0000000001834 RECEIVED BY: SECRETARY OF THE SENATE Date: May 25, 2022

Print This Form... Clear Form

# 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): Partnership for a Secure America

Travel date(s): May 14th and May 15th 2022

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<br>☐ Actual Amount | $35 | $96 | $59 | $155 (Conference services: breakout rooms and AV needs) |

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

| | Transportation Expenses | Lodging Expenses | Meal Expenses | Other Expenses (Amount & Description) |
|---|---|---|---|---|
| ☐ Good Faith Estimate<br>☐ Actual Amount | | | | |

Provide a description of all meetings and events attended. *See* Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): This retreat brought together a bipartisan cohort of staffers together to discuss national security and foreign policy topics and issues relevant to their portfolios, members, and the work they do. Please see attached schedule for our event schedule.

5/24/22 Stephanie Mertz
*(Date)* *(Printed name of traveler)*

Stephanie Mertz
*(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.

5/25/22
*(Date)*

Cynthia M. Lummis
*(Signature of Supervising Senator/Officer)*

(Revised 1/3/11)

**Form RE-2**

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: Stephanie Mertz

Employing Office/Committee: Senator Cynthia Lummis

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

Travel date(s): May 14-15, 2022

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

Destination(s): Airlie Conference Center, 6809 Airlie Road, Warrenton, VA 20187

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

This trip will provide professional developent and networking to Stephanie Mertz to advance bipartisanship in national security and foreign policy issue areas, both of which she works on in the office.

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:

4/6/22
*(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, Senator Cynthia Lummis hereby authorize Stephanie Mertz

*(Print Senator's/Officer's Name)* *(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)* ☐

4/6/22
*(Date)*

*(Signature of Supervising Senator/Officer)*

(Revised 10/19/15)

**Form RE-1**

0000000001836 RECEIVED BY: SECRETARY OF THE SENATE Date: May 25, 2022

PARTNERSHIP FOR
A SECURE AMERICA

April 5, 2022

Stephanie Mertz
Foreign Affairs and Defense Legislative Correspondent
Senator Cynthia Lummis

Dear Stephanie,

As a participant in Partnership for a Secure America's (PSA) Congressional Partnership Program (CPP), you are invited to attend the CPP retreat. The event is scheduled for Saturday-Sunday, May 14-15, 2022. The retreat will take place at the Airlie Conference Center, located at 6809 Airlie Road, Warrenton, VA 20187.

PSA will arrange for bus transportation to and from Airlie. The pickup and drop off location will be Columbus Circle, Union Station. The expected pickup time will be 1:30 PM. PSA will confirm all the details closer to the event date. The planned event schedule is attached.

We are attaching documents that are required to be submitted to the Ethics Committee. **Please ensure all the appropriate documents are completed and submitted to the Ethics Committee by Thursday, April 14, 2021**. This is critical in order to attend the event.

Please notify us if you have any questions or concerns.

PSA Staff
*cpp@psaonline.org*
*202-293-8580*

PARTNERSHIP FOR A SECURE AMERICA

# Congressional Partnership Program

## Itinerary

| **Saturday, May 14th** | |
|---|---|
| *1:30 PM* | **Departure from Union Station, Washington D.C.** |
| *3:00 PM – 4:00 PM* | **Arrive at Airlie Conference Center & Check-in** |
| *4:00 PM – 4:30 PM* | **Opening Remarks & Event Review** *(Meadow Room)*<br><br>Attendees will review their substantive materials for the retreat. Andy Semmel, Chairman of Partnership for a Secure America (PSA), will outline retreat agenda, provide logistical information for the day (i.e. location of restrooms, where to store any bags, etc.). |
| *4:30 PM – 5:30 PM* | **Trade Simulation** *(Meadow Room)*<br><br>Participants will take part in a mock trade simulation that will take place over the two days. The exercise is based on fictional countries negotiating a trade agreement. |
| *5:30 PM – 6:15 PM* | **Pre-Dinner Reception** *(Federal Room)*<br><br>Attendees will break for a reception in the Federal Room. Participants will have an opportunity to informally engage their colleagues, PSA staff, and speakers. Participants will converse with colleagues, PSA staff, and speakers on matters relevant to their duties and the scheduled event discussions. |
| *6:15 PM - 8:30 PM* | **Keynote Dinner** *(Federal Room)*<br><br>Featuring: Robert B. Zoellick, Partnership for a Secure America Board of Advisors (confirmation pending)<br><br>Speaker will discuss dynamics with international trade and economics in light of competition with China and hostilities with Russia. For approximately half the time, staff will have the opportunity to directly ask speakers question relevant to their duties. |
| *8:30 PM – 9:00 PM* | **After-Dinner Reception**<br><br>Participants will have an opportunity to informally engage their colleagues, PSA staff, and speakers. Participants will converse with colleagues, PSA staff, and speakers on matters relevant to their duties and the scheduled event discussions. |
| | |

