

# COMMITTEE ON ETHICS

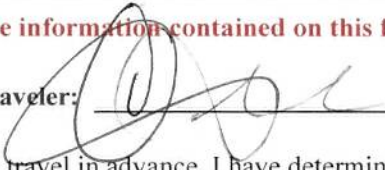
## EMPLOYEE POST-TRAVEL DISCLOSURE FORM Original Amendment

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](mailto: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: Brandon Casey
2. a. Name of Accompanying Relative: Nina Lopez **OR**  None  
b. Relationship to Traveler:  Spouse  Child  Other (specify): \_\_\_\_\_
3. a. Dates: Departure: March 22, 2024 Return: March 24, 2024  
b. Dates at Personal Expense, if any: \_\_\_\_\_ **OR**  None
4. Departure City: Washington, DC Destination: Middleburg, Virginia Return City: Washington, DC
5. Sponsor(s), Who Paid for the Trip: Center Forward
6. Describe Meetings and Events Attended: As Staff Director, I was able to listen in on sessions that highlighted the important issues involving healthcare, trade and supply chains. These issues will play a key role in drafting legislation.
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: 4/15/2024

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: Richard Neal Date: 4/15/2024

Signature of Supervising Member: 

HAND DELIVERED

# 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 in the trip within 10 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 or provided in-kind support for the trip: Center Forward

2. Travel Destination(s): Middleburg, VA

3. Date of Departure: Friday, March 22nd, 2024 Date of Return: Sunday, March 24th, 2024

4. Name(s) of Traveler(s): Brandon Casey

*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	\$6	\$500	\$286	\$250 (waived registration fee)
Accompanying Family Member	\$0	\$0	\$90	N/A

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

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

Signature:  Date: 3/26/24

Name: Riley Kilburg Title: Executive Director

Organization: Center Forward

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

Address: 410 New Jersey Avenue SE, Washington, D.C. 20003

Telephone: (563) 542-6821 Email: riley@center-forward.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.

# COMMITTEE ON ETHICS

## TRAVELER FORM

1. Name of Traveler: Brandon Casey
2. Sponsor(s) who will be paying or providing in-kind support for the trip: Center Forward
3. City and State **OR** Foreign Country of Travel: Middleburg, Virginia
4. a. Date of Departure: March 22, 2024 Date of Return: March 24, 2024  
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: Nina Lopez
  - (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, invitation, 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 Staff Director, Center Forward is a group that brings together Republicans and Democrats on key policy theory that we can work on a bipartisan front. The events would assist me in hearing feedback and expanding my view on potential legislation regarding trade, supply chains, and healthcare.
9. **Yes  No  Is the traveler aware of any registered federal lobbyists or foreign agents involved in 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: 2/26/2024

# 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's website (ethics.house.gov) provides detailed instructions for filling out the form. The Committee will notify the House invitees directly of its decision and will not notify the trip sponsors.

**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. Signatures must comply with section 104(bb) of the Travel Regulations.**

1. Sponsor who will be paying for the trip:

Center Forward

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, services, or in-kind assistance from other source(s) intended directly or indirectly to finance all or part of this trip and has enclosed disclosure forms from each of those entities.

If "c" is checked, list the names of the additional sponsors: \_\_\_\_\_

4. Provide names and titles of **ALL** House Members *and* employees you are inviting. **For each House invitee, provide an explanation of why the individual was invited** (include additional pages if necessary): Please see attachments

5. Yes  No  Is travel being offered to an accompanying family member of the House invitee(s)?

6. Date of Departure: Friday, March 22nd, 2024 Date of Return: Sunday, March 24th, 2024

7. a. City of departure: Washington, D.C.

b. Destination(s): Middlburg, VA

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.

