RE-2 Employee Post Travel Disclosure of Travel Expenses

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):

William and Flora Hewlett Foundation

Travel Dates:

April 24-25, 2024

Name of accompanying family member (if any):

Relationship to Traveler:

Total Expenses

Transportation Expenses	Lodging Expenses	Meals Expenses	Other Expenses (Amount & Description)
468.56	454.49	413	

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.

5/29/24 — Date

Rebecca Drago — 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.

5/29/24 — Date

 Signature of Supervising Senator/Officer

0000000004602 RECEIVED BY: SECRETARY OF THE SENATE Date: May 30, 2024

From: Jen Harris <jharris@hewlett.org>
Sent: Sunday, February 18, 2024 1:13 AM
To: Ecke, Jacob (Murphy) <Jacob_Ecke@murphy.senate.gov>
Cc: Heath Wickline <HWickline@hewlett.org>; Mackenzie Long <mackenzie@evergreenstrategygroup.com>
Subject: Invitation for Senator Murphy to speak at the New Common Sense Conference, April 24-26, San Francisco CA

Dear Mr. Ecke:

I am honored to extend an invitation to Senator Murphy to speak at the Hewlett Foundation's **New Common Sense Conference,** taking place April 24-26, 2024 at Cavallo Point, just north of San Francisco.

This in-person event brings leading national news media together with thinkers and policymakers working to develop a new, post-neoliberal 'common sense' about how our economy should work. Last year's inaugural attempt was a great success: We were joined by journalists from top-tier outlets (NYT, Bloomberg, Axios, New Yorker, Atlantic, WSJ, etc) and guests including National Security Advisor Jake Sullivan and Heather Boushey from the White House Council of Economic Advisors, among many others.

Like last year, this year's event will feature a number of interviews and panels about the end of the neoliberal era and what comes next— from what economists are still learning about Bidenomics and the broader industry policy re-embrace, to the future of labor, to the link between these things and democracy. We've appreciated the Senator bringing attention to the "spiritual crisis" our country faces, and his ongoing focus on moving beyond neoliberalism and toward a more just, inclusive and sustainable economic framework. Senator Murphy's ability to tie together issues impacted by neoliberalism's reign — from cities struggling with rising rates of drug addiction to workers protesting against corrupt elites — offers a powerful down-payment on what should come next.

We would be honored to feature Senator Murphy in an on-the-record 1:1 discussion moderated by a mutually agreed upon interviewer. We are flexible on the timing of his interview within the two days of our event, but we've provided a suggested time slot below as a starting point. Happy to structure the conversation to be useful to ideas or efforts you're working to push into the media.

I've cc'ed my Hewlett colleague Heath Wickline, who is planning the event, and can provide any more information you or your team needs.

Thanks for considering. I very much hope Senator Murphy can make it.

Sincerely,
Jen Harris, Director, Economy & Society Initiative
William and Flora Hewlett Foundation

++

The Event: The William & Flora Hewlett Foundation's Economy and Society Initiative will host its second New Common Sense Conference; an in-person, on-the-record event that will bring together diverse experts, thought leaders, and journalists to discuss the the end of the neoliberal era — and the critical work being done to define what comes next.

- **When:** The event will commence at 4:30pm PT on Wednesday, April 24th and conclude at 1:00pm on Friday, April 26th.
- **Where:** Cavallo Point, Sausalito, CA
- **Who:** Members of the national news media, experts from government and civil society, and corporate leaders will all be in attendance. We expect about 60 people.

The Speaking Opportunity: 1:1 on-the-record discussion in front of the conference's live audience

- **Topic:** America's "Spiritual Crisis" and Moving Past Neoliberalism
- **When:** We have tentatively held a slot on the morning of Thursday, April 25th for the conversation, but are happy to accommodate the Senator's availability from Thursday, April 25th - Friday, April 26th.
- **Who:** Senator Murphy and a mutually agreed upon interviewer.

