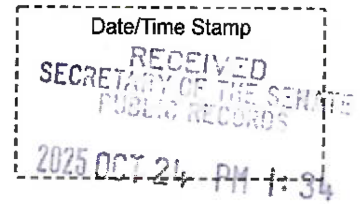


RE-2 Employee Post Travel Disclosure of Travel Expenses

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):

Global Women's Innovation Network "GlobalWIN"

Travel Dates:

9/23/25-9/26/25

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

Transportation Expenses	Lodging Expenses	Meals Expenses	Other Expenses (Amount & Description)
\$990.84	\$717.00	\$300.00	

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.

10/21/25

Date

Calli Shapiro

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.

10/21/25

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:

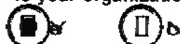
Trip Name: GlobalWIN 2025 Bicameral Mexico City, Mexico Educational Trip

Organization Information

Organization Name:

Global Women's Innovation Network "GlobalWIN"

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



If Yes, §501(c)(3) Organization Type:

☒ Private Foundation ☐ Public Charity

Address:

600 Pennsylvania Avenue, SE Suite 410

City, State, Zip:

Washington, DC 20003

Phone Number:

301-518-6336 (Andrea Mietus-Senior Advisor)

Organization URL:

GlobalWIN.org

History of Congressional Travel

Describe your organization's history of sponsoring congressional travel.

Since its founding in 2009, GlobalWIN has proudly sponsored Congressional staff trips, including several domestic visits with participation from Senate staff. These have included our annual trip to New York City, as well as trips to Baltimore, Boston, and Seattle. This past year, we hosted our inaugural bicameral international trip to Canada, which proved to be highly valuable for all participants. We believe that hosting this year's program in Mexico City—while continuing to include women leaders from both Republican and Democratic Senate offices—will offer another meaningful and impactful opportunity for bipartisan engagement and professional development.

Educational Activities

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

GlobalWIN is dedicated to highlighting and empowering women leaders by bridging the public and private sectors through a diverse portfolio of programming. Our initiatives include high-impact career development workshops, substantive policy roundtables, strategic networking receptions, engagements at embassies in Washington, D.C., and educational trips across the United States and internationally. Through these efforts, we foster meaningful dialogue, cultivate leadership, and promote bipartisan collaboration among emerging and established women leaders.

Lobbyist and Foreign Agent Registration Information

Lobbyist Registration Status (Select one):

- ☒ I certify that the sponsor is not a federally registered lobbyist and does not retain or employ a federally registered lobbyist.
- ☐ I certify that the sponsor is not a federally registered lobbyist but does retain or employ one or more federally registered lobbyists.

Foreign Agent Registration Status (Select one):

- ☒ I certify that the sponsor is not an agent of a foreign principal and does not retain or employ an agent of a foreign principal.
- ☐ I certify that the sponsor is not an agent of a foreign principal but does retain or employ one or more agents of a foreign principal.

Foreign Government Involvement

Foreign Agent Registration Status (Must select all):

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

Purpose and Details

Provide a brief description of the trip.

During our time in Mexico City, GlobalWIN will host events and meetings on issues such as AI, manufacturing, trade, female leadership, innovation in tech, and the US/Mexican bilateral relationship. More information about GlobalWIN can be found on our website. We have confirmed with a variety of GlobalWIN allies to schedule corporate site visits, meetings with senior women in the Mexican government and the US Embassy, as well as a series of receptions and cultural events to round out our time in Mexico City, Mexico. Work on these topics and active participation in our discussions will be a great asset to our delegation, which will include senior staff from both Republican and Democratic House and Senate offices.

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

A visit to Mexico City aligns with GlobalWIN's mission to foster broader conversations beyond Washington by connecting Congressional staff with global partners on innovation, technology, and economic growth. As part of our commitment to advancing women leaders across the public and private sectors, this bicameral international trip will offer meaningful engagement with key stakeholders and like-minded organizations. The U.S. and Mexico share one of the world's most integrated trading relationships, supporting millions of jobs and extensive collaboration—especially among U.S. companies operating in Mexico. Building on the success of our recent Canada trip, this visit will highlight the importance of North American partnerships and offer participants a deeper understanding of cross-border economic ties that directly inform U.S. policy priorities.

Is your organization the only sponsor for this trip?

☒ Yes ☐ No

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

If there are multiple sponsors, each sponsor must submit Organization Information (Page 1 of the Private Sponsor Travel Certification Form) and a Signature Page Form.

