

Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:

RECEIVED
SECRETARY OF THE SENATE
PUBLIC RECORDS
2022 NOV 14 AM 11:28

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): Carnegie Corporation of New York

Travel date(s): October 10, 2022 - October 15, 2022

Name of accompanying family member (if any): N/A

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	See attached.	See attached.	See attached.	See attached.
☒ Actual Amount				

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

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

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

11/14/2022
(Date)

Robert C. Julien
(Printed name of traveler)

Robert C. Julien
(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.

11/14/22
(Date)

Robert M. Menendez
(Signature of Supervising Senator/Officer)

Expenses for Employee:

	Total Transportation Expenses \$2,447.00	Total Lodging Expenses \$883.00	Total Meal Expenses \$240.83	Total Other Expenses (Amount and Description) \$287.60
Actual Amount	Round-Trip Flights per participant: \$2,049.28 Transportation (Ubers): \$207.00 Transportation (Buses): \$190.72	Montreal, Canada: per person \$527 Iceland: per night \$356	Total per participant: \$240.83	Conference fees: \$167.60 Excursion fees: \$120.00
Accompanying Family Member	N/A	N/A	N/A	N/A

TOTAL COST PER PERSON FOR ALL EXPENSES: \$3,858.43

See attached itinerary.

See below for detailed expenses.

HOTELS:

Hotel Iceland	Hotel Exeter	Booked for 15	\$ 6,408.00	\$356
	Dauphin			
	Montreal			
Hotel Montreal	Centre Ville	Booked for 15	\$ 7,902.70	\$527

TOTAL HOTELS: \$883.00

FLIGHTS:

IAD to YUL	Air Canada	Booked for 15	\$ 4,845.00	\$ 322.00
YUL to YYZ	Air Canada	Booked for 13	\$ 3,939.00	\$ 303.00
YYZ to KEF	IcelandAir	Booked for 13	\$ 6,255.73	\$ 481.21
KEF to IAD	IcelandAir	Booked for 13	\$ 12,259.91	\$ 943.07

TOTAL FLIGHTS: \$2,049.28

MEALS

Mon, Oct. 10:

- 1) Lunch at St. Hubert
 - a. \$28pp
- 2) Dinner at Brasserie 701
 - a. \$65.1pp

Wednesday, Oct. 11:

- 1) Lunch at H3
 - a. \$46.4pp

Thurs, Oct. 12:

- 1) Lunch at Gaia Restaurant
 - a. \$49.9pp

Friday, Oct. 13

- 1) Dinner at Messinn
 - a. \$51.43pp

Total Food: \$240.83 pp

TRANSPORTATION:**BUSES:**

Canada:	$\$899.36 / 15 =$	\$59.96
Iceland:	$\$1700 / 13 =$	\$130.76

Total Busses: \$190.72**Total Ubers: \$207.00****Total Transportation: \$396.96**

OTHER:**Conference**

Arctic Circle Assembly Conference	Arctic Circle	Booked for	\$		
Fees	Assembly	13	1,890.85	\$	145.45
	Arctic Circle	Booked for	\$		
ACA Lunch Oct. 13	Assembly	13	287.95	\$	22.15

Excursions

		Booked for		Purchase	
Golden Circle Tour	ICELANDIA	18	\$ 2,160	12-Sep Card	\$120

Further explanation for Golden Circle:

About: "The Golden Circle Tour was a necessary excursion to supplement the delegation's previous meetings in Iceland. The Tour provided the delegation a view of Iceland's natural environment—including geothermal locations—that constitute the country's energy production, economic development, and research. Visiting these locations, which are not widely accessible in the United States, provided unique context to the delegation's meetings with Iceland's National Energy Authority, Iceland's Ministry of Foreign Affairs, CarbFix, and panels at the Arctic Circle Assembly. We are happy to provide more information if necessary."

TOTAL "OTHER" FEES: \$287.60

Filing Location

Select Committee on Ethics
220 Hart Senate Office Building
Washington, DC 20510
Telephone 224-2981

SELECT COMMITTEE ON ETHICS**Reporting Acceptance of Gifts from a Foreign Government or Multinational Organization**

Required by 5 U.S.C. § 7342. The text of the relevant portions of the Foreign Gifts and Decorations Act is attached. This report is not applicable to foreign decorations or grants and other forms of assistance covered by section 108A of the Mutual Educational and Cultural Exchange Act of 1961.

Members, officers, or employees of the Senate must complete this form if they, or their spouse or dependents, have accepted from a foreign government a tangible gift or a gift of travel or expenses for travel taking place entirely outside of the United States (such as transportation, food, lodging or entertainment), of more than minimal value—defined as more than \$100.

Name(s) of Gift Recipient(s)—*Include Title and Employing Office for Staff:*

Robert Julien - Deputy Communications Director, office of Senator Bob Menendez

Signature of Individual Preparing Report—*Include Title and Phone No. if Prepared by Staff:*

Robert C. John - Deputy Communications Director (202) 308-6785

Date of this Report: *10/14/2022*

Tangible Gifts of More Than \$100

Date Accepted (MMDDYYYY)	Description of Gift	Estimated U.S. Dollar Value When Accepted	Disposition or Location		Identity of Foreign Donor and Government	Circumstances Justifying Acceptance
			Do you wish to retain gift for official use?	If "yes", where will gift be displayed?		
Feb. 24, 2016	Candleabra handcrafted of a filigree design. Silver with gold plating.	\$200	Yes	SH 220	Defense Minister Moshe Ya'alon Govt. of Israel	Non-acceptance would cause donor embarrassment

Gifts of Travel or Expense of Travel of more than \$100 Taking Place Entirely Outside of the United States

Date(s) Accepted	Description (Transportation, Food, Lodging and Entertainment)	Identity of Foreign Donor and Government	Circumstances Justifying Acceptance
FEB. 23-24, 2016	Transportation within Israel via small military aircraft to military installations, including lodging and meals.	Defense Minister Moshe Ya'alon, Govt. of Israel	Official travel to view installations and to discuss Mideast security. No commercial transportation was available to these sites.
Oct. 11, 2022	Transportation within Quebec via small private aircraft to hydroelectricity facility, including 1 meal.	Hydro-Quebec (owned by the Quebec Government)	Official travel to view Hydro-Quebec's hydro-electricity facility and to discuss sustainable energy and trade with our Northern ally. No commercial transportation was available to visit this site.

