



U.S. House of Representatives

COMMITTEE ON ETHICS

Member / Officer Post-Travel Disclosure Form

☐ Original ☐ Amendment

This form is for disclosing the receipt of travel expenses from a private source for travel taken in connection with a Member or officer's official duties. This form does not eliminate the need to report privately-funded travel on the Member or officer's annual *Financial Disclosure Statement*. In accordance with House Rule 25, clause 5, **you must complete this form and file it with the Clerk of the House, B-81 Cannon House Office Building, within 15 days after travel is completed.** Please **do not** file this form with the Committee on Ethics.

NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001.

1. Name of Traveler: Rep. Barbara Lee
2. a. Name of Accompanying Relative: Rev. Dr. Clyde Oden Jr. OR None ☐
 b. Relationship to Traveler: ☒ Spouse ☐ Child ☐ Other (specify): _____
3. a. Dates: Departure: Saturday, Feb. 15, 2020 Return: Thursday, Feb. 20, 2020
 b. Dates at Personal Expense, if any: _____ OR None ☒
4. Departure City: San Francisco, CA Destination: Elmau+Munich, DE Return City: San Francisco, CA
5. Sponsor(s), Who Paid for the Trip: The German Marshall Fund of the United States; Robert Bosch Stiftung
6. Describe Meetings and Events Attended (attach additional pages if necessary): Rep. Lee participated in discussion on policy issues affecting the US and Europe and developed connections with her colleagues, which will aid her leadership on the SFOPS sub-committee.
7. Attached to this form are **each** of the following, signify that each item is attached by checking the corresponding box:
 - a. ☒ a completed *Sponsor Post-Travel Disclosure Form*;
 - b. ☒ the *Primary Trip Sponsor Form* completed by the trip sponsor **prior** to the trip, **including all** attachments **and** the *Grantmaking or Non-Grantmaking Sponsor Forms*;
 - c. ☒ page 2 of the completed *Traveler Form* submitted by the Member or officer; **and**
 - d. ☒ the letter from the Committee on Ethics approving my participation on this trip.
8. a. I represent that I participated in each of the activities reflected in the attached sponsor's agenda. **Signify statement is true by checking the box:** ☒
 b. If not, explain: _____

LEGISLATIVE RESOURCE CENTER
2020 DEC 17 AM 11:38
OFFICE OF THE CLERK
U.S. HOUSE OF REPRESENTATIVES

I certify that the information contained in this form is true, complete, and correct to the best of my knowledge. I have determined that all of the expenses on the attached *Sponsor Post-Travel Disclosure Form* were necessary and that the travel was in connection with my duties as a Member or officer of the U.S. House of Representatives and would not create the appearance that I am using public office for private gain.

Member / Officer Signature: _____

Date: _____

12/17/2020



U.S. House of Representatives

COMMITTEE ON ETHICS

Sponsor Post-Travel Disclosure Form

☒ Original ☐ Amendment

This form must be completed by an officer of any organization that served as the primary trip sponsor in providing travel expenses or reimbursement for travel expenses to House Members, officers, or employees under House Rule 25, clause 5. **A completed copy of the form must be provided to each House Member, officer, or employee who participated on the trip within ten days of their return.** You must answer all questions, and check all boxes, on this form for your submission to comply with House rules and the Committee's travel regulations. Failure to comply with this requirement may result in the denial of future requests to sponsor trips and/or subject the current traveler to disciplinary action or a requirement to repay the trip expenses.

NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001.

1. Sponsor(s) who paid for the trip: The German Marshall Fund of the United States and The Robert Bosch Stiftung

2. Travel Destination(s): Elmau, Germany and Munich, Germany

3. Date of Departure: Saturday, February 15, 2020 Date of Return: Thursday, February 20, 2020

4. Name(s) of Traveler(s): Congresswoman Barbara Lee & Rev. Dr. Clyde William Oden

Note: You may list more than one traveler on a form only if *all* information is *identical* for each person listed.

5. Actual amount of expenses paid on behalf of, or reimbursed to, each individual named in Question 4:

	Total Transportation Expenses	Total Lodging Expenses	Total Meal Expenses	Total Other Expenses (dollar amount per item and description)
Traveler	\$11983.75	\$883.50	\$360.53	\$292.77 Conference Fees
Accompanying Family Member	\$11983.75	N/A	\$360.53	N/A

6. All expenses connected to the trip were for actual costs incurred and not a *per diem* or lump sum payment. Signify statement is true by checking box: ☒

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

Signature: Karen P. Donfried Sandra Breka Date: 02/26/2020

Name: Dr. Karen Donfried/ Sandra Breka Title: President/ Member of Board

Organization: The German Marshall Fund of the United States/ Robert Bosch Stiftung

I am an officer of the above-named organization. Signify statement is true by checking box: ☒

Address: 1744 R St NW, Washington D.C. 20009/Französische Straße 32, 10117 Berlin, Germany

Telephone: +1 202 683 2605/+49 30 220025-311

Email: kdonfried@gmfus.org/sandra.breka@bosch-stiftung.de

Committee staff may contact the above-named individual if additional information is required.

