Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:
RECEIVED
SECRETARY OF THE SENATE
PUBLIC RECORDS
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Post-Travel Filing Instructions: Complete this form within **30 days** of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building.**

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

☒ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**
☒ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): Partnership for a Secure America

Travel date(s): May 6-7, 2017

Name of accompanying family member (if any): _____

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING **DID NOT INCREASE** DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☐ Good Faith Estimate ☒ Actual Amount	$33	$90	$77	$167.25 for conference services over 2 days

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☐ Good Faith Estimate ☐ Actual Amount				

Provide a description of all meetings and events attended. *See* Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): The meetings, events, and lectures throughout the trip centered around current foreign policy and national security issues. It also included a National Security Council roundtable simulation.

5/15/17 (Date) Colleen Berny (Printed name of traveler) Colleen Berny (Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

5/15/17 (Date) Ron Johnson (Signature of Supervising Senator/Officer)

(Revised 1/3/11) **Form RE-2**

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Date/Time Stamp:

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics in SH-220.** Incomplete and late travel submissions will **not** be considered or approved. This form **must** be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Name of Traveler: Colleen Elise Berny

Employing Office/Committee: Senate Homeland Security & Governmental Affairs Committee (Chairman Ron Johnson)

Private Sponsor(s) (list all): Partnership for a Secure America (PSA)

Travel date(s): May 6-7, 2017

*Note: If you plan to extend the trip for any reason you **must** notify the Committee.*

Destination(s): Airlie Conference Center (Warrenton, VA)

Explain how this trip is specifically connected to the traveler's official or representational duties:

The PSA weekend retreat will help me learn more about key national security and foreign policy areas, which are relevant to the portfolios I oversee on HSGAC (FEMA/Emergency Management; Critical Infrastructure; and Cybersecurity) as a Professional Staff Member. The weekend retreat will also better help me understand interagency issues and global threats, as it pertains to homeland security. The bipartisan nature of the program will also help me build professional relationships across the aisle and discuss differing views on national security/foreign policy issues related to the Committee and my specific portfolios.

Name of accompanying family member (if any): _____

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

3/27/2017
(Ddte)

Colleen Berny
(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

I, Ron Johnson *(Print Senator's/Officer's Name)* hereby authorize Colleen Berny *(Print Traveler's Name)*

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. *(signify "yes" by checking box)* ☐

3/27/2017
(Date)

Ron Johnson
(Signature of Supervising Senator/Officer)

(Revised 10/19/15)

Form RE-1

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PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

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1. Sponsor(s) of the trip (please list all sponsors): Partnership for a Secure America

2. Description of the trip: Congressional staff weekend of foreign and national security lectures.

3. Dates of travel: May 6-7, 2017

4. Place of travel: Airlie Conference Center, Warrenton, VA

5. Name and title of Senate invitees: See Attached List

6. I *certify* that the trip fits one of the following categories:

   ☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal **and** do not retain or employ registered lobbyists or agents of a foreign principal **and** no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

   – OR –

   ☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) *(see question 9)*.

7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.

   – AND –

   ☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.

8. I *certify* that:

   ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.

   – AND –

   ☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

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9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**
I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and **one** overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

– OR –

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and **two** overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10).*

– OR –

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**
If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

Partnership for a Secure America (PSA) organized the details for this trip.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

PSA's mission is to promote bipartisanship in national security and foreign policy. This trip will bring together staff from both parties to build cross-party relationships and discuss diverse perspectives on pressing issues in the national security and foreign policy arena.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

This will be the sixteenth such trip of this nature.

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15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

In addition to this congressional staff program, PSA releases high-level bipartisan policy statements on a range of foreign policy topics

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
☒ Good Faith estimate ☐ Actual Amounts	$35	$90	$92 (over 2 days)	$191 conference services (over 2 days)

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip was organized specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip

It is close to Washington, DC but also provides a remote setting that will encourage participants to step outside their daily roles as Senate staff.

19. Name and location of hotel or other lodging facility:

Airlie Conference Center, 6809 Airlie Road, Warrenton, VA 20187

20. Reason(s) for selecting hotel or other lodging facility:

It provides all necessary accommodations in one location that is close to Washington, DC for a one night trip.