Grantmaking Organizations (Optional)

If you have a Grantmaking Organization, you must attach a Grantmaking Organization Certification Form.

- 1.
- 2.
- 3.

With or Without Regard to Congressional Participation (Select one):

- ☐ The trip is arranged or organized without regard to congressional participation.
- ☒ The trip is arranged or organized with regard to congressional participation.

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

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

Lobbyist/Foreign Agent Financing (Must select all):

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

Lobbyist/Foreign Agent Accompaniment

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

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

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

- ☐ No sponsor retains or employs a registered lobbyist or agent of a foreign principle, 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

Required if selecting the third option in either column - Please explain why the second overnight stay is practically required and necessary to accomplish the purpose of the trip.

Certification of No Recreational Activity and No Alcohol (Must select all):

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

Invitees list

- ☒ A list of all Senate invitees is attached to this form (required).
- ☒ Members and staff from the House of Representatives will also receive invitations.

Travel Details (Submit additional pages as needed)

Trip Start Date/Time:

9/23/2025 6:25 pm

Trip End Date/Time:

9/26/2025 3:08 pm

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

☐ Yes

☒ No

Transportation (Member/Officer/Employee: \$ 1,200.00 Accompanying Family Member: \$)

Transportation Type	Class	Amount
Roundtrip air travel to Mexico City	Economy	\$750.00
Ground transportation in Mexico City	Charter bus	\$250.00
Transportation to and from IAD Airport	Taxi/Uber/Lyft	\$200.00

Details (optional)

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

Check-In	Check-Out	Facility	City	State	Country
9/23/25	9/26/25	The W Mexico City	Mexico City-Polanco		Mexico
Nights	Cost/Night	Cost Exceed Per Diem (Yes/No)	If Yes, please explain why expenses over the per diem rate are reasonable and necessary.		
3	\$239.00	No			
Check-In	Check-Out	Facility	City	State	Country
Nights	Cost/Night	Cost Exceed Per Diem (Yes/No)	If Yes, please explain why expenses over the per diem rate are reasonable and necessary.		
Check-In	Check-Out	Facility	City	State	Country
Nights	Cost/Night	Cost Exceed Per Diem (Yes/No)	If Yes, please explain why expenses over the per diem rate are reasonable and necessary.		

Meals (Member/Officer/Employee: \$ 377.00 Accompanying Family Member: \$)

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem (Y/N)
9/23/25			47.00	23.00	\$70.00	Dulles Airport	VA	USA	N
9/24/25	18.00	30.00	47.00	23.00	\$118.00	Mexico City		Mexico	N
9/25/25	18.00	30.00	47.00	23.00	\$118.00				N
9/25/25	18.00	30.00		23.00	71.00				N

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

Reasonable Miscellaneous Expenses

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

Expense Type	Amount	Notes
--------------	--------	-------

Additional Details (optional)

Please note: For any inquiries please contact Andrea Mietus, Senior Advisor, GlobalWIN at andrea@mietusevents.com or call 301-518-6336.

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:

Calli Shapiro

Employing Office/Committee:

Senator Lujan

Private Sponsor(s):Global Women's Innovation Network
(GlobalWIN)**Destination(s):**

Mexico City, Mexico

Travel Dates:**Tuesday September 23rd to Friday September 26th**

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 trip covers issues such as AI, manufacturing, trade, female leadership, innovation in tech, and the US/Mexican bilateral relationship.

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.

8/21/25

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)

Senator Lujan

(Print Senator's/Officer's Name)

hereby authorize

Calli Shapiro

(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)

8/21/25

Date



Signature of Supervising Senator/Officer

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: GlobalWIN 2025 Bicameral Mexico City, Mexico Educational Trip

Travel Date(s): Tuesday, September 23, 2025 - Friday, September 26, 2025

Travel Destination(s): Mexico City, Mexico

Sponsor: Global Women's Innovation Network "GlobalWIN"

Helen Milby

(printed name of sponsor representative)

President & Co-Founder

(title)



(signature of sponsor representative)

8/8/2025

(date)

