



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, by email at gifttravelreports@mail.house.gov, within 15 days after travel is completed.** Please **do not** file this form with the Committee on Ethics.

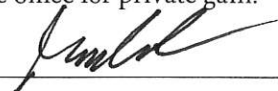
NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001.

1. Name of Traveler: Jason Smith
2. a. Name of Accompanying Relative: _____ OR None
 b. Relationship to Traveler: Spouse Child Other (specify): _____
3. a. Dates: Departure: Monday, August 16, 2021 Return: Wednesday August 18, 2021
 b. Dates at Personal Expense, if any: Midnight to 8am on Wednesday, August 18, 2021 OR None
4. Departure City: Washington, DC Destination: Monterey, CA Return City: Washington,
5. Sponsor(s), Who Paid for the Trip: The Panetta Institute for Public Policy
6. Describe Meetings and Events Attended (attach additional pages if necessary):

Addressed Congressional Internship Program Class of '21 in preparation for their internship with the House of Representatives.

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 *Additional Sponsor Form(s)*;
 - 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:

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: 8/24/21



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.

- Sponsor(s) who paid for the trip: The Panetta Institute for Public Policy
- Travel Destination(s): Monterey, CA
- Date of Departure: August 16, 2021 Date of Return: Morning of August 18, 2021
- Name(s) of Traveler(s): Jason Smith
Note: You may list more than one traveler on a form only if all information is identical for each person listed.
- 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	\$879.60 - Airfare	\$228.45	N/A	312.52 - Rental Car/Gas
Accompanying Family Member	N/A	N/A	N/A	N/A

- 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: 8/24/2021

Name: Sylvia M. Panetta Title: Co-Chair and CEO

Organization: The Panetta Institute of Public Policy

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

Address: 100 Campus Center, Building 86E, Seaside, California, 93955

Email: info@PANETTAINSTITUTE.ORG Telephone: 831-582-4200

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: Jason Smith E

2. Sponsor(s) who will be paying for the trip: The Panetta Institute

3. City and State or Foreign Country of Travel: Monterey, CA

4. a. Date of Departure: August 16, 2021 Date of Return: August 17, 2021 / on August 18, 2021 *Leaves CA on / Arrives in DC*

b. Will you be extending the trip at your personal expense? Yes No *KD*

If yes, list dates at personal expense: EXTENDING 12 hours DUE TO FLIGHT AVAILABILITY / AUGUST 18, 2021

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.

House Parliamentarian - using experience as Parliamentarian to teach legislative procedure seminar at Congressional Intern Program

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 Nancy Pelosi Date 7/29/21



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 Panetta Institute for Public Policy
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: [X]
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: [X] 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): Jason Smith
5. Is travel being offered to an accompanying family member of the House invitee(s)? [] Yes [X] No
6. Date of Departure: August 16, 2021 Date of Return: August 17, 2021
7. a. City of departure: Washington, DC
b. Destination(s): Monterey, CA
c. City of return: Washington, DC
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: [X] 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: [X]
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:



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 Panetta Institute's interest is educational, to prepare college-level interns for two and one-half month
internships at the United States House of Representatives
13. *Answer parts a and b. Answer part c if neccessary:*
- 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): _____
 - 2) Provide the reason for selecting the location of the event or trip: Invitation to speak to the Congressional Internship Program Class of 2021 at the Panetta Institute in Marina, CA
16. Name, nightly cost, and reasons for selecting each hotel or other lodging facility:
- Hotel Name: Casa Munras Hotel City: Monterey, CA Cost Per Night: \$ 215 ²⁰ RK
- Reason(s) for Selecting: Hotel room provided by The Panetta Institute
- 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:*



18. Total Expenses for each Participant:

<input type="radio"/> Actual Amounts	Total Transportation Expenses per Participant	Total Lodging Expenses per Participant	Total Meal Expenses per Participant
<input checked="" type="radio"/> Good Faith Estimates			
For each Member, Officer, or Employee	\$775	\$ 215.20 RK	N/A
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	\$300	Rental car
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 ^{RK}
- 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. ^{RK}

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: Sylvia M. Panetta Date: 8-5-21

Name: Sylvia M. Panetta

Title: Co-Chair and CEO

Organization: Panetta Institute for Public Policy

Address: 100 Campus Center, Building 86E, Seaside, CA 93955

Telephone: 831-582-4200

Email: info@panettainstitute.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

Theodore E. Deutch, Florida
Chairman
Jackie Walorski, Indiana
Ranking Member

Susan Wild, Pennsylvania
Dean Phillips, Minnesota
Veronica Escobar, Texas
Mondaire Jones, New York

Michael Guest, Mississippi
Dave Joyce, Ohio
John H. Rutherford, Florida
Kelly Armstrong, North Dakota



ONE HUNDRED SEVENTEENTH CONGRESS

U.S. House of Representatives

COMMITTEE ON ETHICS

Thomas A. Rust
Staff Director and Chief Counsel

David W. Arrojo
Counsel to the Chairman

Kelle A. Strickland
Counsel to the Ranking Member

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

August 13, 2021

The Honorable Jason Smith
U.S. House of Representatives
H-209, The Capitol
Washington, DC 20515

Dear Colleague:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to Monterey, California, scheduled for August 16 to 18, 2021, sponsored by Panetta Institute for Public Policy. We note that this trip includes one day at your personal expense.

This approval represents the Committee's determination that the proposed trip complies with relevant House rules, federal laws, and Travel Regulations promulgated by the Committee. You should engage in your own assessment of the risks and implications of engaging in travel during the current COVID-19 pandemic.

Committee travel regulations require that you submit your complete pre-trip approval request to the Committee at least 30 days before the commencement of the trip or it will not be granted. Despite your failure to do so in this instance, we are approving your current request. However, any future requests should adhere to the 30-day requirement.

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 \$415 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,

Handwritten signature of Theodore E. Deutch in blue ink.

Theodore E. Deutch
Chairman

Handwritten signature of Jackie Walorski in blue ink.

Jackie Walorski
Ranking Member

TED/JW:smm

Appendix Relating to Items 4, 10 and 12

House Parliamentarian Jason Smith will conduct a two-hour seminar with the Panetta Institute's congressional interns on Tuesday, August 17, 2021, from 9 a.m. to 11 a.m. He will arrive in Monterey, California on August 16, 2021, and will depart on August 17, 2021.

Mr. Smith's topic is *Parliamentary Procedures: The Structure, Working and Organization of the United States House of Representatives*. He will arrive fifteen minutes in advance to prepare the classroom and remain for a short time afterward to answer individual questions. The Panetta Institute is solely responsible for the planning and organizing Jason Smith's trip.

The Panetta Institute's *Congressional Internship Program* begins with an intensive, two-week academic course at the Panetta Institute. As part of this course, the Institute brings together more than thirty local, state, and national leaders as well as experts on immigration, education, the budget, the economy, climate change, energy policy, health care and other issues who lead sessions during the orientation. Mr. Smith will speak to the students in a session explaining how the United States House of Representatives functions. Following completion of the orientation, each intern is assigned to a Capitol Hill office of a member of the California congressional delegation to work for two and one-half months. In Washington, the students perform typical intern duties. They will also attend special seminars with present and former members of Congress; former and current Cabinet members; White House officials; and policy experts. The congressional interns are nominated by the presidents of each of the twenty-three California State University campuses, as well as three private post-secondary schools. Once nominated, an in-person interview by Panetta Institute staff and a representative of the CSU Chancellor's office takes place. All students receive background investigations.