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:**

<input type="checkbox"/> Actual Amounts <input checked="" type="checkbox"/> Good Faith Estimates	Total <b>Transportation</b> Expenses per Participant	Total <b>Lodging</b> Expenses per Participant	Total <b>Meal</b> Expenses per Participant
For each Member, Officer, or Employee	\$60.00	\$500.00	\$250.00
For each Accompanying Family Member	\$60.00	\$0.00	\$250.00

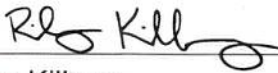
	<b>Other</b> Expenses (dollar amount per item)	Identify Specific Nature of "Other" Expenses (e.g., taxi, parking, registration fee, etc.)
For each Member, Officer, or Employee	\$250.00	Waived registration fee
For each Accompanying Family Member	\$0.00	

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: Wednesday, January 24, 2024  
 Name: Riley Kilburg Title: Executive Director  
 Organization: Center Forward  
 Address: 410 New Jersey Avenue SE, Washington, D.C. 20003  
 Email: riley@center-forward.org Telephone: (563) 542-6821

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

Keelie Broom  
*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

March 20, 2024

Mr. Brandon Casey  
Committee on Ways and Means  
1129 Longworth House Office Building  
Washington, D.C. 20515

Dear Mr. Casey:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your and your spouse's proposed trip to Middleburg, Virginia, scheduled for March 22 to 24, 2024, sponsored by Center Forward.

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:mc



2024 Center Forward Issues Conference  
Salamander Resort and Spa  
Middleburg, Virginia — Friday, March 22nd – Saturday, March 24th, 2024

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**Friday, March 22nd, 2024**

Recommended Attire: Casual

**3:00 pm - 5:00 pm\*** Conference Registration – Hamilton Room, The Salamander Resort  
*Note: If you arrive after registration is closed, please join us at Lost Barrel Brewing. The registration desk will open again at 8:00am on Saturday morning.*

**4:00 pm** Salamander Resort Check-In

**6:00 pm - 9:00 pm** Conference Welcome Reception  
Lost Barrel Brewing  
36138 John Mosby Highway, Middleburg, VA 20117

This is a family-friendly reception and BBQ buffet dinner. A shuttle will run continuously from 6:00 pm - 9:00 pm between the Salamander Resort and Lost Barrel Brewing.

**6:30 pm - 7:30 pm** Welcome Remarks and Conference Review – Building Consensus in a Polarized Congress

Center Forward Executive Leadership team will welcome participants and include a review of the coverage and outcomes of bipartisan legislation from the 118th Congress. The address will highlight areas of opportunity for consensus in 2024 including legislation related to trade, healthcare, manufacturing, supply chains, agriculture, energy, financial services, foreign affairs, and more. Q&A included.

Riley Kilburg, Executive Director, Center Forward  
Cori Kramer, Chief Executive Officer, Center Forward

**Saturday, March 23rd, 2024**

**Conference Program – Middleburg Ballroom**

*Recommended Attire: Casual*

- 8:00 am - 9:00 am**      Conference Registration – Hamilton Room
- 8:00 am - 9:00 am**      Breakfast Buffet — Bluemont Room  
*Note: Please feel free to bring your plate to the Middleburg Ballroom and eat during programming.*
- 9:00 am - 9:15 am**      Welcome Remarks and Introduction, Cori Kramer, Center Forward
- 9:15 am - 9:45 am**      *Breakfast Remarks*  
  
*— Biden Administration Official (Multiple Invites - Speaker TBD)*
- 9:45 am - 10:45 am**      Panel Discussion — “From City Streets to Country Roads: Striving for Equitable Healthcare Outcomes for Underserved Communities”
- This panel brings together experts to engage in a dialogue on the critical issue of health equity in three distinct contexts: rural communities, urban communities, and minority populations. Recognizing that disparities in healthcare access and outcomes exist across these different landscapes, the panelists aim to shed light on the unique challenges faced by underserved individuals and communities. The panel seeks to foster a comprehensive understanding of health equity challenges and collaboratively explore strategies that promote inclusivity and ensure that every individual can access high-quality, culturally sensitive, and equitable healthcare.
- Carrie Cochran-McClain, Chief Policy Officer, National Rural Health Association  
Tilithia McBride, Vice President of Quality, Federation of American Hospitals  
Jason Resendez, President & CEO, National Alliance for Caregiving  
Moderated by Cori Kramer, CEO, Center Forward