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21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

Costs for meals and lodging are $182 over the course of two days - less than the maximum federal government per diem rate of $157.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Participants will be transported by a coach class bus.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

N/A

25. I hereby *certify* that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.):

Signature of Travel Sponsor: _____

Name and Title: Nathan Sermonis, Executive Director

Name of Organization: Partnership for a Secure America

Address: 1629 K Street NW, Suite 450, Washington, DC 20006

Telephone Number: (202) 293-8580

Fax Number: N/A

E-mail Address: sermonis@psaonline.org

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PARTNERSHIP FOR
A SECURE AMERICA

Congressional Partnership Program Retreat Spring 2017

Saturday, May 6th

1:30 pm	Depart from Union Station, Washington, DC
3:00 – 4:00 pm	Arrive at Airlie Conference Center & Check-in
4:00 – 5:00 pm	Material Review and Preparation
5:00 – 5:30 pm	Opening Remarks and Review of Agenda: Nathan Sermonis, PSA
5:30 – 7:00 pm	Airlie House – Meadow Room **Guest Speakers:** To be Determined ***Topic:*** Bipartisan Panel
7:00 – 7:30 pm	East Room Pre-Dinner Reception Informal conversations with guest speakers
7:30 – 9:00 pm	East Room Keynote Dinner **Guest Speaker:** Tom Donilon, former National Security Advisor (INVITED) **Topic:** Global Challenges for Today and Tomorrow
9:00 – 10:00 pm	East Room After-Dinner Reception Informal conversations with guest speakers

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PARTNERSHIP FOR
A SECURE AMERICA

Congressional Partnership Program Retreat Spring 2017

Sunday, May 7th

8:00 – 9:00 am	Airlie House – Dining Room Breakfast
9:00 – 12:00 pm	*Group A* Airlie House – Meadow Room National Security Council Simulation **National Security Advisor:** Mr. Robert Sheldon, Director for Policy – Emerging Threats at the Business Executives for National Security (INVITED)
9:00 – 10:30 am	*Group B* Airlie House – Studio **Guest Speaker:** Amb. John Beyrle, Former Ambassador to Russia (INVITED) **Topic:** Future of US-Russia Relations
10:30 – 12:00 pm	*Group B* Airlie House – Studio **Guest Speaker:** To be Determined ***Topic:*** Challenges Facing the European Union
12:00 – 1:00 pm	Airlie House – Dining Room Lunch
1:00 – 2:00 pm	Informal conversations with guest speakers
2:00 – 5:00 pm	*Group B* Airlie House – Meadow Room National Security Council Simulation **National Security Advisor:** Mr. Robert Sheldon, Director for Policy – Emerging Threats at the Business Executives for National Security (INVITED)

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PARTNERSHIP FOR
A SECURE AMERICA

Congressional Partnership Program Retreat Spring 2017

2:00 – 3:30 pm	*Group A* Airlie House – Studio **Guest Speaker:** Amb. John Beyrle, Former Ambassador to Russia (INVITED) **Topic:** Future of US-Russia Relations
3:30 – 5:00 pm	*Group A* Airlie House – Studio **Guest Speaker:** To be Determined ***Topic:*** Challenges Facing the European Union
5:00 – 5:30 pm	Airlie House – Meadow Room Wrap-up and Departure from Airlie

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PARTNERSHIP FOR
A SECURE AMERICA

Congressional Partnership Program
Spring 2017
Senate

All invited congressional staff members handle foreign policy and national security topics in their professional office capacity.

Colleen Berny
Senate Committee on Homeland Security and Governmental Affairs

Molly Carpenter
Sen. John McCain
(R-AZ)

Baxter Carr
Sen. Shelley Moore Capito
(R-WV)

Melissa Egred
Senate Committee on Homeland Security and Governmental Affairs

William Ellis
Sen. Angus King
(I-ME)

Adam Farris
Sen. James Lankford
(R-OK)

Mikhaila Fogel
Sen. Susan Collins
(R-ME)

Andrew Geibel
Sen. Bob Menendez
(D-NJ)

Charles Hockenbury
Sen. Roger Wicker
(D-MS)

Kristen Lee
Sen. Debbie Stabenow
(D-MI)

Jared Lennon
Senate Committee on Homeland Security and Governmental Affairs

Leigh Maiden
Sen. Joe Manchin
(D-WV)

Mario Semiglia
Sen. Martin Heinrich
(D-NM)

Amy Smith
Sen. Patty Murray
(D-WA)

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PARTNERSHIP FOR
A SECURE AMERICA

Andrew Wang
Sen. Tim Kaine
(D-VA)

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PARTNERSHIP FOR
A SECURE AMERICA

Ethics Instruction Sheet – Senate
Congressional Partnership Program
Spring 2017

In May, PSA will hold the Spring 2017 CPP retreat in Warrenton, Virginia. **CPP participants must fill out these forms and turn them in to the Senate Ethics Committee by COB April 6, 2017. Please note that you WILL NOT be able to participate in the retreat if you do not meet this deadline.** Provided below are detailed instructions and information on required documents for the Senate Ethics Committee.

