RE-2 Employee Post Travel Disclosure of Travel Expenses

Date/Time Stamp

RECEIVED
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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):
The Pew Charitable Trusts

Travel Dates:
04/17/2026 to 04/19/2026

Name of accompanying family member (if any):

Relationship to Traveler:

Expenses

Transportation Expenses	Lodging Expenses	Meals Expenses	Other Expenses (Amount & Description)
$271.00	$498.00	$633.86	$76.00

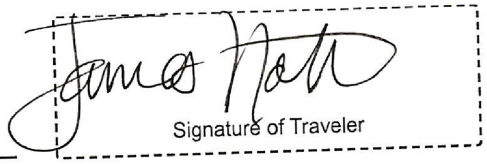
I also certify that attached to this form are all required documents for post travel disclosure, including:

- **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.

5/12/2026
Date

Jim Notter
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.

5/12/2026
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.

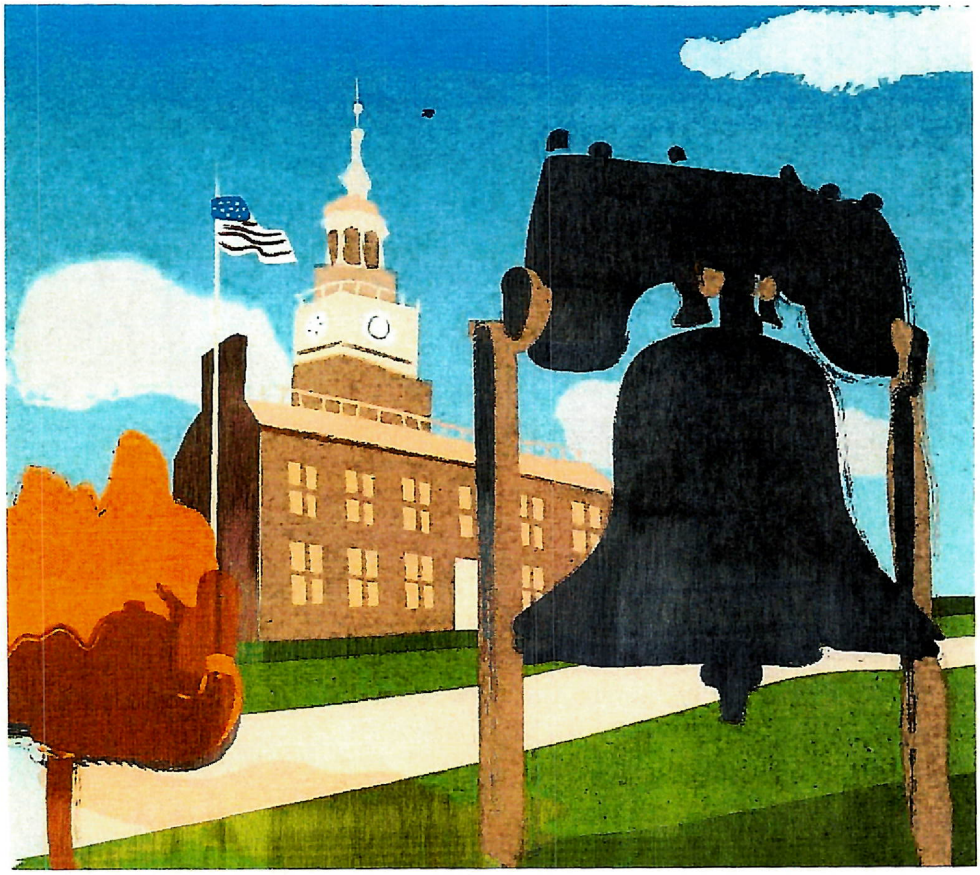
Were there any additional changes to the pre-approved trip?

○ Yes ◉ No

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

View in web browser

Pew | Bipartisan Chiefs Initiative



The Pew Charitable Trusts invites you and an immediate family member to the:

Senate Chiefs of Staff Leadership Conference

April 17-19, 2026

Philadelphia, Pennsylvania

REGISTER WITH .GOV EMAIL

The conference will be set against the backdrop of the nation's upcoming 250th anniversary and will highlight essential leadership principles that shaped America's founding.

Chiefs will have the opportunity to further develop their leadership skills through facilitated tours of the Liberty Bell, Congress Hall, Independence Hall, the Museum of the American Revolution, and the newly opened Calder Gardens Museum.

You can view a copy of the working agenda here.

We will travel to Philadelphia via Amtrak. Expenses for you and your family member are covered by The Pew Charitable Trusts, as permitted, excluding alcohol.

Ethics paperwork:

Click here to download your paperwork.

The Select Committee on Ethics **must receive your pre-travel paperwork by close of business on March 16, 2026** to ensure processing by the legal deadline.

Since the Committee will bar attendance by staff who submit late, **we recommend you submit your forms immediately, even if you're not sure you'll attend**, as there is no penalty if you're approved but later decide you can't attend.

We look forward to seeing you in historic Philadelphia this spring!

The Pew Charitable Trusts makes every effort to comply with federal, state, and local government ethics rules, including when hosting events. Please make sure that your participation is consistent with applicable ethics rules.