The William and Flora Hewlett Foundation: New Common Sense Roundtable (Sausalito, CA)

CHRISTOPHER MURPHY

Title:
Senator

Employing Office/Committee:
MURPHY, CHRIS

Duty Station:
HARTFORD,CT

Destination(s):
Sausalito, California

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

Not applicable for Senators and Officers.

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

Name and Relationship to Traveler:
None

Organization Information

Organization Name
The William and Flora Hewlett Foundation

Is your organization classified as a §501(c)(3)?
☑ Yes ○ No

§501(c)(3) Organization Type
Private Foundation

Address
2121 Sand Hill Road

Address 2 (Optional)
Private Foundation

City, State Zip
Menlo Park, California 95025 United States

Phone Number
(650) 234-4771

Organization URL
www.hewlett.org

History of Congressional Travel

The Foundation has periodically been a grantmaking sponsor of congressional travel when it has furthered the organization's philanthropic programs.

Educational Activities

Established in 1966, the Foundation is a nonpartisan philanthropy that advances gender equity, promotes education, strengthens democracy, combats climate change, and fosters economic opportunity for all.

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.

The signature page is below.

Purpose and Details

Provide a brief description of the trip.

Business leaders, scholars, civil society experts, policymakers, and journalists will convene to discuss how the economy can offer greater opportunity for a broader population.

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

The Foundation's Economy and Society Initiative seeks to reimagine today's economy in a manner that offers economic justice and prosperity for all. This event, the New Common Sense media roundtable, will bring together members of the national news media, experts from government and civil society, and corporate leaders to discuss a new "common sense" about the economy and the aims it should serve.

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

- [x] Travel expenses paid for will not include expenditures for recreational activities.
- [x] 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 not** receive invitations.

The list of invitees is below.

Travel Details

Trip Start Date/Time:
04/24/2024 @ 12:00 PM

Trip End Date/Time:
04/26/2024 @ 01:30 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: $795.00 | Accompanying Family Member: $0.00)

Transportation Type	Class	Amount
Airfare	Coach	$650.00
Note Round trip (estimate) • OUTBOUND: o Wednesday, April 24 o JetBlue 615, JFK-SFO o 10am ET – 1:22PM PT • INBOUND: o Thursday, April 25 o Delta 717, SFO-SLC o 7:15PM PT – 10PM MT		
Ground Transportation	Coach	$145.00
Note Lyft to/from airport		

Lodging (Per Member/Officer/Employee: $454.49)

Check-In	Check-Out	Facility	City	State	Country	Nights	Cost/Night	Cost Exceed Per Diem
04/24/2024	04/25/2024	Cavallo Point Lodge	Sausalito	California	United States	1	$454.49	Yes
Cost Exceeds Per Diem Reason Traveler is staying at the hotel where all other event attendees are staying								

Meals (Per Member/Officer/Employee: $413.00)

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem
04/24/2024	$0.00	$0.00	$206.00	$0.00	**$206.00**	Sausalito	California	United States	Yes
Cost Exceeds Per Diem Reason Meal will be attended by all other event attendees as part of the conference.									

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem
04/25/2024	$78.00	$109.00	$20.00	$0.00	**$207.00**	Sausalito	California	United States	Yes

Cost Exceeds Per Diem Reason
Meal will be attended by all other event attendees as part of the conference. $20 dinner amount is for snacks that will be served to all attendees.

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.

Invitees to Economy and Society Initiative Event (Sausalito, CA)

- The Honorable Chris Murphy, U.S. Senator (CT)
- Ms. Rebecca Drago, Deputy Chief of Staff to U.S. Senator Chris Murphy

