



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, 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: Timothy Bertocci
2. a. Name of Accompanying Relative: _____ OR None ☒
b. Relationship to Traveler: ☐ Spouse ☐ Child ☐ Other (specify): _____
3. a. Dates: Departure: 4/12/22 Return: 4/14/22
b. Dates at Personal Expense, if any: _____ OR None ☒
4. Departure City: IAD Destination: SFO Return City: IAD
5. Sponsor(s), Who Paid for the Trip: Stanford University
6. Describe Meetings and Events Attended:
Meetings to hear about foreign policy, economic and education research from renowned experts such as Condaleeza Rice, HR McMaster, Jack Taylor and Michael McFaul.
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 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:

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

Signature of Traveler: _____ Date: 4/26/22

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: Dean Phillips Date: 4/26/22

Signature of Supervising Member: _____



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: Hoover Institution, Stanford University
2. Travel Destination(s): Stanford University, Stanford, California
3. Date of Departure: April 12, 2022 Date of Return: April 14, 2022
4. Name(s) of Traveler(s): Timothy Bertocci

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	\$584.16 airfare	\$539 total: \$490 lodging total + \$49 tax	\$195.64	\$152.32
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: 03/31/2022

Name: Eryn Witcher Tillman Title: Associate Director, Director of Media and Government Relations

Organization: Hoover Institution, Stanford University

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

Address: 1399 New York Ave NW, 500, Washington DC, 20005

Email: ewitcher@stanford.edu Telephone: (202) 760-3200

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: Tim Bertocci
2. Sponsor(s) who will be paying or providing in-kind support for the trip:
Stanford University
3. City and State **OR** Foreign Country of Travel: Stanford, CA
4. a. Date of Departure: 4/12/2022 Date of Return: 4/15/2022
b. Yes ☒ No ☐ Will you be extending the trip at your personal expense?
If yes, list dates at personal expense: 4/15/2022
5. a. Yes ☐ No ☒ Will you be accompanied by a family member at the sponsor's expense? If yes:
(1) Name of Accompanying Family Member: _____
(2) Relationship to Traveler: ☐ Spouse ☐ Child ☐ Other (specify): _____
(3) Yes ☐ No ☐ Accompanying Family Member is at least 18 years of age:
6. a. Yes ☐ No ☒ 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)?
b. If yes, and you are requesting lodging for two nights, explain why the second night is warranted:
7. Yes ☒ No ☐ *Primary Trip Sponsor Form* is attached, including agenda, invitee list, and any other attachments and Additional Sponsor Forms.
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.
We are hearing from foreign affairs experts, and Rep. Phillips is on the House Foreign Affairs Committee.
Traveler position: Chief of staff
9. Yes ☐ No ☒ Is the traveler aware of any registered federal lobbyists or foreign agents involved planning, organizing, requesting, or arranging the trip?
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 [Signature]

Date 4/4/22

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

April 6, 2022

Mr. Timothy Bertocci
Office of the Honorable Dean Phillips
2452 Rayburn House Office Building
Washington, DC 20515

Dear Mr. Bertocci:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to Stanford, California, scheduled for April 12 to 15, 2022, sponsored by Stanford University. 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.

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 \$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,

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 "Jackie Walorski".

Jackie Walorski
Ranking Member

TED/JW:tn



March 1, 2022

Dear Tim,

We are pleased to inform you that you have been selected to participate in the Hoover Institution's Stuart Family Congressional Fellowship Program from April 12-14, 2022. This program includes seminars on Stanford University's campus, where Hoover scholars, such as Secretary James Mattis, Ambassador Michael McFaul, Amy Zegart, and Hoover Director Condoleezza Rice will lead policy sessions on some of the most pressing issues of today.

These sessions will challenge you to learn from and debate key philosophical and policy issues with some of the nation's leading thinkers and practitioners. As a participant you will receive round-trip airfare and ground transportation to Stanford University from Washington, DC, housing on Stanford's campus, and those meals that are part of the program.

To proceed, please confirm your agreement to attend by completing [this form](#) by the close of business on Wednesday, March 2nd. By completing this form, you agree to abide by Stanford University COVID-19 health and wellness protocols for visitors which can be found [here](#). Due to ethics rules, to maintain your spot, it is imperative that you complete this form. Following completion, you will receive email instructions how to book your flight. Once your flight is secured, I will provide the remainder of your ethics paperwork for submission **to your ethics committee for review by Monday, March 7.**

Your submission packet will include:

- Traveler Form
- Private Sponsor Certification Form
- Agenda & Flight itinerary
- Copy of this invitation letter

If you have any questions, do not hesitate to contact Victoria Guzman (vmguzman@stanford.edu). We look forward to and expect an excellent program.