Documents:

A. Private Trip Sponsor Form
B. Retreat Itinerary
C. List of participating Senate staff
D. Letter of invitation from Partnership for a Secure America
E. The Employee Pre-Travel Authorization Form **(to be filled out by participant and signed by Senator or supervising officer)**

All of the documents listed above must be submitted as a package to the Senate Ethics Committee. Documents A – D above have been completed by the Partnership for a Secure. By COB **April 6th**, please compile all documents and:

1. **FAX** or **DELIVER** one copy to the Senate Ethics Committee (220 Hart). Fax (202) 224-7416
2. **SCAN and EMAIL** one copy to the Partnership for a Secure America at cpp@psaonline.org
3. **KEEP** one copy for personal records and post-travel documentation. Please keep in mind that you will have to resubmit these documents to Ethics after the retreat.

If you have any questions, please do not hesitate to contact Jessica Harrington at harrington@psaonline.org or 202-293-8580.

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PARTNERSHIP FOR
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Congressional Partnership Program Retreat Spring 2017

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4:00 – 5:00 pm	Material Review and Preparation
5:00 – 5:30 pm	Opening Remarks and Review of Agenda: Nathan Sermonis, PSA
5:30 – 7:00 pm	Airlie House – Meadow Room **Guest Speakers:** Ms. Jodi Herman and Mr. Lester Munson ***Topic:*** Bipartisan Panel – Mechanics of Negotiating a Bipartisan Deal – US Department of State Reform
7:00 – 7:30 pm	East Room Pre-Dinner Reception Informal conversations with guest speakers
7:30 – 9:00 pm	East Room Keynote Dinner **Guest Speaker:** Ambassador Robert Gallucci, Former Ambassador-at-Large and Special Envoy for the US Department of State **Topic:** US-North Korean Relations
9:00 – 10:00 pm	East Room After-Dinner Reception Informal conversations with guest speakers

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PARTNERSHIP FOR
A SECURE AMERICA

Congressional Partnership Program Retreat Spring 2017

Sunday, May 7th

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9:00 – 10:30 am	*Group B* Airlie House – Studio **Guest Speaker:** Amb. John Beyrle, Former Ambassador to Russia **Topic:** Future of US-Russia Relations
10:30 – 12:00 pm	*Group B* Airlie House – Studio **Guest Speaker:** Ms. Ellen Laipson, President Emeritus of the Stimson Center and former Vice Chair of the National Intelligence Counsel ***Topic:*** Challenges facing the Middle East
12:00 – 1:00 pm	Airlie House – Dining Room Lunch
1:00 – 2:00 pm	Informal conversations with guest speakers
2:00 – 5:00 pm	*Group B* Airlie House – Meadow Room National Security Council Simulation

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PARTNERSHIP FOR
A SECURE AMERICA

Congressional Partnership Program Retreat Spring 2017

National Security Advisor: Mr. Robert Sheldon, Director for Policy – Emerging Threats at the Business Executives for National Security

2:00 – 3:30 pm	*Group A* Airlie House – Studio **Guest Speaker:** Amb. John Beyrle, Former Ambassador to Russia **Topic:** Future of US-Russia Relations
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PARTNERSHIP FOR
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Congressional Partnership Program
Spring 2017
Senate

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Senate Committee on Homeland Security and Governmental Affairs

Molly Carpenter
Sen. John McCain
(R-AZ)

Baxter Carr
Sen. Shelley Moore Capito
(R-WV)

Melissa Egred
Senate Committee on Homeland Security and Governmental Affairs

William Ellis
Sen. Angus King
(I-ME)

Adam Farris
Sen. James Lankford
(R-OK)

Mikhaila Fogel
Sen. Susan Collins
(R-ME)

Andrew Geibel
Sen. Bob Menendez
(D-NJ)

Charles Hockenbury
Sen. Roger Wicker
(D-MS)

Kristen Lee
Sen. Debbie Stabenow
(D-MI)

Jared Lennon
Senate Committee on Homeland Security and Governmental Affairs

Leigh Maiden
Sen. Joe Manchin
(D-WV)

Mario Semiglia
Sen. Martin Heinrich
(D-NM)

Amy Smith
Sen. Patty Murray
(D-WA)

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PARTNERSHIP FOR
A SECURE AMERICA

Andrew Wang
Sen. Tim Kaine
(D-VA)

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