POST ETHICS FINAL ITINERARY
Robert Julien

Schedule for 2022 Congressional Staff Trip
Woodrow Wilson International Center for Scholars
Foreign Policy Fellowship Program, Canada Institute, & Polar Institute
October 10-15, 2022

Time Zones:

Arlington VA, USA	Eastern Daylight Time (GMT -4)
Montreal, Canada	Eastern Daylight Time (GMT -4)
Reykjavik, Iceland	Greenwich Mean Time (GMT)

Contacts:

Jorden Jones	Congressional Relations
Paige Rotunda	Congressional Relations
Jack Durkee	Polar Institute
Zoe Reid	Canada Institute

Montreal Consular Affairs	+ 514-636-3875
Reykjavik Consular Affairs	+ 354 545 0 112

****All times indicated are local time on the ground.**

Monday, October 10, 2022**Arlington, VA → Montreal, Canada***Attire: Casual/Travel*

6:30 am **DELEGATION MEETS AT DULLES INTERNATIONAL AIRPORT (IAD)**
Location: Bottom of the Escalators Before TSA Security

9:00 am **FLIGHT DEPARTS IAD FOR FINAL DESTINATION AT MONTREAL TRUDEAU INTERNATIONAL AIRPORT (YUL)**
United #3996

10:50 am **FLIGHT ARRIVES AT MONTREAL (YUL)**
Time change from departure airport: 0 hours

12:00 PM **DEPART MONTREAL-TRUDEAU INTERNATIONAL AIRPORT (YUL) FOR LUNCH AT ST. HUBERT (30 mins)**
POC: Jorden Jones and Emergency Number: +606-224-7475

1:30 PM **LUNCH AT ST. HUBERT**
Location: 100 Saint-Catherine St W, Montreal, Quebec H5B 1B9, Canada

2:30 PM **SPEAKER SESSION WITH UQAM (L'Université du Québec à Montréal)**
LOCATION: 405 Rue Sainte-Catherine Est, Montréal, QC H2L 2C4, Canada

SPEAKERS:

- Frédérick Gagnon, Professeur titulaire | Full Professor, Département de science politique | Department of Political Science
- Chris Sands, Director of Canada Institute, Wilson Center

TOPICS:

- US-Canada Relations
- Canadian Perceptions of U.S. Politics and its Global Impact

3:30 PM **DEPART UQAM FOR HOTEL DAUPHIN MONTREAL CENTRE-VILLE**

4:00 PM **ARRIVE HOTEL DAUPHIN MONTREAL CENTRE-VILLE AND CHECK IN**
Address: 1025, Bleury
Montreal, Quebec

Phone: + +1 514-788-3888

5:00-7:00 pm

FREE TIME

**** All activities are at the expense of the participant*

7:50-8:00 pm

**DEPART HOTEL DAUPHIN MONTREAL CENTRE-VILLE
ENRTE WELCOME DINNER (7 mins)**

Group will walk (7 min walk) from the lobby of the hotel to the restaurant)

Dress: Snappy Casual

8:00-10:00 pm

WELCOME DINNER AT BRASSERIE 701 RESTAURANT (1.5 hours)

Address: 701 Cote de la Place d'Armes
Montreal, Quebec

Phone: +1 514-904-1201

About: A menu of French brasserie classics inside a chic space with decorative chandeliers & high ceilings. Click here for the [menu](#).

Participants: Jorden Jones, Wilson Center
Jack Durkee, Wilson Center
Zoe Reid, Wilson Center
Chris Sands, Wilson Center
Paige Rotunda, Wilson Center
Alexandra Heller, Rep. Raul Ruis
Yazeed Abdelhaq, Sen. Chuck Schumer
Robert Julien, Sen. Bob Menendez
Leslie Shedd, Rep. Mike McCaul
Katie Morley, Rep. Adrian Smith
Olivia Elkins, Sen. Patty Murray
Jordan Pakula, Sen. Pat Toomey
Dorothy Clark, Rep. Tom Emmer
David Russell, Rep. John Moolenaar
Dhishal Jayasinghe, Sen. Bernie Sanders

Featured Guest: Justin Masse, **Professor, Department of Political Science, Université du Québec à Montréal (UQAM)**

10:00 pm END

DEPART DINNER ENRTE DAUPHIN MONTREAL CENTRE-VILLE (7 mins)

7 minute walk back to hotel; optional Uber/Taxi

RON

DAUPHIN MONTREAL CENTRE-VILLE
Montreal, Quebec

Tuesday, October 11, 2022

Montreal, Canada to the James Bay and Raddison, Quebec

Focus: Hydro-Energy and the U.S. Trade Relationship with Quebec

Attire: Casual (see further details below)

Temperature

Note: temperatures vary considerably. Current forecasts indicate temperatures in the low 40s.