If you have questions regarding your completion of this form, please contact the Committee on Ethics at 202-225-7103.



U.S. House of Representatives

COMMITTEE ON ETHICS

TRAVELER FORM

1. Name of Traveler: Barbara Lee
2. Sponsor(s) who will be paying for the trip: The German Marshall Fund of the United States; Robert Bosch Stift
3. City and State OR Foreign Country of Travel: Elmau, Germany & Munich, Germany
4. a. Date of Departure: February 15, 2020 Date of Return: February 20, 2020
b. Will you be extending the trip at your personal expense? ☐ Yes ☒ No
If yes, list dates at personal expense: _____
5. a. Will you be accompanied by a family member at the sponsor's expense? ☒ Yes ☐ No If yes:
(1) Name of Accompanying Family Member: Rev. Dr. Clyde Oden Jr.
(2) Relationship to Traveler: ☒ Spouse ☐ Child ☐ Other (specify): _____
(3) Accompanying Family Member is at least 18 years of age: ☒ Yes ☐ No
6. a. Did the trip sponsor answer "Yes" to Question 8(c) on the *Primary Trip Sponsor Form* (i.e., travel is sponsored by an entity that employs a registered federal lobbyist or a foreign agent)? ☐ Yes ☒ No
b. If yes, and you are requesting lodging for two nights, explain why the second night is warranted:

7. *Primary Trip Sponsor Form* is attached, including agenda, invitee list, and any other attachments and contributing sponsor forms: ☒ Yes ☐ No
NOTE: The agenda should show the traveler's individual schedule, including departure and arrival times and identify the specific events in which the traveler will be participating.
8. Explain why participation in the trip is connected to the traveler's individual official or representational duties. Staff should include their job title and how the activities on the itinerary relate to their duties.
Congresswoman Lee will participate in discussion on policy issues affecting the US and Europe and to develop informal connections among colleagues, which is related to her leadership on foreign policy and her work on SFOPS.
9. Is the traveler aware of any registered federal lobbyists or foreign agents involved planning, organizing, requesting, or arranging the trip? ☐ Yes ☒ No
10. For staff travelers, to be completed by your employing Member:

ADVANCED AUTHORIZATION OF EMPLOYEE TRAVEL

I hereby authorize the individual named above, an employee of the U.S. House of Representatives who works under my direct supervision, to accept expenses for the trip described in this request. I have determined that the above-described travel is in connection with my employee's official duties and that acceptance of these expenses will not create the appearance that the employee is using public office for private gain.

Signature of Employing Member _____

Date 1/15/2020



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Primary Trip Sponsor Form

This form should be completed by private entities offering to provide travel or reimbursement for travel to House Members, officers, or employees under House Rule 25, clause 5. A completed copy of the form (and any attachments) should be provided to each invited House Member, officer, or employee, who will then forward it to the Committee together with a *Traveler Form* at least 30 days before the start date of the trip. The trip sponsor should NOT submit the form directly to the Committee. The Committee website (ethics.house.gov) provides detailed instructions for filling out the form.

NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001. Failure to comply with the Committee's Travel Regulations may also lead to the denial of permission to sponsor future trips.

1. Sponsor who will be paying for the trip: The German Marshall Fund of the United States; Robert Bosch Stiftung
2. I represent that the trip will not be financed, in whole or in part, by a registered federal lobbyist or foreign agent. Signify that the statement is true by checking box: ☒
3. **Check only one.** I represent that:
 - a. The primary trip sponsor has not accepted from any other source, funds intended directly or indirectly to finance any aspect of the trip: ☒ **OR**
 - b. The trip is arranged without regard to congressional participation and the primary trip sponsor has accepted funds only from entities that will receive a tangible benefit in exchange for those funds: ☐ **OR**
 - c. The primary trip sponsor has accepted funds from other source(s) intended directly or indirectly to finance all or part of this trip and has enclosed disclosure forms from each of those entities. ☐If "c" is checked, list the names of the additional sponsors: _____
4. Provide names and titles of ALL House Members and employees you are inviting. For each House invitee, provide an explanation of why the individual was invited (include additional pages if necessary): Please see Addendum A.
5. Is travel being offered to an accompanying family member of the House invitee(s)? ☐ Yes ☐ No
6. Date of Departure: _____ Date of Return: February 20, 2020
7.
 - a. City of departure: Please see Addendum D for individual itineraries.
 - b. Destination(s): Elmau, Germany & Munich, Germany
 - c. City of return: Please see Addendum D for individual itineraries.
8. **Check only one.** I represent that:
 - a. The sponsor of the trip is an institution of higher education within the meaning of section 101 of the Higher Education Act of 1965: ☐ **OR**
 - b. The sponsor of the trip does not retain or employ a registered federal lobbyist or foreign agent: ☒ **OR**
 - c. The sponsor employs or retains a registered federal lobbyist or foreign agent, but the trip is for attendance at a one-day event and lobbyist / foreign agent involvement in planning, organizing, requesting, or arranging the trip was *de minimis* under the Committee's travel regulations. ☐
9. **Check only one of the following:**
 - a. I checked 8(a) or (b) above: ☒
 - b. I checked 8(c) above but am not offering any lodging: ☐
 - c. I checked 8(c) above and am offering lodging and meals for one night: ☐ **OR**
 - d. I checked 8(c) above and am offering lodging and meals for two nights: ☐ If you checked this box, explain why the second night of lodging is warranted: _____



