

**RECEIVED**

By WV Ethics Commission at 1:49 pm, May 17, 2023

West Virginia Ethics Commission

**Lobbyist Activity Report Form**

2023-01

West Virginia Ethics Commission

Attn: Lobbyist Registrar

210 Brooks St., Ste. 300

Charleston, WV 25301

304-558-0664

No faxed copies

For office use only:

Postmark

Days late

2

Rec'd

Fine \$20

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

**1. Name and contact information**Name Danielle WaltzPhone 3043401160Address 500 Lee Street East  
Suite 1600Email dwaltz@jacksonkelly.comCity, State Zip Charleston, WV 25301**2. Reporting period for which this activity report is being filed**

Check	Report	Period	Due Date				
x	2023-01	1/1/23-4/30/23	5/15/23				

**3. List all employers/organizations that you represent as a lobbyist**

Use additional reporting forms if necessary.

1. See attached

4. \_\_\_\_\_

2. \_\_\_\_\_

5. \_\_\_\_\_

3. \_\_\_\_\_

6. \_\_\_\_\_

**4. Lobbying activity summary - If there was no activity or expenditures, indicate "none."**Legal reform, labor issues, flood resiliency, higher education, transportation, technology, general business issues**5. Expenditures**If no expenditures, including campaign contributions, mark here: ☐

If you spent money on any public official, employee or member of his or her immediate family, list the amounts spent in each of the following categories per each employer you represent. Complete and attach Schedule A to this report.

Expenditure Categories	Employer 1	Employer 2	Employer 3	Employer 4	Employer 5	Employer 6	Total Expended
A. Meals and Beverages	\$	\$	\$	\$	\$ 100.59	\$	\$ 100.59
B. Lodging	\$	\$	\$	\$	\$	\$	\$
C. Advertising	\$	\$	\$	\$	\$	\$	\$
D. Travel	\$	\$	\$	\$	\$	\$	\$
E. Gifts	\$	\$	\$	\$	\$	\$	\$
F. Other Expenses	\$	\$	\$	\$	\$	\$	\$
G. Group Expenditures	\$ 664.38	\$ 267.20	\$	\$	\$ 305.53	\$	\$ 1237.11
H. Campaign Contributions	LIST AMOUNT IN "TOTAL EXPENDED" COLUMN.						\$ 250
I. TOTAL of all expenditures	\$	\$	\$	\$	\$	\$	\$ 1587.70

If you sponsored or contributed to any group event or shared expenses, list the total expended in category 5G immediately above. Complete and attach a Schedule B for each event.

Continued on page 2

1. Amazon.com Services, LLC
2. American Forest Foundation
3. American Property Casualty Insurance Assn. (PCI)
4. Defense Trial Counsel of WV
5. Elevance Health and its Affiliates
6. F & S Management, LLC
7. Go-Mart, Inc.
8. The Pew Charitable Trusts
9. Turo
10. U.S. Chamber of Commerce
11. US Methanol, LLC
12. West Virginia University
13. WV American Water

Meals/Beverages

Date of Event: 1/13/23  
Location: Prime 44 Steakhouse  
Shared with: Bryan Hoylman

Event Attendees:

Bryan Hoylman  
Danielle Waltz  
JE White  
Mrs J.E White  
Craig Blair (legislator)  
Clay Riley (legislator)  
Clay Riley's spouse  
Patrick Smith

Total Receipt: \$804.55  
Danielle Waltz Share: \$402.37  
Amount per person: \$50.29

Total for legislators: 100.59

**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 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 co-sponsors 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: 1/16 Location: 208-W
2. Type of event (reception, dinner, etc.): Women's Caucus Lunch
3. Event sponsor: Danielle Waltz / HS Chamber (If you shared the sponsorship and expenses with others, you must also complete Section C below.)
4. Which of the following governmental groups were invited? All members of:
- |   |   |
|---|---|
| <input type="checkbox"/> a. the Legislature                 | <input checked="" type="checkbox"/> c. a standing or select committee of either house |
| <input type="checkbox"/> b. either house of the Legislature | <input type="checkbox"/> 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:

Women's Caucus event

**Section B: Calculate Reportable Expenses***Some calculations must be performed manually.*

1.  $\frac{305.41}{(total\ cost\ of\ event)} \div \frac{15}{(total\ attendance)} = \$20.36$   
(per capita cost)

2. Number of governmental officials or employees in attendance:

$\frac{14}{(governmental\ attendees)} \times \frac{20.36}{(per\ capita\ cost)} = \boxed{285.04}$

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? No (yes or no)
2. If yes, with how many others are sharing the cost?          List the names of all sponsors below:

