



U.S. House of Representatives

# COMMITTEE ON ETHICS

## Employee Post-Travel Disclosure Form

Original  Amendment

This form is for disclosing the receipt of travel expenses from private sources for travel taken in connection with official duties. This form does not eliminate the need to report privately-funded travel on the annual *Financial Disclosure Statements* of those employees required to file them. 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: ANNMARIE GOYZUETA
2. a. Name of Accompanying Relative: \_\_\_\_\_ OR None   
 b. Relationship to Traveler:  Spouse  Child  Other (specify): \_\_\_\_\_
3. a. Dates: Departure: DECEMBER 13, 2019 Return: DECEMBER 15, 2019  
 b. Dates at Personal Expense, if any: \_\_\_\_\_ OR None
4. Departure City: WASHINGTON, DC Destination: QUEENSTOWN, MD Return City: WASHINGTON, DC
5. Sponsor(s), Who Paid for the Trip: ASPEN INSTITUTE INC. (SOCRATES PROGRAM)
6. Describe Meetings and Events Attended: WORKSHOPS TO DISCUSS LEADERSHIP, RESPONSIBLE GOVERNANCE AND THE ROLE OF CONGRESS.
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 employee; *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: \_\_\_\_\_

2020 JAN -9 PM 2:46  
U.S. HOUSE OF REPRESENTATIVES  
OFFICE OF THE CLERK  
LEGISLATIVE RESOURCE CENTER

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

Signature of Traveler: *Annamarie Goyzueta* Date: 01/07/20

I authorized this travel in advance. I have determined that all of the expenses listed on the attached *Sponsor Post-Travel Disclosure Form* were necessary and that the travel was in connection with the employee's official duties and would not create the appearance that the employee is using public office for private gain.

Name of Supervising Member: JAHANA HAYES Date: 01/07/20

Signature of Supervising Member: *Jahana Hayes*



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: Aspen Institute Inc. (Socrates Program)

2. Travel Destination(s): Aspen Institute Wye River Conference Center Queenstown, Maryland

3. Date of Departure: December 13, 2019 Date of Return: December 15, 2019

4. Name(s) of Traveler(s): \_\_\_\_\_

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	\$78	\$234	\$142	\$141 (conference room fees, including setup/take down, cleaning)
Accompanying Family Member				

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:  Date: 12/31/19

Name: Elliot Gerson Title: EVP, Policy & Public Programs

Organization: The Aspen Institute

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

Address: 2300 N St NW, Suite 700 Washington DC, 20037

Telephone: 202-736-5859 (Lisa Jones, Deputy General Counsel) Email: lisa.jones@aspeninstitute.org

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: Annmarie Goyzueta
2. Sponsor(s) who will be paying for the trip: Aspen Institute Inc. (Socrates Program)
3. City and State OR Foreign Country of Travel: Queenstown, MD
4. a. Date of Departure: December 13, 2019 Date of Return: December 15, 2019  
 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: \_\_\_\_\_  
 (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.**

The purpose of this trip is to discuss leadership, responsible governance, and the role of Congress.

As scheduler, I assist new Member on strategic planning & maintaining her office priorities. This program will provide a greater understanding of Congress, its functions, and greater purpose.

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 \_\_\_\_\_

*Jahana Hoops*

Date 11/12/19



U.S. House of Representatives

# COMMITTEE ON ETHICS

## TRAVELER FORM

1. Name of Traveler: Annmarie Goyzueta
2. Sponsor(s) who will be paying for the trip: Aspen Institute Inc. (Socrates Program)
3. City and State OR Foreign Country of Travel: Queenstown, MD
4. a. Date of Departure: December 13, 2019 Date of Return: December 15, 2019  
 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: \_\_\_\_\_  
 (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.**

The purpose of this trip is to discuss leadership, responsible governance, and the role of Congress.

As scheduler, I assist new Member on strategic planning & maintaining her office priorities. This

program will provide a greater understanding of Congress, its functions, and greater purpose.

