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: Aaron Schmidt

2. a. Name of Accompanying Relative: 
   b. Relationship to Traveler: □ Spouse □ Child □ Other (specify): 

3. a. Dates: Departure: May 8, 2024 Return: May 12, 2024
   b. Dates at Personal Expense, if any: 


5. Sponsor(s), Who Paid for the Trip: Progressive Policy Institute

6. Describe Meetings and Events Attended: Met with Members of Parliament, attended a conference, met with labour leaders and American business leaders.

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: 5/21/2024

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: Suzan K. DelBene Date: 5/21/2024

Signature of Supervising Member: ___________________________

last updated 7/2023
SPONSOR POST-TRAVEL DISCLOSURE FORM

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:
   The Third Way Foundation (Progressive Policy Institute is a project of Third Way Foundation)

2. Travel Destination(s): London, United Kingdom
   Date of Departure: May 8, 2024  Date of Return: May 12, 2024

3. Name(s) of Traveler(s): Macoy Matthews, Aaron Schmidt, Casey O'Shea, Charlie Chamness, Will Pisano, Joe Valente, Yusuf Nekzad, Alex Rajakovich, Michael Bunrand
   Note: You may list more than one traveler on a form only if all information is identical for each person listed.

4. Actual amount of expenses paid on behalf of, or reimbursed to, each individual named in Question 4:

<table>
<thead>
<tr>
<th>Total Transportation Expenses</th>
<th>Total Lodging Expenses</th>
<th>Total Meal Expenses</th>
<th>Total Other Expenses (dollar amount per item and description)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Traveler</td>
<td>$930</td>
<td>$840 for general</td>
<td>$470.64 for general</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$708 for energy</td>
<td>$441.41 for energy</td>
</tr>
<tr>
<td>Accompanying Family Member</td>
<td></td>
<td></td>
<td>$0</td>
</tr>
</tbody>
</table>

5. 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: Lindsay Lewis  Date: May 17th, 2024

Name: Lindsay Lewis  Title: Executive Director

Organization: Progressive Policy Institute

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

Address: 1919 M St NW

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

last updated 7/2023
TRAVELER FORM

1. Name of Traveler: Aaron Schmidt

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:

4. a. Date of Departure: May 8, 2024 Date of Return: May 12, 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:
       (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.
   I am Rep. DelBene's Chief of Staff and oversee her policy goals. She is a member of the House Ways and Means Committee with jurisdiction over trade issues with the United Kingdom and was appointed to the British-American Parliamentarian Group by Leader Jeffries.

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: 4/5/2024
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:
   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, 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):

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

6. Date of Departure: May 8, 2024 Date of Return: May 12, 2024

7. a. City of departure: Washington D.C.
   b. Destination(s): London, England
   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.

(last updated 7/2/2023)
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 the statement is true by clicking the 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:

   PPI has been conducting policy work and facilitating transatlantic dialogues between U.S. policymakers and international partners since 1989. The mission of the trip is aligned with the goals of PPI’s Center Left Renewal Project.

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 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 $150 per day**
      2) Provide the reason for selecting the location of the event or trip:
         
         London is the seat of the U.K. government and capital city.

16. Name, nightly cost, and reasons for selecting each hotel or other lodging facility:
   - **Hotel Name:** Curio Collection by Hilton, Westminster  
     **City:** London  
     **Cost Per Night:** $280
   - **Reason(s) for Selecting:** Centrally located to meetings
   - **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:

<table>
<thead>
<tr>
<th></th>
<th>Total Transportation Expenses per Participant</th>
<th>Total Lodging Expenses per Participant</th>
<th>Total Meal Expenses per Participant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual Amounts</td>
<td>$900</td>
<td>$950</td>
<td>$400</td>
</tr>
<tr>
<td>Good Faith Estimates</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>For each Member, Officer, or Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>For each Accompanying Family Member</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Expenses</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(dollar amount per item)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Identify Specific Nature of “Other” Expenses (e.g., taxi, parking, registration fee, etc.):</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>For each Member, Officer, or Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>For each Accompanying Family Member</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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: 04/04/2024

Name: Lindsay Lewis

Organization: The Third Way Foundation

Address: 1919 M Street NW, Ste 300, Washington, DC 20036

Email: llewis@ppionline.org

Telephone: (202) 617-4042

If there are questions regarding this form, please contact the Committee on Ethics at 202-225-7103 or travel.requests@mail.house.gov.
May 7, 2024

Mr. Aaron Schmidt
Office of the Honorable Suzan DelBene
2230 Rayburn House Office Building
Washington, DC 20515

Dear Mr. Schmidt:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to United Kingdom,¹ scheduled for May 8 to 12, 2024, 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.