First Name	Last Name	Title	Office
Becky	Angelson	Chief of Staff	Office of Senator Jon Husted
Mana	Azarmi	Counsel	Office of Senator Alex Padilla
Sarah	Bittleman	Policy Director and Deputy Chief of Staff	Office of Senator Ron Wyden
Kelly	Boyer	Deputy Chief of Staff	Office of Senator Andy Kim
Gable	Brady	Senior Health Policy Advisor	Senate Committee on Finance
Amelia	Breing	Chief of Staff	Office of Senator Pete Ricketts (R-NE)
Kate	Cassling	Deputy Chief of Staff	Office of Sen. John Hickenlooper (D-CO)
Reema	Dodin	Chief of Staff	Office of Senator Brian Schatz
Naz	Durakoglu	Staff Director	Senate Foreign Relations Committee
Elizabeth	Falcone	Chief of Staff	Office of Senator Mark Warner
Stephanie	Gamache	Deputy Chief Clerk	Senate Commerce Committee
Tiffany	Ge	Staff Director	Office of Senator Mitch McConnell (R-KY)/ Senate Rules and Administration Committee
Lisa	Goeas	Chief of Staff	Office of Senator Jonie Ernst
Molly	Harper	Deputy Chief of Staff	Senator Bernie Moreno (R-OH)
Toni-Marie	Higgins	Chief of Staff	Office of Senator John Boozman
Leah	Hill	Legislative Director	Office of Senator Cory A. Booker (D-NJ)
Kate	Landers	Economic Policy Adviser	Sen. Jacky Rosen (D-NV)
Katie	Lane	Chief of Staff	Sen. Marsha Blackburn (R-TN)
Rachel	Lang	Advisor on International Trade, Competitiveness and Innovation	Office of Sen. Ron Wyden
Maia	Leeds	Staff Director	Senate Banking, Housing and Urban Affairs Committee Digital Assets Subcommittee
Mindi	Linquest	Chief of Staff	Office of Senator Patty Murray (D-WA)
Alison	MacDonald	Chief of Staff	Office of Senator Jeanne Shaheen
Anna Rose	Moore	Health Policy Advisor	Senate Committee on Health, Education, Labor, and Pensions
Caryn	Moore Lund	Senior Professional Staff Member	Senate Committee on Environment and Public Works
Lauren	O'Brien	Legislative Director	Sen. Todd Young (R-IN)
Olivia	Oo	Policy Advisor	Senator Adam Schiff
Stephanie	Penn	Press Secretary	Senator Mitch McConnell
Eliza	Ramirez	National Security Advisor	Office of U.S. Senator Ruben Gallego
Dana	Richter	Counsel	Office of Senator Shelley Moore Capito
Tricia	Russell	Chief of Staff	U.S. Senator Chris Van Hollen
Marisa	Salemme	Senior Health Policy Advisor	Senate Committee on Finance
Jaqueline	Sanchez	Chief of Staff	Office of Senator Lisa Blunt Rochester
Calli	Shapiro	Senior Policy Counsel	Office of Senator Ben Ray Lujan (D-NM)

Beth	Spivey	Chief of Staff	Office of Senator Roger F. Wicker (R-MS)
Caitlyn	Stephenson	Chief of Staff	Office of Senator Gary C. Peters
Cabelle	St. John	Chief of Staff	Office of Senator John Fetterman
Kalina	Thompson	Chief of Staff	Office of Senator Tammy Duckworth
Carly	Vandegrift	Chief of Staff	Office of Senator Jeff Merkley (D-OR)
Beth	Vrabel	Counsel	Office of Senator Chuck Schumer
Brianne	Walker	Counsel	Senate Judiciary Committee



2025 Mexico City Bicameral Staff Delegation Trip Itinerary
Tuesday, September 23rd - Friday, September 26th

Tuesday, September 23, 2025

4:30 PM Meet at Washington Dulles International Airport (IAD)

6:25 PM Depart Washington Dulles International Airport (IAD)
United Airlines Flight #1566

9:10 PM Arrive at Mexico City International Airport Benito Juárez (MEX)

9:40 PM Depart Mexico City International Airport Benito Juárez (MEX)

9:40 PM [45-minute drive to W Mexico City]
10:25 PM

Wednesday, September 24, 2025

6:30 AM Breakfast Available at 25DOS (Second floor)
7:30 AM

7:30 AM [30-minute drive to Benjamin Franklin Library]
8:00 AM

8:30 AM **Delegation US Embassy Visit**
9:45 AM **Location:** Benjamin Franklin Library: Liverpool 31, Juárez, Cuauhtémoc, 06600
Overview: The delegation will receive a comprehensive briefing on Mexico's political landscape, economic outlook, and emerging technology sectors. Embassy officials will provide insights into healthcare and pharmaceutical business exchanges, offering essential context for understanding bilateral relations under President Sheinbaum's female-led administration and current diplomatic priorities.