Suggested attire

- Warm and comfortable clothing (jeans, sweater, coat or raincoat depending on temperature)
- Walking/hiking shoes (or tennis shoes)
- Camera (photos allowed during outside portion of the tour, but not inside the generating station or the substation)

Cell phone coverage

Most cellphone networks are available in the area, but reception may be affected by various factors, including system availability and capacity, customer's equipment, signal strength, topography and environmental conditions. Coverage map:

<http://www.comparecellular.com/coverage-maps/>

Participants for ALL Activities:

Jorden Jones, Wilson Center
Jack Durkee, Wilson Center
Zoe Reid, Wilson Center
Chris Sands, Wilson Center
Paige Rotunda, Wilson Center
Alexandra Heller, Rep. Raul Ruis
Yazeed Abdelhaq, Sen. Chuck Schumer
Robert Julien, Sen. Bob Menendez
Leslie Shedd, Rep. Mike McCaul
Katie Morley, Rep. Adrian Smith
Olivia Elkins, Sen. Patty Murray
Jordan Pakula, Sen. Pat Toomey
Dorothy Clark, Rep. Tom Emmer
David Russell, Rep. John Moolenaar
Dhishal Jayasinghe, Sen. Bernie Sanders

6:30 am

**DEPART HOTEL DAUPHIN MONTREAL CENTRE-VILLE
ENRTE PRIVATE AIR TERMINAL IN DORVAL (30 mins)**

Metropolitan Shuttle Charter Bus Company

POC: Jorden Jones and Emergency Number: +606-224-7475

Bus will depart from the lobby

7:00 am

**ARRIVE PRIVATE AIR TERMINAL IN DORVAL FOR
WELCOME AND BRIEFING ON Hydro-Quebec (30 mins)**

Address: Skyservice
9785, avenue Ryan

Dorval, Quebec

Greeted by: **Gary Sutherland**, Director, Strategic Affairs and Stakeholder Relations, Northeast Markets chez Hydro-Québec

Topic:

- What Hydro-Quebec (HQ) is and the agenda for the day
- How HQ contributes to clean energy and its impact on US export markets

7:30-10:00 am

DEPARTURE FROM DORVAL AIR TERMINAL ON CHARTED PLANE AND ON BOARD BREAKFAST BRIEFING (2.5 hours)

Breakfast served on Board (individual trays, food allergies/intolerances taken into account)

Presenters: **Gary Sutherland**, Director, Strategic Affairs and Stakeholder Relations, Northeast Markets chez Hydro-Québec

Topics:

- Overview on Hydro-Quebec (15 mins)
- What is Clean Energy? (15 mins)
- Reducing carbon emissions (15 mins)
- Initiatives by the Quebec government for climate security (30 mins)

Presenter: *Chris Sands, Director of the Canada Institute, The Wilson Center*

Topics:

- Initiatives by the Quebec government for climate security (30 min)
- Q&A (30 min)

10:00-10:10 am

ARRIVE AT LA GRANDE RIVIERE AIRPORT AND WELCOMED BY HYDRO-QUEBEC REPRESENTATIVE (10 mins)
Hydro Quebec Shuttle Bus

Address: Km 590, James Bay Rd, Quebec, Canada

Greeted by: **Éric Hamel**, Head – Corporate Visits, Hydro-Québec

Phone: +1 819-638-8847

10:10-10:45 am

DEPART LA GRANDE RIVIERE AIRPORT ENTRE JAMES BAY FACILITY (35 mins)

Buses provided by Hydro-Quebec

10:45-12:00 pm

ARRIVE ROBERT-BOURASSA HYDROELECTRIC FACILITIES

Address: Complexe Pierre-Radisson 66 Desgroseillers Radisson, Québec, J0Y 2X0, QC, Canada

Phone: (800) 291-8486

Presenter: **Gary Sutherland**, *Director, Strategic Affairs and Stakeholder Relations, Northeast Markets chez Hydro-Québec*

Topics of Discussion:

- Water intakes, dykes, and dams
- Spillway
- Lookout Points
- How these hydro-electricity structures contribute to the global green economy

12:00-12:45 pm

LUNCH BRIEFING WITH HYDRO-QUEBEC (45 mins)

Provided by HYDRO-QUEBEC with Staff

Choice of 3 options, including one vegetarian option and full salad bar

Topic:

- Building staff capacity for large clean energy projects, daily operations

12:45-1:00 pm

DEPART FOR ROBERT-BOURASSA UNDERGROUND GENERATING STATION (15 mins)

HQ Shuttle Bus

Address: Complexe Pierre-Radisson 66 Desgroseillers Radisson, Québec, J0Y 2X0, QC, Canada

Note to visitors

Visitors must have with them identification (passport or driver's licence for Canadians and Americans) before they can tour the facility. Cameras, cell phones and handbags are prohibited inside the power plant.

The electromagnetic fields in power plants may disrupt pacemaker operation. As a precaution, pacemaker users will not be allowed on the part of the guided tour that takes place inside the power plant.

1:00-2:15 pm

ARRIVE AND TOUR ROBERT-BOURASSA UNGERGROUND GENERATING STATION (1 hour, 15 mins)Presenter: **Eric Hamel**, Head – Corporate Visits, Hydro-Québec**Topics of Discussion:**

- Machine Hall (30 mins)
- Turbine Pit (30 mins)
- How and why are these facilities necessary to generate clean energy? (15 mins)

2:15-2:30 pm

DEPART ROBERT-BOURASSA UNGERGROUND GENERATING STATION FOR RADISSON SUBSTATION (15 mins)

HQ Shuttle Bus

Bus will depart from Robert-Bourassa Underground to Radisson Substation

2:30-3:00 pm

ARRIVE AND TOUR RADISSON SUBSTATION (30 mins)Presenter: **Gary Sutherland**, Director, Strategic Affairs and Stakeholder Relations, Northeast Markets chez Hydro-Québec**Topics of Discussion:**

- Machine Hall (10 mins)
- Turbine Pit (10 mins)
- How do these facilities differ? Why are both necessary for generating clean energy? – Wrap Up (10 mins)

3:00-3:15 pm

DEPART RADISSON SUBSTATION FOR LA GRANDE RIVIERE AIRPORT (15 mins)

3:15-3:30 pm

ARRIVE AND CHECK IN AT LA GRANDE RIVIERE AIRPORT

Address: Km 590, James Bay Rd, Quebec, Canada

Phone: +1 819-638-8847

3:30-6:00 pm

DEPART LA GRANDE RIVIERE AIRPORT FOR MONTREAL (2.5 hours)

Snacks will be served on board, provided by HQ

Presenter: **Gary Sutherland**, Director, Strategic Affairs and Stakeholder Relations, Northeast Markets chez Hydro-Québec and **Chris Sands**, Director of Canada Institute, Wilson Center

Topics of Discussion:

- Debrief of the day and Q&A Session with Gary Sutherland and Dr. Christopher Sands
- Benefits of cross-border trade in electrons. How can energy between Canada and the United States be enhanced?
- What is the overall importance of water as a renewable resource? How does water contribute to US-Canada relations? How does it contribute to environmental and national security?