Because the trip may involve meetings with foreign government representatives, we note that House employees may accept, under the Foreign Gifts and Decorations Act (FGDA), gifts “of minimal value [currently $480] tendered as a souvenir or mark of courtesy” by a foreign government. Any tangible gifts valued in excess of minimal value received from a foreign government must, within 60 days of acceptance, be disclosed on a Form for Disclosing Gifts from Foreign Governments and either turned over to the Clerk of the House, or, with the written approval of the Committee, retained for official use.

¹ Please be aware that the Committee’s review of the proposed trip does not extend to either the security situation in the destination country or security related to foreign travel in general. We recommend you contact the Office of House Security (OHS) for a safety and security briefing prior to your departure. OHS may be reached at (202) 226-2044 or ohsstaff@mail.house.gov. House travelers should also register for the U.S. State Department’s Smart Traveler Enrollment Program at https://step.state.gov.
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
London Chiefs of Staff StaffDel Schedule  
Wednesday, May 8, 2024 – Sunday, May 12, 2024

*All times local*

**Wednesday, May 8**

10:05 PM - 10:40 AM+1  
United (UA 924): IAD to LHR

**Thursday, May 9**

10:40 AM  
Flight lands at LHR

11:15 AM  
Transportation to hotel (anticipate at least 1 hour)  
Heathrow Express to Paddington Station, Cab to Hotel

12:30 PM  
Check into hotel and drop bags off –  
The Westminster London, Curio Collection by Hilton  
30 John Islip St, London SW1P 4DD, United Kingdom

1:00 - 2:00 PM  
**Lunch Briefing: UK Political Landscape and Current Polling**  
Location: Central Hall Westminster, Storey's Gate, Westminster, London SW1H 9NH

Presentation from Dr Patrick English, Director of Political Analytics  
YouGov and Claire Ainsley, Director of PPI's Project on Center-Left Renewal.

2:15 - 3:15 PM  
**Policy Discussion with the Institute for Public Policy Research (IPPR)**  
Location: IPPR Office, 8 Storey's Gate, London, SW1P 3AY

Meeting with leaders from various projects of IPPR including immigration and migration policy, workforce and apprenticeships, and the green energy transition to compare successful policies and messaging strategies for common issues across both countries.

3:30 - 4:30 PM  
**Meeting with Joni Smith and Harry Summers at Tony Blair Institute**  
Location: TBI Main Office, London

Overview of TBI's Global Political Engagement strategy and their work with allies in the U.S.

5:00 - 7:30 PM  
**Reception with Labour MPs, Staff, U.K. Business Officials**  
**Location:** Kentish Town Brewery, 55-58 Wilkin Street mews  
Kentish Town, NW5 3NN
Reception with top Labour MP, prospective Candidates, staffers and
business officials to discuss what a Labour government would mean for
domestic and international business.

8:00 - 10:30 PM

**Dinner with Stephen Doughty MP and Labour international team**
Location: Cinnamon Club, The Old Westminster Library, Great
Smith St, London SW1P 3BU

Discussion with current MP Stephen Doughty, the Shadow Minister for
Europe and North America on how the U.K. and the U.S. can continue to
partner together.

**Friday, May 10**

8:30 - 10:00 AM

**Breakfast meeting with Startup Coalition and Labour Staffers**
Location: The Westminster London, Curio Collection by Hilton

Discussion on intersecting policy issues related to the tech
industry and UK foreign policy, including the UK's International
Technology Strategy.

10:30 - 11:30 AM

**Meeting with Matt Pound, Senior Advisor to the Senior Advisor to
the Labour General Secretary**
Location: The Portcullis House: 1 Victoria Embankment, London SW1A
2JR, UK

Discussion with Matt Pound, Senior Advisor to Labour General Secretary
on building a successful government and transition into power.

12:00 - 1:30 PM

**Lunch with James Murray, MP, Shadow Financial Secretary to the
Treasury**
Location: The Ivy Victoria, 66 Victoria St., London

Lunch discussion on UK tax administration policy, European and other
international tax issues, and trade policy post-Brexit.

