0000000001477 RECEIVED BY: SECRETARY OF THE SENATE Date: November 17, 2021

Employee Post-Travel Disclosure of Travel Expenses

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): World Vision Inc

Travel date(s): October 21-22, 2021

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	$145	$254.81	$165.20	$111.93 (Room rental and AV)

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.): All meetings and events attended are detailed on the attached itinerary.

11/17/21 (Date) Megan Reiss (Printed name of traveler) (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.

11/17/2021 (Date) (Signature of Supervising Senator/Officer)

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

0000000001478 RECEIVED BY: SECRETARY OF THE SENATE Date: November 17, 2021

United States Senate

SELECT COMMITTEE ON ETHICS

HART SENATE OFFICE BUILDING, ROOM 220
SECOND AND CONSTITUTION AVENUE, NE
WASHINGTON, DC 20510-6425

TELEPHONE: (202) 224-2981
FACSIMILE: (202) 224-7416
TDD: (202) 228-3752

October 14, 2021

Megan Reiss
Office of Senator Mitt Romney
United States Senate
Washington, DC 20510

Dear Dr. Reiss:

This responds to your recent correspondence requesting approval from the Select Committee on Ethics (the Committee) to accept an invitation you received to travel on a fact-finding trip in New York, New York, on October 21–22, 2021, sponsored by World Vision, Inc. Provided that you adhere to the guidance set forth below, it appears that it is permissible for you to accept necessary expenses from World Vision, Inc. in connection with this trip.

Background

Based on your communication with the Committee, the background in this matter is as follows.[1] You are employed as the National Security Policy Advisor in the Office of Senator Mitt Romney. World Vision, Inc. invited you to travel on a fact-finding trip in New York, New York, on October 21–22, 2021. World Vision, Inc. certified to the Committee that it will pay the necessary expenses[2] related to the travel and that it is neither a lobbyist, lobbying firm, agent of a foreign principal, or otherwise acting as a representative or agent of a foreign government. World Vision, Inc. has also certified that it does not retain or employ a registered lobbyist or agent of a foreign principal and that no registered lobbyist or agent of a foreign principal will accompany you at any point throughout your trip.[3]

Additionally, you inform the Committee that you plan to extend your trip for a personal purpose. Based on the information you submitted, the Committee understands that, for a personal purpose, you intend to extend your trip in New York, New York for less than one day after the conclusion of officially related events. The Committee also understands that you will pay for your return transportation to Washington, DC. In addition, you must personally pay the cost of any additional expenses incurred as a result of extending your trip.

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[1] If this letter does not correctly recite the facts, contact the Committee immediately.

[2] The term "necessary expenses" has a specific definition. *See Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel – Glossary of Terms* at 8.

[3] The term "any point throughout your trip" has a specific definition. *See id.* at 2.

Discussion

Privately-sponsored travel includes any gift of travel and travel-related expenses for travel outside the Senate duty station, including transportation, lodging, food and refreshments, and conference fees and materials, whether paid for directly, reimbursed, or provided directly, from a private individual or entity, in connection with a Member's, officer's, or employee's official Senate duties. Incorporating reforms from the Honest Leadership and Open Government Act of 2007 (HLOGA), Pub. L. 110–81 (2007), Senate Rule 35.2 permits Members, officers, and employees to accept privately-sponsored travel only with the prior written approval of the Committee.

The Committee's approval process is governed by the *Regulations and Guidelines for Privately-Sponsored Travel and Glossary of Terms* (collectively, *Travel Regulations*). The *Travel Regulations* contain detailed requirements regarding who may sponsor travel; time limits for trips; and the type and amount of expenses that can be reimbursed.

Entities that do not retain or employ a lobbyist or foreign agent and all non-profit organizations designated as tax-exempt organizations under § 501(c)(3) of the Internal Revenue Code of 1986, regardless of whether they retain or employ a lobbyist or foreign agent, may sponsor domestic trips for up to three days. The three-day limitation means three 24-hour periods, calculated from the time of arrival in the trip location to the time of departure from the trip location. For such trips, neither lobbyists nor foreign agents may accompany a Senate invitee at any point throughout the trip, other than in a *de minimis* way.[4] This means that neither lobbyists nor foreign agents may accompany Senate invitees at any point to and from the event, at the event itself, or at the location being visited.[5]