Last updated: 4.8.24

DRAFT AGENDA, TIMING AND CONTENT TO SHIFT PENDING SCHEDULES*

April 24 - 26, 2024

NEW COMMON SENSE

William + Flora Hewlett Foundation

NEW COMMON SENSE 2024 AGENDA

WEDNESDAY, APRIL 24, 2024

2:00 – 4:00 PM **REGISTRATION**

4:30 – 6:00 PM **WELCOME RECEPTION**

6:00 – 6:05 PM **FORMAL WELCOME**

Elizabeth Peters, Interim President, Hewlett Foundation

6:05 – 7:05 PM **DINNER**

7:05 – 7:15 PM **OPENING REMARKS**

Jen Harris, Director of Economy & Society Initiative, Hewlett Foundation

7:15 – 8:15 PM **PANEL DISCUSSION**

The US Economy Today: Defied Expectations, Ongoing Misperceptions, and What's Next
Brian Deese, National Economic Council (Invited)
Skanda Amarnath, Employ America
Peter Goodman, New York Times
Rana Foroohar, Financial Times
Moderator: Jim Tankersley, New York Times (Invited)

Following the global pandemic, many of the predicted economic disasters in the U.S. have not borne out: inflation has fallen, unemployment has stayed low, and the stock market is booming. Where did the economists and pundits go astray in their predictions, or how were their predictions thwarted? Why is the current public perception of the economy so misaligned with what the numbers are saying?

THURSDAY, APRIL 25, 2024

8:00 – 8:45 AM **BREAKFAST**

8:45 – 9:00 AM **WELCOME & INTRODUCTION**

Vidya Krishnamurthy, Chief Communications Officer, Hewlett Foundation

9:00 – 10:00 AM **PANEL DISCUSSION**

Elections Around the World & The Rise of Anti-Democratic Attitudes
David Singh Grewal, Berkeley Law
Gary Gerstle, University of Cambridge
David Wallace-Wells, New York Times (Invited)
Maria Ressa, Rappler (Invited)
Moderator: Farah Stockman, New York Times

Last updated: 4.8.24

DRAFT AGENDA, TIMING AND CONTENT TO SHIFT PENDING SCHEDULES*

April 24 - 26, 2024

NEW COMMON SENSE

William + Flora Hewlett Foundation

Nearly 50% of the world's population will be heading to the polls this year for elections that will undoubtedly impact geopolitics and the global economy for decades to come.

Yet many countries are teetering between post-neoliberal progress and democratic backsliding. From Mexico, to the US, to Russia, to Bangladesh, what does the rise in authoritarianism suggest about the role of democracies in our post-neoliberal future? And how much will the outcomes of these elections shape the next dominant economic paradigm?

10:00 - 10:15 AM **BREAK**

10:15 – 11:00 AM **NEWSMAKER 1:1 CONVERSATION**

Chris Murphy, U.S. Senator for Connecticut
Interviewed by: Rana Foroohar, The Financial Times

US Senator Chris Murphy (D-CT) has been vocal on the need for a new paradigm that can move past neoliberalism and account for a changing landscape on labor, tech, climate, and more. By connecting the dots between seemingly-disparate issues like an epidemic of loneliness and industrial policy, the Senator will offer thoughts on how we can collectively realign our political economy to better support working families, thriving communities, and a strong domestic economy.

11:15 AM – 12:15 PM **ROUNDTABLE DISCUSSIONS - ROUND #1**

Option 1: The Impact of Media Coverage on the Economy Today
Nicholas Lemann, New Yorker
Gilad Edelman, The Atlantic

By most measures, the American economy is very healthy – the pandemic-driven recession has ended, inflation is cooling, job growth is solid, and consumer spending is high. Yet, public perception of the economy remains largely negative and reports suggest that economic coverage has been increasingly pessimistic, despite what's actually happening in the economy. To what extent is the media's negative outlook perpetuating or even shaping public perception of the strength of our economy, or vice versa? How will this trend change over the coming months, and how might it impact consumer behavior, business decisions, or even election outcomes in the coming months?

Option 2: Countervailing Concentrated Economic Power
Ganesh Sitaraman, Vanderbilt University
Natalie Foster, Economic Security Project

Neoliberalism's unbridled form of capitalism has made companies larger, more profitable, and more powerful than ever before. At the same time, income inequality has gotten worse and worse – evidenced by soaring rates of household debt, homelessness, child poverty, and more. How can capitalism be reimagined to counteract concentrated economic power and foster a more equitable society? What policy solutions are necessary, whether through building power from the middle-out or implementing reforms from the top-down? Where are these ideas already being implemented, from antitrust to the expanded Child Tax Credit, and where are there opportunities to expand on this progress?

