

RECONCILIATION STATEMENT  
AS REQUIRED BY 930 CMR 5.08(2)(d)3.

RECEIVED  
COMMONWEALTH  
COMMISSION

<b>PUBLIC EMPLOYEE INFORMATION</b>	
Name of employee:	Eric P. Lesser
Title/ Position	State Senator
Agency/ Department	Massachusetts Senate
Agency address:	24 Beacon Street, Boston, MA 02133
Office Phone:	617-722-1291
Office E-mail:	Eric.Lesser@masenate.gov
	I previously filed a disclosure explaining that I accepted reimbursement, waiver or payment by a non-public entity (but not a lobbyist) of travel expenses related to an activity or speaking engagement that served a legitimate public purpose. I am filing this Reconciliation Statement because the actual amount of the travel expenses differed by more than \$50 from the amount I originally disclosed.  <b>I HAVE ATTACHED A COPY OF MY PREVIOUS DISCLOSURE.</b>
<b>ADDITIONAL EXPENSES</b>	
Date of activity or speaking engagement:	The NewDEAL (Developing Exceptional American Leaders) 8th Annual Leaders Conference November 21 – November 22, 2019 Washington, D.C.
Reason that the actual amount differs from the previously disclosed amount by \$50 or more:	NewDEAL did not provide the total per person costs for the conference, including meals, until February 25, 2020.

**PLEASE INCLUDE DETAILED INFORMATION  
ONLY ABOUT AMOUNTS THAT DIFFER FROM THE AMOUNTS ORIGINALLY DISCLOSED.**

	<u>Previously disclosed amount</u>	<u>Actual amount</u>
Transportation:	N/A	(See below)
Lodging:	\$263.24 (\$229 per night plus 14.95% tax)	\$263.24 (\$229 per night plus 14.95% tax)
Meals:	N/A	(See below)
Admission:	N/A	N/A
Other (please list):	N/A	Total per person cost for the conference, including meals, facilities, bus transportation and excluding hotel and transportation - \$349.70.
Total:	\$263.24	\$612.94 (Difference of \$349.70)

Employee signature	
Date	2/25/2020

Attach additional pages if necessary.

**Non-elected public employees - file with your appointing authority.**

**Elected state or county employees - file with the State Ethics Commission.**

**Members of the General Court -  
file with the Senate or House Clerk or the State Ethics Commission.**

**Elected municipal employee - file with the city or town clerk.**

**Elected regional school committee member –  
file with the clerk or secretary of the committee.**

## Swanson, Stephanie (SEN)

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**To:** Swanson, Stephanie (SEN)  
**Subject:** RECORD: [External]: Last Call for NewDEAL Travel Reimbursement!

**From:** Ben Moore <ben@newdealleaders.org>  
**Sent:** Tuesday, February 25, 2020 1:24 PM  
**To:** Swanson, Stephanie (SEN) <Stephanie.Swanson@masenate.gov>  
**Subject:** Re: [External]: Last Call for NewDEAL Travel Reimbursement!

Hi Stephanie,

According to our events consultant who did all the booking and provided these amounts, the difference was not calculated on the overall bill which she used for pricing, and the folios came much later. So she just pulled the folios and compared them to the bill and there was a .35 difference and on the main bill noted as a misc. charge that she was still trying to figure out.

So I assume the correct amount is \$263.24 (\$0.35 more than the original amount of \$262.89 that we provided).

On Tue, Feb 25, 2020 at 12:25 PM Swanson, Stephanie (SEN) <Stephanie.Swanson@masenate.gov> wrote:

Hi Ben,

Quick follow up – the overnight hotel costs with tax it looks like uses the 14.8% hotel tax, whereas I believe the tax rate is now 14.95% in Washington, DC., which would make the total \$263.34. Can you please confirm? I want to make sure I have the costs right.

Thank you!