This email was sent to acalbos@pewtrusts.org

901 E Street NW, Washington, DC 20004-2008

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Brian	Abraham	Capitol Office of Sen. Jim Justice (WVS02 R)	brian_abraham@justice.senate.gov
Brian	McCormack	Capitol Office of Sen. Bill Hagerty (TNS02 R)	brian_mccormack@hagerty.senate.gov
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Joel	Kelsey	Capitol Office of Sen. Richard Blumenthal (CTS01 D)	jjk@blumenthal.senate.gov
Rebecca	Angelson	Capitol Office of Sen. Jon A. Husted (OHS02 R)	rebecca_angelson@husted.senate.gov
Lisa	Goeas	Capitol Office of Sen. Joni Ernst (IAS02 R)	lisa_goeas@ernst.senate.gov

RE-1 Employee Pre-Travel Authorization

Date/Time Stamp

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics in SH-220.** Incomplete and late travel submissions will **not** be considered or approved.

Name of Traveler:
James Notter

Employing Office/Committee:
Senator Angela Alsobrooks

Private Sponsor(s):
The PEW Charitable Trust

Destination(s):
Philadelphia, Pennsylvania

Travel Dates:

April 17-19, 2026

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 Senate Chiefs of Staff will visit historical sites including the Liberty Bell, Congress Hall, Independence Hall, and the Museum of the American Revolution to learn about our nation's founding and the varying leadership styles and perspectives that shaped our government.

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.

3/10/20 James Notter

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)

I Angela Alsobrooks (Print Senator's/Officer's Name) hereby authorize James Notter (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)

3/10/20 Angela D. Alsobrooks

Date Signature of Supervising Senator/Officer

Trip Name: Pew Bipartisan Senate Chiefs of Staff Leadership Conference 2026

Organization Information

Organization Name:
The Pew Charitable Trusts

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

If Yes, §501(c)(3) Organization Type:
[✓] Private Foundation [ ] Public Charity

Address:
901 E Street NW

City, State, Zip:
Washington, DC 20004

Phone Number:
202-669-6449

Organization URL:
www.pew.org

History of Congressional Travel

Describe your organization's history of sponsoring congressional travel.

Educational Activities

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

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.

The Pew Charitable Trusts will host its biennial Senate Chiefs of Staff Leadership Conference April 17-19, 2026, in Philadelphia. This year's program is intentionally set against the backdrop of the nation's upcoming 250th anniversary, reinforcing essential leadership traits that shaped America's founding. Throughout the conference, Senate Chiefs of Staff will explore how early American leaders navigated uncertainty and built consensus to chart a path forward for a new democracy. The Conference will feature learning sessions and site visits that highlight Philadelphia's history, emerging cultural experiences, and community. These sessions will allow for historical reflection, experiential learning, and peer-to-peer exchange—all of which will strengthen the Senate Chiefs' capacity to manage teams, advise senators, and lead effectively.

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

Through both its research and advocacy work, Pew seeks to advance the development of sound public policy at home and abroad, as well as strengthen the institutions that form the foundation of our democracy. The Biannual Bipartisan Leadership Conference advances those goals by creating a space to Chiefs of Staff to meet, exchange ideas, learn from each other, and build and strengthen relationships across the aisle. The program thereby also enhances Pew's reputation among senior government leaders as a trusted source of nonpartisan, data-driven information.

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:	⇄	Trip End Date/Time:
4/17/2026 8:45 AM		4/19/2026 1:30 PM

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

(●) Yes ( ) No

Transportation (Member/Officer/Employee: $271.60 Accompanying Family Member: $_____)

Transportation Type	Class	Amount
Amtrak	coach	$5,832
Bus in Philadelphia	n/a	$11,436

Details (optional)

Lodging (Member/Officer/Employee: $$498 Accompanying Family Member: $_____)

Check-In	Check-Out	Facility	City	State	Country
4/17/26	4/19/26	Sofitel	Philadelphia	PA	USA

Nights	Cost/Night	Cost Exceed Per Diem (Yes/No)	If Yes, please explain why expenses over the per diem rate are reasonable and necessary.
2	$249	Yes	Required a hotel with meeting space that could accommodate a larger group. We selected this hotel due to availability, ADA compliance, and best cost.

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: $848 Accompanying Family Member: $_____)

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem (Y/N)
4/17/26	$35	$86	$160		$281	Philadelphia	PA	USA	Y
4/18/26	$61	$115	$270		$446	Philadelphia	PA	USA	Y
4/19/26	$61	$60			$121	Philadelphia	PA	USA	Y

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

We are going over the per diem for this event because Philadelphia is a major metropolitan city and because the hotel includes a food and beverage minimum.