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10. Attached is a detailed agenda of the activities House invitees will be participating in during the travel (i.e., an hourly description of planned activities for trip invitees). *Indicate agenda is attached by checking box:* ☒
11. *Check only one of the following:*
a. I represent that a registered federal lobbyist or foreign agent will not accompany House Members or employees on any segment of the trip. *Signify that the statement is true by checking box:* ☒ **OR**
b. *Not Applicable.* Trip sponsor is a U.S. institution of higher education: ☐
12. For *each* sponsor required to submit a sponsor form, describe the sponsor's interest in the subject matter of the trip *and* its role in organizing and/or conducting the trip:
GMF seeks to promote cooperation between the United States and Europe on transatlantic and global issues. Robert Bosch
Stiftung is a German foundation that supports projects in many important fields, including international relations. This Forum brings together U.S. and German lawmakers for
policy discussions. GMF and Robert Bosch Stiftung are responsible for all aspects of the trip, including recruitment of participants and creation of the agenda.
13. *Answer parts a and b. Answer part c if necessary:*
a. Mode of travel: Air ☒ Rail ☐ Bus ☒ Car ☐ Other ☐ (specify: _____)
b. Class of travel: Coach ☐ Business ☒ First ☐ Charter ☐ Other ☐ (specify: _____)
c. If travel will be first class, or by chartered or private aircraft, explain why such travel is warranted:

14. I represent that the expenditures related to local area travel during the trip will be unrelated to personal or recreational activities of the invitee(s). *Signify that the statement is true by checking box:* ☒
15. *Check only one.* I represent that either:
a. The trip involves an event that is arranged or organized *without regard* to congressional participation and that meals provided to congressional participants are similar to those provided to or purchased by other event attendees: ☐ **OR**
b. The trip involves events that are arranged specifically *with regard* to congressional participation: ☒
If "b" is checked:
1) Detail the cost *per day* of meals (approximate cost may be provided): Approximately \$94 per day in Munich.
Please note that the hotel in Elmau is inclusive and costs include all meals.
2) Provide the reason for selecting the location of the event or trip: The Congress-Bundestag Forum alternates each year between a city
in the United States and Germany. Munich was selected as it is the capital of an important German state. Elmau was selected for its superior conference facilities.
16. Name, nightly cost, and reasons for selecting each hotel or other lodging facility:
- | | | | |
|---|---------------------|---------------------------------|----------|
| Hotel Name: <u>Schloss Elmau</u> | City: <u>Elmau</u> | Cost Per Night: <u>\$319</u> | PD |
| Reason(s) for Selecting: <u>Superior conference facilities</u> | | | \$197/12 |
| Hotel Name: <u>Le Meridien</u> | City: <u>Munich</u> | Cost Per Night: <u>\$208.41</u> | 5 |
| Reason(s) for Selecting: <u>Capital of an important German state, where attendees can better understand the German federal system</u> | | | total |
| Hotel Name: _____ | City: _____ | Cost Per Night: _____ | 322 |
| Reason(s) for Selecting: _____ | | | \$319 |
| | | | includes |
| | | | food at |
| | | | this |
| | | | location |
| | | | PD |
| | | | Munich |
| | | | \$225/94 |
17. I represent that all expenses connected to the trip will be for actual costs incurred and not a per diem or lump sum payment. *Signify that the statement is true by checking box:* ☒



U.S. House of Representatives

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18. Total Expenses for each Participant:

<input type="checkbox"/> Actual Amounts	Total Transportation Expenses per Participant	Total Lodging Expenses per Participant	Total Meal Expenses per Participant
<input checked="" type="checkbox"/> Good Faith Estimates			
For each Member, Officer, or Employee	Please see Addendum C.	Please see Addendum C.	Please see Addendum C.
For each Accompanying Family Member	Please see Addendum C.	N/A	Please see Addendum C.

	Other Expenses (dollar amount per item)	Identify Specific Nature of "Other" Expenses (e.g., taxi, parking, registration fee, etc.)
For each Member, Officer, or Employee	\$292.77	Conference fees. Please see Addendum E.
For each Accompanying Family Member	N/A	N/A

NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001.