6:00-6:10 pm

ARRIVE PRIVATE AIR TERMINAL IN DORVAL AND LOAD BUSES (10 mins)**HQ Charter Bus**

POC: Jorden Jones and Emergency Number: + 1 606-224-7475

6:10-6:40 pm

DEPART PRIVATE AIR TERMINAL IN DORVAL FOR HOTEL DAUPHIN MONTREAL CENTRE-VILLE (30 mins)

6:40 pm END

ARRIVE DEPART HOTEL DAUPHIN MONTREAL CENTRE-VILLE**END OF PROGRAMMING**

Participants to acquire dinner by their own means

RON**HOTEL DAUPHIN MONTREAL CENTRE-VILLE**

Wednesday, October 12, 2022**Montreal, Canada***Focus: Climate Security is National Security**Attire: Business Casual but note that you MUST WEAR CLOSED-TOE SHOES*

Participants for ALL Activities: Jorden Jones, Wilson Center
Jack Durkee, Wilson Center
Zoe Reid, Wilson Center
Chris Sands, Wilson Center
Paige Rotunda, Wilson Center
Alexandra Heller, Rep. Raul Ruis
Yazeed Abdelhaq, Sen. Chuck Schumer
Robert Julien, Sen. Bob Menendez
Leslie Shedd, Rep. Mike McCaul
Katie Morley, Rep. Adrian Smith
Olivia Elkins, Sen. Patty Murray
Jordan Pakula, Sen. Pat Toomey
Dorothy Clark, Rep. Tom Emmer
David Russell, Rep. John Moolenaar
Dhishal Jayasinghe, Sen. Bernie Sanders

6:00 – 9:00 am **BREAKFAST ON YOUR OWN AT HOTEL (1 hour or so)**
Breakfast is included in the hotel reservation and is served from 6am – 10am.

9:00-9:30 am **DEPART HOTEL DAUPHIN MONTREAL CENTRE-VILLE FOR LITHION RECYCLING PLANT (30 mins)**
Bus Company: Bus.Com
POC: Jorden Jones and Emergency Number: + 1 606-224-7475
Bus will depart from the front of the hotel

9:30-10:55 am **ARRIVE LITHION RECYCLING PLANT FOR TOUR (1 hour, 25 mins)**
Address: 9388 Boulevard du Golf
Anjou, Quebec
Phone: + +1 514-353-4008

Presenters: **Chris Sands, Director of the Canada Institute, Wilson Center**

Topics of Discussion:

- Background on Critical Minerals
- Importance of Critical Mineral and Recycling for Energy

10:55-11:00 am

LOAD CHARTER BUS AT FRONT ENTRANCE OF LITHION PLANT (5 mins)

POC: Jordan Jones and Emergency Number: + 1 606-224-7475

Bus will depart from the front of the recycling plant

11:00-11:45 pm

DEPART LITHION RECYCLING PLANT FOR MOBILE BRIEFING (45 mins)

Presenters: **Dr. Christopher Sands**, Director of Wilson Center's
Canada Institute

Topics of Discussion:

- Quebec plan for Green Economy
- Critical and strategic minerals plan and battery storage that feed into the plan
- Why is matters for the United States

12:00-1:00 pm

ARRIVE AT THE RESTAURANT H3 FOR BRIEFING AND ROUNDTABLE POLICY DISCUSSION (1 hour)

Address: 340 Rue De La Gauchetière O 2e étage, Montréal, QC
H2Z 0B9, Canada

Phone: + 514-398-9695

Presenters:

- **Ana Escrogima**, U.S. Consulate General in Montreal
- **Dr. Christopher Sands**, Director of Wilson Center's
Canada Institute
- **Garret Flint**, Political / Economic Officer, U.S. Consulate
General Montreal
- **Steven Carsom**, Political Officer, U.S. Consulate in
Montreal

Topics of Discussion:

- U.S.-Canada Relations
- USMCA & Trade

1:00-1:05 pm

LUNCH CONCLUDES & WRAP UP (5 mins)

1:05-1:10 pm	DEPART RESTAURANT H3 FOR HOTEL DAUPHIN MONTREAL Walk 1 min to Hotel
1:10-3:00 pm	BREAK (2 hours to chill & to gather belongings) <i>Everyone returns to rooms, gathers belongings, and checks out of hotel</i>
3:00 pm	DEPART HOTEL DAUPHIN MONTREAL FOR MONTREAL- TRUDEAU INTERNATIONAL AIRPORT (YUL) (30 mins) <i>Ubers will leave from lobby. Please be down early enough to check out and be on the bus ready to depart on time</i>
4:30 pm	ARRIVE MONTREAL-TRUDEAL INTERNATIONAL AIRPORT (YUL)
6:50 pm	FLIGHT DEPARTS MONTREAL-TRUDEAL INTERNATIONAL AIRPORT (YUL) (~1 hour, 30 mins) Air Canada #8944 Flight Time: 1 hour, 25 mins
8:30 pm	FLIGHT ARRIVES AT NEWARK INTERNATIONAL AIRPORT (EWR) WITH LAYOVER (~ 2 hours) Layover time on the ground: 2 hours, 30 mins <i>*** You may get your own dinner during the layover OR eat the dinner provided on the plane</i>
10:55- 8:30 am	FLIGHT DEPARTS NEWARK INTERNATIONAL AIRPORT FOR OVERNIGHT FLIGHT TO KEFLAVIK AIRPORT (KEF) (~7 hours) Icelandair #623 Flight time: 6 hours, 45 mins <i>Dinner served on flight, additional food available for purchase</i>
RON	OVERNIGHT FLIGHT

