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: Philip McLaughlin
2. a. Name of Accompanying Relative: _____ ***OR*** None ☒
   b. Relationship to Traveler: ☐ Spouse ☐ Child ☐ Other (specify): _____
3. a. **Dates:** Departure: 6/1/2023 Return: 6/3/2023
   b. Dates at Personal Expense, if any: _____ ***OR*** None ☒
4. Departure City: Washington D.C. Destination: New York City Return City: Washington D.C.
5. Sponsor(s), Who Paid for the Trip: _____
6. Describe Meetings and Events Attended:
   Fiscal policy dinner discussion with Catherine Rampell and David Shor; Breakfast briefing on national debt and economic growth with Dr. Lori Esposito Murray; U.S. Bank Economic Outlook Meeting; Federal Reserve NY Visit; Discussion with Moody's on credit risk assessments; reception with experts
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: Philip McLaughlin **Date:** 6/7/23

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: Ann McLane Kuster **Date:** 6/7/23

Signature of Supervising Member: Ann McLane Kuster

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 Third Way Foundation (Progressive Policy Institute is a project of Third Way Foundation)
2. Travel Destination(s): New York, NY
3. Date of Departure: June 1, 2023 Date of Return: June 3, 2023
4. Name(s) of Traveler(s): Phil McLaughlin

   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	$315	$530	$150	$10 (taxi from train station to hotel)
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:

Name: LindsayLewis Title: ExecutiveDirector

Organization: The Third Way Foundation

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

Address: 1156 15th St NW, Ste 400, Washington D.C. 20005

Email: llewis@ppionline.org Telephone: (202) 617 - 4042

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

This form should be completed by House Members, officers, or employees seeking Committee approval of privately-sponsored travel or reimbursement for travel under House Rule 25, clause 5. The completed form should be submitted directly to the Committee by each invited House Member, officer, or employee, together with the completed and signed trip sponsor form(s) and any attachments. A copy of this form, minus this initial page, will be made available for public inspection. **This form and any attachments may be delivered to the Committee at 1015 Longworth or e-mailed to travel.requests@mail.house.gov.**

Your completed request must be submitted to the Committee no less than 30 days before your proposed departure date. Absent exceptional circumstances, permission will not be granted for requests received less than 30 days before the trip commences. **You must receive explicit approval from the Committee before you depart on this trip.**

Name of Traveler: Philip McLaughlin

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

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

Signature: _____

Name of Signatory (if other than traveler): _____

For Staff (name of employing Member or Committee): New Democrat Coalition (Rep. Annie Kuster, Chair)

Office Address: 5200 O'Neill House Office Building, 200 C St. SW, Washington DC 20024

Telephone Number: (508) 513-8145

Email Address of Contact Person: Phil.mclaughlin@mail.house.gov

☐ Check this box if the sponsoring entity is a media outlet, the purpose of the trip is to make a media appearance sponsored by that entity, *and* these forms are being submitted to the Committee less than 30 days before the trip departure date.

NOTE: You must complete all of the contact information fields above, as Committee staff may need to contact you if additional information is required.

KEEP A COPY OF THIS FORM. Page 2 (but not this page) must be submitted to the Clerk as part of the post-travel disclosure required by House Rule 25. Travel Regulation § 404(d) also requires you to keep a copy of all request forms and supporting paperwork for three subsequent Congresses from the date of travel.

If there are any questions regarding this form, please contact the Committee on Ethics at 202-225-7103 or via e-mail: *travel.requests@mail.house.gov.*

U.S. House of Representatives
COMMITTEE ON ETHICS

TRAVELER FORM

1. Name of Traveler: Philip McLaughlin

2. Sponsor(s) who will be paying or providing in-kind support for the trip:
   The Third Way Foundation (Progressive Policy Institute is a project of Third Way Foundation)

3. City and State **OR** Foreign Country of Travel : New York City, New York

4. a. Date of Departure: 6/1/23, 2023 Date of Return: 6/3/23, 2023
   b. Yes ☐ No ☒ Will you be extending the trip at your personal expense?
   If yes, list dates at personal expense: _____

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.**

   As a Policy Advisor for the New Democrat Coalition, my role is to provide informed advice on policy issues including federal fiscal, economic, and monetary policy to our Members. This trip will enhance my knowledge of these topics through discussions with economic experts and policy practitioners, improving my ability to provide policy expertise. This trip will also allow me to better understand topical economic issues like the national debt, the statutory debt limit, interest rate changes, inflation, and more.