19. Check only one:

a. I certify that I am an officer of the organization listed below: ☒ OR

b. Not Applicable. Trip sponsor is an individual or a U.S. institution of higher education. ☐

20. I certify that I am not a registered federal lobbyist or foreign agent for any sponsor of this trip. ☒

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

Signature: Karen P. Donfried Sandra Breka Date: February 5, 2020

Name: Karen Donfried Sandra Breka

Title: President Member, Board of Management

Organization: German Marshall Fund Robert Bosch Stiftung

Address: 1744 R St NW, Washington, D.C. 20009 Französische Straße 32, 10117 Berlin, Germany

Telephone: +1 202 683 2650 +49 30 220025-316

Email: kdonfried@gmfus.org sandrabreka@bosch-stiftung.de

If there are any questions regarding this form, please contact the Committee at the following address:

Committee on Ethics

U.S. House of Representatives

1015 Longworth House Office Building, Washington, D.C. 20515

Phone: 202-225-7103 General Fax: 202-225-7392

Version date 12/2018 by Committee on Ethics

Please refer to Addendums A - E for specific information.

Theodore E. Deutch, Florida
Chairman
Kenny Marchant, Texas
Ranking Member

Grace Meng, New York
Susan Wild, Pennsylvania
Dean Phillips, Minnesota
Anthony Brown, Maryland

John Ratcliffe, Texas
George Holding, North Carolina
Jackie Walorski, Indiana
Michael Guest, Mississippi



ONE HUNDRED SIXTEENTH CONGRESS

U.S. House of Representatives

COMMITTEE ON ETHICS

Thomas A. Rust
Staff Director and Chief Counsel

David W. Arrojo
Counsel to the Chairman

Christopher A. Donesa
Counsel to the Ranking Member

1015 Longworth House Office Building
Washington, D.C. 20515-6328
Telephone: (202) 225-7103
Facsimile: (202) 225-7392

February 11, 2020

The Honorable Barbara Lee
U.S. House of Representatives
2470 Rayburn House Office Building
Washington, DC 20515

Dear Colleague:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your and your spouse's proposed trip to Germany,¹ scheduled for February 15 to 20, 2020, sponsored by German Marshall Fund of the United States and Robert Bosch Stiftung.

You must complete a Member/Officer Post-Travel Disclosure Form and file it, together with a Sponsor Post-Travel Disclosure Form completed by the trip sponsor, with the Clerk of the House within 15 days after your return from travel. As part of that filing, you are also required to attach a copy of this letter and both the Traveler and Primary Trip Sponsor Forms (including attachments) you previously submitted to the Committee in seeking pre-approval for this trip. You must also report all travel expenses totaling more than \$390 from a single source on the "Travel" schedule of your annual Financial Disclosure Statement covering this calendar year. Finally, Travel Regulation § 404(d) also requires you to keep a copy of all request forms and supporting information provided to the Committee for three subsequent Congresses from the date of travel.

Because the trip may involve meetings with foreign government representatives, we note that House Members may accept, under the Foreign Gifts and Decorations Act (FGDA), gifts "of minimal value [currently \$390] tendered as a souvenir or mark of courtesy" by a foreign government. Any tangible gifts valued in excess of minimal value received from a foreign government must, within 60 days of acceptance, be disclosed on a Form for Disclosing Gifts from Foreign Governments and either turned over to the Clerk of the House, or, with the written approval of the Committee, retained for official use.

¹ Please be aware that the Committee's review of the proposed trip does not extend to either the security situation in the destination country or security related to foreign travel in general. We recommend you contact the Office of House Security (OHS) for a safety and security briefing prior to your departure. OHS may be reached at (202) 226-2044 or ohsstaff@mail.house.gov. House travelers should also register for the U.S. State Department's Smart Traveler Enrollment Program at <https://step.state.gov>.

If you have any further questions, please contact the Committee's Office of Advice and Education at extension 5-7103.

Sincerely,

A handwritten signature in blue ink, appearing to read "Theodore E. Deutch".

Theodore E. Deutch
Chairman

A handwritten signature in blue ink, appearing to read "Kenny Marchant".

Kenny Marchant
Ranking Member

TED/KM:adw

For Internal Use Only
Not Intended for Distribution

AGENDA

Congress-Bundestag Forum

Schloss Elmau and Munich February

16 – 20, 2020

Sunday, February 16, 2020

U.S. Members of Congress and German Members of the Bundestag arrive on individual travel itineraries.

Transport to the hotel is provided. Please look for a “Congress-Bundestag Forum” sign upon arrival at the airport or upon your pick-up.

Accommodation: Schloss Elmau

82493 Elmau/Oberbayern

Tel. +49 8823 18 0

(Business casual)

12:55 U.S. lawmakers and spouses meet in the lobby and walk to Kaminstüberl

13:00 – 14:45 Welcome Lunch for U.S. Member of Congress on Germany’s Perspective on the International Order

With remarks by GMF and Robert Bosch Stiftung’s experts

Location: Kaminstüberl

Description: At this working lunch, Members of Congress will engage in discussion about the bilateral relationship between Germany and the United States the challenges and opportunities presented by the current state of global affairs. Experts from the Robert Bosch Stiftung and the German Marshall Fund will provide perspectives on the importance of international engagement for both countries, and participants will discuss the ways in which German and American perspectives on engagement converge and diverge. Should Members of the Bundestag arrive early, they are welcome to lunch.