Thursday, October 13, 2022**Toronto, Canada → Reykjavik, Iceland***Focus: U.S.-Icelandic Relations & Renewable Energy Efforts**Afternoon Attire: Business*

Participants for ALL Activities: Jorden Jones, Wilson Center
Jack Durkee, Wilson Center
Zoe Reid, Wilson Center
Dr. Mike Sfraga, Wilson Center
Alexandra Heller, Rep. Raul Ruis
Yazeed Abdelhaq, Sen. Chuck Schumer
Robert Julien, Sen. Bob Menendez
Leslie Shedd, Rep. Mike McCaul
Katie Morley, Rep. Adrian Smith
Olivia Elkins, Sen. Patty Murray
Jordan Pakula, Sen. Pat Toomey
Dorothy Clark, Rep. Tom Emmer
David Russell, Rep. John Moolenaar
Dhishal Jayasinghe, Sen. Bernie Sanders

8:30 am

ARRIVE AT KEFLAVIK AIRPORT (KEF)

Time change from departure airport: - 4:00 hours (UTC)

Location: Group will meet at the end of the jet bridge before moving to customs and passport control as a group.

9:30 am

DEPART KEFLAVIK AIRPORT (KEF) FOR GOLDEN CIRCLE TOUR

10:00 AM

GOLDEN CIRCLE TOUR

Tour Company: Reykjavik Excursions

About: "The Golden Circle Tour was a necessary excursion to supplement the delegation's previous meetings in Iceland. The Tour provided the delegation a view of Iceland's natural environment—including geothermal locations—that constitute the country's energy production, economic development, and research. Visiting these locations, which are not widely accessible in the United States, provided unique context to the delegation's meetings with Iceland's National Energy Authority, Iceland's Ministry of Foreign Affairs, CarbFix, and panels at the Arctic Circle Assembly. We are happy to provide more information if necessary.

Topics of Importance:

- Energy: Geothermal, Hyrdoelectric
- Icelandic History

4:00 PM **DEPART GOLDEN CIRCLE TOUR FOR RECEPTION (1 hour)**

5:15-7:15 PM **ARRIVE AT FRIENDS OF THE FAR NORTH: ALASKA & GREENLAND RECEPTION (2 hours)**

Location: Harpa Concert Hall
101 Reykjavik, Iceland
Bjortuloft Reception Hall

Presenter: **Dr. Mike Sfraga**, Founder of the Polar Institute, The Wilson Center/Chairman of the Arctic Research Commission (Appointed by POTUS) – Introductory Remarks

Múte Bourup Egede, Prime Minister of Greenland

Topics of Discussion:

- Areas of Collaboration and Energy Security for the US and Greenland

7:15 pm END **END OF PROGRAMMING (10 min walk to hotel)**
****Note: Optional 9 min walk back to Exeter Hotel with Jorden*

RON **EXETER HOTEL**
Reykjavik, Iceland

Friday, October 14, 2022

Reykjavik, Iceland

*FOCUS: ARCTIC CIRCLE ASSEMBLY**ATTIRE: BUSINESS******Note: YOU WILL NEED YOUR PASSPORT TO ACCESS US EMBASSY**

Participants for ALL Activities: Jorden Jones, Wilson Center
Jack Durkee, Wilson Center
Zoe Reid, Wilson Center
Dr. Mike Sfraga, Wilson Center
Alexandra Heller, Rep. Raul Ruis
Yazeed Abdelhaq, Sen. Chuck Schumer
Robert Julien, Sen. Bob Menendez
Leslie Shedd, Rep. Mike McCaul
Katie Morley, Rep. Adrian Smith
Olivia Elkins, Sen. Patty Murray
Jordan Pakula, Sen. Pat Toomey
Dorothy Clark, Rep. Tom Emmer
David Russell, Rep. John Moolenaar
Dhishal Jayasinghe, Sen. Bernie Sanders

8:00-8:45 am **BREAKFAST ON YOUR OWN AT EXETER HOTEL** (45 mins)
Breakfast included in the hotel reservation. Breakfast begins at 7:00 am.

8:45-9:00 am **DEPART EXETER HOTEL FOR HARPA CONCERT HALL** (10 MIN WALK)
Group will depart from lobby. It is a 10 minute walk from the hotel to the Concert Hall.
Note: Staffers are welcome to depart hotel earlier if they want to attend an 8:30a panel

9:00 AM **ARRIVE AT HARPA CONCERT HALL & REGISTER** (3 hours)
****Note: A map/instructions for navigating the Summit will be provided by Jorden and Jack*
****NOTE: JACK AND JORDEN WILL GIVE YOU YOUR BADGES/TICKET/LUNCH TICKET*

Address: Harpa Concert Hall
101 Reykjavik, Iceland
Phone: + +354 528 5050

About: *Arctic Circle is the largest network of international dialogue and cooperation on the future of the Arctic and our Planet. It is an open democratic platform with*

participation from governments, organizations, corporations, universities, think tanks, environmental associations, indigenous communities, concerned citizens, and others. It is nonprofit and nonpartisan.