9:45 AM [15-minute drive to Netflix]
10:00 AM

10:15 AM **Delegation Netflix Visit**
11:45 AM **Location:** Av. Paseo de la Reforma 483, Torre Reforma, Floor 37
Featured Speaker: Anabel Lopez Mendez, Sr. Director, Publicity & Events, Netflix
Overview: Netflix's Anabel Lopez Mendez will discuss cutting-edge streaming innovations and content creation strategies in the Mexican market. Netflix will explore technological advancements in entertainment delivery and how streaming platforms adapt to diverse cultural markets while driving digital transformation across Latin America.

11:45 AM [15-minute drive to La Unica]
12:00 PM

12:15 PM **Delegation Lunch with Featured Speaker****1:30 PM** **Location:** *La Unica, Anatole France 98, Polanco, Polanco III Secc, Miguel Hidalgo, 11550**1:35 PM* *[15-minute drive to Coca-Cola]**1:45 PM***2:00 PM** **Delegation Coca-Cola Visit****3:30 PM** **Location:** *Rubén Darío 115, Polanco, Polanco V Secc, Miguel Hidalgo, 11580***Featured Speaker:** Talina Filigrana, Senior Director, Marketing, Coca-Cola**Overview:** Coca Cola's Mexico City headquarters will showcase a facility tour and product tasting experience. Talina will speak about the company's involvement in Coca-Cola's centennial in Mexico and FIFA World Cup 2026.*3:30 AM* *[20-minute drive to General Motors]**3:50 AM***4:00 PM** **Delegation General Motors Visit****5:30 PM** **Location:** *Avenida Ejército Nacional 843-B, Acceso por Corporativo Antara II, Blvd. Miguel de Cervantes Saavedra, Granada, 11520***Overview:** The hosts will discuss GM's Mexican manufacturing operations, trade policy implications, and supply chain strategies. Topics include navigating tariffs, investment decisions, and automotive industry trends, followed by networking with regional business leaders and government relations professionals.*5:30 PM* *[55 minute drive to Raiz]**6:30 PM***6:30 PM** **Delegation Dinner with Featured Speaker****8:30 PM** **Location:** *Raiz Schiller 331 Esquina Masaryk Col. Polanco, Mexico City 11560 Mexico***Featuring:** Susannah Goshko, Ambassador to the United Kingdom to Mexico*8:30 PM* *[15-minute drive to W Mexico City]**8:45 PM**RON**W Mexico City**Campos Elíseos 252, Polanco, Chapultepec, Miguel Hidalgo, 11560 Ciudad de México, CDMX, Mexico***Thursday, September 25, 2025***6:30 AM* *Breakfast Available at 25DOS (Second floor)**8:15 AM**8:15 AM* *[20-minute drive to McKinsey]**8:35 AM*

8:45 AM **Delegation McKinsey Visit****10:15 AM** **Location:** *Pedregal 24, Torre Virreyes, Piso 23°, Molino del Rey, 11040***Overview:** A discussion centered on McKinsey's research from "The Broken Rung," examining workplace gender equity challenges. The session will explore barriers facing women in professional advancement, particularly in Latin American markets, and strategies for creating more inclusive corporate environments.10:20 AM *[10-minute walk to Meta]*

10:30 AM

10:45AM **Delegation Meta Visit****11:45 AM** **Location:** *Pedregal 24, Col. Molina del Rey, Alc. Miguel Hidalgo, 11000***Overview:** The Mexico City team at Meta will give presentations on North American Innovation, showcasing innovation in education technology and entrepreneurship throughout the region. This will be followed by two women owned success stories.11:45 AM *[10-minute drive to AWS]*

11:55 AM

12:15 PM **Delegation AWS Visit****1:15 PM** **Location:** *Periférico Blvd Manuel Ávila Camacho 261, 5th Floor Polanco, Polanco I Secc, Miguel Hidalgo 11510***Overview:** AWS will host an exclusive briefing exploring Mexico's emerging AI regulatory landscape and its implications of innovation across the Americas. This session will feature a pioneering Mexican startup that has successfully scaled under the current regulatory framework, offering valuable insights for U.S. policymakers.1:15 PM *[20-minute drive to Mastercard]*

1:35 PM

2:00 PM **Delegation Mastercard****4:15 PM** **Location:** *Av. Paseo de la Reforma, 250 Torre A, Col. Juarez, 22th Floor***Overview:** Mastercard will highlight financial technology operations in Mexico City. Discussions will cover digital payment innovations, financial inclusion initiatives, cross-border transaction facilitation, and how fintech solutions address unique challenges in Latin American banking and commerce.4:15 PM *[45-minute drive to Closing dinner- Blanco Colima]*

