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Employee Post-Travel Disclosure of Travel Expenses

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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): September 10-11, 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)
<input checked="" type="checkbox"/> Good Faith Estimate	\$35 (coach bus)	\$96	\$59	\$109 conference services. This includes cost of breakout room, A/V equipment, and incidental snacks/refreshments.
<input type="checkbox"/> Actual Amount				

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

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate				
<input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. *See* Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): This trip brought 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. See attached Agenda for additional information.

10/11/22
(Date)


Nathaniel Sizemore
(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.

10/11/22
(Date)


(Signature of Supervising Senator/Officer)

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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.

Nathaniel Sizemore

Name of Traveler: _____

Sen. Deb Fischer

Employing Office/Committee: _____

Partnership for a Secure America

Private Sponsor(s) (list all): _____

September 10-11, 2022

Travel date(s): _____

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

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

Destination(s): _____

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

I am the communications director for Sen. Fischer. My duties include drafting press releases, remarks, and talking points related to the Senator's policy areas. The Senator is on the Senate Armed Services Committee, which means the office needs to message on issues related to national defense, international affairs, and foreign relations. This trip will help to further educate me on these issues and improve my ability to draft content related to these issues.

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:

9/7/22

(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, Sen. Deb Fischer hereby authorize Nathaniel Sizemore
(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)

9/7/22

(Date)

(Signature of Supervising Senator/Officer)

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.

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

 2. Description of the trip: Congressional staff conference with foreign policy and national security discussions.

 3. Dates of travel: September 10-11, 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 funding, 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 program and trip. The last conference was held in May 2022.

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 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
<input checked="" type="checkbox"/> Good Faith estimate <input type="checkbox"/> Actual Amounts	\$35 (coach bus)	\$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, thus allowing events to be held in one location.

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:

Lodging and meal 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:

None.

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



PARTNERSHIP FOR
A SECURE AMERICA

July 20, 2022

Nathaniel Sizemore
Sen. Deb Fischer

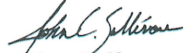
Dear Nathaniel,

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, September 10-11, 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, August 11, 2022.** This is critical in order to attend the event.

Please notify us if you have any questions or concerns.


John Sullivan

Executive Director
202-293-8580



PARTNERSHIP FOR
A SECURE AMERICA

Congressional Partnership Program

Itinerary

Saturday, September 10 th , 2022	
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	<p>Opening Remarks & Event Review (<i>Meadow Room</i>)</p> <p>Attendees will review their substantive materials for the conference. Andy Semmel, Chairman of Partnership for a Secure America (PSA), will outline conference agenda, provide logistical information for the day (i.e. location of restrooms, where to store any bags, etc.).</p>
4:30 PM – 5:30 PM	<p>Trade Simulation (<i>Meadow Room</i>)</p> <p>Featuring: John Sullivan, Executive Director, Partnership for a Secure America</p> <p>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. Participants will do part one of negotiation during this session and part two will take place the following day.</p>
5:30 PM – 6:15 PM	<p>Pre-Dinner Reception (<i>Federal Room</i>)</p> <p>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.</p>
6:15 PM – 8:30 PM	<p>Keynote Dinner (<i>Federal Room</i>)</p> <p>Featuring: Hon. Ellen Lord, Senior Fellow, Johns Hopkins Applied Physics Laboratory</p> <p>Speaker will discuss current U.S. defense capabilities: how should the U.S. continue to strengthen its industrial and educational base and define its goals for the future? For approximately half the time, staff will have the opportunity to directly ask speakers questions relevant to their duties.</p>

8:30 PM – 9:00 PM	<p>After-Dinner Reception</p> <p>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.</p>	
Sunday, September 11th, 2022		
8:00 AM – 9:00 AM	<p>Breakfast (<i>Airlie Dining Room</i>)</p> <p>Participants will gather for breakfast.</p>	
Participants will be split up into groups		
9:00 AM – 10:30 AM	<p>Group A - Trade Simulation (<i>Jefferson Room</i>)</p> <p>Featuring: John Sullivan, Executive Director, Partnership for a Secure America</p> <p>Participants will do part two of a mock trade simulation that will take place over the two days. The exercise is based on fictional countries negotiating a trade agreement.</p>	<p>Group B – The Geopolitical Landscape (<i>Meadow Room</i>)</p> <p>Featuring: Bruce Jones, Director - Project on International Order and Strategy, The Brookings Institution</p> <p>Speaker will discuss current U.S. foreign policy interests: how should the U.S. understand the current foreign affair environment and define its goals for the future. For approximately half the time, staff will have the opportunity to directly ask speakers question relevant to their duties.</p>
10:30 AM - 12:00 PM	<p>Group A -Trade Simulation (<i>Jefferson Room</i>)</p> <p>Featuring: John Sullivan, Executive Director, Partnership for a Secure America</p> <p>Participants will do part two of a mock trade simulation that will take place over the two days. The exercise is based on fictional countries negotiating a trade agreement.</p>	<p>Group B – Evolution of the Homeland Security Threat Environment (<i>Meadow Room</i>)</p> <p>Featuring: Carrie F. Cordero, Senior Fellow, Center for a New American Security</p> <p>Speaker will discuss the legacies of 9/11 on U.S. foreign policy. For approximately half the time, staff will have the opportunity to directly ask speakers question relevant to their duties.</p>



