West Virginia Ethics Commission

# **Lobbyist Activity Report Form**

2023-01

Late reporting fine - \$10 per business day past the due date (\$250 maximum)

1. Name and contact information

West Virginia Ethics Commis: Attn: Lobbyist Registrar 210 Brooks St., Ste. 300 Charleston, WV 25301	sion
304-558-0664	No faxed copies
For office use only: Postmark	Rec'd5-8-2023
Days late	Fine

<sub>Name</sub> Julie Thomm				Phone 3044441222					
Address 301 Woodbridge Dr				Email julie.thomm@heart.org			g		
City, S1	ate Zip C	harleston, W	V 25311						
2. Re	eporting per	riod for which this	activity repor	t is being filed					
Check	Report	Period	Due Date		4-2-5-5				
x	2023-01	1/1/23-4/30/23	5/15/23						
				10222010		Z TANK			
				Sector of	1 A				
3. Li	st all emplo	yers/organizations	that you rep	resent as a lobb	oyist	Us	e additional rej	porting forms	if necessary.
1.	America	an Heart Asso	ociation		4.				
2.					5				
3.					6				
4. Lo	4. Lobbying activity summary - If there was no activity or expenditures, indicate "none."								
Healthcare									
	cpenditures								
		, including campai							
	•	y on any public offi				• •	the amounts sp	ent in each of	the following
		h employer you rep		1					1
<u> </u>	diture Categ		Employer 1	Employer 2	Employer 3	Employer 4	Employer 5	Employer 6	Total Expended
Α.		Beverages	\$	\$	\$	\$	\$	\$	\$
В.	Lodging		\$	\$	\$	\$	\$	\$	\$
С.	Advertisin	g	\$	\$	\$	\$	\$	\$	\$
D.	Travel		\$	\$	\$	\$	\$	\$	\$
Ε.	Gifts		\$	\$	\$	\$	\$	\$	\$
F.	Other Exp	enses	\$	\$	\$	\$	\$	\$	\$
G.	Group Exp		\$	\$	\$	\$	\$	\$	\$
н.		Contributions	LIST AMOUNT IN "TOTAL EXPENDED" COLUMN.			\$			
I.	TOTAL of a	all expenditures	\$	\$	\$	\$	\$	\$	\$0
I.	TOTAL of a		\$	\$	\$	\$			\$0

# Schedule A: WV Lobbyist Expenditure Details

(Attach this completed sheet to the Lobbyist Activity Report)

Complete this form if you have made or shared any expenditure **other** than group entertainment on a public official or employee during this reporting period. If you have made expenditures in these categories - (1) *Meals & Beverages*, (2) *Lodging*, (3) *Travel*, (4) *Gifts*, (5) *Other Expenditures* - list below, you must report it in sections 1 or 2 on this form.

If you shared any of these expenditures with another lobbyist, note who shared the expenditures in the area below the recipient's name. You are not required to report on Schedule A detailed expenditures on Advertising, Contributions [including political contributions] and Group Entertainment. Expenditures in those categories must be reported on the Lobbyist Activity Report and/or Schedule B.

## 1. Expenditure Details - (include shared expenditures not reported on Schedule B)

Report all expenditures in any of the categories listed below on a particular person or member of their immediate family EXCEPT those reported in Section 1a or 2 (below) or any portion of a "Group Entertainment" OR "Shared Expense" event which are to be reported on Schedule B. Transfer the totals to section 5 on the Lobbyist Activity Report. If you shared expenditures with another lobbyist, identify who shared the cost in the area below each recipient's name.

Recipient name(s) and date of expenditure	Meals & beverages	Lodging	Travel	Gifts	Other	Total \$ expended
TOTAL Expenditures						0

## 1a Gifts (Group)

Ordinarily gifts to individual legislators must not exceed \$25. Gifts such as key chains, mugs, and calendars given to ALL members of the House or Senate, the entire Legislature or to standing or joint committees must be listed here. Describe the item, to which group it was given and the total cost. You need not list each legislator who received the gift, only the name of the group. Transfer the total cost to the Lobbyist Activity Report, section **5E**.