Under Senate Rule 35, Senate staff must receive advance authorization signed by the Member or officer under whose direct supervision the individual works in order to accept payment or reimbursement for necessary expenses related to fact-finding travel. Further, such authorization and expenses must be disclosed to the Secretary of the Senate by filing the completed *Employee Pre-Travel Authorization* and the *Employee Post-Travel Disclosure of Travel Expenses* (Form RE-1 and Form RE-2), along with a copy of the *Private Sponsor Travel Certification Form,* and all relevant attachments (e.g., the private sponsor's invitation and itinerary) **within 30 days of the conclusion of Privately-Sponsored Travel.**[6]

Consistent with these standards and Committee precedent, World Vision, Inc.'s factual representations, and the guidance contained in this letter regarding extending your trip for a personal purpose, it appears that it is permissible for you to accept necessary expenses from World Vision, Inc. in connection with this trip, provided that the actual travel and travel-related

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[4] The term "*de minimis*" has a specific definition. *See Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel – Glossary of Terms* at 3.

[5] *See Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel* at 5; *see also Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel – Glossary of Terms* at 2-3.

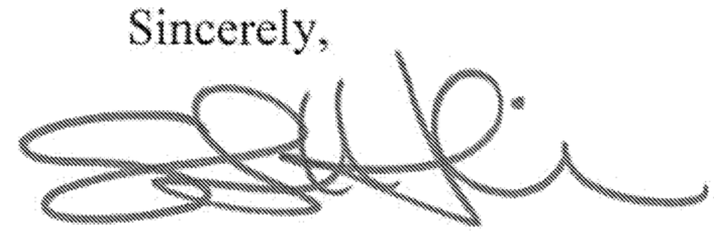
[6] Trip extensions for any purpose do not extend this deadline.

expenses conform to the information and materials you provided, and the travel and all required documents are disclosed to the Secretary of the Senate (Office of Public Records).

Finally, Senate Rule 34 requires a reporting individual,[7] on his or her Financial Disclosure Report, to make an annual disclosure of the receipt of payments or reimbursements under Senate Rule 35 from a private sponsor for officially-related travel expenses where, in the aggregate, travel expenses exceed $415 from that sponsor during a calendar year. However, if a Member, officer, or employee properly reports the receipt of necessary expenses for such travel to the Secretary of the Senate within 30 days of the travel, as discussed above, the travel expenses need not be disclosed a second time on their Financial Disclosure Report.

I hope you find this information helpful. If you have any additional questions, please do not hesitate to contact the Committee.

Sincerely,



Shannon Hamilton Kopplin
Chief Counsel and Staff Director

Enclosure: Travel Checklist

[7] A reporting individual is someone whose salary equals or exceeds 120% of the basic rate of pay for GS-15 ($132,552 for CY 2021) or is a political fund designee and is required to file Financial Disclosure Reports.

0000000001481 RECEIVED BY: SECRETARY OF THE SENATE Date: November 17, 2021

Print This Form... Clear Form

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: Megan Reiss

Employing Office/Committee: Senator Mitt Romney

Private Sponsor(s) (list all): World Vision Inc

Travel date(s): October 21 and 22, 2021

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

Destination(s): New York, New York

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

The trip will focus on the work of the United Nations with respect to women and children's health globally. My job in Senator Romney's office is as his National Security Policy Advisor, where I oversee his foreign policy and defense policy portfolios, including for his role on SFRC. This trip falls within SFRC jursidiction.

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:

9/29/21
(Date)

(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, Sen. Mitt Romney *(Print Senator's/Officer's Name)* hereby authorize Megan Reiss *(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)* ☐

09/29/2021
(Date)

(Signature of Supervising Senator/Officer)

(Revised 10/19/15)

Form RE-1

0000000001482 RECEIVED BY: SECRETARY OF THE SENATE Date: November 17, 2021

World Vision NYC Congressional Staff Learning Trip:
October 21 and 22, 2021

October 21, 2021

2:50 p.m. – Amtrak Acela Departs Union Station. Pre-reads available to review on train.