| **Sunday, May 15th** | | |
|---|---|---|
| *8:00 AM – 9:00 AM* | **Breakfast** *(Airlie Dinning Room)*<br><br>Participants will gather for breakfast. | |
| *9:00 AM – 10:30 AM* | **Group A -*Trade Simulation*** *(Meadow Room)*<br><br>Participants will take part in a mock trade simulation that will take place over the two days. The exercise is based on fictional countries negotiating a trade agreement. | **Group B – *Global Food Security*** *(Jefferson Room)*<br><br>Featuring: Caitlin Welsh, Director of Global Food Security, Center for Strategic & International Studies (*pending confirmation)*; Abiola Afolayan, Strategic Partnership & Communications Officer, United Nations (*pending confirmation)*<br><br>Speakers will discuss the state of global food security. For approximately half the time, staff will have the opportunity to directly ask speakers question relevant to their duties. |
| *10:30 AM – 12:00 PM* | **Group A -*Trade Simulation*** *(Meadow Room)*<br><br>Participants will take part in a mock trade simulation that will take place over the two days. The exercise is based on fictional countries negotiating a trade agreement. | **Group B – *Implications for Eastern Europe from the Russia Invasion into Ukraine*** *(Meadow Room)*<br><br>Featuring: Vasili Rukhadze, Visiting Lecturer of Political Science, University of Pittsburgh *(pending confirmation)*<br><br>Speaker will discuss the implications of the Russian invasion into Ukraine from Eastern Europe's perspective. For approximately half the time, staff will have the opportunity to directly ask speakers question relevant to their duties. |
| *12:00 PM – 2:00 PM* | **Lunch** *(Airlie Dining Room)*<br><br>Attendees will break for lunch in the Airlie Dining Room. Participants will have an opportunity to informally engage their colleagues, PSA staff, and speakers on matters relevant to their duties and the scheduled event discussions. | |

| | | |
|---|---|---|
| *2:00 PM - 3:30 PM* | **Group A - *Global Food Security*** *(Jefferson Room)*<br><br>Featuring: Caitlin Welsh, Director of Global Food Security, Center for Strategic & International Studies (*pending confirmation)*; Abiola Afolayan, Strategic Partnership & Communications Officer, United Nations (*pending confirmation)*<br><br>Speakers will discuss the state of global food security. For approximately half the time, staff will have the opportunity to directly ask speakers question relevant to their duties. | **Group B – *Trade Simulation*** *(Meadow Room)*<br><br>Participants will take part in a mock trade simulation that will take place over the two days. The exercise is based on fictional countries negotiating a trade agreement. |
| *3:30 PM – 5:00 PM* | **Group A - *Implications for Eastern Europe from the Russia Invasion into Ukraine*** *(Meadow Room)*<br><br>Featuring: Vasili Rukhadze, Visiting Lecturer of Political Science, University of Pittsburgh *(pending confirmation)*<br><br>Speaker will discuss the implications of the Russian invasion into Ukraine from Eastern Europe's perspective. For approximately half the time, staff will have the opportunity to directly ask speakers question relevant to their duties. | **Group B – *Trade Simulation*** *(Meadow Room)*<br><br>Participants will take part in a mock trade simulation that will take place over the two days. The exercise is based on fictional countries negotiating a trade agreement. |
| *5:00-5:30 PM* | **Retreat Debrief & Event Ends**<br><br>Participants will briefly meet with PSA to review the retreat's events before departure. | |
| *5:30 PM* | **Departure**<br><br>Departure from Airlie. Buses will return back to Union Station, Washington DC, for drop off. | |

0000000001840 RECEIVED BY: SECRETARY OF THE SENATE Date: May 25, 2022

PARTNERSHIP FOR A SECURE AMERICA

# Congressional Partnership Program Senate Participants

Each participant is invited due to their role supporting Members' of Congress duties pertaining to issues that affect national security and foreign policy.

| | |
|---|---|
| Andrew Fuentes | Senator Dianne Feinstein |
| Ryan Giles | Senate Homeland Security and Governmental Affairs Committee |
| Anna Hardage | Senator Tom Cotton |
| Annie Kowalewski | Senate Foreign Relations Committee |
| Stephanie Mertz | Senator Cynthia Lummis |
| Anna Owens | Senator Tammy Baldwin |
| Serena Robinson | Senator Kirsten Gillibrand |
| Simon Stack | Senate Foreign Relations Committee |
| Sarai Torres | Senator Martin Heinrich |
| Micki Werner | Senator Marsha Blackburn |

# 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 policy and national security lectures.

3. Dates of travel: May 14-15, 2022

4. Place of travel: Airlie Conference Center, 6809 Airlie Road, Warrenton, VA 20187

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*).

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:

PSA is solely responsible for planning and conducting 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 13th year of this such program and trip.

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

In addition to congressional staff programs, PSA releases high-level bipartisan policy statements on a on a range of foreign policy topics. These statements are generally available to the public.

16. Total Expenses for Each Participant:

| | Transportation Expenses | Lodging Expenses | Meal Expenses | Other Expenses |
|---|---|---|---|---|
| ☒ Good Faith estimate<br>☐ Actual Amounts | $35 | $96 | $59 | $155 - conference services over two days. This includes cost of breakout room, A/V equipment, and incidental snacks/refreshments. |

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 is organized specifically with regard to congressional staff 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 congressional 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:

The lodging facility is co-located at the conference facility.

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:

Expenses are at the per diem rate.

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 round trip by coach 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:

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Signature of Travel Sponsor: 

Name and Title: John Sullivan, Executive Director

Name of Organization: Partnership for a Secure America

Address: 1990 M Street NW, Suite 250, Washington DC 20036

Telephone Number: 202-293-8580

Fax Number:

E-mail Address: sullivan@psaonline.org