Reasonable Miscellaneous Expenses

(Member/Officer/Employee: $76 Accompanying Family Member: $_____)

Expense Type	Amount	Notes
Museum of the American Revolution Entrance Fee	$26	
Man Full of Trouble Entrance Fee	$40	
Carpenter's Hall	$10	

Additional Details (optional)

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: Pew Charitable Trusts Bipartisan Senate Chiefs of Staff Leadership Conference 2026

Travel Date(s): 4/17/26-4/19/26

Travel Destination(s): Philadelphia, PA

Sponsor: The Pew Charitable Trusts

Lauren Supina — *(printed name of sponsor representative)*

Senior Director — *(title)*

lsupina — Digitally signed by lsupina Date: 2026.02.24 11:19:48 -05'00' — *(signature of sponsor representative)*

2/24/26 — *(date)*

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AGENDA

Bipartisan Senate Chiefs of Staff Leadership Conference

Philadelphia | April 17-19, 2026

The Pew Charitable Trusts will host its biennial Senate Chiefs of Staff Leadership Conference April 17-19, 2026, in Philadelphia. This year's program is intentionally set against the backdrop of the nation's upcoming 250th anniversary, highlighting essential leadership principles that shaped America's founding. Throughout the conference, Senate Chiefs of Staff will examine how early American leaders navigated uncertainty and built consensus during the country's formative years. The Conference will provide Senate Chiefs of Staff with substantive leadership development, management training, and historical case studies to support effective office administration, senior staff leadership, and institutional stewardship within the United States Senate.

Friday, April 17, 2026

8:45 am	Check in and breakfast at Union Station
9:30 am	Depart for Philadelphia via Amtrak
11:30 am	Arrive at 30th Street Station; buses will meet group outside of 30th Street Station and transport participants to Sofitel hotel
12:30-1:30 pm	Working lunch and opening briefing led by Pew at Sofitel Hotel (Joel Wiginton, Lauren Supina)
2:00-3:30 pm	Guided educational session and facilitated discussion at Franklin Institute led by Franklin Institute staff
4:00 pm	Check in to Sofitel
5:15-6:30 pm	Guided site visit and facilitated peer discussion at Calder Gardens
6:15-6:30 pm	Buses to Barnes Foundation
6:45-9:00 pm	Program dinner and moderated panel discussion at the Barnes Foundation

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Panelists: Michael Newmuis, 2026 Director for the City of Philadelphia; Kathryn Ott Lovell, President and CEO of Philadelphia Visitor Center; Donna Frisby-Greenwood, Senior Vice President, Philadelphia and Scientific Advancement, The Pew Charitable Trusts (Moderator)

Background on Day I Programming

The Franklin Institute: A science and technology museum in Philadelphia dedicated to public education. It is named after Ben Franklin, one of America's earliest and most inventive leaders. For Senate Chiefs, this visit will highlight leadership qualities that support effective decision-making, problem-solving, and management in complex professional environments.

Calder Gardens: The visit to the Calder Gardens will allow Senate Chiefs to engage in peer-to-peer exchanges, while providing the opportunity to examine themes of innovation, interpretation, and resilience, as inspired by Alexander Calder's work. This facilitated tour will encourage Senate Chiefs to think creatively on their decision-making practices—a crucial skill needed to navigate the unique and competing priorities inherent in the management of a Senate office.

The Barnes Foundation: Philadelphian Albert C. Barnes (1872-1951) chartered this museum in 1922. The galleries will be open to the Senate Chiefs for a guided educational viewing led by a Barnes Foundation docent. The docent's tour will discuss how cultural institutions preserve and interpret national identity. This will in turn foster opportunities for peer-to-peer discussions on leadership, institutional values, and stewardship.

Moderated Panel Discussion: This discussion will ground the Leadership Conference in the broader semiquincentennial context. The panelists will discuss the historical significance of Philadelphia and how major civic commemorations, such as the 250th anniversary of the country's founding, require coordination, planning, and strong public engagement. This discussion will reinforce how Chiefs play similar roles in managing complex organizations and institutions.

Saturday, April 18, 2026

7:00-8:30 am	Breakfast at hotel
8:30-9:00 am	Buses to Independence National Historic Park
9:00-10:30 am	Guided educational session at Liberty Bell, Congress Hall, and Independence Hall led by Museum Staff

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11:00 am-12:00 pm	Guided educational session at Museum of the American Revolution (MOAR) led by museum staff
12:15-1:00 pm	Working lunch panel discussion at MOAR **Panelists:** George Leone, Homecoming 250 Navy Marine Corps; R. Scott Stephenson, President and CEO of MOAR; Kathryn Ott Lovell, President and CEO of Philadelphia Visitor Center (Moderator)
1:00-1:30 pm	Guided educational viewing of George Washington's tent led by museum staff
1:45 pm	Buses from MOAR to select educational activities
2:00-5:00 pm	Chiefs must choose and attend one of the following guided educational site visits: • A Man Full of Trouble • Carpenter's Hall
6:15-7:00 pm	Working reception and facilitated peer discussion at Rex at the Royal
7:00-9:00 pm	Program dinner and facilitated leadership discussion at Rex at the Royal

Background on Day II Programming

Independence National Historic Park: Independence Hall—where both the Declaration of Independence and the Constitution of the United States were once debated—is not only a historic site but also a laboratory of early American leadership. As Senate Chiefs are provided with a guided tour of Independence Hall, the Liberty Bell, and Congress Hall, they will examine how our Founders navigated conflicting interests, forged compromise, and sustained trust during unprecedented national uncertainty. These sites highlight leadership skills grounded in consensus-building, ethical reasoning, and institution-building. This tour asks Chiefs to consider how foundational leadership principles can inform their modern team management and organizational culture within congressional offices.