5:49 p.m. – Arrival at Moynihan Train Hall, New York City

6:00 p.m. – 6:30 p.m. – Transit to hotel and check in
Westin New York Grand Central
212 East 42nd Street
New York NY 10017

7:00 p.m. – 9:00 p.m. – Working welcome dinner (Westin 3rd Floor, Ambassador Room): The Work of the United Nations in Addressing the Needs of Women and Children. Participants in the dinner will hear from the World Vision UN Office, United Nations Population Fund (UNFPA), United Nations Children's Fund (UNICEF), and the World Health Organization (WHO) about their work in meeting the needs of vulnerable women and girls around the world.

Dinner Speakers:

- Lisa Bos, World Vision US
- Stewart Simonson, Assistant Director-General of the World Health Organization
- Sang Silano, UNICEF USA's VP of Foundation Partnerships
- Ian McFarlane, Director, Division for Communications and Strategic Partnerships, UNFPA

Overnight – Westin New York Grand Central

October 22, 2021

8:00 a.m. – Meet in hotel lobby, room check out

8:30 a.m. – 9:45 a.m. – Working breakfast with U.S. United Nations (USUN) Mission representative Jeffrey DeLaurentis, Alternative Representative for Special Political Affairs. Congressional staff will learn more about the role of the USUN mission and current U.S. government priorities within the United Nations, including women and girls and recent conflicts/crisis. (Westin Grand Central, Track 61, 3rd Floor. Note: breakfast service will begin at 8:00)

10:00 a.m. – 11:45 a.m. – Presentations from UNFPA on their mission and work around the world. Staff will learn more about how UNFPA responds to the critical needs of women and girls, including through partnerships with faith-based organizations. (Westin Grand Central)

- Presentation1: Saving Women's Lives: UNFPA Stories from the Field
  Speakers - Andrew Billo and Emily Krasnor, UNFPA, with short videos from the field from Debora Rodrigues (Brazil) and Rascha Albaba (Jordan).

- Presentation 2: UNFPA and the Three Zeros (presentation focused on the three zeroes of UNFPA's work; zero unmet need for family planning, zero preventable maternal deaths, and zero GBV including child marriage and female genital mutilation).

12:00 p.m. – 1:45 p.m. – Working lunch. Discussion topic: Building a Healthier World: The Power of Immunizations. This session will focus on the work of the UN, WHO and partners (including the private sector) in delivering life-saving vaccines around the world. Staff will learn more about successful public-private partnerships around both childhood immunizations and progress in delivering the COVID-10 vaccines (Westin Grand Central)

Speakers:

- Stewart Simonson, Assistant Director-General of the World Health Organization
- Dr. Luwei Pearson and Viorica Berdaga, UNICEF

2:00 p.m. – Depart Westin for Moynihan Station

3:00 p.m. – Depart on Acela back to DC

6:00 p.m. – Arrival in DC

0000000001484 RECEIVED BY: SECRETARY OF THE SENATE Date: November 17, 2021

Thursday, September 16, 2021

Megan Reiss
National Security Policy Adviser
Sen. Mitt Romney (R-UT)

Dear Megan,

World Vision is pleased to invite you on a bipartisan, bicameral Staff Learning Trip to New York City, where you will have the opportunity to learn more about the role of the United Nations in addressing global poverty, maintaining international peace and security, and promoting human rights, with a particular focus on UN programs addressing the needs of women and children. The trip will take place from **October 21 – 22, 2021**.

As a founding member of the United Nations and host of its headquarters, the United States has played an important leadership role in the organization for more than seventy years. The United States also remains the largest donor to the United Nations, contributing roughly $11 billion in 2019. This represents about one-fifth of the annual US foreign aid budget. From peacekeeping missions that promote stability, to its work on nonproliferation, counterterrorism, human rights, and humanitarian relief and development, the UN is a force-multiplier for US foreign assistance.

In New York, you'll have the chance to tour the United Nations, meet with the USUN Mission, and learn more about the work of UN agencies like UNFPA and UNICEF to address the needs of women and children globally. Please see the attached draft trip itinerary for more details and please reach out if you have any questions.

I hope that you will be able to participate in this educational and exciting trip.

Sincerely,

Robert Zachritz
Vice President of Advocacy
World Vision US

World Vision is a Christian humanitarian organization conducting relief, development, and advocacy activities in its work with children, families, and their communities in nearly 100 countries to help them reach their full potential by tackling the causes of poverty and injustice. World Vision serves all people regardless of religion, race, ethnicity, or gender.