Please note that the entirety of the lunch will be allocated to discussion.

- 14:50 U.S. and German lawmakers meet in the patio for a 3-minute walk to the Retreat Building

(If you require a transfer to the Retreat Building, please come to the lobby, where staff will assist you)
- 15:00 – 16:45 **Welcome and Facilitated Opening Session on Role of Legislators in Transatlantic Relations** with **Sandra Breka**, Member of the Board of Management, Robert Bosch Stiftung; and **Dr. Karen Donfried**, President, The German Marshall Fund of the United States

Mark Shillaker, Facilitator, FLAG Consulting & Training Location: tbd

Description: At this facilitated session, Members of Congress and Members of the Bundestag will discuss the role that legislators play in shaping the transatlantic relationship. In particular, discussants will focus on, the most constructive ways to engage with their foreign counterparts, and the general role of the legislative branch in facilitating transatlantic cooperation. The discussion will be informed by the personal experience and backgrounds of each Member of Congress and Bundestag. Remarks will be given by the Robert Bosch Stiftung's Sandra Breka and GMF's Dr. Karen Donfried.
- 16:45 – 18:00 Personal Work Period
- 18:00 – 20:30 **CBF Opening Dinner Discussion: An Asian Perspective on Transatlantic Relations and the Global Order**
Dr. Huang Jing, Distinguished Professor and Dean of the Institute on National and Regional Studies, Beijing Language and Culture University
Location: Restaurant Fidelio

Description: At this working dinner, Members of Congress and Members of the Bundestag will hear remarks by Dr. Huang Jing about the Asian perspective on the transatlantic relationship. China's growing influence in world affairs both poses a challenge and presents an opportunity for German and American policymakers, and the future of the transatlantic relationship will be shaped significantly by the countries' respective policies towards China. The delegation will explore the ways in which American and German policy on China converges and diverges, especially as it pertains to technology.

Please note that the entirety of the dinner will be allocated to discussion.

Monday, February 17, 2020

Starting at 7:30 Buffet breakfast at La Salle Restaurant

(Business casual)

8:45

U.S. and German lawmakers meet in the patio for a 3-minute walk to the Retreat Building

(If you require a transfer to the Retreat Building, please come to the lobby, where staff will assist you)

09:00 – 10:45

Session I: Global Order – Challenges to the West

Federica Mogherini, Former High Representative of the European Union for Foreign Affairs and Security Policy and Vice-President of the European Commission

General John R. Allen, President, The Brookings Institution Location:
Pavillon

Description: At this working session, Members of Congress and Members of the Bundestag will hear remarks by Federica Mogherini, Former High Representative of the European Union for Foreign Affairs and Security Policy and Vice President of the European Commission, and General John R. Allen, President of the Brookings Institution, about their perspectives on challenges to the transatlantic relationship. Participants will discuss the challenges they identify as most relevant with the two experts and present a German or American perspective to their respective counterparts. The discussants will then answer questions from the delegation.

10:45 – 11:00

Coffee Break

11:00 – 12:00

Facilitated Group Working Phase

Description: In this facilitated group working phase, Members of Congress and Members of the Bundestag will discuss, in small groups, the topic of global order, which was held with Federica Mogherini and General John R. Allen. The purpose of this session is to facilitate relationship-building among participants, foster collaborative approaches to transatlantic policymaking, and identify policy areas in which German and American perspectives converge and diverge. Members of Congress and Members of the Bundestag will reflect on the perspectives they heard and give their views on the topic.

12:15 – 13:45 Lunch Break

Location: La Salle and Kaminstüberl

14:00 – 15:30 Discussion of Global Order Session

Location: Pavillon

Description: In this facilitated discussion, Members of Congress and Members of the Bundestag will have the opportunity to present the results of the group working phase to the plenum and suggest collaborative solutions and common transatlantic approaches. Integrating the conversation with Federica Mogherini and General John R. Allen, the participants will further develop the collaboration they began in the facilitated group working phase.

15:50 Lawmakers and interested spouses meet at the hotel lobby

16:00 – 18:00 Facilitated team-building activity

Description: In this facilitated session, Members of Congress and Members of the Bundestag will participate in an on-site team-building exercise. The purpose of this activity is to engage Members of Congress and Members of the Bundestag to engage in both candid and informal discussions about their experience at the Congress-Bundestag Forum thus far. They will have the opportunity to reflect on the perspectives they have heard, discuss whether they agree or disagree, and build personal connections with their transatlantic counterparts.