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 11/12/19



U.S. House of Representatives

# COMMITTEE ON ETHICS

## 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](http://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: Aspen Institute inc. (Socrates Program)
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: Democracy Fund, William and Flora Hewlett Foundation
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): See attached.
5. Is travel being offered to an accompanying family member of the House invitee(s)?  Yes  No
6. Date of Departure: December 13, 2019 Date of Return: December 15, 2019
7. a. City of departure: Washington D.C.  
b. Destination(s): Queenstown, MD  
c. City of return: Washington D.C.
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: \_\_\_\_\_



U.S. House of Representatives

# COMMITTEE ON ETHICS

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:
- The Aspen Institute's Socrates Program (AISP) has an 8 year history of providing non-partisan educational programs for Congressional Staff. The purpose of this trip is to convene a seminar to discuss leadership, responsible governance and the role of Congress. AISP is solely responsible for organizing and conducting this ser
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: Chartered bus)
  - 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): \$47 per day
  - 2) Provide the reason for selecting the location of the event or trip: Conference center is close to Washington, DC and owned by the Aspen Institute
16. Name, nightly cost, and reasons for selecting each hotel or other lodging facility:
- Hotel Name: Wye River Conference Center City: Queenstown Cost Per Night: \$117.00  
Reason(s) for Selecting: Easily accessible with sufficient lodging and meeting space for all participants.
- Hotel Name: \_\_\_\_\_ City: \_\_\_\_\_ Cost Per Night: \_\_\_\_\_  
Reason(s) for Selecting: \_\_\_\_\_
- Hotel Name: \_\_\_\_\_ City: \_\_\_\_\_ Cost Per Night: \_\_\_\_\_  
Reason(s) for Selecting: \_\_\_\_\_
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

# COMMITTEE ON ETHICS

### 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	\$78	\$234	\$142
For each Accompanying Family Member	N/A	N/A	N/A

	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	\$141	Conference room fees (including meeting facilities, set up/take down, cleaning)
For each Accompanying Family Member	N/A	N/A

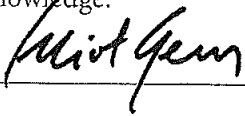
NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001.

### 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:  Date: 11/12/19

Name: Elliot Gerson

Title: Executive Vice President of Policy and Public Programs

Organization: The Aspen Institute

Address: 2300 N Street NW, Suite 700

Telephone: 202-736-5859 (Lisa Jones, Deputy General Counsel)

Email: lisa.jones@aspeninstitute.org

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



U.S. House of Representatives

# COMMITTEE ON ETHICS

## 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: Aspen Institute inc. (Socrates Program)
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: Democracy Fund, William and Flora Hewlett Foundation
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): See attached.
5. Is travel being offered to an accompanying family member of the House invitee(s)?  Yes  No
6. Date of Departure: December 13, 2019 Date of Return: December 15, 2019
7.
  - a. City of departure: Washington D.C.
  - b. Destination(s): Queenstown, MD
  - c. City of return: Washington D.C.
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: \_\_\_\_\_



U.S. House of Representatives

# COMMITTEE ON ETHICS

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:  
The Aspen Institute's Socrates Program (AISP) has an 8 year history of providing non-partisan educational programs for Congressional Staff. The purpose of this trip is to convene a seminar to discuss leadership, responsible governance and the role of Congress. AISP is solely responsible for organizing and conducting this seminar.
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: Chartered bus)  
 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): \$47 per day  
 \_\_\_\_\_  
 2) Provide the reason for selecting the location of the event or trip: Conference center is close to Washington, DC and owned by the Aspen Institute  
 \_\_\_\_\_
16. Name, nightly cost, and reasons for selecting each hotel or other lodging facility:  
 Hotel Name: Wye River Conference Center City: Queenstown Cost Per Night: \$117.00  
 Reason(s) for Selecting: Easily accessible with sufficient lodging and meeting space for all participants.  
 Hotel Name: \_\_\_\_\_ City: \_\_\_\_\_ Cost Per Night: \_\_\_\_\_  
 Reason(s) for Selecting: \_\_\_\_\_  
 Hotel Name: \_\_\_\_\_ City: \_\_\_\_\_ Cost Per Night: \_\_\_\_\_  
 Reason(s) for Selecting: \_\_\_\_\_
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

# COMMITTEE ON ETHICS

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	\$78	\$234	\$142
For each Accompanying Family Member	N/A	N/A	N/A

	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	\$141	Conference room fees (including meeting facilities, set up/take down, cleaning)
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: Elliot Gerson Date: 11/12/19