9:20 AM

MEETING WITH FORMER PM H.E. Ólafur Ragnar Grímsson AT ASSEMBLY – WILSON CENTER EVENT ONLY (1 hour, 15 mins)

Address: Harpa Concert Hall
101 Reykjavik, Iceland
Visa Room

Presenters: President Ólafur Ragnar Grímsson, President of Iceland 1996-2016.

Adis Olafsfottir, CEO, Arctic Circle

10:00 pm

ARRIVE AND MEETING ICELAND'S MINISTRY OF FOREIGN AFFAIRS (1 hour)

Address: Harpa Concert Hall, Stemma Room

Presenter: **Maria Jonsdottir, Political Director, Iceland Ministry of Foreign Affairs**

Ambassador Bergdis Ellertsdottir, Ambassador of Iceland to the US

Topics of Discussion:

- US- Icelandic Relations
- Iceland's Global Relationships and National Security
- Iceland and NATO
- Iceland Arctic Strategy

10:45 AM

ATTEND THE ARCTIC CIRCLE ASSEMBLY (3 hours)

****Note: A map/instructions for navigating the Summit will be provided by Jorden and Jack*

Address: Harpa Concert Hall
101 Reykjavik, Iceland
Phone: + 354 528 5050

Topics of Discussion:

- Click [here](#) to choose which 3 sessions you would like to attend (**START AT PG. 50**)

12:15-1:00 pm

LUNCH AT ASSEMBLY (45 mins)

Hosted by: **Arctic Circle Assembly** (****Lunch is included in fees for the conference*)

1:30 pm

LUNCH ENDS

1:45 pm

DEPART ASSEMBLY FOR MEETING WITH CARBFIX

Location: Everyone meet in the Lobby of the Harpa Concert Hall

2:15 pm

ARRIVE AND MEETING WITH CARBFIX OFFICIALS (15 min intro)

Address: Hellisheioarvirkjun
801 Selfoss, Iceland

Presenter: Dr. Edda Sif Pind Aradóttir, CEO of Carbfix

About: **Carbfix** is academic-industrial partnership that has developed a novel approach (CO₂-to-stone) to capturing and storing CO₂ by its capture in water and its injection into subsurface basalts

Topics of Discussion:

- Permanent storage solution for carbon
- How CO₂ turns into stone underground (in > 2 years)

2:30 PM

TOUR HELLISHEIOI GEOTHERMAL POWER PLANT (1 hour)

Presenters: Dr. Bergur Sigfusson, Head of CO₂ Capture and Injection, and Thomas Ratouis, Head of Reservoir Engineering

Topics of Discussion:

- How to capture and store CO₂
- General Plant Operations
- How the plant operates as a public-private partnership

3:35 PM

DEPART GEOTHERMAL PLANT FOR AFTERNOON TEA WITH THE U.S. AMBASSADOR TO ICELAND AT HER RESIDENCE

LOCATION: WE WILL MEET IN THE LOBBY OF THE HARPA CONFERENCE HALL TO TAKE BUS TO THE MEETING LOCATION

- Ambassador Carrin Patman, US Ambassador to Iceland

- Ms. Michelle Yerkin, Charge d'Affaires (Chief of Mission)
- (Additional staff of US Embassy)

Note: You MUST have your Passport in order to get into the Embassy

5:00 pm

MEETING CONCLUDES

DEPART FOR THE HOTEL VIA BUS

5:30 pm

ARRIVE AT HOTEL, LIBERTY TO GET READY FOR DINNER

DEPART FOR THE HOTEL VIA BUS

7:00 pm

DINNER HOSTED BY WILSON CENTER

Location: Messinn

Lækjargata 6, 101 Reykjavík, Iceland

TRANSPO: WALKING FROM THE HOTEL

Menu:

- Starter

Creamy lobster soup with cognac and langustine tails

- Main course

Artic Char with honey, almonds, cherry tomatoes, lemon and butter and Fillet of cod with chilli, curry, leek, mangochutney, white wine, cream and parmesan

- Dessert

Chocolate cake with pistachio ice ream, pistachio nuts, whipped cream, berries and berry sauce

RON

EXETER HOTEL
Reykjavik, Iceland

Saturday, October 15, 2022**Reykjavik, Iceland***FOCUS: TRAVEL DAY**ATTIRE: CASUAL*

4:00 am **MEET IN LOBBY OF HOTEL (45 mins).**

5:30 pm **ARRIVE AT KEFLAVIK AIRPORT (KEF) (~3 hours)**
Address: 235 Keflavikurflugvollur
 235 Keflavik, Iceland
Emergency Contact: Jorden Jones Phone: 1-606-224-7475

7:30 am **FLIGHT DEPARTS KEFLAVIK AIRPORT (KEF) FOR DUBLIN
INTERNATIONAL AIRPORT (DUB)**
Icelandair #FI416

11:05 am **FLIGHT LANDS AT DUBLIN (DUB) FOR LAYOVER
(Approx. 5 hour layover; leaving 1-2 hours for customs)**

4:25 pm **FLIGHT FROM DUBLIN (DUB) TO DULLES INTERNATIONAL
AIRPORT (IAD) DEPARTS**
Aer Lingus #EI0119

7:20 pm **ARRIVE WASHINGTON DULLES INTERNATIONAL AIRPORT
(IAD) AND PROGRAMMING CONCLUDES**
Time change from departure airport: + 4 hours
****Note: Participants are responsible for making travel arrangements
from Dulles airport to their homes.

Date/Time Stamp:

ETHIC OCT 4'22PM 3:29

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: Robert JulienEmploying Office/Committee: Senator Bob MenendezPrivate Sponsor(s) (list all): Woodrow Wilson International Center for ScholarsTravel date(s): October 10, 2022 - October 15, 2022

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

Destination(s): Montreal, Quebec, Canada & Reykjavik, Iceland

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

This staff delegation trip to Canada and Iceland will help reinforce Robert's working knowledge and ability to craft communications strategies for the Senator's personal office on critical issues such as trade, the environment, and immigration policy - the latter topic focused on how climate change will impact long-term human migration. This trip will also help improve Robert's regular collaboration with the Senator's communications team on the Senate Foreign Relations Committee.