Best,  
Stephanie

**Stephanie L. Swanson**  
Chief of Staff & General Counsel  
Office of Senator Eric P. Lesser  
State House, Room 410  
Boston, MA 02133  
617.722.1291 (p)  
617.722.1014 (f)

**From:** Ben Moore <ben@newdealleaders.org>  
**Sent:** Friday, February 14, 2020 3:52 PM  
**To:** Swanson, Stephanie (SEN) <Stephanie.Swanson@masenate.gov>  
**Subject:** Re: [External]: Last Call for NewDEAL Travel Reimbursement!

Hi Stephanie,

Here is the price breakdown for all of the activities at the conference.

Breakdown Cost for NewDEAL Leaders Participation 2019

Cap Lounge \$ 30.00  
Breakfast \$ 43.00  
Breaks \$ 12.00  
Lunch \$ 62.00  
Dinner \$ 85.70  
Breakfast \$ 34.00  
Lunch \$ 58.00  
Transportation-Bus \$ 25.00  
Overnight per night (with tax it is \$262.89 per night) \$ 229.00  
Air travel \_\_\_\_\_

Let me know if you have any questions!

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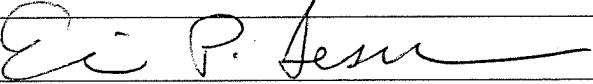
Best,

Ben Moore  
Member Services Coordinator & Office Administrator | The NewDEAL  
202.660.1340 ext. 2 | [@newDEALleaders](https://twitter.com/newDEALleaders)

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RECEIVED  
DISCLOSURE BY ELECTED PUBLIC EMPLOYEE AT THE ETHICS COMMISSION  
OF TRAVEL EXPENSES SERVING A LEGITIMATE PUBLIC PURPOSE  
AS REQUIRED BY 930 CMR 5.08(2)(d). 2019 NOV 20 PM 2:06

<b>ELECTED PUBLIC EMPLOYEE INFORMATION</b>	
Name of <b>elected</b> public employee:	Eric P. Lesser
Title/ Position	State Senator
Agency/ Department	Massachusetts Senate
Agency address:	24 Beacon Street, Boston, MA 02133
Office phone:	617-722-1291
Office e-mail:	Eric.Lesser@masenate.gov
<b>Write an X to confirm each statement.</b>	<p>I am filing this disclosure because:</p> <p><input checked="" type="checkbox"/> I am going to engage in an activity that serves a legitimate public purpose, i.e., it is intended to promote the interests of the Commonwealth, a county or a municipality; and</p> <p><input checked="" type="checkbox"/> A non-public entity (but not a lobbyist) has offered to reimburse, waive or pay travel expenses and costs worth more than \$50.</p>
<b>ACTIVITY THAT SERVES A LEGITIMATE PUBLIC PURPOSE</b>	
Describe the activity which is the reason for traveling.	The NewDEAL (Developing Exceptional American Leaders) 9th Annual Leaders Conference.
Describe your participation in the activity.	Attendance, including meetings, panel discussions and break-out sessions with elected officials and policy experts from around the country. I will also be speaking on the <i>Modernizing Retirement Saving in a New Era of Work</i> panel and discussing Senate Bill 211, <i>An Act establishing a portable benefits for independent workers innovation fund</i> , which I filed in the current legislative session.
Date, time and location of activity.	November 21 – November 22, 2019 Washington, D.C.
Please explain how the activity will promote the interests of the Commonwealth, a county or a municipality.	The conference will enable legislators from across the United States to share innovative ideas and learn from top policy experts, industry leaders, federal officials, and other elected leaders. This opportunity will also provide me with a better understanding of current issues other states are facing and potential solutions, which I can bring back to the constituents in my district as well as the Commonwealth as a whole.
<b>TRAVEL EXPENSES</b>	
Identify the person or organization that offered to reimburse,	The NewDEAL