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 _____ Date 5/2/2023

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:
   The Third Way Foundation (Progressive Policy Institute is a project of Third Way Foundation)
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):
5. Yes ☐ No ☐ Is travel being offered to an accompanying family member of the House invitee(s)?
6. Date of departure: June 1, 2023 Date of return: June 3, 2023
7. a. City of departure: Washington, D.C.
   b. Destination(s): New York, NY
   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; **OR**
   b. ☐ I checked 8(c) above but am not offering any lodging; **OR**
   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 Third Way Foundation has been conducting policy work and faciliting educational dialogues on fiscal and monetary issues since in 1989. The meetings on this trip will take into account congressional staff interest and their relevance to shared policy obectives of PPI and the attending staff, focusing specifically on three key themes (1) the federal debt limit (2) inflation, interest rates, & long-term debt trajectory (3) the impact of fiscal and monetary on bank stability.

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 the 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):

    Average of $48 per day (6/1 one meal provided, 6/2 three meals, 6/3 one meal)

    2) Provide the reason for selecting the location of the event or trip:

    NYC is home to several global financial institutions, academics, and relevant media

16. Name, nightly cost, and reasons for selecting each hotel or other lodging facility:
    Hotel Name: Kimberly Hotel City: New York, NY Cost Per Night: $240
    Reason(s) for Selecting: Centrally located, nice accommodations, cost under federal pier diem
    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 the box.*

18. **Total Expenses for each Participant:**

☐ Actual Amounts ☐ Good Faith Estimates	Total **Transportation** Expenses per Participant	Total **Lodging** Expenses per Participant	Total **Meal** Expenses per Participant
For each Member, Officer, or Employee	$300	$520	$144
For each Accompanying Family Member			

	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	$20	Taxi if needed
For each Accompanying Family Member		

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 by my signature that
   a. I read and understand the Committee's Travel Regulations;
   b. I am not a registered federal lobbyist or registered foreign agent; and
   c. The information on this form is true, complete, and correct to the best of my knowledge.

Signature: _____ Date: _____

Name: LindsayLewis Title: ExecutiveDirector

Organization: The Third Way Foundation

Address: 1156 15th St NW, Ste 400, Washington D.C. 20005

Email: llewis@ppionline.org Telephone: (202) 617 - 4042

INSTRUCTIONS

Complete the *Primary Trip Sponsor Form* and submit the agenda, invitation list, any attachments, and any *Additional Trip Sponsor Forms* directly to the Travelers.

Written approval from the Committee on Ethics is required before traveling on this trip. The Committee on Ethics will notify the House invitees directly and will not notify the trip sponsors.

Willful or knowing misrepresentation on this form may be subject to criminal prosecution under 18 U.S.C. § 1001. Signatures must comply with section 104(bb) of the Travel Regulations.

For questions, please contact the Committee on Ethics at:

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

ethicscommittee@mail.house.gov | 202-225-7103
More information and forms available at **ethics.house.gov**

Michael Guest, Mississippi
Chairman
Susan Wild, Pennsylvania
Ranking Member

David P. Joyce, Ohio
John H. Rutherford, Florida
Andrew R. Garbarino, New York
Michelle Fischbach, Minnesota

Veronica Escobar, Texas
Mark DeSaulnier, California
Deborah K. Ross, North Carolina
Glenn F. Ivey, Maryland

ONE HUNDRED EIGHTEENTH CONGRESS

U.S. House of Representatives

COMMITTEE ON ETHICS

Thomas A. Rust
Staff Director and Chief Counsel

Kelle A. Strickland
Counsel to the Chairman

David Arrojo
Counsel to the Ranking Member

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

May 18, 2023

Mr. Philip McLaughlin
New Democrat Coalition
5200 O'Neill House Office Building
Washington, DC 20515

Dear Mr. McLaughlin:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to New York City, New York, scheduled for June 1 to 3, 2023, sponsored by the Third Way Foundation.