MOAR: Further highlighting Philadelphia's pivotal role in our country's history, MOAR tells the story of the American Revolution. The MOAR illustrates how leaders like George Washington operated in times of instability, scarcity, and evolving public identity. The

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panelists for the lunch sessions will reflect on the historical significance of the events of the American Revolution and how the decisions made 250 years ago still inform leaders today. This visit and lunch panel will prompt Chiefs to discuss historical decision-making and lessons relevant to senior staff roles today. This session will also invite Chiefs to reflect on historical leadership approaches and their relevance to contemporary professional environments.

A Man Full of Trouble: This site offers a glimpse into the informal networks where ideas circulated, relationships were built, and early American political culture took shape. For Senate Chiefs, this site visit will allow reflection on the importance of informal leadership spaces—the hallway conversations, coffee-shop discussions, and interpersonal trust that often play an important role in professional environments.

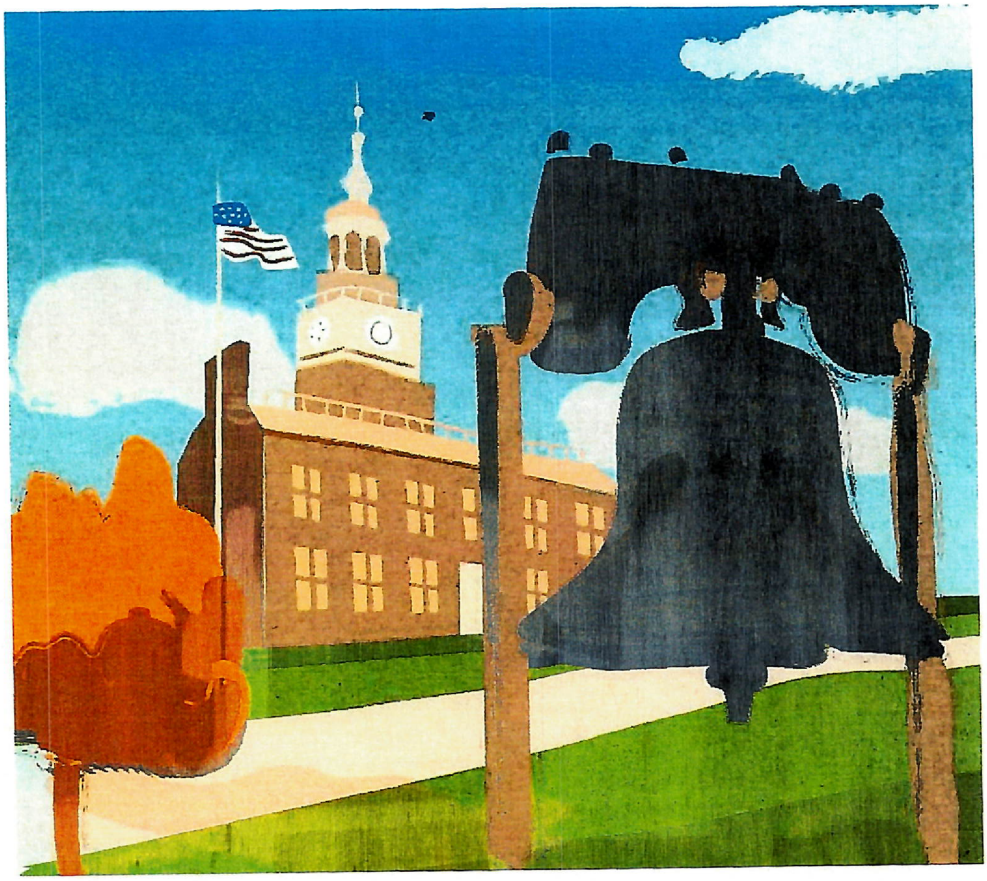
Carpenter's Hall: This historic building originally housed the First Continental Congress in 1774 and was also home to Franklin's Library Company and the American Philosophical Society. This is an ideal venue for the Senate Chiefs to explore themes of collaborative leadership, information sharing, and the role of intellectual communities in shaping institutions and public discourse.

Sunday, April 19, 2026

8:00-9:30 am	Breakfast at hotel and departure preparations
11:00 am	Arrive at 30th Street Station via bus (Grab-and-go lunch to be provided)
11:20 am	Train departs from Philadelphia, returning to Washington, D.C.
1:22 pm	Arrive at Union Station in Washington, D.C.

View in web browser

Pew | Bipartisan Chiefs Initiative



The Pew Charitable Trusts invites you and an immediate family member to the:

Senate Chiefs of Staff Leadership Conference

April 17-19, 2026

Philadelphia, Pennsylvania

REGISTER WITH .GOV EMAIL

The conference will be set against the backdrop of the nation's upcoming 250th anniversary and will highlight essential leadership principles that shaped America's founding.

Chiefs will have the opportunity to further develop their leadership skills through facilitated tours of the Liberty Bell, Congress Hall, Independence Hall, the Museum of the American Revolution, and the newly opened Calder Gardens Museum.

You can view a copy of the working agenda here.

We will travel to Philadelphia via Amtrak. Expenses for you and your family member are covered by The Pew Charitable Trusts, as permitted, excluding alcohol.

Ethics paperwork:

Click here to download your paperwork.

The Select Committee on Ethics **must receive your pre-travel paperwork by close of business on March 16, 2026** to ensure processing by the legal deadline.

Since the Committee will bar attendance by staff who submit late, **we recommend you submit your forms immediately, even if you're not sure you'll attend**, as there is no penalty if you're approved but later decide you can't attend.

