

COMMITTEE ON ETHICS

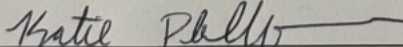
EMPLOYEE POST-TRAVEL DISCLOSURE FORM Original Amendment

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.

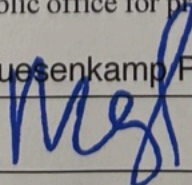
1. Name of Traveler: Katherine "Katie" Phillips
2. a. Name of Accompanying Relative: _____ **OR** None
b. Relationship to Traveler: Spouse Child Other (specify): _____
3. a. Dates: Departure: 9/12/2025 Return: 9/14/2025
b. Dates at Personal Expense, if any: _____ **OR** None
4. Departure City: Washington, DC Destination: Las Vegas, NV Return City: Washington, DC
5. Sponsor(s), Who Paid for the Trip: The Third Way Foundation (Progressive Policy Institute is a project of Third Way Foundation)
6. Describe Meetings and Events Attended: Attended a dinner with conference attendees and elected officials as well as an all-day conference that included break-out sessions on the topic of lowering the cost of living, trade policy, education, and energy. _____
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: 9/16/2025

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: Rep. Marie Gluesenkamp Perez Date: 9/16/2025

Signature of Supervising Member: 

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: The Third Way Foundation (Progressive Policy)

2. Travel Destination(s): Las Vegas, Nevada

3. Date of Departure: September 12, 2025 Date of Return: September 14, 2025

4. Name(s) of Traveler(s): Katie Phillips

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	581.03	225	175	
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: 9/18/2025

Name: Lindsay Lewis Title: CEO

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

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

Address: 1919 M Street NW, Suite 300, Washington D.C

Telephone: 860-508-8554 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.

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 submitted at 1015 Longworth House Office Building or 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.**

Katherine "Katie"

Name of Traveler: Phillips

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: Katie Phillips

Name of Signatory (if other than traveler): _____

For Staff (name of employing Member or Committee): Rep. Marie Gluesenkamp Perez

Office Address: 1431 Longworth

Telephone Number: 202-225-3536

Email Address of Contact Person: Katie.Phillips@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 email: travel.requests@mail.house.gov.

COMMITTEE ON ETHICS

TRAVELER FORM

1. Name of Traveler: Katherine "Katie" Phillips
2. Sponsor(s) who will be paying or providing in-kind support for the trip: Third Way Foundation (Progressive Poli
3. City and State **OR** Foreign Country of Travel: Las Vegas, NV
4. a. Date of Departure: 9/12/2025 Date of Return: 9/14/2025
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.**

As the Executive Director of the Blue Dog Coalition, working directly under Rep. Marie Gluesenkamp Perez as Admin Chair of the Blue Dog Coalition, the subject matter of this trip is directly related to my legislative work with the Congresswoman to help develop pragmatic policies that Rep. Gluesenkamp and the broader Blue Dog Coalition may consider, support, and endorse.

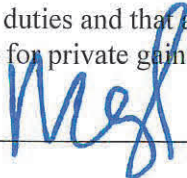
9. **Yes No Is the traveler aware of any registered federal lobbyists or foreign agents involved in planning, organizing, requesting, or arranging the trip?**

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: _____

8/13/25

House Staff Invitees

PPI Sept 2025 - Staff Del to Las Vegas, Nevada

Yvanna Cancela

Chief of Staff for U.S. Representative Steven Horsford (D-NV)

yvanna.cancela@mail.house.gov

Lauren Toy

Chief of Staff for U.S. Representative Susie Lee (D-NV)

lauren.toy@mail.house.gov

Brad Howard

Chief of Staff for U.S. Representative Greg Stanton (D-AZ)

brad.howard@mail.house.gov

Katie Phillips

Executive Director of Blue Dog Coalition

katie.phillips@mail.house.gov

Anne E. Sokolov

Executive Director of New Democrat Coalition

anne.sokolov@mail.house.gov

The U.S. House of Representative staff above have been invited because of their policy portfolios and senior roles within their respective offices.

PPI Staff Delegation Trip to Las Vegas, Nevada
September 2025

Friday, September 12, 2025

12:35 PM ET - 2:35 PM PT **Flight from Washington, DC (IAD) to Las Vegas, NV (LAS)**

Flight: United Airlines (UA 2747)

2:35 - 3:15 PM PT **Deplane, Baggage Claim, Etc.**

3:15 - 3:30 PM **Travel to Hotel**

Location: Hotel Vdara

3:30 - 5:00 PM **Check In & Trip Briefing**

5:30 - 9:00 PM **Dinner & Discussion: A New Democratic Policy Agenda**

Location: Hotel Aria Ballroom

Private dinner with discussion on current state of legislative affairs in Congress and conversation on new policy ideas.

Saturday, September 13, 2025

8:00 - 8:30 AM **Arrival Window**

Location: Hotel Aria Primose

8:30 - 9:30 AM **Breakfast: Listening to Working Americans**

Discussion of issue-based polling data and focus groups.

9:30 - 11:00 AM **Discussion 1: Lowering Living Costs and Promoting Fiscal Responsibility**

Creative ideas for lowering living costs, restoring fiscal sanity to Washington, building new career pathways for non-college youths, and making taxes fairer.

11:00 - 12:00 PM **Discussion 2: Trade Policy that Benefits the Working-Class**

Fighting inflationary tariffs and cutting tax and regulatory burdens on entrepreneurs and small businesses.