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:

10/4/2022
 (Date)

Robert C. Julien
 (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 Bob Menendez hereby authorize Robert C. Julien
 (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) ☐

10/4/2022
 (Date)

Robert Menendez
 (Signature of Supervising Senator/Officer)

Julien, Robert (Menendez)

From: Jorden Jones <Jorden.Jones@wilsoncenter.org>
Sent: Wednesday, August 24, 2022 3:33 PM
To: Jorden Jones
Cc: Zoe Reid; Jack Durkee
Subject: Wilson Center Congressional Staff Delegation to Canada & Iceland

Good Afternoon,

Congratulations! *You have been selected to attend the Wilson Center's Staff Delegation to Canada and Iceland on October 10th-15th.*

First of all, we are delighted to have you! This trip should be an interesting, fun, and wide-ranging experience directly contributing to your work on the Hill. We will be exploring several topics such as Arctic security, trade, energy, climate, and more. **Please acknowledge this email and confirm your attendance by noon on Friday, August 26th.**

Second, I want to introduce you to our team: Zoe (*Canada Institute*), Jack (*Polar Institute*), and I are leading logistics for this trip. We will all be attending the trip with you, along with subject-matter experts Chris Sands (*Director of the Canada Institute*) and Mike Sfraga (*Chair and Distinguished Fellow of the Polar Institute*). **If you have any questions, please reach out to me.**

Third, **I have created a Google Drive to easily share documents/updates/itineraries/etc.** In this Drive, I have created a folder for the Ethics Forms for each participant that must be submitted to the committee **before/by September 6th.**

A few notes:

- We are still working on finalizing the Primary Trip Sponsor Form & the Itinerary, but I will notify you as soon as it's completed so you can submit the documents to the Ethics Committee.
- For now, I'm placing a **draft itinerary** in the Drive for you to share with your office for approval. If you need any additional information to share with your boss, please let me know.
- I'll continue to keep you all closely updated as we finalize the itinerary with our partners.
- We will have a **pre-trip coffee briefing on the morning of Tuesday, October 5th** with HydroQuebec's DC team. This will be a wonderful opportunity to meet everyone attending the trip and ask any additional questions you may have. More details to come.

Final side note for now: I am new to organizing Staff Dels, so your patience/help is greatly appreciated. We are working hard to make this a wonderful experience for you all, and if there's anything we can do to improve the trip, let me know.

Looking forward to an incredible experience in October!

Jorden Jones (she/her)

Program Coordinator, Congressional Relations

Office | 202.691.4364

Mobile | 606.224.7475



**Wilson
Center**



**Congressional
Relations**



Foreign Policy
Fellowship Program

List of Participants

Staff Delegation to Canada & Iceland
October 10-15th, 2022
The Wilson Center

1. Alexandra Heller
 - a. Legislative Assistant, Office of Rep. Raul Ruiz
 - b. Reason for attending trip: Congressman Ruiz' interest in energy; environment; trade
 - c. alexandra.heller@mail.house.gov
2. Leslie Shedd
 - a. Communications Director, Senior Advisor, Deputy Chief of Staff for Communications, House Foreign Affairs Committee & Office of Rep. Michael McCaul
 - b. Reason for attending trip: Congressman McCaul's interest in foreign affairs, trade, border security, energy, & the economy
 - c. leslie.shedd@mail.house.gov
3. Olivia Elkins
 - a. National Security Legislative Assistant, Office of Senator Patty Murray
 - b. Reason for attending trip: Represents Northern Border state; Senator Murray's interest in climate, energy, national security
 - c. olivia_elkins@murray.senate.gov
4. Dhishal Jayasinghe
 - a. Legislative Correspondent, Office of Senator Bernie Sanders
 - b. Reason for attending trip: Represents Northern Border state; Senator Sanders' interest in energy, environment, foreign policy and national security, and trade
 - c. dhishal_jayasinghe@sanders.senate.gov
5. Yazeed Abdelhaq
 - a. Legislative Correspondent, Office of Majority Leader Chuck Schumer
 - b. Reason for attending trip: Represents Northern Border state; Majority Leader Schumer's interest in energy, environment, foreign policy and national security, and trade
 - c. Yazeed_Abelhaq@schumer.senate.gov



Foreign Policy
Fellowship Program

6. David Russell
 - a. Deputy Chief of Staff, Office of Rep. John Moolenaar
 - b. Reason for attending trip: Represents Northern Border state; Congressman Moolenaar's interest in energy, foreign affairs, and national security
 - c. drussell@mail.house.gov
7. Dorothy Clark
 - a. Legislative Assistant, Office of Rep. Tom Emmer
 - b. Reason for attending trip: Represents Northern Border state; Congressman Emmer's interest in energy, natural resources, foreign affairs, trade, and national security
 - c. Dorothy.clark@mail.house.gov
8. Katie Morley
 - a. Senior Legislative Assistant, Office of Rep. Adrian Smith
 - b. Reason for attending trip: Congressman Smith's interest in energy, trade, homeland security
 - c. katie.morley@mail.house.gov
9. Robert Julien
 - a. Deputy Communications Director, Office of Senator Bob Menendez
 - b. Reason for attending trip: Senator Menendez's interest in foreign relations, national security, environment, climate change, and trade policy
 - c. robert_julien@menendez.senate.gov
10. Jordan Pakula
 - a. Legislative Aide, Office of Senator Pat Toomey
 - b. Reason for attending trip: Represents Northern Border state; Senator Toomey's interest in energy, national security
 - c. jordan_pakula@toomey.senate.gov