We look forward to seeing you in historic Philadelphia this spring!

The Pew Charitable Trusts makes every effort to comply with federal, state, and local government ethics rules, including when hosting events. Please make sure that your participation is consistent with applicable ethics rules.

This email was sent to acalbos@pewtrusts.org

901 E Street NW, Washington, DC 20004-2008

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The Pew Charitable Trusts: Senate Philadelphia Conference 2026

Jim Notter

Title:
Chief of Staff

Employing Office/Committee:
ALSOBROOKS, ANGELA

Duty Station:
WASHINGTON,DC

Destination(s):
Philadelphia, Pennsylvania

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

The Senate Chiefs of Staff will visit historical sites including the Liberty Bell, Congress Hall, Independence Hall, and the Museum of the American Revolution to learn about our nation's founding and the varying leadership styles and perspectives that shaped our government.

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

Name and Relationship to Traveler:
None

Organization Information

Organization Name
The Pew Charitable Trusts

§501(c)(3) Organization Type
Public Charity

Address 2 (Optional)

Phone Number
(202) 607-7346

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

Address
901 E Street NW

City, State Zip
Washington, District Of Columbia 20004 United States

Organization URL

History of Congressional Travel

Through both its information and advocacy work, The Pew Charitable Trusts seeks to advance the development of sound public policy in the United States, as well as to strengthen the institutions that form the foundations of our democracy. A major component of this ongoing strategy has been to help create an environment in which policy makers can productively deliberate important issues of the day. The purpose of this, the tenth Senate Chiefs of Staff Leadership Conference, hosted by Pew, is to provide a collaborative environment for the chiefs of staff to learn from experts and discuss strategies for effective leadership, management, and drive bipartisan collaboration. The Pew Charitable Trusts last hosted this conference in October 2023.

Educational Activities

The Pew Charitable Trusts is driven by the power of knowledge to solve today's most challenging problems. Pew applies a rigorous, analytical approach to improve public policy, inform the public and invigorate civic life. We partner with a diverse range of donors, public and private organizations, and concerned citizens who share our commitment to fact-based solutions and goal driven investments to improve society. Pew issues dozens of research reports each year to educate the public and policy makers, and sponsors convening of researchers and experts to examine various issues of public policy and civic life.

Lobbyist and Foreign Agent Registration Information

Lobbyist Registration Status: *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: *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

Signature Page

The signature page is below.

Purpose and Details

Provide a brief description of the trip.

The Pew Charitable Trusts will host its biennial Senate Chiefs of Staff Leadership Conference April 17-19, 2026, in Philadelphia. This year's program is intentionally set against the backdrop of the nation's upcoming 250th anniversary, reinforcing essential leadership traits that shaped America's founding. Throughout the conference, Senate Chiefs of Staff will explore how early American leaders navigated uncertainty and built consensus to chart a path forward for a new democracy. The Conference will feature learning sessions and site visits that highlight Philadelphia's history, emerging cultural experiences, and community. These sessions will allow for historical reflection, experiential learning, and peer-to-peer exchange—all of which will strengthen the Senate Chiefs' capacity to manage teams, advise senators, and lead effectively.

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

Through both its research and advocacy work, Pew seeks to advance the development of sound public policy at home and abroad, as well as strengthen the institutions that form the foundation of our democracy. The Biannual Bipartisan Leadership Conference advances those goals by creating a space to Chiefs of Staff to meet, exchange ideas, learn from each other, and build and strengthen relationships across the aisle. The program thereby also enhances Pew's reputation among senior government leaders as a trusted source of nonpartisan, data-driven information.

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

- ⑤ Members and staff from the House of Representatives **will not** receive invitations.

The list of invitees is below.

Travel Details

Trip Start Date/Time:
04/17/2026 @ 08:45 AM

Trip End Date/Time:
04/19/2026 @ 01:30 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: $271.00 | Accompanying Family Member: $0.00)

Transportation Type	Class	Amount
Ground Transportation	N/A	$190.00
Note Rental bus for all three days.		
Train	Coach	$81.00
Note Round trip		

Lodging (Per Member/Officer/Employee: $498.00)

Check-In	Check-Out	Facility	City	State	Country	Nights	Cost/Night	Cost Exceed Per Diem
04/17/2026	04/19/2026	Sofitel	Philadelphia	Pennsylvania	United States	2	$249.00	Yes

Cost Exceeds Per Diem Reason
Required a hotel with meeting space that could accommodate a larger group. We selected this hotel due to availability, ADA compliance, and best cost.

Meals (Per Member/Officer/Employee: $633.86)

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem
04/17/2026	$24.25	$86.00	$160.00	$0.00	**$270.25**	Philadelphia	Pennsylvania	United States	Yes

Cost Exceeds Per Diem Reason
The cost of meals for this conference exceeds the federal per diem because the meals are working meals integrated into the official conference programming and are held at the same hotel and museum venues where substantive sessions and facilitated discussions will take place. Meals are scheduled as working breakfasts, lunches, and dinners to support continuous participation in the program and to avoid disruption to the agenda. Holding meals onsite is necessary given the structure of the conference and the logistical challenges of moving a large group between off site locations during scheduled sessions. Pew made reasonable efforts to control costs and is providing standard, non luxury meals only.