18:00 – 19:00 Personal Work Period

19:00 – 21:00 Dinner Discussion: Europe Reunited – 30 years after the fall of the Berlin Wall

Sonja Licht, President, Belgrade Fund for Political Excellence

Sławomir Sierakowski, Founder, Krytyka Polityczna

Location: Restaurant Fidelio

Description: At this working dinner, the delegation will engage in conversation about the process and impacts of Europe's "reunification" after the fall of the Berlin Wall in 1989. Perspectives from Middle and Eastern Europe will be provided by two guest discussants: Sonja Licht, President of the Belgrade Fund for Political Excellence, a Belgrade-based nonpartisan organization dedicated to Serbia's democratization and

European integration, and Sławomir Sierakowski, founder of Krytyka Polityczna (The Political Critique), a Polish intellectual organization and independent news provider.

Please note that the entirety of the dinner will be allocated to discussion.

Tuesday, February 18, 2020

Starting at 7:30 Buffet breakfast at La Salle Restaurant

(Business casual)

8:55 Lawmakers meet at the Pavillon

9:00 – 10:30 Session II: Social Cohesion in Changing Societies across the Atlantic

Tim Dixon, Co-Founder, More in Common

Description: In this facilitated session, Members of Congress and Members of the Bundestag will discuss the best practices and policies to foster social cohesion in changing societies. Immigration, aging populations, and a widening disparity between urban and rural areas will be topics of conversation, and the delegations will share their views on the most constructive ways to manage such changes.

10:30 – 10:45 Coffee Break

10:45 – 11:45 Continue with group working phase

12:00 – 13:00 Lunch Break

Location: La Salle and Kaminstüberl

Lawmakers walk back to Pavillon

13:15 – 15:00 Session III: Opportunities and Risks: Energies for the Future

Mechthild Wörsdörfer, Director, Sustainability, Technology and Outlooks,
International Energy Agency (invited)

Location: Pavillon

Description: In this session, Members of Congress and Members of the Bundestag will engage in a facilitated discussion about energy and energy policy, with focus on how emerging technologies will change how energy is sourced and used. As promoting sustainable energy becomes a more prominent political and

economic goal across the world, energy has become one of the fields in which technology has advanced rapidly. The implications of such change for the transatlantic relationship and the ways in which Germany and the United States can cooperate on energy policy will be explored.

15:00 – 15:15 Coffee Break

15:15 – 17:15 Closing Session: Transatlantic Relations – The Way Forward

Facilitated discussion on the future of the transatlantic relationship

Mark Shillaker, Facilitator, FLAG Consulting & Training

Location: Pavillon

Description: In this session, Members of Congress and Members of the Bundestag will engage in a facilitated discussion about the future of the transatlantic relationship. The problems it faces, the solutions required, and the best methods of cooperation will be topics of discussion. Attendees will have the opportunity to reflect on how their experience at the Congress-Bundestag Forum has informed their views on policy and transatlantic engagement.

17:15 – 19:00 Personal Work Period

19:00 – 21:30 CBF Closing Dinner with remarks from **Sandra Breka**, Member of the Board of Management, Robert Bosch Stiftung; and **Dr. Karen Donfried**, President, The German Marshall Fund of the United States

Location: Restaurant Summit

Description: At this working dinner, the delegation will hear remarks on the state of the transatlantic relationship from the Robert Bosch Stiftung's Sandra Breka and GMF's Dr. Karen Donfried. The delegation will engage in a discussion about policy areas of focus (including trade and technology), areas in which cooperation may be strengthened, ways in which German and American politicians might constructively engage.


Please note that the entirety of the dinner will be allocated to discussion.

Wednesday, February 19, 2020

Starting at 7:30 Buffet breakfast at La Salle Restaurant

(Business casual)

8:00 **Check out of Schloss Elmau**
German Members of the Bundestag depart on individual itineraries

8:00 **Transfer to Munich airport**
 **U.S. Members of Congress depart to Munich**

10:00 – 11:30 **Visit to the Munich Documentation Center for the History of National Socialism**

Tour and discussion with **Dr. Mirjam Zadoff**, Director of the Munich Documentation Center for the History of National Socialism

Description: The Munich Documentation Center for the History of National Socialism was built upon the site of the National Socialist German Workers' Party (NSDAP) headquarters and opened in 2015 as an educational facility with permanent and special exhibitions. On this site visit, the delegation will learn about the history, crimes, and consequences of the Nazi dictatorship and will explore how the lessons of the rise of Nazism are relevant today.

11:30 **Transfer to BMW (exact BMW location to be confirmed)**

12:00 – 14:00 **Lunch Discussion on Digitalization and Workforce Development in Germany**

Description: At BMW, the delegation will discuss how BMW approaches Germany's modern economic opportunities and challenges: an aging workforce, rapid advances in technology, European economic integration, and increased global competition. They will explore how the company, which has its American headquarters in New Jersey, approaches the transatlantic relationship against a backdrop of changing trade policy.

Please note that this site visit includes lunch, and the entire lunch period is allocated to discussion.