Option 3: The Growing Power – and Visibility – of Workers in America

Last updated: 4.8.24

DRAFT AGENDA, TIMING AND CONTENT TO SHIFT PENDING SCHEDULES*

April 24 - 26, 2024

NEW COMMON SENSE

William + Flora Hewlett Foundation

Sarah Jaynes, Rural Democracy Initiative
Taylor Nicole Rogers, Financial Times

A series of successful strike actions last year reinvigorated the labor organizing movement – with more high-profile strikes anticipated in 2024. Recent public investments in America's clean energy workforce and domestic manufacturing industries have also further highlighted the importance of supporting workers by centering fair wages and equity of opportunity. What do recent labor success stories say about the future of worker power under a new economic framework? Will this momentum continue to grow and even reach other areas of work that haven't been valued under neoliberalism's reign – from care workers to working parents? What policy reforms should be on the table to build on this progress and support the creation of a more comprehensive safety net for all workers?

12:30 – 1:30 PM **LUNCH**

With pre-scheduled 1:1 conversations related to the agenda for participants

1:30 – 2:30 PM **PANEL DISCUSSION**

Post-Neoliberal Progress: Climate & The Clean Energy Economy
Jen Harris, Director of Economy & Society Initiative, Hewlett Foundation
Rich Powell, ClearPath
Trevor Houser, Rhodium Group

Over the last several years, historic federal investments in the U.S. have helped realign economic incentives to better support communities and workers and advance a clean energy transition at the same time. These investments have represented a clear break from neoliberal orthodoxy, particularly as the private and philanthropic sectors have complemented federal investments with efforts of their own. Can these shifts in the roles of government, business, and nonprofits be sustained and ultimately add up to realignment? What hasn't been addressed yet that will be essential to reorienting the global political economy both as it relates to climate change and more broadly? And, most importantly, can this transition happen fast enough to keep up with the quickening pace of damage climate change is inflicting on people and places around the world?

2:45 – 3:45 PM **ROUNDTABLE DISCUSSIONS - ROUND #2**

Option 1: The Global Economy: Rising Competition and Security Interests
Callum Williams, The Economist

The expansion and diversification of international trade is arguably one of the most notable features of the neoliberal era — yet this has also resulted in new challenges for safeguarding national security. Industrial supply chains, the influence of tech and media companies, and climate-resilient transportation and energy infrastructure are among the myriad factors shaping today's global political economy. Why is there a movement underway away from globalization and towards a more regional approach to trade? What implications does this have for American businesses, the future of the global economy, and a post-neoliberal economic framework?

Option 2: The Proliferation of AI & What It Means for Our Future Economy
David Robinson, OpenAI
Josh Cohen, Boston Review

Last updated: 4.8.24

DRAFT AGENDA, TIMING AND CONTENT TO SHIFT PENDING SCHEDULES*

April 24 - 26, 2024

NEW COMMON SENSE

William + Flora Hewlett Foundation

Generative A.I. will soon drive transformative change across various sectors of our economy in the near future. Its impact is already reshaping our perspectives on worker productivity, intellectual property, voter information, and more. But as investments in A.I. development surge, are adequate guardrails being implemented to protect people, ideas, and our democracy? What factors do business leaders, union leaders, and policymakers need to consider as they work together to shape an economic and regulatory framework that harnesses the benefits of A.I., while mitigating misuses?

Option 3: How Industrial Policy is Shaping a New Era of Business

Rob Meyer, Heatmap

Businesses are increasingly being pushed to reconsider their impact on and responsibility to the broader economy, society, and environment. As geopolitical and industrial interests continue to intertwine – from the rise of 'friendshoring' to public investments in key industries like semiconductor and clean tech manufacturing – how can businesses work alongside government to shape America's future position on the global stage? Closer to home, how can business leaders move quickly to meet the urgent needs of workers, consumers, and our planet? How much of the movement we're seeing in markets today reflects a new era of capitalism, and where, if at all, are we seeing backtracking due to political backlash around "woke capitalism?"