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem
04/18/2026	$61.00	$57.36	$160.00	$0.00	**$278.36**	Philadelphia	Pennsylvania	United States	Yes

Cost Exceeds Per Diem Reason
The cost of meals for this conference exceeds the federal per diem because the meals are working meals integrated into the official conference programming and are held at the same hotel and museum venues where substantive sessions and facilitated discussions will take place. Meals are scheduled as working breakfasts, lunches, and dinners to support continuous participation in the program and to avoid disruption to the agenda. Holding meals onsite is necessary given the structure of the conference and the logistical challenges of moving a large group between off site locations during scheduled sessions. Pew made reasonable efforts to control costs and is providing standard, non luxury meals only.

04/19/2026	$61.00	$24.25	$0.00	$0.00	**$85.25**	Philadelphia	Pennsylvania	United States	Yes

Cost Exceeds Per Diem Reason
The cost of meals for this conference exceeds the federal per diem because the meals are working meals integrated into the official conference programming and are held at the same hotel and museum venues where substantive sessions and facilitated discussions will take place. Meals are scheduled as working breakfasts, lunches, and dinners to support continuous participation in the program and to avoid disruption to the agenda. Holding meals onsite is necessary given the structure of the conference and the logistical challenges of moving a large group between off site locations during scheduled sessions. Pew made reasonable efforts to control costs and is providing standard, non luxury meals only.

Reasonable Miscellaneous Expenses (Per Member/Officer/Employee: $76.00)

Expense Type	Amount	Notes
Other (Museum)	$26.00	Museum of the American Revolution Entrance Fee
Other (Museum)	$40.00	Man Full of Trouble Entrance Fee
Other (Museum)	$10.00	Carpenter's Hall

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: Pew Charitable Trusts Bipartisan Senate Chiefs of Staff Leadership Conference 2026

Travel Date(s): 4/17/26-4/19/26

Travel Destination(s): Philadelphia, PA

Sponsor: The Pew Charitable Trusts

Lauren Supina — *(printed name of sponsor representative)*

Senior Director — *(title)*

lsupina — *(signature of sponsor representative)*

Digitally signed by lsupina
Date: 2026.02.24 11:19:48 -05'00'

2/24/26 — *(date)*

First Name	Last Name	Office
Alexandra	Golden	Capitol Office of Sen. Peter Welch (VTS02 D)
Alison	MacDonald	Capitol Office of Sen. Jeanne Shaheen (NHS01 D)
Allison	Herwitt	Capitol Office of Sen. Chris S. Murphy (CTS02 D)
Amelia	Breinig	Capitol Office of Sen. Pete Ricketts (NES02 R)
Amit	Ronen	Capitol Office of Sen. Maria Cantwell (WAS02 D)
Amy	Pfeiffer	Capitol Office of Sen. Andy Kim (NJS02 D)
Amy	Friedman	Capitol Office of Sen. Michael Bennet (COS01 D)
Beth	Spivey	Capitol Office of Sen. Roger Wicker (MSS01 R)
Beth	Pearson	Capitol Office of Sen. Elizabeth Warren (MAS01 D)
Brad	Bunning	Capitol Office of Sen. John A. Barrasso (WYS01 R)
Brent	Robertson	Capitol Office of Sen. Roger Marshall (KSS02 R)
Brian	McCormack	Capitol Office of Sen. Bill Hagerty (TNS02 R)
Brian	Winseck	Capitol Office of Sen. Chris Coons (DES01 D)
Brian	Abraham	Capitol Office of Sen. Jim Justice (WVS02 R)
Cabelle	St. John	Capitol Office of Sen. John K. Fetterman (PAS01 D)
Caitlyn	Stephenson	Capitol Office of Sen. Gary Peters Sr. (MIS01 D)
Carlos	Sanchez	Capitol Office of Sen. Ben Ray Lujan Jr. (NMS02 D)
Carly	Vandegrift	Capitol Office of Sen. Jeff Merkley (ORS02 D)
Casey	Contres	Capitol Office of Sen. Eric S. Schmitt (MOS02 R)
Chelsea	DeCasper	Capitol Office of Sen. Tim Scott (SCS02 R)
Christopher	Weihs	Capitol Office of Sen. Josh Hawley (MOS01 R)
Corey	Norman	Capitol Office of Sen. John Curtis (UTS02 R)
Coti-Lynne	Hale	Capitol Office of Sen. Mazie K. Hirono (HIS02 D)
Daniel	Keylin	Capitol Office of Sen. Thom Tillis (NCS01 R)
Dara	Cohen	Capitol Office of Sen. Jacky Rosen (NVS02 D)
Darin	Miller	Capitol Office of Sen. Cynthia Lummis (WYS02 R)
Darin	Thacker	Capitol Office of Sen. Steve Daines (MTS01 R)
Dave	Christie	Capitol Office of Sen. Maggie Hassan (NHS02 D)
Dave	Natonski	Capitol Office of Sen. Alan S. Armstrong (OKS02 R)
David	Montes	Capitol Office of Sen. Alex Padilla (CAS01 D)
David	Stokes	Capitol Office of Sen. John Kennedy (LAS02 R)
David	Keller	Capitol Office of Sen. Jim Banks (INS02 R)
Derek	Osborn	Capitol Office of Sen. James Lankford (OKS01 R)
Dezmond	Ward	Capitol Office of Sen. Mike Rounds (SDS02 R)
Doug	Davis	Capitol Office of Sen. Cindy Hyde-Smith (MSS02 R)
Doug	Counts	Capitol Office of Sen. Tom Cotton (ARS02 R)
Drew	Brandewie	Capitol Office of Sen. John Cornyn III (TXS01 R)
Elizabeth	Falcone	Capitol Office of Sen. Mark R. Warner (VAS01 D)
Emily	Levitan	Capitol Office of Sen. Deb Fischer (NES01 R)
Erin	Vaughn	Capitol Office of Sen. Chuck Schumer (NYS01 D)
Garrett	Boyle	Capitol Office of Sen. Lisa Murkowski (AKS01 R)