12:00 PM - 2:00 PM	<p>Lunch (<i>Airlie Dining Room</i>)</p> <p>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.</p>	
2:00 PM - 3:30 PM	<p>Group A – The Geopolitical Landscape (<i>Meadow Room</i>)</p> <p>Featuring: Bruce Jones, Director - Project on International Order and Strategy, The Brookings Institution</p> <p>Speaker will discuss current U.S. foreign policy interests: how should the U.S. understand the current foreign affair environment and define its goals for the future. For approximately half the time, staff will have the opportunity to directly ask speakers questions relevant to their duties.</p>	<p>Group B – Trade Simulation (<i>Jefferson Room</i>)</p> <p>Featuring: John Sullivan, Executive Director, Partnership for a Secure America</p> <p>Participants will do part two of a mock trade simulation that will take place over the two days. The exercise is based on fictional countries negotiating a trade agreement.</p>
3:30 PM - 5:00 PM	<p>Group A – Evolution of the Homeland Security Threat Environment (<i>Meadow Room</i>)</p> <p>Featuring: Carrie F. Cordero, Senior Fellow, Center for a New American Security</p> <p>Speaker will discuss the legacies of 9/11 on U.S. foreign policy. For approximately half the time, staff will have the opportunity to directly ask speakers questions relevant to their duties.</p>	<p>Group B – Trade Simulation (<i>Jefferson Room</i>)</p> <p>Featuring: John Sullivan, Executive Director, Partnership for a Secure America</p> <p>Participants will do part two of a mock trade simulation that will take place over the two days. The exercise is based on fictional countries negotiating a trade agreement.</p>
5:00 PM - 5:30 PM	<p>Conference Debrief & Event Ends</p> <p>Featuring: John Sullivan, Executive Director, Partnership for a Secure America</p> <p>Participants will briefly meet with PSA to review the simulation exercise and discussions held during the conference.</p>	
5:30 PM	<p>Departure</p> <p>Departure from Airlie. Buses will return back to Union Station, Washington, D.C. for drop off.</p>	





PARTNERSHIP FOR
A SECURE AMERICA

Congressional Partnership Program Senate Participants

Name (First)	Name (First)	Position	Office
Ian	Haimowitz	Legislative Correspondent	Sen. Alex Padilla
Jared	Henderson	Senior Policy Advisor	Sen. Ben Ray Luján
Trevor	Hustus	Legislative Correspondent and Grants Coordinator	Sen. Susan M. Collins
Adam	Kozloski	Foreign Policy Aide	Sen. Joni Ernst
Nathaniel	Sizemore	Press Secretary	Sen. Deb Fischer
Callahan	Stoub	Special Projects Assistant	Senate Committee on Foreign Relations
Xavier	Underwood	Digital Director	Sen. Tim Scott

CHRISTOPHER A. COONS, DELAWARE, CHAIRMAN
JAMES LANKFORD, OKLAHOMA, VICE CHAIRMAN

BRIAN SCHATZ, HAWAII
JEANNE SHAHEEN, NEW HAMPSHIRE

JAMES E. RISCH, IDAHO
DEB FISCHER, NEBRASKA

SHANNON HAMILTON KOPPLIN, CHIEF COUNSEL AND STAFF DIRECTOR
WILLIAM B. CABLE, CHIEF CLERK

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

United States Senate

SELECT COMMITTEE ON ETHICS

September 8, 2022

Nathaniel Sizemore
Office of Senator Deb Fischer
United States Senate
Washington, DC 20510

Dear Mr. Sizemore:

This responds to your recent correspondence requesting approval from the Select Committee on Ethics (the Committee) to accept an invitation you received to travel the *Congressional Partnership Program* in Warrenton, Virginia, on September 10–11, 2022, sponsored by the Partnership for a Secure America (PSA). Provided that you adhere to the guidance set forth below, it appears that it is permissible for you to accept necessary expenses from PSA 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 communications director for the Office of Senator Deb Fischer. PSA invited you to travel to the *Congressional Partnership Program* in Warrenton, Virginia, on September 10–11, 2022. PSA certified to the Committee that it will pay the necessary expenses² 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. PSA 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

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

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.

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.**

Consistent with these standards and Committee precedent, and PSA's factual representations, it appears that it is permissible for you to accept necessary expenses from PSA in connection with this trip, provided that the actual travel and travel-related 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).

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.

Finally, Senate Rule 34 requires a reporting individual⁶ on their 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

⁶ A reporting individual is someone whose salary equals or exceeds 120% of the basic rate of pay for GS-15 (\$135,468 for CY 2022) or is a political fund designee and is required to file Financial Disclosure Reports.