14:00 – 15:30 **City tour of Munich**

15:30 – 16:30 Meeting with Joachim Herrman, Minister for the Interior, Integration and Sport (invited)

Description: At the Bavarian Landtag [Parliament], the delegation will meet Joachim Herrman, Minister for the Interior, Integration and Sport, for a discussion about Bavarian politics and relationship with the United States. The discussion will allow participants to better understand Germany's federal system of government and the way it impacts German relations with the European Union and United States.

16:30 – 17:00 Transfer to Le Meridien Hotel

17:00 – 18:00 Personal Work Period at Hotel

18:00 Transfer to Zum Franziskaner Restaurant

18:30 – 20:30 Dinner Discussion on Current German Politics

Gregor Peter Schmitz, Editor-in-Chief, Augsburger Allgemeine Zeitung

Description: At this working dinner, the delegation will engage in a discussion with Gregor Peter Schmitz, Editor-in-Chief of the Augsburger Allgemeine Zeitung, about the state of German politics. As Germany's traditional political parties decline, new parties and parties on the fringes of politics have drastically increased their share of votes and have, in many cities and federal states, entered government – changing the way politics is conducted in Europe's largest national economy. In this discussion, the causes and consequences of these developments will be explored, with focus on the implications for the transatlantic relationship.

Please note that the entirety of the dinner will be allocated to discussion.

Thursday, February 20, 2020

U.S. Members of Congress depart to airport on individual itineraries

House Ethics Addendum A
Congress-Bundestag Forum 2020

The following Members of Congress were invited to participate due to their interest in the transatlantic relations and international affairs:

- Congresswoman Robin Kelly (D-IL)
- Congresswoman Barbara Lee (D-CA)
- Congressman Mike Turner (R-OH)
- Congresswoman Brenda Lawrence (D-MI)
- Congresswoman Debbie Lesko (R-AZ)
- Congressman Robert Bishop (R-UT)
- Congressman Mark Green (R-TN)
- Congressman Eric Swalwell (D-CA)
- Congressman C. A. Dutch Ruppersberger (D-MD)
- Congressman Bill Flores (R-TX)
- Congressman Barry Loudermilk (R-GA)

House Ethics Addendum B
Congress-Bundestag Forum 2020

The following Members of Congress are participating in the 2020 Congress-Bundestag Forum:

- Congresswoman Robin Kelly (D-IL)
- Congresswoman Barbara Lee (D-CA)
- Congressman Mike Turner (R-OH)
- Congresswoman Brenda Lawrence (D-MI)
- Congresswoman Debbie Lesko (R-AZ)
- Congressman Robert Bishop (R-UT)
- Congressman Mark Green (R-TN)
- Congressman Eric Swalwell (D-CA)
- Congressman C. A. Dutch Ruppersberger (D-MD)
- Congressman Bill Flores (R-TX)

Confirmed, only Rep Loudermilk not
attending (see communications/e-mails)

House Ethics Addendum C
Congress-Bundestag Forum 2020

Please find below the comprehensive list of travel expenses. These are good-faith estimates.

- Congresswoman Robin Kelly (D-IL)
Transportation: \$12,042.58
Lodging: \$883.41
Meal: \$376
- Nathaniel Horn, spouse of Congresswoman Robin Kelly (D-IL)
Transportation: \$12,042.58
Lodging: N/A
Meal: \$376
- Congresswoman Barbara Lee (D-CA)
Transportation: \$11,765.75
Lodging: \$883.41
Meal: \$376
- Clyde Oden, spouse of Congresswoman Barbara Lee (D-CA)
Transportation: \$11,765.75
Lodging: N/A
Meal: \$376
- Congressman Mike Turner (R-OH)
Transportation: \$6,170.55
Lodging: \$883.41
Meal: \$376
- Jessica Turner, daughter of Congressman Mike Turner (R-OH)
Transportation: \$814.06
Lodging: \$883.41
Meal: \$376
- Congresswoman Brenda Lawrence (D-MI)
Transportation: \$3,597.23
Lodging: \$883.41
Meal: \$376
- McArthur Lawrence, spouse of Congresswoman Brenda Lawrence (D-MI)
Transportation: \$7,305.14

It is standard practice for the sponsor to offer separate accommodations when a Member indicates that their guest will be someone other than a spouse. See communications.