Giselle	Barry	Capitol Office of Sen. Ed Markey (MAS02 D)
Jacqueline	Sanchez	Capitol Office of Sen. Lisa Blunt Rochester (DES02 D)
James	Kelly	Capitol Office of Sen. Jerry Moran (KSS01 R)
James	Quinn	Capitol Office of Sen. Bill Cassidy (LAS01 R)
Jeff	Lomonaco	Capitol Office of Sen. Tina Smith (MNS02 D)
Jeffrey	Michels	Capitol Office of Sen. Ron Wyden (ORS01 D)
Jeffrey	Jezierski	Capitol Office of Sen. Shelley Moore Capito (WVS01 R)
Jennifer	Cox	Capitol Office of Sen. Mark Kelly (AZS01 D)
Jennifer	Heins Davis	Capitol Office of Sen. Chuck Grassley (IAS01 R)
Jess	Fassler	Capitol Office of Sen. Kirsten Gillibrand (NYS02 D)
Jessica	McBride	Capitol Office of Sen. John Thune (SDS01 R)
Jim	Notter	Capitol Office of Sen. Angela D. Alsobrooks (MDS02 D)
Joel	Kelsey	Capitol Office of Sen. Richard Blumenthal (CTS01 D)
John	Etue	Capitol Office of Sen. Ted Cruz (TXS02 R)
Jordan	Dorfexis	Capitol Office of Sen. Tommy Tuberville (ALS01 R)
Justin	Roth	Capitol Office of Sen. Ashley Moody (FLS02 R)
Kalina	Bakalov-Thompson	Capitol Office of Sen. Tammy Duckworth (ILS02 D)
Kathleen	Connery Dawe	Capitol Office of Sen. Angus King Jr. (MES02 D)
Kaytlin	Lane	Capitol Office of Sen. Marsha Blackburn (TNS01 R)
Keagan	Buchanan	Capitol Office of Sen. Amy Klobuchar (MNS01 D)
Ken	Reidy	Capitol Office of Sen. Tammy Baldwin (WIS02 D)
Larry	Burton	Capitol Office of Sen. Dan Sullivan (AKS02 R)
Lauren	O'Brien	Capitol Office of Sen. Todd C. Young (INS01 R)
Lisa	Goeas	Capitol Office of Sen. Joni Ernst (IAS02 R)
Mark	Libell	Capitol Office of Sen. Raphael Warnock (GAS02 D)
Mark	Welt	Capitol Office of Sen. Mike Lee (UTS01 R)
Mark	Gruman	Capitol Office of Sen. Kevin Cramer (NDS02 R)
Mark	Isakowitz	Capitol Office of Sen. Dave McCormick (PAS02 R)
Matt	Hennessey	Capitol Office of Sen. Elissa Slotkin (MIS02 D)
Michael	Lynch	Capitol Office of Sen. Chuck Schumer (NYS01 D)
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Neil	Campbell	Capitol Office of Sen. Jack Reed (RIS01 D)
Patrick	Hayes	Capitol Office of Sen. John Hickenlooper (COS02 D)
Patrick	Souders	Capitol Office of Sen. Dick Durbin (ILS01 D)
Patrick	Boland	Capitol Office of Sen. Adam Schiff (CAS02 D)
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Philip	Larson	Capitol Office of Sen. Bernie Moreno (OHS01 R)
Raphael	Chavez-Fernandez	Capitol Office of Sen. Ruben Gallego (AZS02 D)

Rebecca	Angelson	Capitol Office of Sen. Jon A. Husted (OHS02 R)
Rebecca	Avitia	Capitol Office of Sen. Martin Heinrich (NMS01 D)
Reema	Dodin	Capitol Office of Sen. Brian Schatz (HIS01 D)
Reynaldo	Benitez	Capitol Office of Sen. Jon Ossoff (GAS01 D)
Richard	Perry	Capitol Office of Sen. Lindsey Graham (SCS01 R)
Ryan	Alban	Capitol Office of Sen. Ted Budd (NCS02 R)
Ryan	White	Capitol Office of Sen. James E. Risch (IDS02 R)
Scott	Fairchild	Capitol Office of Sen. Catherine Cortez Masto (NVS01 D
Sean	Ross	Capitol Office of Sen. Katie Britt (ALS02 R)
Sean	Riley	Capitol Office of Sen. Ron Johnson (WIS01 R)
Susan	Wheeler	Capitol Office of Sen. Mike Crapo (IDS01 R)
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Toni-Marie	Higgins	Capitol Office of Sen. John Boozman (ARS01 R)
Tony	Eberhard	Capitol Office of Sen. John Hoeven III (NDS01 R)
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AGENDA