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 $480 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,

Michael Guest
Chairman

Susan Wild
Ranking Member

MG/SW:tn

ppi radically pragmatic

CONGRESSIONAL STAFF DELEGATION

NEW YORK, NEW YORK – JUNE 2023

ppi radically pragmatic

Welcome to PPI's 2023 Trip to New York, NY

To our Congressional Staff Delegation,

Thank you for joining the Progressive Policy Institute's Spring 2023 trip to New York, NY.

Since 1989, PPI has been a catalyst for policy innovation and political reform. Our mission is to create radically pragmatic ideas for moving America beyond ideological and partisan deadlock. Many of these mold-breaking ideas have been translated into public policy and law and have influenced efforts to modernize progressive politics across the globe.

This trip will assemble a standout group of bipartisan, bicameral Congressional staff who are leaders in their respective offices on fiscal policy issues.

At PPI, we believe it is crucially important for U.S. federal policy experts to step outside Washington and explore how the issues are playing out in the real world. We value the opportunity to connect federal policymakers with leaders in state and local government, academic, and the private sector who can enhance their work back on Capitol Hill.

That's why for this trip we have organized a packed day of meetings and events with top researchers, senior economists and analysts, and other industry leaders who are prepared to discuss three key issues with our group:

- The standoff over the federal debt limit
- The impact of inflation, interest rates, and long-term debt growth on our economy
- The influence of fiscal and monetary policy on recent small and midsize bank collapses

We have quite an itinerary lined up for our short time in New York and we will do our best to make sure you get the most out of this experience. Thank you again for joining us!

Sincerely,

Ben Ritz
Director of PPI's Center for Funding America's Future

BEFORE YOU GO

- Make sure you have your photo ID and train ticket. Photo IDs may be required for some meetings and events during the trip as well.
- Give yourself ample time to get to Union Station prior to departure. With construction and security delays, we recommend arriving early.
- PPI has provided travel accommodations, lodging, and meal arrangements for your trip. Any additional spending outside of the trip's programming must be on your own.

THINGS TO BRING

- Photo ID
- Notebooks, tablets, etc. for note taking during meetings
- Each passenger may bring two personal items, 25 lbs. (12 kg) and 14 x 11 x 7 inches each, and two carry-on items, 50 lbs. (23 kg) and 28 x 22 x 14 inches each, onboard.
- Make sure to pack any medications you may need, comfortable shoes for walking, comfortable clothes, and any other necessities.

DRESS CODE/ATTIRE:

- Business casual. No formal clothes needed for any meeting.

NOTE: These are simply recommendations for packing and preparing for the trip. Down time is your personal clothing choice. Pack accordingly.

NYC WEATHER

Thursday: Partly cloudy skies. High 81F. Winds S at 5 to 10 mph.

Friday: Sun and a few passing clouds. High near 85F. Winds SSE at 5 to 10 mph.

We recommend checking the weather immediately prior to the trip and to consider packing an umbrella or rain jacket if necessary.