Name: Elliot Gerson

Title: Executive Vice President of Policy and Public Programs

Organization: The Aspen Institute

Address: 2300 N Street NW, Suite 700

Telephone: 202-736-5859 (Lisa Jones, Deputy General Counsel)

Email: lisa.jones@aspeninstitute.org

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



U.S. House of Representatives

# COMMITTEE ON ETHICS

## Grantmaking Trip Sponsor Form

This form should be completed by a public charity or private foundation (both as defined under section 501(c)(3) of the Internal Revenue Code) that provides a grant of funds to another entity to underwrite, in whole or in part, a trip or an event, meal, or activity that will occur during a trip, or a necessary expense that will be incurred during a trip, with express or implicit knowledge or understanding that one or more House Members or employees may participate in or attend that trip or event, or otherwise may be beneficiaries of the gift or donation. Provide a copy of your completed form to the primary sponsor of the trip.

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. I certify that (name of your organization): Democracy Fund  
has been designated a § 501(c)(3) nonprofit charitable organization by the Internal Revenue Service.  Yes  No

2. Name of Primary Trip Sponsor: The Aspen Institute, Inc. (Socrates Program)

3. I certify that my organization (check and complete a or b):  
a.  Has provided a grant, gift, or donation to the above-named Primary Trip Sponsor and conducts an audit or review of its grant, gift, or donation to ensure that the funds are spent in accordance with the terms of its grant, gift, or donation. OR  
b.  Has had a direct role in the organizing, planning, or conducting of a trip to  
Destination: \_\_\_\_\_ on Date: \_\_\_\_\_  
that is being organized or arranged by the above-named Primary Trip Sponsor.

4. Check only one:  
a.  My organization does not employ or retain a registered federal lobbyist or foreign agent OR  
b.  My organization employs a registered federal lobbyist or foreign agent, but their involvement in planning, organizing, or arranging the trip was *de minimis* under the travel regulations.

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

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

Signature: \_\_\_\_\_ Date: 3/21/19

Name: Joseph Goldman Title: President

Organization: Democracy Fund

Address: 1200 17th St NW Suite 300

Telephone: 202 420 7900 Email: jgoldman@democracyfund.org

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



U.S. House of Representatives

# COMMITTEE ON ETHICS

## Grantmaking Trip Sponsor Form

This form should be completed by a public charity or private foundation (both as defined under section 501(c)(3) of the Internal Revenue Code) that provides a grant of funds to another entity to underwrite, in whole or in part, a trip or an event, meal, or activity that will occur during a trip, or a necessary expense that will be incurred during a trip, with express or implicit knowledge or understanding that one or more House Members or employees may participate in or attend that trip or event, or otherwise may be beneficiaries of the gift or donation. Provide a copy of your completed form to the primary sponsor of the trip.

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. I certify that (name of your organization): Democracy Fund  
has been designated a § 501(c)(3) nonprofit charitable organization by the Internal Revenue Service.  Yes  No

2. Name of Primary Trip Sponsor: The Aspen Institute, Inc. (Socrates Program)

3. I certify that my organization (check and complete a or b):  
a.  Has provided a grant, gift, or donation to the above-named Primary Trip Sponsor and conducts an audit or review of its grant, gift, or donation to ensure that the funds are spent in accordance with the terms of its grant, gift, or donation. OR  
b.  Has had a direct role in the organizing, planning, or conducting of a trip to  
Destination: \_\_\_\_\_ on Date: \_\_\_\_\_  
that is being organized or arranged by the above-named Primary Trip Sponsor.

4. Check only one:  
a.  My organization does not employ or retain a registered federal lobbyist or foreign agent OR  
b.  My organization employs a registered federal lobbyist or foreign agent, but their involvement in planning, organizing, or arranging the trip was *de minimis* under the travel regulations.

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

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

Signature: [Handwritten Signature] Date: 3/21/19

Name: Joseph Goldman Title: President

Organization: Democracy Fund

Address: 1200 17th St NW Suite 300

Telephone: 202 420 7900 Email: jgoldman@democracyfund.org

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



U.S. House of Representatives

# COMMITTEE ON ETHICS

## Grantmaking Trip Sponsor Form

This form should be completed by a public charity or private foundation (both as defined under section 501(c)(3) of the Internal Revenue Code) that provides a grant of funds to another entity to underwrite, in whole or in part, a trip or an event, meal, or activity that will occur during a trip, or a necessary expense that will be incurred during a trip, with express or implicit knowledge or understanding that one or more House Members or employees may participate in or attend that trip or event, or otherwise may be beneficiaries of the gift or donation. Provide a copy of your completed form to the primary sponsor of the trip.