Sincerely,

Sarah Delahunty
Senior Manager, Government Relations
Hoover Institution, Stanford University



APRIL 12-14 2022 SESSION

FINAL HOUSE ATTENDEES

Timothy "Tim" Bertocci	Chief of Staff, Office of Rep. Dean Phillips (MN-03)
Arthur Bryant	Communications Director, Office of Rep. Ann Wagner (MO-02)
Emily Burdick	Legislative Assistant and Scheduler, Office of Rep. Andrew Garbarino (NY-02)
Daniel Flores	Senior Counsel, House Committee on Oversight and Reform
Jonathan Halpern	Deputy Chief of Staff, Office of Rep. Sanford Bishop (GA-02)
Rachel Huggins	Legislative Director, Office of Rep. Michael Burgess (TX-26)
James "Jimmy" Loomis	Defense and Foreign Policy Advisor, Office of Rep. Stephanie Murphy (FL-07)
Aliya Manjee	Counsel, Committee on Ways and Means - Subcommittee on Oversight
Michael Mansour	Deputy Chief of Staff, Office of Rep. Adam Kinzinger (IL-16)
Tanner Palin	Communications Director, Office of Rep. Lucy McBath (GA-06)
Chance Russell	Professional Staff Member, House Education and Labor Committee



THE HOOVER INSTITUTION IN WASHINGTON

STUART FAMILY CONGRESSIONAL FELLOWSHIP PROGRAM

APRIL 12-14 2022 SESSION

HOUSE INVITEES

Timothy "Tim" Bertocci	Chief of Staff, Office of Rep. Dean Phillips (MN-03)
Arthur Bryant	Communications Director, Office of Rep. Ann Wagner (MO-02)
Emily Burdick	Legislative Assistant and Scheduler, Office of Rep. Andrew Garbarino (NY-02)
Ryan Carney	Chief of Staff, Office of Rep. Bryan Steil (WI-01)
Daniel Flores	Senior Counsel, House Committee on Oversight and Reform
Jonathan Halpern	Deputy Chief of Staff, Office of Rep. Sanford Bishop (GA-02)
Rachel Huggins	Legislative Director, Office of Rep. Michael Burgess (TX-26)
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Rossiter "Casey" O'Shea	Chief of Staff, Office of Rep. Brad Schneider (IL-10)
Tanner Palin	Communications Director, Office of Rep. Lucy MacBeth (GA-06)
Chance Russell	Professional Staff Member, House Education and Labor Committee



April 12-14, 2022

All day-time meetings will be held in Annenberg Conference Room, 580 Serra Mall

TUESDAY, APRIL 12

- | | |
|------------------------|--|
| 8:45 AM | Depart IAD via United Flight 424. |
| 11:34 AM | Arrive SFO |
| 12:00 PM | Depart SFO en route Stanford University
580 Serra Mall, Stanford, CA 94350 |
| 1:15 PM–1:45 PM | Welcome Lunch with Hoover’s Director of Institutional Programming Accessing Hoover’s Research
Annenberg Pavilion
<i>Denise Elson, Director of Institutional Programming, will discuss how to access Hoover’s research and attendees will meet with other senior program managers to discuss Hoover’s research on foreign and domestic policy.</i> |
| 2:00 PM–2:50 PM | Spies, Lies, and Algorithms
<i>Amy Zegart, the Morris Arnold and Nona Jean Cox Senior Fellow, will discuss the past, present, and future of American espionage as it faces a revolution driven by digital technology, as well as challenges that intelligence communities must confront in the 21st century.</i> |
| 3:00 PM–4:50 PM | War Games Simulation
<i>Jacquelyn Schneider, Hoover Fellow, will conduct a wargaming exercise to demonstrate its role in international relations, how social sciences can guide its design and analysis, and future applications for policy problems.</i> |
| 4:50 PM–5:45 PM | Hotel Break
Hyatt Centric 409 San Antonio Road, Mountain View |
| 6:00 PM–7:30 PM | Dinner
Pacific Catch 545 San Antonio Road, Unit 34, Mountain View |



WEDNESDAY, APRIL 13

8:30 AM–9:00 AM

Breakfast

Annenberg Pavilion

9:00 AM–9:45 AM

Welcome with Secretary Rice: America in the World

Condoleezza Rice, Tad and Dianne Taube Director and the Thomas and Barbara Stephenson Senior Fellow on Public Policy, will discuss institutional priorities including: engaging with state and local issues; the Technology, Economics, and Governance working group; improving K-12 education; challenges posed by China and its advancement in digital currencies; foreign policy threats to America.

10:00 AM–11:00 AM

Econ 1 and Monetary Policy

John Taylor, the George P. Shultz Senior Fellow in Economics, will examine the state of the economy and share his research on fiscal policy.

11:15 AM –12:15 PM

Flashpoints: The Prospect for Cascading Crises in the Coming Years

H.R. McMaster, the Fouad and Michelle Ajami Senior Fellow, will discuss the geopolitical challenges to American interests.

12:15 PM–12:45 PM

Lunch

Annenberg Pavilion

12:45 PM–1:45 PM

Break

2:00 PM–2:45 PM

Library & Archives Presentation

Hoover Tower

Jean Cannon, Curator for North American Collections, to show Hoover Library and Archives primary sources including Joan Quigley's notes for President Reagan, WWII diaries, and Records from William F. Buckley Jr.'s Firing Line.