TRIP INFORMATION

TRANSPORTATION

Trains:

Outbound:
184 Northeast Regional - Union Station to Penn Station (NYC): Departs Thursday, June 01, 2023 at 1:10PM ET, Arrives at 4:42PM |

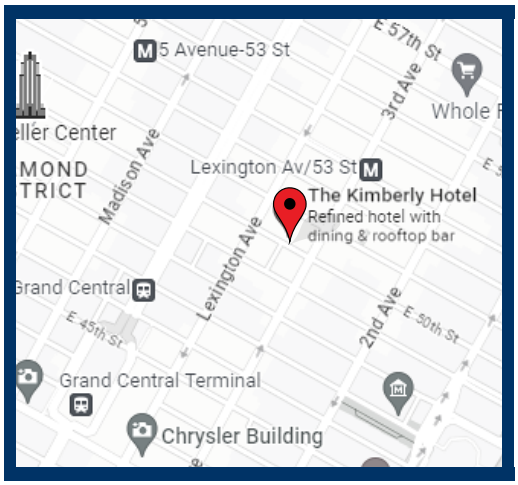
Return:
***91 Silver Star - Penn Station (NYC) to Union Station (DC)*:** Departs Saturday, June 03, 2023 at 11:02AM, Arrives at 2:28PM

Subway / Rideshare:

Between meetings, PPI will facilitate group travel either by subway, taxi, and rideshare.

LODGING

The Kimberly Hotel, 145 E 50th St, New York, NY 10022 | 212 755 0400



PPI STAFF CONTACTS

Stuart Malec *Government Affairs*	**smalec@ppionline.org** **860-508-8554**
Ben Ritz *Center for Funding America's Future*	**britz@ppionline.org** **202-322-5325**
Reid Fauble *Government Affairs*	**rfauble@ppionline.org** **814-795-7652**

EMERGENCY INFORMATION

In the event of a life-threatening medical emergency or other emergency situation, call 911

U.S. House and Senate Resources

House First Call
+1 (202) 225-8000

House First Call
+1 (202) 225-8000

PPI Staff has medical kits for non-emergency situations, including Band-Aids, ice-packs, and more. Contact a PPI staff member at any time of day or night for assistance.

Ben Ritz | Director of the Center for Funding America's Future

Ben Ritz is the Director of PPI's Center for Funding America's Future, which develops policy proposals to strengthen public investments in the foundation of our economy, modernize health and retirement programs to reflect an aging society, and transform our tax code to reward work over wealth. Ben's expert analysis has been published in the Washington Post, the New York Times, the Wall Street Journal, Forbes, The Hill, and other national news outlets.

Stuart Malec | Director of Government Affairs

Stuart Malec is the Director of Government Affairs for PPI. Before joining PPI, Stuart directed the press operations for two members of the U.S. House of Representatives, serving as a senior aide to lawmakers sitting on the Energy and Commerce, Veterans Affairs, Homeland Security, and Armed Services Committees. Prior to his work in political communications, Stuart led outreach programs for a Congressional district office and worked on state and local political campaigns in New England.

Reid Fauble | State and Local Political Director

Reid Fauble is the State and Local Political Director at the Progressive Policy Institute. Prior to joining PPI, Reid interned at the Democratic Legislative Campaign Committee, worked at the Sine Institute of Policy and Politics, and most recently, served as Director of Scheduling and Advance for Congresswoman Dina Titus. Reid earned a BA from American University in Political Science and History along with a certificate in Women, Policy, and Political Leadership in 2021, and completed the General Course at the London School of Economics in 2020. She is also a 2022 graduate of the Master of Public Policy program at American University.

Will Marshall | President

Will Marshall is president and founder of the Progressive Policy Institute (PPI), a catalyst for political change and policy innovation with offices in Washington, D.C., Brussels and the United Kingdom. Its mission is to craft new ideas for advancing the enduring values of liberal democracy.

A veteran policy entrepreneur, Marshall in 1985 helped to found the Democratic Leadership Council, serving as its first policy director. He is an honorary Vice-President of Policy Network, an international think tank launched by Tony Blair to promote progressive policy ideas throughout the democratic world.

Jason Gold | Senior Fellow

Jason is a Senior Fellow for the Progressive Policy Institute's Financial Services, ESG and Capital Markets Research. He was an executive at S&P Global and a member of the senior leadership team, where he ran thought leadership, and manages a data focused, multi-discipline, international research portfolio supporting the CEO and Chief Economist, among other C-suite executives.