3. What is your share of Box 1 above? \$ 285.04

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

BOX 2



**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 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 co-sponsors 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: 1/17/23 Location: Senate President's Conference
2. Type of event (reception, dinner, etc.): Breakfast for Huggins event
3. Event sponsor: Danielle Waltz / no employer (If you shared the sponsorship and expenses with others, you must also complete Section C below.)
4. Which of the following governmental groups were invited? All members of:
- |   |   |
|---|---|
| <input checked="" type="checkbox"/> a. the Legislature      | <input checked="" type="checkbox"/> c. a standing or select committee of either house |
| <input type="checkbox"/> b. either house of the Legislature | <input type="checkbox"/> 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:

~~Lunch for Joint Flooding Committee~~Huggins event**Section B: Calculate Reportable Expenses***Some calculations must be performed manually.*

$$1. \frac{375.03}{(\text{total cost of event})} \div \frac{40}{(\text{total attendance})} = \$9.37 \quad (\text{per capita cost})$$

2. Number of governmental officials or employees in attendance:

$$\frac{30}{(\text{governmental attendees})} \times \frac{9.37}{(\text{per capita cost})} = \boxed{281.10} \quad \text{Box 1}$$

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? No (yes or no)
2. If yes, with how many others are sharing the cost?            List the names of all sponsors below:

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

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

281.10 <sup>Box 2</sup>

**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 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 co-sponsors 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: 2/15 Location: Senate Rules
2. Type of event (reception, dinner, etc.): Lunch for Senators
3. Event sponsor: Danielle Waltz / US Chamber (If you shared the sponsorship and expenses with others, you must also complete Section C below.)
4. Which of the following governmental groups were invited? All members of:
- |  |  |
|--|--|
| <input type="checkbox"/> a. the Legislature                            | <input type="checkbox"/> c. a standing or select committee of either house |
| <input checked="" type="checkbox"/> b. either house of the Legislature | <input type="checkbox"/> 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:

Lunch for Senate Rules

**Section B: Calculate Reportable Expenses***Some calculations must be performed manually.*

$$1. \frac{379.34}{(\text{total cost of event})} \div \frac{34}{(\text{total attendance})} = \$11.15 \quad (\text{per capita cost})$$

2. Number of governmental officials or employees in attendance:

$$\frac{34}{(\text{governmental attendees})} \times \frac{11.15}{(\text{per capita cost})} = \boxed{379.34} \quad \text{Box 1}$$

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? No (yes or no)
2. If yes, with how many others are sharing the cost?          List the names of all sponsors below:

3. What is your share of Box 1 above? \$ 379.

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

**379.34** Box 2



**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 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 co-sponsors 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: 3/2 Location: Senate President's Office
2. Type of event (reception, dinner, etc.): Lunch for Flooding Committee
3. Event sponsor: Danielle Waltz / ptw (If you shared the sponsorship and expenses with others, you must also complete Section C below.)
4. Which of the following governmental groups were invited? All members of:
- |   |   |
|---|---|
| <input type="checkbox"/> a. the Legislature                 | <input checked="" type="checkbox"/> c. a standing or select committee of either house |
| <input type="checkbox"/> b. either house of the Legislature | <input type="checkbox"/> 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:

Lunch for Joint Flooding Committee

**Section B: Calculate Reportable Expenses***Some calculations must be performed manually.*

$$1. \frac{400.94}{(\text{total cost of event})} \div \frac{15}{(\text{total attendance})} = \$26.72 \quad (\text{per capita cost})$$

2. Number of governmental officials or employees in attendance:

$$\frac{10}{(\text{governmental attendees})} \times \frac{26.72}{(\text{per capita cost})} = \boxed{267.20}$$

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? No (yes or no)
2. If yes, with how many others are sharing the cost?            List the names of all sponsors below:

3. What is your share of Box 1 above? \$ 379. 267.20

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

**267.20<sup>2</sup>**

**Schedule B: Group Entertainment & Shared Expenses**

(Attach to the Lobbyist Activity Report)

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- |   |                                     |
|---|-------------------------------------|
| 1. the Legislature                                | 3. either house of the Legislature  |
| 2. a standing or select committee of either house | 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 co-sponsors 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 / DW / not employees (If you shared the sponsorship and expenses with others, you must also complete Section C below.)
4. Which of the following governmental groups were invited? All members of:
- |   |  |
|---|--|
| <input type="checkbox"/> a. the Legislature                 | <input type="checkbox"/> c. a standing or select committee of either house |
| <input type="checkbox"/> b. either house of the Legislature | <input type="checkbox"/> 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***Some calculations must be performed manually.*

1.  $\frac{\$1814.14}{(\text{total cost of event}) \div (\text{total attendance})} = \$53.36$  (per capita cost)

2. Number of governmental officials or employees in attendance:

$\frac{12}{(\text{governmental attendees})} \times \$53.36 = \boxed{\$640.32}$  Box 2

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? 26 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.

$\boxed{\$23.72^{Box 2}}$