Describe the gift(s)	Which employer provided the gift?	Which group received the gift?	Total cost of gift(s)
			0

## 2. Participation in a Panel or Speaking Engagement

Report expenditures on a particular person in the categories listed below when such expenditure was for the individual's participation in a panel or speaking engagement. Transfer the totals to section 5 on the Lobyist Activity Report.

Recipient name and event
Meals & beverages
Lodging
Travel
Gifts
Scheduled entertainment & totals other
Total \$ expended

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Total \$ expended

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Total \$ expended

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Total \$ expended

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## 3. Subjects of Lobbying

For each recipient identified in 1, 1a & 2 above, explain briefly the subjects of lobbying. List the individual or group recipient and then the subject matter of the lobbying. Example: "Del. Joe Jones – Health Care" or "House Finance Committee - Environment." Healthcare

# Schedule B: Group Entertainment & Shared Expenses

(Attach to the Lobbyist Activity Report)

**Instructions:** Group Entertainment functions include only the functions that fall within the following groups. Report expenditures for a dinner party, reception or other similar function if you invited ALL members of any of these four specific groups. Individual names of attendees do not need to be listed for these four specific groups.

1. the Legislature

- 3. either house of the Legislature
- 2. a standing or select committee of either house 4. a
- 4. a joint committee of both houses

Use the worksheet below to figure the amount spent on legislators and other governmental officials and employees for each *"event."* Enter this amount on the Lobbyist Activity Report.

List each group event separately. **Make additional copies of this page** *if* **necessary**. Record total expenditures for each group event in **Section B**. You must then calculate and post on the Lobbyist Activity Report only the amount actually spent on public officials. If you share expenses with another reporting lobbyist, report only your portion of the expenses and list the names of other cosponsors in **Section C** below.

#### **Section A: Event Information**

Lobbying expenses for entertainment of "**OTHER**" group events are reported in the "Meals & Beverages" category on the Lobbyist Activity Report Form. List the names of attendees on this form or attach additional information pages. If using this form, list the names in item 5 below, as well as other event information requested in items 1 through 4 and complete the Section B calculations.

1.	Date of event: January 23, 2023	Location:	2000 Quarrier St. East, Charleston, WV
2.	Type of event (reception, dinner, etc.): Reception		
3.	Event sponsor: See below must also complete Section C below.)		(If you shared the sponsorship and expenses with others, you
4.	Which of the following governmental groups were		All members of: a standing or select committee of either house

b. either house of the Legislature

- c. a standing or select committee of either house
- d. a joint committee of both houses

## OR

5. OTHER: If the event was not in one of the four specific groups listed above, you must list the names of all public employees or public officials in attendance here or on an attachment to this form. List attendees here: West Virginia Legislative Women's Caucus members attending were Senators Laura Chapman, Amy Grady and Patricia Rucker; Delegates Kathie Hess Crouse, Lori Dittman; Laura Kimble, Margitta Mazzocchi,

Mickey Petitto, Amy Summers, Delegate Heather Tully, Delegate Debbie Warner, Delegate Kayla Young

## Section B: Calculate Reportable Expenses

1.  $\frac{\$1814.14}{(total cost of event)} \div \frac{34}{(total attendance)}$ 

= \$ 53.36

al cost of event) ÷ (total attendance) (per capita cost)

2. Number of governmental officials or employees in attendance:

(governmental attendees) x (per capita cost)

\$640.832

If this was a true Group Entertainment event and you were the sponsor, report the amount above as Group Entertainment on the Lobbyist Activity Report in Section 5G. If you shared expenses with others, complete section C below, and report only your portion of the cost. Note: If you classified the expenditure described in section A as "OTHER," it is reported on the Lobbyist Activity Report Form as a Meals & Beverages expense (5A), not as a "Group Expenditure" (5G).

## Section C: Shared Sponsorship Expenses

1. Were any other lobbyists co-sponsors of this event? Yes (yes or no)

2. If yes, with how many others are sharing the cost? <u>26</u> List the names of all sponsors below: See attached invitation with list of all 27 cosponsors

3. What is your share of Box 1 above? \$ 24.63

Record that amount in Box 2 and on the Lobbyist Activity Report in Section 5G.

\$23.7°2×2

Some calculations must be performed manually.