CONNECT WITH PPI

@ppi

progressivepolicy.org

1156 15th Street NW, STE 400
Washington, D.C. 20002

CONGRESSIONAL STAFF

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Robert Ordway | Senior Policy Adviser for Sen. Mike Braun
Robert is a professional that leads by participating in the five pillars of a strong community: education, business/labor, non-profits, government, and faith-based institutions. He has over a decade of experience in public policy, civil service, and private sector work. Entrepreneurial endeavors helped him develop a generalist skill set in sales, marketing, finance/fundraising and operations.

Robert's 2023 goal is to finish his first book - Millrat: A Memoir about ALS, Adversity and the American Dream. In his free time, Robert designs custom clothing, competes in powerlifting, enjoys cycling, and studies the history of the prohibition era.

Kelsey Wolfgram | Deputy Chief of Staff to Rep. Tim Burchett
Kelsey Wolfgram currently serves as Deputy Chief of Staff to U.S. Congressman Tim Burchett (TN-02), who sits on the House Committees on Transportation & Infrastructure, Oversight & Accountability, and Foreign Affairs. She has nearly ten years of experience in Congress working on a range of policy issues including financial services, energy, technology, and telecommunications.

Brian Duckworth | Legislative Director and Senior Advisor to Rep. Jeff Jackson
Brian serves as Legislative Director and Senior Advisor to Rep. Jeff Jackson (D-NC). Before assuming his current role, he worked as Senior Member Services Advisor for former Majority Leader Stony Hoyer. Throughout his eight-year tenure on Capitol Hill, Brian has held multiple legislative roles, such as the Legislative Director for Rep. Colin Allred (TX-32) and Legislative Assistant for Rep. Hank Johnson (GA-04). Before embarking on his career in politics, Brian earned a bachelor's degree in vocal performance and business from Georgia Southern University. He lives in Washington, DC with his partner Joe and their retired racing greyhound, Greggory.

Will Pisano | Legislative Director to Rep. Annie Kuster
Will Pisano is the Legislative Director for Congresswoman Annie Kuster (NH-02). In that role, he is responsible for guiding the Congresswoman's legislative team and ensuring it achieves her priorities. In addition to managing her legislative staff, Will is the lead staffer for the Rep. Kuster's work on the Energy Subcommittee of the House Energy and Commerce Committee. He also advises Rep. Kuster on issues related to financial services, tax policy, and foreign affairs. Will is a graduate of Connecticut College and is pursuing his Juris Doctorate at the Georgetown University Law Center.

Annika Nozaki | Policy Assistant to Rep. Ed Case
Annika Nozaki covers policy in financial services, consumer protections, and small business for the Office of Congressman Ed Case. She previously worked for the Office of Senator Mazie Hirono, the Office of Hawai'i State Senator Donna Mercado Kim, and the City and County of Honolulu. Annika's work supports Representative Case's leading role in fiscal negotiations as a Vice-Chair of the Problem Solvers Caucus and member of the House Appropriations Committee.

Kathryn Chakmak | Tax Policy Adviser to Chairman of the Ways and Means Committee
Kathryn Chakmak is the Tax Policy Advisor for Ways and Means Chairman Jason Smith (R-MO). In her role, she handles a diverse domestic tax policy portfolio. Before transitioning to the Ways and Means Committee, Kathryn served as a Legislative Assistant for Congressman Smith. In her roles, she served as the primary advisor for a legislative portfolio that included domestic, international, and corporate tax, financial services, pensions, education, small business, and housing. Prior to joining Team Smith, she served as the Special Assistant to the Staff Director at the House Ways and Means Committee. She is originally from Las Vegas, Nevada and received her Bachelor's in Economics and Government from Claremont McKenna College in southern California.