**Additional Information
Primary Trip Sponsor Form**

Staff Delegation to Canada and Iceland

October 10-15 2022

Senate Ethics Committee

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:*

- Montreal:
 - Hôtel Dauphin Montréal Centre-Ville is \$229 per night and above the per diem rate (\$179 for Montreal)
 - Although rate is above per diem, after much research and exploration of ALL options, we found this was the best rate for the proximity to accessible transportation and programming activities, as well as the money saved with an included breakfast.
 - For meal expenses: \$110 per day is under the federal per diem rate for Montreal (which is \$129 USD)
- Reykjavik:
 - Exeter Hotel is \$179 per night and under the per diem rate (\$220 for Reykjavik)
 - For meal expenses, \$110 per day is under the federal per diem rate for Reykjavik (which is \$130 USD)

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): Woodrow Wilson International Center for Scholars

2. Description of the trip: To learn about Canada and Iceland's energy, environment, security, trade, and Arctic policies & meet with government officials and other related experts crucial for US national security

3. Dates of travel: October 10-15th, 2022

4. Place of travel: Montreal, Quebec, Canada & Reykjavik, Iceland

5. Name and title of Senate invitees: See attached.

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:

N/A

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:

The Wilson Center is the primary trip sponsor and in charge of organization for the trip.

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

The Wilson Center aims to unite the world of ideas to the world of policy by supporting pre-eminent _____ scholarship and linking that scholarship to issues of concern to officials in Washington.

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

The Wilson Center has sponsored 11 Congressional Trips since 2014

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

The Wilson Center hosts the Foreign Policy Fellowship Program biannually for a cohort of 50 staff.

The Wilson Center also hosts Masterclasses, Briefings, and other events for Congressional Staff.

***See attached for additional information.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
☒ Good Faith estimate	\$1,470.00	\$816.00	\$550.00	\$338.00
☐ Actual Amounts	An additional estimate of \$1,500 will be included to pay for chartered plane TOTAL = \$2,970			Arctic Circle Assembly Conference Fees

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:

The entire trip is organized with regard to Congressional Staff participation

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

To focus specifically on the U.S.'s nearest Arctic global partners

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

Hôtel Dauphin Montréal Centre-Ville, Montreal, Quebec, Canada

Exeter Hotel, Reykjavik, Iceland

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

Montreal: Price, Proximity, Breakfast Included

Reykjavik: Price, Proximity to Harpa Concert Hall (Location of Arctic Circle Assembly)

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:

***See additional information attached.

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:

DCA to MTL: Coach Flight; MTL to James Bay: Chartered by HQ due to lack of ground transport; YUL to

YYZ: Coach Flight; YYZ to KEF: Coach Flight; KEF to IAD: Coach Flight

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. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Signature of Travel Sponsor: **Robert Litwak**

Digitally signed by Robert Litwak
DN: cn=Robert Litwak, o=Woodrow Wilson Center, ou=Senior Vice President,
email=robert.litwak@wilsoncenter.org, c=US
Date: 2022.09.06 14:37:52 -0400

Name and Title: Robert Litwak, Senior Vice President

Name of Organization: The Wilson Center

Address: 1300 Pennsylvania Avenue NW Washington, DC 20004

Telephone Number: 202-691-4179

Fax Number: N/A

E-mail Address: robert.litwak@wilsoncenter.org

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

October 6, 2022

Robert Julien
Office of Senator Robert Menendez
United States Senate
Washington, DC 20510

Dear Mr. Julien:

This responds to your recent correspondence requesting approval from the Select Committee on Ethics (the Committee) to accept an invitation you received to travel to Montreal, Quebec and Reykjavik, Iceland, on October 10–15, 2022, sponsored by the Woodrow Wilson International Center for Scholars (the Wilson Center). Provided that you adhere to the guidance set forth below, it appears that it is permissible for you to accept necessary expenses from the Wilson Center 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 Deputy Communications Director in the Office of Senator Robert Menendez. The Wilson Center invited you to travel to Montreal, Quebec and Reykjavik, Iceland, on October 10–15, 2022. The Wilson Center 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. The Wilson Center 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

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 *Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel – Glossary of Terms* at 2.

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 foreign trips for up to seven days. The seven-day limitation means seven 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

The Committee has determined that § 501(c)(3) non-profit organizations that are classified as private foundations, as opposed to public charities, may not pay for transportation from the United States to a foreign country.⁶ However, the Wilson Center represented to the Committee that it is a § 501(c)(3) public charity, as opposed to a private foundation, pursuant to the Internal Revenue Code.⁷

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 the Wilson Center's factual representations, it appears that it is permissible for you to accept necessary expenses from

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 See 26 U.S.C. § 4941 et seq. Section 501(c)(3) of the Internal Revenue Code broadly defines non-profit, charitable, tax-exempt organizations. These § 501(c)(3) organizations are then further defined or designated as "public charities" and "private foundations."

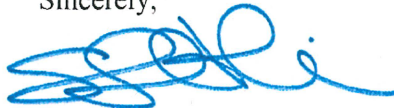
⁷ 26 U.S.C. § 501(c)(3).

the Wilson Center 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).

Please be advised that the United States Constitution prohibits the acceptance of any gift, including a meal, from a foreign government without the consent of Congress. In the Foreign Gifts and Decorations Act (FGDA), Congress consented to the acceptance by federal government officials of: (1) gifts of minimal value and (2) travel or the expenses for travel taking place entirely outside the United States, from a foreign government (which includes those acting as a representative or agent of a foreign government).⁸ The Senate has defined minimal value as \$100 or less. Further, pursuant to FGDA, there are certain reporting and procedural requirements that are imposed upon Members, officers, and employees who accept gifts from a foreign government. Please review the Committee's "Dear Colleague" letter of January 11, 2019, setting forth the items to be included in filing that report.

Finally, Senate Rule 34 requires a reporting individual⁹ 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

⁸ 5 U.S.C. § 7342.

⁹ 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.