**10:45 am - 11:00 am** Break

**11:00 am - 12:30 pm** Breakout Sessions — “Balancing Competing Legislative Priorities”

Conference participants will work in small groups through facilitated dialogues to review competing legislative priorities and find bipartisan agreement on policies that achieve shared goals and help Congress find consensus. In five separate breakouts, participants will consider an issue related to artificial intelligence, workforce, climate and sustainability, health care, or financial services as they work together and weigh the public policy impact of their decisions. Facilitated by special guests:

- Crystal Anderson, Washington Media Group, Artificial Intelligence & Technology Breakout
- Rhett Buttle, Public Private Strategies, Workforce Breakout
- Matthias Muelbauer, OnePointFive, Climate and Sustainability Breakout
- Marissa Padilla, Global Strategy Group, Health Care Breakout
- John Court, Bank Policy Institute, Financial Services Breakout

**12:30 pm - 1:30 pm** Lunch — Middleburg Foyer

Panel Discussion — Bipartisan Legislative Opportunities in 2024

Center Forward leadership and leading polling experts discuss recent research on voters’ attitudes towards bipartisanship and the perceived efficiency of government. Researchers also discuss areas where Americans broadly agree on issues, noting potential possibilities for bipartisan legislation and solutions in 2024.

- Cori Kramer, CEO, Center Forward
- Matt Monday, Morning Consult

**1:30 pm - 2:45 pm** Lunch — Middleburg Foyer

Panel Discussion — Companies in Crossfire: Pressure Testing Business Leadership

Policy and politics are impacting companies more now than ever. The “safety space” where CEOs could weigh in on taxes and economics is now overshadowed by a longer list of issues that affect employees, customers, and the communities where businesses operate and lead. Voting rights, reproductive health, social issues, and diversity & inclusion programs are all issues that CEOs must navigate carefully. Non-traditional stakeholder voices are weighing in more loudly, creating opportunities and challenges. This panel will bring together leaders across sectors to examine this moment, share learnings and discuss business leadership in this challenging time.

- Joanna Smith-Ramani Co-Executive Director, Aspen Institute Financial Security Program
- Ying McGuire, CEO, National Minority Supplier Diversity Council
- Dane Linn, Senior Vice President of Corporate Initiatives, Business Roundtable
- Moderated by: Rhett Buttle, Founder Public Private Strategies

**2:45 pm - 3:00 pm** Panel Closing Remarks, Riley Kilburg, Center Forward

**3:00 pm - 4:45 pm** Policy Roundtable Discussions — Library

Perspectives from House offices on legislative progress made in 2023 and opportunities for collaboration in 2024.

**4:45 pm - 6:00 pm** Break

### **Conference Closing Reception and Dinner**

*Recommended Attire: Business Casual*

**6:00 pm - 7:00 pm** Reception — Middleburg Foyer

Conference attendees will have the opportunity to reflect and collaborate about their experiences. These conversations will conclude on how best conference attendees can react to new information and ideas upon returning to the Congress.

**7:00 pm - 8:30 pm** Dinner — Middleburg Ballroom

2024: The Legislative Implications of a Reshaping Congress and White House

Dave Wasserman, Senior Editor, The Cook Political Report

**8:30 pm - 8:45 pm** Closing Remarks, Cori Kramer, CEO, Center Forward

**Sunday, March 24, 2024**

*Recommended Attire: Casual*

**8:00 am - 10:00 am** Breakfast Buffet — Middleburg Foyer

**8:30 am** Shuttle provided for Congressional Staffers departs for D.C.  
*Note: Please meet the shuttle directly in front of the Salamander resort.*

**11:00 am** Salamander Resort Check-Out