waive or pay your travel expenses.	
Address of person or organization.	The NewDEAL Second Floor 233 Pennsylvania Ave, SE Washington, DC 20003
<b>Provide information in as much detail as possible:</b>	<b><i>Itemization and explanation of amounts offered:</i></b>
Transportation:	<i>Air, train, bus, and taxi fare and rental car hire, etc.</i> N/A
Lodging:	<i>Overnight accommodations.</i> \$263.24 (\$229 per night plus 14.95% tax)
Meals:	<i>Breakfast, lunch, dinner, special events.</i> WILL PROVIDE FOLLOWING THE CONFERENCE
Admission:	<i>Registration, admission, tickets, etc.</i> N/A
Other (please list):	<i>Refreshment, instruction, materials, entertainment, etc.</i>
Total:	\$263.24
Write an X beside any relevant statement.	<input checked="" type="checkbox"/> I have attached the relevant itinerary. <input checked="" type="checkbox"/> I have attached the relevant agenda.
<b>For the exemption to apply, check off both statements.</b>	<b>Having disclosed the facts above, I determine that:</b> <input checked="" type="checkbox"/> Acceptance of the reimbursement, waiver or payment of travel expenses will serve a legitimate public purpose i.e., it will promote the interests of the Commonwealth, a county or a municipality; AND <input checked="" type="checkbox"/> Such public purpose outweighs any special non-work related benefit to me or to the person providing the reimbursement, waiver or payment.
Employee signature:	
Date:	11/19/19

Attach additional pages if necessary.

Elected state or county employees – file with the State Ethics Commission.

Members of the General Court – file with the House or Senate clerk or the State Ethics Commission.

Elected municipal employee – file with the City Clerk or Town Clerk.

Elected regional school committee member – file with the clerk or secretary of the committee.



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## 2019 TENTATIVE CONFERENCE AGENDA

\*\*\*Agenda topics and times subject to change\*\*\*

All sessions at the Westin Washington DC City Center, 1400 M Street NW, unless otherwise noted

### **Wednesday, November 20:**

1:30 – 2:30 pm      **Climate Change Working Group meeting**  
*Penn Biden Center, 101 Constitution Ave NW, Suite 600 West*  
with Climate Change Working Group co-chairs Wisconsin Lt. Gov Mandela Barnes and Norfolk, VA Councilmember Andria McClellan; and with Josh Freed, Third Way; and Shelley Poticha, Natural Resources Defense Council

4:00 – 5:30 pm      **Capitol Hill Visit by NewDEAL Leaders**  
*1539 Longworth House Office Building*  
*Dinner on your own*

7:30 – 11:00 pm      **NewDEAL Welcome Reception & Debate Watch Party**  
*Capitol Lounge, 229 Pennsylvania Ave SE*  
*Food & drink served*

### **Thursday, November 21:**

8:00 am      **Breakfast opens**

8:30 am      **Opening Remarks**  
Welcome by Debbie Cox Bultan, The NewDEAL  
Presentation of Ideas Challenge winners by Cathilea Robinett, e.Republic

8:45 – 10:30 am      **Morning Plenary: Ideas Matter**  
***Empowering Disadvantaged Communities through Increased Mobility***  
with Beth Osborne, T4A; Cathilea Robinett, e.Republic; and West Sacramento Mayor Chris Cabaldon

***Rebuilding Community through National Service***  
with Emily Cherniack, New Politics Academy, and Josh Fryday, Chief Service Officer of California

***Modernizing Retirement Saving in a New Era of Work***  
with Elizabeth Kelly, former Special Assistant to the President, National Economic Council; and Massachusetts Senator Eric Lesser

***Eliminating Barriers to Housing Affordability***  
with Ankur Jain, Kairos; and Cincinnati Councilmember P.G. Sittenfeld