Trey Webster | Legislative Director for Rep. Dean Phillips
Trey Webster serves as Legislative Director in the Office of U.S. Rep. Dean Phillips (MN-03), where he oversees the legislative work of the office. Prior to joining Congressman Phillips's office in May 2021, Trey led the research team at Forbes Tate Partners (FTP), a bipartisan, full-service public affairs consultancy. Previously, Trey worked as a field organizer for the North Carolina Coordinated Campaign in the 2016 election and as a legal fellow for U.S. Sen. Amy Klobuchar (MN) on the Senate Judiciary Committee. Trey graduated with a B.A. from the University of South Carolina (2012) and a J.D. from Georgetown University Law Center (2015).

Aaron Groce | Legislative Director for Rep. Sean Casten
Aaron Groce serves as the Legislative Director for Rep. Sean Casten (D-IL-06). Along with overseeing Rep. Casten's legislative team and strategy, he leads his work on the House Financial Service's Committee. A native of Salem, New Jersey, Aaron started his career working on the Campaign of former New Jersey Senate President Steve Sweeney and is a graduate of Rowan University. He began his career on the Hill working for Rep. Jason Crow (D-CO-06) and has also worked for Rep. Ritchie Torres (D-NY-15).

Chris Sharer | Legislative Assistant for Sen. Joe Manchin
Chris Sharer - a Western North Carolina native - is a Legislative Assistant for Sen. Joe Manchin (D-WV). Chris has been with the Senator for nearly 5 years and oversees his financial services, econ, tax, and judiciary portfolios. Prior to joining the Senator, he worked on Rep. Kathy Manning's 2018 Congressional campaign in the Greensboro, NC area. Chris holds a bachelor's degree in political science with a second in public policy from the University of North Carolina at Chapel Hill. In addition to serving the people of the Mountain State, Chris enjoys rooting on Pittsburgh sports team and spending time with his two-year old golden-doodle, Mia.

Noelle Britton | Deputy Chief of Staff for Rep. Lloyd Smucker
Noelle serves as Congressman Lloyd Smucker's Deputy Chief of Staff. Overseeing a team of four, she is responsible for directing legislative operations to serve the constituents of Pennsylvania's eleventh congressional district. In addition to her management responsibilities, Noelle covers a legislative portfolio that includes staffing the Congressman in his assignment to the Ways and Means Committee on tax and trade policy. Ways and Means is the chief tax-writing committee of the U.S. House of Representatives and has jurisdiction over tariffs and other revenue-raising measures, as well as Social Security, Medicare, and welfare programs. Noelle is from Las Vegas, NV and is a graduate of the University of Nevada Las Vegas (UNLV).

Phil McLaughlin | Senior Policy Advisor for New Democrat Coalition
Phil McLaughlin is a Senior Policy Advisor for the New Democrat Coalition, a group of nearly 100 forward-thinking House Democrats seeking bipartisan solutions to the most pressing challenges facing the country. In this role he works on a policy portfolio covering agriculture, energy, financial services, housing, telecommunications, transportation, and infrastructure. He was previously a Policy Fellow with the Progressive Policy Institute, and worked for various elected officials in his home state of Massachusetts.

Leah Li | Senior Legislative Assistant for Rep. Derek Kilmer
Leah Li works as a Senior Legislative Assistant in the Office of Congressman Derek Kilmer (WA-06), where she advises on policy issues related to trade, technology, judiciary, campaign finance reform, labor, small business, and transportation, among other issues. A native of Washington state, Leah attended the University of Washington in Seattle, where she studied Political Science, International Security, and English.

Donald Pollard | Legislative Director for Rep. Jennifer McClellan
Donald Pollard serves as legislative director for Representative Jennifer L. McClellan (VA-04). As legislative director, he handles economic and fiscal policy and commerce and judicial-related issues. Prior to this, Donald held several positions in the Office of U.S. Senator Tim Kaine, most recently serving as policy advisor. In his role as a policy advisor, Donald worked on commerce, appropriations, and judicial issues. Donald is a native of Richmond, Virginia and received his bachelor's degree from University of Richmond and a master's degree in public administration from American University.