3:00 PM–4:00 PM

Inflation and The Federal Reserve

Kevin Warsh, Shepard Family Distinguished Visiting Fellow in



Economics will examine the state of the economy and discuss inflation.

4:15 PM – 5:30 PM

Standing up to China’s Global Sharp Power

Larry Diamond, Senior Fellow, and Glenn Tiffert, Research Fellow, will discuss strategies to confront and contain China’s global sharp power.

5:30 PM– 6:30 PM

The State of American Education

Margaret (Macke) Raymond, Distinguished Research Fellow, and Eric (Rick) Hanushek, Paul and Jean Hanna Senior Fellow in Education, to discuss their research on K–12 issues, including policy challenges as a result of the global pandemic

6:30 PM– 7:00 PM

Reception

David and Joan Traitel Building Terrace

7:00 PM– 8:30 PM

Keynote - Putinism

David and Joan Traitel Building Terrace

Michael McFaul, Peter and Helen Bing Senior Fellow, will examine strategies to defuse the current Russia-Ukraine crisis and the role of the Western governments in supporting democracies.

THURSDAY, APRIL 14

8:00 AM– 8:30 AM

Breakfast

Annenberg Pavilion

8:30 AM- 9:30 AM

Economics of Shareholder Primacy

Josh Rauh, Hoover Institution Senior Fellow, on examining the impact of what it means to put stock prices first and the current ESG investment space challenges.

9:30 AM – 10:30 AM

Learning to Lead: America on the World Stage - Virtual Session

General Jim Mattis, Davies Family Distinguished Fellow, on the role of leadership and the strategic dilemmas that our nation faces.

11:00 AM

Depart for SFO

1:07 PM

Depart SFO via United Flight 2002

9:16 PM

Arrive IAD

HOUSE PRIMARY TRIP SPONSOR FORM
HOOVER INSTITUTION, STANFORD UNIVERSITY 2022 CONGRESSIONAL
FELLOWSHIP PROGRAM

#4 House staff members below have been chosen to attend due to their background, work portfolio, or interest in the policy areas being discussed:

- **Timothy "Tim" Bertocci** Chief of Staff, Office of Rep. Dean Phillips (MN-03)
- **Arthur Bryant** Communications Director, Office of Rep. Ann Wagner (MO-02)
- **Emily Burdick** Legislative Assistant and Scheduler, Office of Rep. Andrew Garbarino (NY-02)
- **Daniel Flores** Senior Counsel, House Committee on Oversight and Reform
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- **Tanner Palin** Communications Director, Office of Rep. Lucy MacBeth (GA-06)
- **Ryan Chantry "Chance" Russell** Professional Staff Member, House Education and Labor Committee

#12 The Hoover Institution is a department within Stanford University and is headquartered on Stanford University's campus where sessions will take place. Sessions are organized by Hoover Institution staff who are also Stanford employees. As a part of Stanford University, which is an institution of higher education committed to extending the frontiers of knowledge and solving real-world problems, the Hoover Institution is a research institution that through its scholars and library and archives, promotes economic opportunity and prosperity. By convening the program on Stanford's campus, we will be able to include many of our Senior Fellows for substantive policy discussion with staff.

#13 A chartered group shuttle will be provided for transportation throughout the program, rideshare services will be provided for staff whose itinerary necessitates alternative travel and is within House Ethics guidelines. All airfares will be coach class.

#15 **(B)1** Meals have been arranged to comply with the full \$74 per diem rate for Santa Clara county. Stanford determined that the full \$74 per diem rate for both travel days is reasonable considering travelers will be participating in officially-connected activities for most of the day on April 12 and 14
 (B)2 The location of the Hoover Institution's headquarters on Stanford Campus will allow more California-based scholars to participate.



April 12-14, 2022

All day-time meetings will be held in Annenberg Conference Room, 580 Serra Mall

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1:15 PM–1:45 PM	Welcome Lunch with Hoover's Director of Institutional Programming Accessing Hoover's Research Annenberg Pavilion <i>Denise Elson, Director of Institutional Programming, will discuss how to access Hoover's research and attendees will meet with other senior program managers to discuss Hoover's research on foreign and domestic policy.</i>
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Hoover Tower

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Breakfast

Annenberg Pavilion

8:30 AM – 9:30 AM

Government Policy and Shareholder vs. Stakeholder Capitalism

Josh Rauh, Senior Fellow, will discuss how government policy is amplifying pressure on the private sector to pursue nonfinancial goals, and the possible courses that government policy could take given the rise of ESG investing.

9:30 AM–10:30 AM

Learning to Lead: America on the World Stage - Virtual Session

General Jim Mattis, Davies Family Distinguished Fellow, on the role of leadership and the strategic dilemmas that our nation faces.

11:00 AM

Depart for SFO



THE HOOVER INSTITUTION IN WASHINGTON STUART FAMILY CONGRESSIONAL FELLOWSHIP PROGRAM

1:07 PM

Depart SFO via United Flight 2002

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