10:45 – 11:45 am	<b>Breakouts Session 1</b>  <i>Expanding Access to Secure Voting</i> with Sheila Nix, Tusk Philanthropies; and Maricopa County, AZ Recorder Adrian Fontes  <i>Talking about Immigration</i> with Wendy Feliz, American Immigration Council; Maria Praeli, Fwd.us; and Steve Tobocman, Global Detroit  <i>The Future of Recycling</i> with Jules Bailey, Oregon Beverage Recycling Cooperative, and Pittsburgh Councilmember Erika Strassburger  <i>NewDEAL Forum Education Working Group Launch: Expanding Access to Quality Career &amp; Technical Education</i> with Phillip Lovell, Alliance for Excellent Education; West Sacramento Mayor Chris Cabaldon; and Georgia Senator Elena Parent
Noon	<b>NewDEAL Leader Group Photo</b>
12:15 – 2:00 pm	<b>The Political Landscape</b>  <i>The 2020 Electorate</i> moderated by Emily Cain, EMILY's List with Teri Arvesu, Univision; Akunna Cook, Black Economic Alliance; and Kentucky Representative Chris Harris  <i>A View from the Early Primary States</i> moderated by Santa Cruz, CA County Supervisor Ryan Coonerty with Iowa Senator Liz Mathis, New Hampshire Senator Jon Morgan, and Nevada Assemblymember Daniele Monroe-Moreno
2:15 – 3:15 pm	<b>Breakouts Session 2</b>  <i>The Colorado River Drought Contingency Plan: A Case Study in Making Progress on Water Policy</i> with U.S. Congressman Greg Stanton, NewDEAL Alumnus; Sue Brown, Walton Conservation Coalition; and Kevin Moran, Environmental Defense Fund  <i>Fostering Entrepreneurship</i> with Jason Wiens, Kauffman Foundation; Rhode Island Treasurer Seth Magaziner; and Connecticut Representative Caroline Simmons  <i>The Changing Nature of Employment</i> with Vikrum Aiyer, Postmates; and James Conigliaro, Jr., Independent Drivers Guild  <i>Criminal Justice Reform</i> with Douglas County, KS District Attorney Charles Branson, Columbus, OH City Attorney Zach Klein, and Shelby County, TN Mayor Lee Harris
4:30 pm	<b>NewDEAL 2020 Conversation with Campaign Representatives</b>
5:15 pm	<b>Buses depart Westin for Library of Congress</b>
5:45 – 6:15 pm	<b>Docent-led tours of the Library of Congress</b>
6:30 – 8:30 pm	<b>VIP Dinner</b> <i>Library of Congress, 101 Independence Avenue SE, Montpelier Room in the James Madison Building</i>  Remarks by Wisconsin Lieutenant Governor Mandela Barnes  Featuring a conversation with former Governor Terry McAuliffe and Adrienne Elrod



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### ***Friday, November 22:***

8:30 – 9:30 am      **Breakfast – Social Media Best Practices** with BerlinRosen's Kelly Vingelis and Claire Darby

9:45 – 11:45 am      **Cities & States Driving Change**

Video from Louisville Mayor Greg Fischer

#### ***New Mayors Panel***

moderated by Santa Cruz, CA County Supervisor Ryan Coonerty  
with Lincoln, NE Mayor Leirion Gaylor Baird, Montgomery, AL Mayor Steven Reed, and  
Wichita, KS Mayor-elect Brandon Whipple

#### ***A Case Study: Climate***

moderated by Christy Goldfuss, Center for American Progress  
with Santa Barbara, CA School Board Member Laura Capps; Norfolk, VA  
Councilmember Andria McClellan; Chester County, PA Commissioner-elect Josh  
Maxwell; and New Bedford, MA Mayor Jon Mitchell

Remarks by Maryland Senate President-elect Bill Ferguson

12:00– 1:00 pm      **Lunch & Panel Discussion: China's Rising Power**

moderated by Orit Frenkel, American Leadership Institute  
with panelists Dr. Melanie Hart, Center for American Progress; Kevin Nealer, CSIS; and  
Jeremie Waterman, China Center, U.S. Chamber of Commerce

1:00 – 1:30 pm      **Closing Keynote with James Fallows, *The Atlantic***

1:30 – 1:45 pm      **NewDEAL Closing**