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. I certify that (name of your organization): The William and Flora Hewlett Foundation  
has been designated a § 501(c)(3) nonprofit charitable organization by the Internal Revenue Service.  Yes  No
2. Name of Primary Trip Sponsor: The Aspen Institute, Inc. (Socrates Program)
3. I certify that my organization (check and complete a or b):
  - a.  Has provided a grant, gift, or donation to the above-named Primary Trip Sponsor and conducts an audit or review of its grant, gift, or donation to ensure that the funds are spent in accordance with the terms of its grant, gift, or donation. OR
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6. I certify by my signature that the information contained in this form is true, complete, and correct to the best of my knowledge.

Signature: Kristy Tsadick Date: 3/28/2019

Name: Kristy Tsadick Title: Deputy General Counsel

Organization: William and Flora Hewlett Foundation

Address: 2121 Sand Hill Road, Menlo Park, CA 94107

Telephone: 202-234-4500 Email: ktsadick@hewlett.org

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  
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U.S. House of Representatives

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

Signature: *Kristy Tsadick* Date: 3/28/2019

Name: Kristy Tsadick Title: Deputy General Counsel

Organization: William and Flora Hewlett Foundation

Address: 2121 Sand Hill Road, Menlo Park, CA 94107

Telephone: 202-234-4500 Email: ktsadick@hewlett.org

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

**Committee on Ethics**  
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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

December 12, 2019

Ms. Annmarie Goyzueta  
Office of the Honorable Jahana Hayes  
221 Cannon House Office Building  
Washington, DC 20515

Dear Ms. Goyzueta:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to Queenstown, Maryland, scheduled for December 13 to 15, 2019, sponsored by the Aspen Institute, Inc., with financial support from the William and Flora Hewlett Foundation and the Democracy Fund.

You must complete an Employee Post-Travel Disclosure Form (which your employing Member must also sign) 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. If you are required to file an annual Financial Disclosure Statement, 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.

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

Sincerely,

Theodore E. Deutch  
Chairman

Kenny Marchant  
Ranking Member

TED/KM:jls



The Honorable Ted Deutch, Chairman  
Committee on Ethics  
U.S. House of Representatives  
1015 Longworth House Office Building  
Washington, DC 20515

April 3, 2019

Re: The Aspen Institute 2019 Socrates Program Emerging Governance Leaders Seminar

Dear Chairman Deutch,

This letter is submitted in connection with The Aspen Institute 2019 Socrates Program Emerging Governance Leaders Seminar, to which House of Representatives staff have been invited. We understand that the Committee on Ethics, which is charged with reviewing and approving privately-funded, officially-connected travel by Members and staff of the House, may consider the Foundation to be a "source" of funds associated with The Aspen Institute's study trips that must be identified under House rules.

The William and Flora Hewlett Foundation (the "Foundation"), a non-profit foundation established in 1967, made a grant to The Aspen Institute to support the Socrates Program and its Emerging Governance Leaders Seminar series (Grant #2018-8044). Please note that the William and Flora Hewlett Foundation is aware of the study trips, the participants, and the agenda. However, there is no agreement, written or oral, between the Foundation and The Aspen Institute whereby the Foundation may direct the activities of the Socrates Program, including the conduct of the study trips, or cause the selection of any invited congressional participant. The Aspen Institute exercises control over that selection process and makes the selection completely independent from the Foundation.

Furthermore, please note that the Foundation is not a registrant under the Federal Lobbying Disclosure Act ("LDA"), does not retain or employ a registered federal lobbyist to lobby on its behalf, and has not received funds from any lobbyist or LDA registrant. Moreover, the Foundation has not accepted any source funds earmarked for The Aspen Institute or any congressional travel.

If we can provide any additional information, please contact me at 650-234-4771 or [ksadick@hewlett.org](mailto:ksadick@hewlett.org).