12:00 - 1:00 PM

Lunch

Location: Hotel Aria Primrose Veranda

1:00 - 2:00 PM

Discussion 3: Finding Common Ground on Immigration, Public Safety, and Education

Secure the border and modernize our outdated immigration laws, put more and better trained police in crime-ridden places and hire prosecutors who will put public safety first, tackle the learning crisis in our public schools and fight attempts to privatize education.

2:00 - 3:00 PM

Discussion 4: Delivering Abundant Energy and Housing

Dismantle exclusionary zoning rules that block new and different kinds of housing, follow Colorado's example of full-spectrum energy development and innovation, put America's clean energy transition on a more realistic, politically sustainable pace, and embrace permit reform and lower energy costs in disadvantaged communities.

3:00 - 5:00 PM

Break

5:00 - 7:30 PM

Closing Dinner

Location: Hotel Aria Primrose Veranda

Recap and debrief of policy sessions and discussion about next steps.

7:30 - 8:15 PM

Gather Bags, Prepare for Departure, Etc.

8:15 - 8:30 PM

Drive to Las Vegas Airport (LAS)

Travel Time: 15 minute drive

10:45 PM PT - 6:20 AM ET

Flight from Las Vegas, NV (LAS) to Washington, DC (IAD)

Flight: United Airlines (UA 284)

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:

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): See attached.

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

6. Date of Departure: September 12, 2025 Date of Return: September 13, 2025

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

b. Destination(s): Las Vegas, Nevada

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 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 is planning and organizing all meetings and discussions on the trip. The subject matter of the trip is directly related to PPI's mission of developing new, pragmatic ideas to tackle pressing policy challenges facing the nation.
-

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

16. Name, nightly cost, and reasons for selecting each hotel or other lodging facility:

Hotel Name: Vdara Hotel City: Las Vegas Cost Per Night: 225
 Reason(s) for Selecting: _____

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:**

<input type="checkbox"/> Actual Amounts <input checked="" type="checkbox"/> Good Faith Estimates	Total Transportation Expenses per Participant	Total Lodging Expenses per Participant	Total Meal Expenses per Participant
For each Member, Officer, or Employee	450	225	175
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		
For each Accompanying Family Member		

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: 8/8/25
 Name: Lindsay Lewis Title: CEO
 Organization: The Third Way Foundation (Progressive Policy Institute is a project of Third Way Founda
 Address: 1919 M Street NW, Suite 300, Washington DC
 Email: llewis@ppionline.org Telephone: 860-508-8554

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

Michael Guest, Mississippi
Chairman
Mark DeSaulnier, California
Ranking Member

John H. Rutherford, Florida
Andrew R. Garbarino, New York
Ashley Hinson, Iowa
Nathaniel Moran, Texas

Deborah K. Ross, North Carolina
Glenn F. Ivey, Maryland
Sylvia R. Garcia, Texas
Suhas Subramanyam, Virginia



ONE HUNDRED NINETEENTH CONGRESS

U.S. House of Representatives

COMMITTEE ON ETHICS

Thomas A. Rust
Staff Director and Chief Counsel

Jordan Downs
Chief of Staff to the Chairman

David Arrojo
Counsel to the Ranking Member

1015 Longworth House Office Building
Washington, D.C. 20515-6328
Telephone: (202) 225-7103
<https://Ethics.House.gov>

September 10, 2025

Ms. Katherine Phillips
Office of the Honorable Marie Gluesenkamp Perez
1431 Longworth House Office Building
Washington, DC 20515

Dear Ms. Phillips:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to Las Vegas, Nevada, scheduled for September 12 to 14, 2025, 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

Mark DeSaulnier
Ranking Member

MG/MD:eme

August 8, 2025

Katie Phillips
Executive Director
Blue Dog Coalition
2209 Rayburn House Office Building
45 Independence Ave SW, Washington, DC 20515

Dear Katie,

On behalf of the Progressive Policy Institute (PPI), We'd like to invite you on a staff delegation trip to Las Vegas, Nevada, on September 12-13, 2025.

For over a decade, PPI has hosted congressional delegation trips with elected officials and staff to learn firsthand about some of the most pressing policy issues facing our nation. This high-level trip will feature a select group of senior staff working for members of Congress who are committed to shaping practical solutions for the American public.

Across the country, working families are facing rising costs, increasing economic uncertainty, and challenges in accessing education and opportunities. Addressing these issues requires thoughtful policy solutions that strengthen economic security, improve public services, and ensure government works effectively for all Americans.

That's why we are traveling to Las Vegas for a convening with other policy experts and strategists to discuss these challenges.

Key Policy Challenges to Discuss:

- Lowering Living Costs and Promoting Fiscal Responsibility
- Trade Policy that Benefits the Working-Class
- Finding Common Ground on Immigration
- Addressing Public Safety
- Improving Educational Outcomes
- Delivering Abundant Energy and Housing

PPI is a non-profit 501 (c) (3) organization with the mission of providing educational programming on current policy issues and generating radically pragmatic ideas for governing.

I hope you will join us in what promises to be an insightful and educational trip. Space is limited; please contact Stuart Malec smalec@ppionline.org if you have questions or require further information.

Sincerely,



Will Marshall
President, PPI



Lindsay Lewis
CEO, PPI