues from both sides of the aisle in a neutral environment the new Representatives have the opportunity to learn from experts about congressional procedures.

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

The IOP's mission is to unite and engage students, particularly undergraduates, with academics, politicians, activists, and policymakers on a non-partisan basis to inspire them to consider careers in politics and public service. The Institute strives to promote greater understanding and cooperation between the academic world and the world of politics and public affairs.

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

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

The list of invitees is below.

Travel Details

Trip Start Date/Time:
12/09/2024 @ 09:29 AM

↔

Trip End Date/Time:
12/09/2024 @ 05:10 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: \$382.20 | Accompanying Family Member: \$0.00)

Transportation Type	Class	Amount
Airfare	Coach	\$282.20

Note
Airfare

Ground Transportation	Charter	\$100.00
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Note
Uber to and from Logan Airport

Lodging (Per Member/Officer/Employee: \$0.00)

Check-In	Check-Out	Facility	City	State	Country	Nights	Cost/Night	Cost Exceed Per Diem
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There are no lodging expenses.

Meals (Per Member/Officer/Employee: \$38.00)

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem
12/09/2024	\$18.00	\$20.00	\$0.00	\$0.00	\$38.00	Cambridge	Massachusetts	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.

Invite List:

Bill Dauster - Deputy Staff Director Deputy Staff Director
U.S. Senate Committee on Health, Education, Labor, & Pensions

Cambridge, Massachusetts
Monday, December 9
WILLIAM DAUSTER TRAVEL ITINERARY

Monday, December 9, 2024

7:55 AM EST **Depart from Washington DC Reagan, JetBlue 1854**

Economy, Seat 9C, 1hr 34 min

JetBlue Confirmation Code: IWTEOU

9:29 AM **Arrive at Boston Logan International**

9:45 AM **Uber to Harvard Kennedy School**

79 JFK Street, Cambridge, MA 02138

10:45 – 11:45 AM **PROGRAM: The Economy**

This panel will examine the current state of the economy in the United States, and what economic issues – and challenges - new members can expect to encounter when they begin in January.

- **Jason Furman**, Aetna Professor of the Practice of Economic Policy jointly at Harvard Kennedy School
- **Gordon Hanson**, Peter Wertheim Professor in Urban Policy, Academic Dean For Strategy and Engagement
- **Michael Strain**, Director of Economic Policy Studies and Arthur F. Burns Scholar in Political Economy at the American Enterprise Institute
- **Dani Rodrik (Moderator)**, Ford Foundation Professor of International Political Economy at Harvard's John F. Kennedy School of Government

79 JFK Street, Cambridge, MA 02138

12:00 – 1:00 PM **Lunch**

79 JFK Street, Cambridge, MA 02138

1:00 – 2:00 PM **Bill Dauster part of this panel: Budgeting, Appropriations, Revenue, Spending**

This panel will address rules and best practices regarding budgeting and appropriations a new member of Congress and will allow for new members to ask questions of the panelists.

- **Douglas W. Elmendorf** Lucius N. Littauer Professor of Public Policy; Harvard University Distinguished Service Professor; Former Dean, Harvard Kennedy School; Director, Congressional Budget Office (2009-2015)
- **Bill Dauster**, Deputy Staff Director, Senate HELP Committee
- **Linda Bilmes (Moderator)**, Daniel Patrick Moynihan Senior Lecturer in Public Policy and Public Finance, and Faculty Chair of the Senior Managers in Government Program

79 JFK Street, Cambridge, MA 02138

2:15 – 3:15 PM **PROGRAM: America's Role in the World**

This panel will examine American international relations with a particular focus on China & Taiwan, as well as the Middle East.

- **Graham Allison**, Douglas Dillon Professor of Government
- **Tarek Masoud**, Ford Foundation Professor of Democracy and Governance, Harvard University
- **Meghan O'Sullivan**, Director, Belfer Center for Science and International Affairs, Kirkpatrick Professor of the practice of International Affairs, Harvard Kennedy School
- **Natalie Colbert (Moderator)**, Executive Director, Belfer Center for Science and International Affairs

79 JFK Street, Cambridge, MA 02138

3:30 PM

Uber to Boston Logan International
1 Harborside Drive, Boston, MA

5:10 PM

Depart Boston Logan International, JetBlue 2055
Economy, 10C, 1hr, 48min
JetBlue Confirmation Code: IWTEOU

6:58 PM

Arrive at Washington DC Reagan

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

BRIAN SCHATZ, HAWAII
JEANNE SHAHEEN, NEW HAMPSHIRE

JAMES E. FISCH, IDAHO
DEB FISCHER, NEBRASKA

SHANNON HAMILTON KOPFLIN, 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) 224-2351
FACSIMILE: (202) 224-7416
TDD: (202) 226-3762

United States Senate

SELECT COMMITTEE ON ETHICS

December 6, 2024

Bill Dauster
Committee on Health, Education, Labor, and Pensions
United States Senate
Washington, DC 20510

Dear Mr. Dauster:

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 *Bipartisan Program for Newly Elected Members of Congress* in Cambridge, Massachusetts, on December 9, 2024, sponsored by the Institute of Politics at Harvard Kennedy School, Harvard University (Harvard). Provided that you adhere to the guidance set forth below, it appears that it is permissible for you to accept necessary expenses from Harvard in connection with this trip.

Background

Based on your communication with the Committee, the background in this matter is as follows.¹ You are employed as the Deputy Staff Director for the Committee on Health, Education, Labor, and Pensions and Senator Bernard Sanders is your supervising Senator. Harvard invited you to travel to the *Bipartisan Program for Newly Elected Members of Congress* in Cambridge, Massachusetts, on December 9, 2024. Harvard certified to the Committee that it will pay the necessary expenses² related to the travel and that it is neither a lobbyist, lobbying firm, agent of a foreign principal, or otherwise acting as a representative or agent of a foreign government. Although Harvard retains or employs a federally registered lobbyist or foreign agent, Harvard has certified that it is an organization designated under § 501(c)(3) of the Internal Revenue Code³ and that no registered lobbyist or agent of a foreign principal will accompany you at any point throughout your trip.⁴

Discussion

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

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

² The term "necessary expenses" has a specific definition. See *Select Committee on Ethics Regulations and Guidelines for Privately Sponsored Travel* at 10-13.

³ 26 U.S.C. § 501(c)(3).

⁴ The term "any point throughout your trip" has a specific definition. See *Select Committee on Ethics Regulations and Guidelines for Privately Sponsored Travel* at 15.

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 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.⁵ This means that neither lobbyists nor foreign agents may accompany Senate invitees at any point to and from the event, at the event itself, or at the location being visited.⁶

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

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

Finally, Senate Rule 34 requires a reporting individual,⁷ 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,

⁵ The term "*de minimis*" has a specific definition. See *Select Committee on Ethics Regulations and Guidelines for Privately Sponsored Travel* at 6-8.

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

⁷ 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.

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,

A handwritten signature in blue ink, appearing to read "Shannon Hamilton Kopplin".

Shannon Hamilton Kopplin
Chief Counsel and Staff Director

Enclosure: Employee Privately Sponsored Travel Checklist