Sincerely,

Kristy Tsadick  
*Deputy General Counsel*



The Honorable Ted Deutch, Chairman  
Committee on Ethics  
U.S. House of Representatives  
1015 Longworth House Office Building  
Washington, DC 20515

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If we can provide any additional information, please contact me at 650-234-4771 or [ksadick@hewlett.org](mailto:ksadick@hewlett.org).

Sincerely,

Kristy Tsadick  
Deputy General Counsel

**Arwa Dubud**

Staff Assistant and Legislative Aide  
Office of Congresswoman Rashida Tlaib

**Taylor Nkollo**

Legislative Correspondent and Staff Assistant  
Office of Congressman John Lewis

**Paul Nicholas**

Staff Assistant  
Congressman Steny H. Hoyer

**Jennifer Kwon**

Communications and Legislative Aide  
Congressman Brendan F Boyle

**Annmarie Goyzueta**

Scheduler  
Office of Representative Jahana Hayes

**Sheresh Khan**

Legislative Assistant  
Office of Congressman J. Luis Correa

**Roberto Estrada**

Staff Assistant  
Committee on House Administration

**Arwa Dubud**

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Staff Assistant  
Committee on House Administration

**Emerging Governance Leaders Seminar**  
*Leadership & the Role of Congress*

(Moderated by Dr. Mischa Thompson)

**Seminar Weekend Schedule**

December 13-15, 2019  
Aspen Institute Wye River Campus  
Queenstown, Maryland  
*Seminar Location: River House*

**Friday, December 13<sup>th</sup>**

- |                       |   |
|-----------------------|---|
| 5:00 p.m.             | Shuttle departure from Capitol Hill   |
| 6:45 p.m.             | Shuttles arrives at Aspen Institute Wye River Campus  |
| 7:00 p.m. - 8:00 p.m. | Check-In & Registration<br><i>River House</i>   |
| 8:00 p.m. – 9:30 p.m. | <b>Socrates Opening Dinner and Program</b><br>“Responsible Governance and Your Role in Congress”<br>A conversation addressing norms of governance, hyper-partisanship, political polarization, and the experiences of Congressional staffers.<br>Moderated by <b>Cordell Carter</b> , Socrates Program Director<br><i>River House Dining Room</i> |

**Saturday, December 14<sup>th</sup>**

- |                        |  |
|------------------------|--|
| 7:45 a.m. – 9:00 a.m.  | Breakfast<br><i>River House Dining Room</i>  |
| 9:00 a.m. – 12:00 p.m. | <b>Seminar Session I: The Evolution of Congress: How Did We Get Here?</b><br><i>River House Main Conference Room</i><br>Seminar discussion based on the following texts and videos:<br><b>Origins:</b> <ul style="list-style-type: none"><li>• Hamilton or Madison, “No. 57” and “No. 63,” The Federalist Papers, 1788</li></ul> |

- Davidson, Oleszek, Lee, and Schickler. "Institutional Evolution," *Congress and Its Members*
- Nelson Polsby, "Causes of Liberalization: Rise of the Two Party South," and "How Congress Evolves: Overview of the House," *How Congress Evolves*
- Barbara Sinclair, "The New World of U.S. Senators," *Congress Reconsidered*

*What Does It Mean to Represent? Mr. Smith versus Charlie Wilson*

- "Mr. Smith Goes To Washington" movie clip. 1939
- "Charlie Wilson's War" movie clip. 2007

10:30 a.m. – 10:45 a.m.

Morning Break  
*River House Break Room*

12:00 p.m. – 1:00 p.m.

Working Lunch with Discussion of Seminar Session I  
Conversation will consider the evolution of Congress and what it means to represent constituents and communities.  
*River House Dining Room*

1:00 p.m. – 4:00 p.m.