2:00 - 3:00 PM

**Meeting with Patrick Diamond, Professor of Public Policy, QMUL;
Director, Mile End Institute**
Location: Queen Mary University of London, Mile End Road
London E1 4NS

Discussion led by Dr. Diamond on the current policy and political
challenges in the U.K. and the future of social democracy.
3:00 - 4:30 PM  
**Tour of UK Parliament**  
Location: The Portcullis House: 1 Victoria Embankment, London SW1A 2JR, UK

5:00 - 7:00 PM  
**Reception with Progressive Britain and London Chapter of New Liberals**  
Location: Duke of Wellington, 12 Toynbee St, London E1 7NE, UK  
Reception with staffers and researchers from Progressive Britain, Labour MPs, and the London Chapter of the Center for New Liberalism.

7:00 - 9:00 PM  
**Dinner Discussion led by Claire Ainsley, Director of PPI’s Project on Center-Left Renewal**  
Location: Santini Laura, 29 Ebury St, Belgravia, London SW1W 0NZ, UK  
Dinner discussion with Claire Ainsley on policies to support working class constituents in both the U.K. and the U.S.

**Saturday, May 10**

8:15 - 9:00 AM  
**Breakfast Overview of the Conference**  
Location: The Westminster London, Curio Collection by Hilton  
Staff will receive a breakfast briefing from PPI’s Colin Mortimer and NEC member Abdi Duale on the agenda of the conference and what policy discussions will take place.

9:30 AM - 5:00 PM  
**2024 Progressive Britain Conference**  
Location: 133 Houndsditch, London, EC3A 7DB  
*Link to conference page*  
*Note: Agenda to come*  
10:00 - 10:45 am: Keynote Address from Labour Party Leadership  
11:00 - 11:50 am: Participants can choose from several small group policy discussions including: Economic growth, Energy and Net Zero, Crime, and Opportunity and Class  
12:00 - 12:45 pm: Participants can choose between larger policy panels around Crime or Health care  
12:45 pm - 1:30 pm: Lunch and networking Break  
1:30 - 2:15 pm: Participants can choose from several small group policy discussions including: How does the Labour government tackle crime against women, Housing Priorities, Mental Health Crisis, and Workforce Development.  
2:25 - 3:10 pm: Participants can choose from several small group policy discussions including: Municipal green growth, Change to Cultural
Industrial Strategies, Cracking down on Fraud, Delivering high quality health care.

3:10 - 3:30 pm: Networking break

3:30 - 4:14 pm: Participants can choose from several small group policy discussions including: A.I. Growth, Saving the NHS, Protecting U.K. natural environment, and providing support for families and young children.

4:25 - 5:10 pm: Participants can choose between larger policy panels with Rachel Reeves MP, Shadow Chancellor of the Exchequer, on the State of the British Economy or Bidenomics and the Green New Deal.

5:00 - 7:00 PM
Post Conference Reception with Progressive Britain and MPs
Location: 133 Houndsditch, London, EC3A 7DB

Reception with policy experts, staff, MPs from the conference.

7:30 - 9:00 PM
Closing Dinner with Team PPI
Location: Dishoom Covent Garden, 12 Upper St. Martin’s Lane, London

Closing discussion with PPI team on takeaways from the trips and lessons learned.

Sunday, May 11

12:15 - 3:20 PM
United (UA 919): LHR to IAD
U.S. House Staff Invites
Staff Del to London, May 8-12, 2024

Aaron Grace
Legislative Director
U.S. Representative Sean Casten

Hillary Beard
Chief of Staff
U.S. Representative Terri Sewell

Rick Jakious
Chief of Staff
U.S. Representative Seth Moulton

Chandra Harris
State Director
U.S. Senator Jon Ossoff

Macay Matthews
Chief of Staff
U.S. Representative Brittany Petterson

Aaron Schmidt
Chief of Staff
U.S. Representative Susan Delbene

Melanee Farrah
Chief of Staff
U.S. Representative Nikema Williams

Charlie Chamness
Deputy Chief of Staff
U.S. Representative Mike Quigley

Jeremy Tittle
Chief of Staff
U.S. Representative Salud Carbajal

Casey O’Shea
Chief of Staff
U.S. Representative Brad Schnieder