Thursday, June 1, 2023

1:10PM ET

Delegation Departs Washington Union Station
50 Massachusetts Ave NE, Washington, DC 20002
148 Northeast Regional from WAS → NYP
***Note**: YOU are responsible for getting to Union Station.*
Staff Contact: Ben Ritz and Stuart Malec

5:00PM
to 6:00PM

Travel to Hotel - Uber/Lyft
***Note**: Ben and Stuart will be on site to arrange transportation.*
Staff Contact: Ben Ritz and Stuart Malec

6:00 PM

Check-in to Hotel
Kimberly Hotel, 145 E 50th St, New York, NY 10022
Staff contact: Reid Fauble (Reid will be at hotel)

7:30PM
to 9:30PM

Fiscal Policy Dinner Discussion with Catherine Rampell and David Shor
Sea Fire Grill, 158 E 48th St Between 3rd and Lexington Avenue, New York, NY 10017

Special guests at the dinner will be Catherine Rampell, an opinion journalist and nationally syndicated opinion columnist; David Shor, a data scientist and political consultant; and academics at Columbia University. We will discuss the fiscal challenges facing the United States, the debt limit debate, and how these issues are perceived by and communicated to the general public.

Friday, June 2, 2023

8:30 AM
to 10:00AM

Breakfast Briefing on National Debt and Economic Growth
Kimberly Hotel, Conference Space, 145 E 50th St, New York, NY 10022

The presentation will cover the national debt and the implications it could have for economic growth. The briefing will be provided by Dr. Lori Esposito Murray, President of the Committee for Economic Development of The Conference Board.

10:00AM
to 10:30AM

Travel to meeting - subway/taxi

10:30AM to 11:30AM

U.S. Economic Outlook Meeting with Beth Ann Bovino
Apco, Conference Room, 1250 Broadway 31st floor, New York, NY 10010

Meeting topic will be on the U.S. economic outlook and how failing to raise or suspend the federal debt limit would affect it. Beth Ann Bovino is the Chief Economist at U.S. Bank and a widely renowned economic and market research analyst. The Wall Street Journal recognized Beth Ann as the most accurate forecaster of the U.S. economy in 2013 and the 2nd most accurate forecaster in 2018.

11:30AM to 12:00PM

Travel to Federal Reserve Bank of New York - subway

12:00PM to 2:00PM

Visit to Federal Reserve Bank of New York
33 Liberty Street, New York, NY 10045

Meeting will be led by Stanley Hardy and Michael Nelson at the New York Fed to discuss the impact of monetary policy on inflation and bank stability, and embark on a guided tour. The mission of the Federal Reserve Bank of New York is to make the U.S. economy stronger and the financial system more stable for all segments of society.

2:00PM to 2:30PM

Travel to meeting - walk

2:30PM to 4:00PM

Discussion with Risk Assessment Professionals
Moody's, 7 World Trade Center, 250 Greenwich St, New York, NY 10007

Staff will receive a briefing from Moody's analysts Anne Van Praagh, Mauro Leos, and Bill Foster on the impact of debt-limit brinkmanship on U.S. borrowing. Moody's is one of the major three main independent rating agencies in the United States.

4:00PM to 4:30PM

Travel to hotel - subway

5:30PM to 7:00PM

Reception with PPI Leadership and Financial Experts
Kimberly Hotel, 145 E 50th St, New York, NY 10022

Staff will participate in a debrief meeting with PPI's Ben Ritz and and then reconvene with private sector, media and academic experts met during the day's programming for a closing reception.

Saturday, June 3, 2023

8:30AM to 10:00AM

Breakfast at hotel with PPI Staff
Kimberly Hotel, 145 E 50th St, New York, NY 10022

Congressional staff will debrief the trip, discuss lessons learned, and have an opportunity to ask final questions to PPI staff.