Bipartisan Senate Chiefs of Staff Leadership Conference

Philadelphia | April 17-19, 2026

Friday, April 17, 2026

8:45 am	Check in and breakfast at Union Station
9:30 am	Depart for Philadelphia via Amtrak 182 Northeast Regional
11:30 am	Arrive at 30th Street Station; buses will meet group outside of 30th Street Station and transport participants to the Sofitel Hotel where guests can store bags until check in
12:30 - 1:30 pm	Lunch and opening briefing led by Pew at Sofitel Hotel (Joel Wiginton, Lauren Supina)
1:30 - 2:00 pm	Bus to Franklin Institute
2:00 - 3:30 pm	Franklin Institute. The Franklin Institute President and CEO, Larry Dubinski, and Director of Collections, Susannah Collins, will highlight exhibits that serve as case studies for effective decision-making, problem-solving, and management in complex professional environments. Dubinski and Collins will facilitate discussions drawing direct parallels to how Senate Chiefs operate on a daily basis.
3:30 – 4:00 pm	Bus back to the Sofitel Hotel
4:00 – 5:15 pm	Check in to the Sofitel Hotel
5:15 - 6:30 pm	Calder Gardens. Guided educational session led by docents Noah Gorson and Nadine Gorson highlighting selected works by American sculptor Alexander Calder. The session will examine Calder Gardens as a civic institution, focusing on governance, public stewardship, and leadership decision-making. The Gorsons will draw parallels to Senate Chiefs' responsibilities overseeing complex organizations and managing stakeholder engagements, including through reference to Calder's work displayed in the U.S. Senate Hart Office Building.

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6:30 - 6:45 pm	Buses to Barnes Foundation
6:45 - 9:00 pm	Program dinner and moderated panel discussion at the Barnes Foundation. **Welcome Remarks:** Pew Bipartisan Chiefs co-chairs Toni-Marie Higgins and Allison Herwitt. **Panelists:** Michael Newmuis, 2026 Director for the City of Philadelphia; Kathryn Ott Lovell, President and CEO of Philadelphia Visitor Center; Angela Val, President and CEO of Visit Philadelphia; Donna Frisby-Greenwood, Senior Vice President, Philadelphia and Scientific Advancement, The Pew Charitable Trusts (Moderator). This discussion will ground the Leadership Conference in the broader semiquincentennial context. The panelists will discuss the historical significance of Philadelphia and how major civic commemorations, such as the 250th anniversary of the country's founding, require coordination, planning, and strong public engagement. This discussion will reinforce how Chiefs play similar roles in managing complex organizations and institutions.
9:00 pm	Buses back to the Sofitel Hotel

Saturday, April 18, 2026

7:00 - 8:30 am	Breakfast at hotel
8:30 - 9:00 am	Buses to Independence National Historic Park
9:00 - 10:30 am	Independence National Historical Park. Guided educational session at Liberty Bell, Congress Hall, and Independence Hall led by Luke Hopely (National Park Service Ranger and Community Engagement Coordinator). Hopely will discuss how our Founders navigated conflicting interests, forged compromise, and sustained trust during unprecedented national uncertainty. These sites highlight leadership skills grounded in consensus-building, ethical reasoning, and institution-building—foundational leadership principles that can inform Senate Chiefs' modern team management and organizational culture within their offices.
11:00 am - 1:30 pm	Guided educational session at Museum of the American Revolution (MOAR) led by museum staff and working lunch panel. **Panelists:** George Leone, Homecoming 250 Navy Marine Corps; R. Scott

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	Stephenson, President and CEO of MOAR; Kathryn Ott Lovell, President and CEO of Philadelphia Visitor Center (Moderator) The panelists for the lunch sessions will discuss the historical significance of the events of the American Revolution and how historical decision-making practices and lessons are relevant to Chiefs' roles today.
1:45 pm	Buses from MOAR to select educational activities
2:00 - 5:00 pm	Chiefs must choose and attend one of the following guided educational site visits: • A Man Full of Trouble: Dan Wheeler (museum curator) will provide a tour of the site and discuss the importance of informal leadership spaces to Senate Chiefs, including the importance of trust-building, informal communication, and relationship management outside of formal settings. • Carpenter's Hall: This historic building originally housed the First Continental Congress in 1774. Michael Norris (Executive Director) will provide a tour of the site and discuss collaborative leadership, information sharing, and the role of intellectual communities in shaping institutions and public discourse—paralleling the Senate Chief's role in coordinating internal teams and facilitating cross-office collaboration.
5:00 - 5:30 pm	Buses back to the Sofitel Hotel
5:45 - 6:15 pm	Buses to dinner at Rex at the Royal
6:15 - 9:00 pm	Program dinner at Rex at the Royal

Sunday, April 19, 2026

8:00 - 9:30 am	Breakfast at hotel and departure preparations
11:00 am	Arrive at 30th Street Station via bus (Grab-and-go lunch to be provided)
11:20 am	Return to Washington, D.C. via Amtrack 143 Northeast Regional
1:22 pm	Arrive at Union Station in Washington, D.C.