**Seminar Session II: Congress and Its Governance Challenges**

*River House Main Conference Room*

Seminar discussion based on the following texts:

- Davidson Oleszek, Lee, and Schickler. "Congress as Institution," *Congress and Its Members*
- Barbara Sinclair, "Assessing Unorthodox Lawmaking," *Unorthodox Lawmaking*

*Resources and Knowledge in Congress*

- Kevin Kosar and various authors, "Restoring Congress as the First Branch." R Street Policy Study No. 50
- Colleen Shogan, "The Knowledge Culture of Congress," *Leg Branch Blog*
- Matthew Glassman, "Why Congress Doesn't Always Do The Right Thing." *New York Times*

*Technology and Changing Norms of Representation*

- Samantha McDonald, "Staff Perspectives on the State of Constituent Correspondence in the U.S. Congress," *Leg Branch Blog*
- Lorelei Kelley and Robert Bjarnason, "Our Modern Congress Doesn't Understand 21st Century Technology," *TechCrunch*, March 6, 2018

***Partisanship and Policymaking***

- Sarah Binder, "Legislating in Polarized Times,"  
*Congress Reconsidered*

2:30 p.m. – 2:45 p.m.

Afternoon Break  
*River House Break Room*

4:30 p.m. – 6:30 p.m.

**Historical Tour of Wye**

The Aspen Institute Wye campus is a site imbued with historical moments in American political discourse and policy decisions – from early days as the home of William Paca, a signer of the Declaration of Independence and the third governor of Maryland, to more recent moments as the site for negotiations between Israel and the Palestine Authority. This historical tour will connect the seminar to place and embody the rich history of American discourse and governing in Washington and beyond.

*Wye Campus*

7:00 p.m. – 8:30 p.m.

**Working Dinner with Discussion of Seminar Session II**

Conversation will consider the governance challenges of Congress, exploring what resources and knowledge inform Congress and how technology and changing norms of representation are affecting governance.

*River House Dining Room*

8:45 p.m. – 10:00 p.m.

**Fireside Chat**

**"Life & Lessons in Congress"**

A conversation with **William Hoagland**, Bipartisan Policy Center Senior Vice President and **Lorelei Kelly**, Fellow-In-Residence at the Georgetown University Beek Center for Social Impact + Innovation

Conversation will cover the personal and professional realities of pursuing a career as a congressional staffer and juxtapose them with the larger implications of representing congress, focusing on how congress's role as the interlocutor of the American people, particularly in the digital age, is evolving, and with it the roles and responsibilities of its staff.

Moderated by **Cordell Carter**, Socrates Program Director

*River House Library*

**Sunday, December 15<sup>th</sup>**

7:45 a.m. – 9:00 a.m.

Breakfast  
*River House Dining Room*

9:00 a.m. – 12:00 p.m.

**Seminar Session III: Congressional Reform**

*River House Main Conference Room*

Seminar discussion based on the following texts:

*What's Working Well and What Isn't*

- Colleen Shogan, "Defense Authorization: The Senate's Last Best Hope," *Party and Procedure in the United States Congress*
- Josh Huder, "Democrats Want to Modernize the House. Good Luck With That," *The Washington Post*

*Reform Proposals*

- Zach Graves, "Rebuilding a Technology Assessment Office in Congress," R Street Policy Study 152
- Congressional Institute, "Congressional Reform Concepts"
- Jim Newell, "The Shutdown to End All Shutdowns," *Slate*

10:30 a.m. – 10:45 a.m.

Morning Break  
*River House Break Room*

12:00 p.m.

Check-out

12:00 p.m. – 1:00 p.m.

Working Lunch with Discussion of Seminar Session III  
Conversation will consider the Articles 1 and 2 of the Constitution, and how foundations of the U.S. government inform and influence the role of Congress today.  
*River House Dining Room*

1:00 p.m.

Shuttle departs for Capitol Hill

2:30 pm

Shuttle drops off participants

**Emerging Governance Leaders Seminar**  
*Leadership & the Role of Congress*

(Moderated by Dr. Mischa Thompson)

**Seminar Weekend Schedule**

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A conversation addressing norms of governance, hyper-partisanship, political polarization, and the experiences of Congressional staffers.  
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Moderated by **Cordell Carter**, Socrates Program Director  
*River House Library*

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7:45 a.m. – 9:00 a.m.

Breakfast  
*River House Dining Room*

9:00 a.m. – 12:00 p.m.

**Seminar Session III: Congressional Reform**

*River House Main Conference Room*

Seminar discussion based on the following texts:

***What's Working Well and What Isn't***

- Colleen Shogan, "Defense Authorization: The Senate's Last Best Hope," *Party and Procedure in the United States Congress*
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12:00 p.m.

Check-out

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