10:30AM to 11:15AM

Travel to Moynihan Train Hall (NYP) - walk/subway/taxi

12:20PM

Delegation Departs Moynihan Train Hall (NYP)
350 W 33rd St, New York, NY 10001
91 Silver Star from NYP -> WAS
Staff Contact: Stuart Malec

Catherine Rampell | Journalist

Catherine Rampell is an opinion columnist at The Washington Post. She frequently covers economics, public policy, immigration and politics, with a special emphasis on data-driven journalism. She is also an economic and political commentator for CNN, a special correspondent for the PBS NewsHour and a contributor to Marketplace. Before joining The Post, she wrote about economics and theater for the New York Times. Rampell received the 2021 Online Journalism Award for Commentary and the 2010 Weidenbaum Center Award for Evidence-Based Journalism, and she is a six-time Gerald Loeb Award finalist. She grew up in Florida and graduated Phi Beta Kappa from Princeton University.

David Shor | Head of Data Science with Blue Rose Research

David Shor is a data scientist and political consultant known for analyzing political polls. He serves as head of data science with Blue Rose Research in New York City, and is a senior fellow with the Center for American Progress Action Fund. Previously, Shor was the director of Political Data Science at Civis Analytics, overseeing a research and development program that interviewed millions of people for hundreds of individual campaigns and electoral organizations.

Dr. Lori Esposito Murray | President of the Committee for Economic Development of The Conference Board

Dr. Lori Esposito Murray is President of the Committee for Economic Development of The Conference Board. Murray brings to CED extensive experience at the highest echelons of domestic and international policy. She most recently served as an adjunct senior fellow at the Council on Foreign Relations' (CFR). Prior to her role at CFR, she held the distinguished national security chair at the US Naval Academy. She also is president emeritus of the World Affairs Councils of America, the largest non-partisan, non-profit, grassroots organization dedicated to educating and engaging the US public on global issues.

Beth Ann Bovino | Chief Economist at U.S. Bank

Beth Ann Bovino was named Chief Economist at U.S. Bank in May 2023. In this role, Bovino will build on U.S. Bank's existing economic research capabilities to support client-facing businesses as well as economic scenario analysis supporting, among other things, treasury balance sheet management activities, CCAR stress testing and CECL modeling processes. Bovino's career has spanned almost three decades supporting several government, finance and information organizations. She joins U.S. Bank from S&P Global Ratings, where she was the managing director and chief North American economist (United States/Canada)

Michael Nelson | Assistant General Counsel and Senior Vice President of the Federal Reserve Bank of New York
Michael Nelson is Assistant General Counsel and Senior Vice President of the Federal Reserve Bank of New York (FRBNY). He is responsible for the New York Fed's outreach to the U.S. Congress. He is Chair of the Financial Markets Lawyers Group and has helped the New York Fed develop other such external advisory groups.

Stanley Hardy | Director of Government & Industry Relations at the Federal Reserve Bank of New York
Stanley Hardy is Director of Government & Industry Relations at the Federal Reserve Bank of New York (FRBNY). He works to build and strengthen relationships between the FRBNY and federal and state, legislative and government staffers, as well as financial, industrial, and other business trade and advocacy groups.

Anne Van Praagh | Global Head of Public, Project & Infrastructure Finance at Moody's
Anne Van Praagh is the Global Head of the Public, Project & Infrastructure Finance Group. In her role, she oversees credit ratings and research on public sector entities worldwide. Before this role, Anne led the Sovereign Risk Group between 2021 and 2022. Also, Anne was the Head of Moody's Investors Service Research from 2019 to early 2022, driving the content and engagement strategy for 20,000 research publications published annually.

Mauro Leos | Associate Managing Director for the Americas at Moody's
Mauro Leos has been with Moody's Sovereign Risk Group since 1996. He is currently Associate Managing Director for the Americas responsible for sovereign ratings inLatin America, the Caribbean, US and Canada. Mauro is also responsible for ratings of multilateral banks in the region.

Bill Foster | Vice President-Senior Credit Officer at Moody's
William (Bill) Foster is a Vice President-Senior Credit Officer in Moody's Sovereign Risk Group in New York, where he serves as lead analyst on the Canada, India, Pakistan, Bangladesh, Sri Lanka and World Bank Group credits. Bill joined Moody's in August 2016, following 10 years at the U.S. Department of the Treasury.

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