Lodging: \$883.41

Meal: \$376

- Congresswoman Debbie Lesko (R-AZ)
Transportation: \$10,734.07
Lodging: \$883.41
Meal: \$376
- Joseph Lesko, spouse of Congresswoman Debbie Lesko (R-AZ)
Transportation: \$10,734.07
Lodging: N/A
Meal: \$376
- Congressman Robert Bishop (R-UT)
Transportation: \$3,604.89
Lodging: \$883.41
Meal: \$376
- Congressman Mark Green (R-TN)
Transportation: \$8,390.55
Lodging: \$883.41
Meal: \$376
- Congressman Eric Swalwell (D-CA)
Transportation: \$3,604.84
Lodging: \$883.41
Meal: \$376
- Brittany Swalwell, spouse of Congressman Eric Swalwell (D-CA)
Transportation: \$3,604.84
Lodging: N/A
Meal: \$376
- Congressman C. A. Dutch Ruppersberger (D-MD)
Transportation: \$3,607.51
Lodging: \$883.41
Meal: \$376
- Kay Ruppersberger, spouse of Congressman C. A. Dutch Ruppersberger (D-MD)
Transportation: \$3,607.51
Lodging: N/A
Meal: \$376

- Congressman Bill Flores (R-TX)
Transportation: \$4,796.83
Lodging: \$883.41
Meal: \$376
- Gina Flores, spouse of Congressman Bill Flores (R-TX)
Transportation: \$4,796.83
Lodging: N/A
Meal: \$376

House Ethics Addendum D
Congress-Bundestag Forum 2020

Please find below the list of individual itineraries.

- Congresswoman Robin Kelly (D-IL)
Departing from: Chicago, Illinois
Departure date: February 15, 2020
Returning to: Chicago, Illinois
Return date: February 20, 2020
- Nathaniel Horn, spouse of Congresswoman Robin Kelly (D-IL)
Departing from: Chicago, Illinois
Departure date: February 15, 2020
Returning to: Chicago, Illinois
Return date: February 20, 2020
- Congresswoman Barbara Lee (D-CA)
Departing from: San Francisco, California
Departure date: February 15, 2020
Returning to: San Francisco, California
Return date: February 20, 2020
- Clyde Oden, spouse of Congresswoman Barbara Lee (D-CA)
Departing from: San Francisco, California
Departure date: February 15, 2020
Returning to: San Francisco, California
Return date: February 20, 2020
- Congressman Mike Turner (R-OH)
Departing from: Munich, Germany
Departure date: February 16, 2020
Returning to: Washington, D.C.
Return date: February 20, 2020
- Jessica Turner, daughter of Congressman Mike Turner (R-OH)
Departing from: London, United Kingdom
Departure date: February 16, 2020
Returning to: London, United Kingdom
Return date: February 20, 2020
- Congresswoman Brenda Lawrence (D-MI)

- Departing from:* Detroit, Michigan
Departure date: February 15, 2020
Returning to: Detroit, Michigan
Return date: February 20, 2020
- McArthur Lawrence, spouse of Congresswoman Brenda Lawrence (D-MI)
Departing from: Detroit, Michigan
Departure date: February 15, 2020
Returning to: Detroit, Michigan
Return date: February 20, 2020
 - Congresswoman Debbie Lesko (R-AZ)
Departing from: Washington, D.C.
Departure date: February 15, 2020
Returning to: Phoenix, Arizona
Return date: February 20, 2020
 - Joseph Lesko, spouse of Congresswoman Debbie Lesko (R-AZ)
Departing from: Washington, D.C.
Departure date: February 15, 2020
Returning to: Phoenix, Arizona
Return date: February 20, 2020
 - Congressman Robert Bishop (R-UT)
Departing from: Washington, D.C.
Departure date: February 15, 2020
Returning to: Washington, D.C.
Return date: February 20, 2020
 - Congressman Mark Green (R-TN)
Departing from: Nashville, Tennessee
Departure date: February 15, 2020
Returning to: Nashville, Tennessee
Return date: February 20, 2020
 - Congressman Eric Swalwell (D-CA)
Departing from: Washington, D.C.
Departure date: February 15, 2020
Returning to: Washington, D.C.
Return date: February 20, 2020
 - Brittany Swalwell, spouse of Congressman Eric Swalwell (D-CA)
Departing from: Washington, D.C.

Departure date: February 15, 2020
Returning to: Washington, D.C.
Return date: February 20, 2020

- Congressman C. A. Dutch Ruppersberger (D-MD)
Departing from: Washington, D.C.
Departure date: February 15, 2020
Returning to: Washington, D.C.
Return date: February 20, 2020
- Kay Ruppersberger, spouse of Congressman C. A. Dutch Ruppersberger (D-MD)
Departing from: Washington, D.C.
Departure date: February 15, 2020
Returning to: Washington, D.C.
Return date: February 20, 2020
- Congressman Bill Flores (R-TX)
Departing from: Houston, Texas
Departure date: February 15, 2020
Returning to: Houston, Texas
Return date: February 20, 2020
- Gina Flores, spouse of Congressman Bill Flores (R-TX)
Departing from: Houston, Texas
Departure date: February 15, 2020
Returning to: Houston, Texas
Return date: February 20, 2020

House Ethics Addendum E
Congress-Bundestag Forum 2020

Let this addendum serve as a point of clarification that \$292.77 of the nightly expense reported on previous pre-travel Ethics forms is the expense for conference fees, which includes:

- Facility fees
- Facilitation fees
- Staffing fees
- Setup & cleanup fees
- Room reservation fees
- Equipment rental