5:00PM

5:30 PM **Delegation Closing Dinner****7:00 PM** **Location:** *Blanco Colima***Overview:** An open conversation what stood out most was the scale of collaboration already happening between U.S. and Mexican enterprises. From advanced manufacturing and technology to financial services and sustainability initiatives, each conversation underscored how deeply our economies are connected—and how much potential exists to grow that partnership further. Review top line items that came up oftenthe need to strengthen supply chains, invest in workforce development, and embrace innovation in order to remain globally competitive. Mexico is not just a neighbor; it is a strategic partner whose success is tied to ours.**Mexico City Programming End**

RON

*W Mexico City**Campos Elíseos 252, Polanco, Chapultepec, Miguel Hidalgo, 11560 Ciudad de México, CDMX, Mexico*

Friday, September 26, 2025

5:00 AM *Departure from Hotel*
Campos Elíseos 252, Polanco, Chapultepec, Miguel Hidalgo, 11560 Ciudad de México, CDMX, Mexico

5:00 AM *[45-minute drive to Mexico City International Airport Benito Juárez (MEX)]*
5:45 AM

5:45 AM *Arrive at Mexico City International Airport Benito Juárez (MEX)*

8:45 AM *Depart Mexico City International Airport Benito Juárez (MEX)*
United Airlines Flight #1567

3:08 PM *Arrive at Washington Dulles International Airport (IAD)*

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

JAMES E. RISCH, IDAHO
DEB FISCHER, NEBRASKA

BRIAN SCHATZ, HAWAII
JEANINE SHAHEEN, NEW HAMPSHIRE

SHANNON HAMILTON KOPPLIN, CHIEF COUNSEL AND STAFF DIRECTOR
WILLIAM B. CABLE, CHIEF CLERK

HART SENATE OFFICE BUILDING, ROOM 720
SECOND AND CONSTITUTION AVENUE, NE
WASHINGTON, DC 20513-6475

TELEPHONE: (202) 224-2961
FACSIMILE: (202) 224-2416

United States Senate

SELECT COMMITTEE ON ETHICS

September 18, 2025

Calli Shapiro
Office of Senator Ben Ray Lujan
United States Senate
Washington, DC 20510

Dear Ms. Shapiro:

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 *2025 Bicameral Mexico City, Mexico Educational Trip* in Mexico City, Mexico, on September 23-26, 2025, sponsored by the Global Women's Innovation Network (GlobalWIN). Provided that you adhere to the guidance set forth below, it appears that it is permissible for you to accept necessary expenses from GlobalWIN 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 Senior Policy Counsel in the Office of Senator Ben Ray Lujan. GlobalWIN invited you to travel to the *2025 Bicameral Mexico City, Mexico Educational Trip* in Mexico City, Mexico, on September 23-26, 2025. GlobalWIN 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. GlobalWIN 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.

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 foreign trips for up to seven days. The seven-day limitation means seven 24-hour periods, calculated from the time of arrival in the trip location to the time of departure from the trip location. For such trips, neither lobbyists nor foreign agents may accompany a Senate invitee at any point throughout the trip, other than in a *de minimis* way.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

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

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, Committee precedent, and GlobalWIN's factual representations, it appears that it is permissible for you to accept necessary expenses from GlobalWIN 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).

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.

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

⁷ 26 U.S.C. § 501(c)(3).

Please be advised that the United States Constitution prohibits the acceptance of any gift, including a meal, from a foreign government without the consent of Congress. In the Foreign Gifts and Decorations Act (FGDA), Congress consented to the acceptance by federal government officials of: (1) gifts of minimal value and (2) travel or the expenses for travel taking place entirely outside the United States, from a foreign government (which includes those acting as a representative or agent of a foreign government).⁸ The Senate has defined minimal value as \$100 or less. Further, pursuant to FGDA, there are certain reporting and procedural requirements that are imposed upon Members, officers, and employees who accept gifts from a foreign government. Please review the Committee's "Dear Colleague" letter of January 11, 2019, setting forth the items to be included in filing that report.

Finally, Senate Rule 34 requires a reporting individual⁹ 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

⁸ 5 U.S.C. § 7342.

⁹ A reporting individual is someone whose salary equals or exceeds 120% of the basic rate of pay for GS-15 (\$150,160 for CY 2025) or is a political fund designee and is required to file financial disclosure reports.