3:45 – 4:00 PM **BREAK**

4:00 – 4:45 PM **VIRTUAL NEWSMAKER 1:1 CONVERSATION**

Ro Khanna, U.S. Representative for California's 17th Congressional District
Interviewed by: Jeanna Smialek, The New York Times (Invited)

Globalization — driven by growth-at-all-costs neoliberalism — has undoubtedly led to significant improvements, while also exacerbating challenges like wealth inequality, climate change, and the reach of tech in our daily lives. Given his instrumental role in advancing the CHIPS & Science Act, US Congressman Ro Khanna will share thoughts on how Americans can advance a new economic patriotism that is capable of revitalizing our nation's productive capacities and forging a more equitable and resilient future.

5:00 – 6:45 PM **HAPPY HOUR & FOOD TRUCKS**

7:00 – 8:00 PM **LIVE PODCAST TAPING & DRINKS**

FRIDAY, APRIL 26, 2024

7:30 – 9:00 AM ***OPTIONAL HIKE***

8:30 – 10:00 AM **BREAKFAST**

10:00 – 10:45 AM **NEWSMAKER 1:1 CONVERSATION**

To be announced

10:45 – 11:45 AM **PANEL DISCUSSION**
The Next Paradigm: Where There's Emerging Consensus and Ongoing Debate

0000000004613 RECEIVED BY: SECRETARY OF THE SENATE Date: May 30, 2024

DRAFT AGENDA, TIMING AND CONTENT TO SHIFT PENDING SCHEDULES*

April 24 - 26, 2024

NEW COMMON SENSE

William + Flora Hewlett Foundation

Oren Cass, American Compass
Felicia Wong, Roosevelt Institute
Roxanne Brown, United Steelworkers
Moderator: Eric Levitz, Vox

With the break from neoliberalism well underway, the contest of ideas for determining its replacement has started to surface areas of consensus that suggest what could come next. Where are those areas of agreement and how, if anything so far, do they account for addressing the most pressing issues of our time that were caused or catalyzed by neoliberalism? Where does debate remain and how much of what's unsettled is stymying the determination of neoliberalism's successor?

11:45 AM – 12:00 PM **CLOSING REMARKS**

12:00 – 1:00 PM **LUNCH**

0000000004614 RECEIVED BY: SECRETARY OF THE SENATE Date: May 30, 2024

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

BRIAN SCHATZ, HAWAII
JEANNE SHAHEEN, NEW HAMPSHIRE
JAMES E. RISCH, 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

April 19, 2024

The Honorable Christopher Murphy
United States Senate
Washington, DC 20510

Dear Senator Murphy:

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 *New Common Sense Conference* in Sausalito, California on April 24–25, 2024, sponsored by the William and Flora Hewlett Foundation (Hewlett). Provided that you adhere to the guidance set forth below, it appears that it is permissible for you to accept necessary expenses from Hewlett 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 a Senator in the United States Senate. Hewlett invited you to travel to the *New Common Sense Conference* in Sausalito, California on April 24–25, 2024, sponsored by Hewlett. Hewlett certified to the Committee that it will pay the necessary expenses[2] 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. Hewlett 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 Act of 2007 (HLOGA), Pub. L. 110–81 (2007), Senate Rule 35.2 permits Members, officers, and employees to accept privately sponsored travel only with the prior written approval of the Committee.

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[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.

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

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[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 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

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
Flights	422.10	flight was cheaper than expected
Ride Share	$46.46	ride share was cheaper than expected

Were there any changes to the pre-approved itinerary?

(●) Yes ( ) No

Explanation:

Rebecca flew from DC to San Francisco, instead of flying from New York. She took United 1606 from IAD to SFO on Wednesday, April 24th.

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

( ) Yes (●) No

Explanation: