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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**.

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SECRETARY OF THE SENATE
PUBLIC RECORDS
2022 SEP 30 PM 12:35

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.)

Conservative Partnership Institute (CPI)

Private Sponsor(s) (list all):

September 1, 2022 - September 3, 2022

Travel date(s):

Name of accompanying family member (if any):

Relationship to Traveler: ☐ Spouse ☐ Child

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

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☒ Good Faith Estimate ☐ Actual Amount	\$141.54	\$198	\$98	\$0

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

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

Provide a description of all meetings and events attended. *See Senate Rule 35.2(c)(6).* (Attach additional pages if necessary.): All meetings and events covered Senate procedure, rules, and strategy. Keynote addresses

were given by a former Secretary of the Senate and a former Senate Chief of Staff.

9/30/22
(Date)

Jackson Bergman
(Printed name of traveler)

Jackson Bergman
(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.

9/30/22
(Date)

Rand Paul
(Signature of Supervising Senator/Officer)

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Date/Time Stamp:

EMPLOYEE PRE-TRAVEL AUTHORIZATION

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

Name of Traveler: Jackson Berryman

Employing Office/Committee: U.S. Senator Rand Paul

Private Sponsor(s) (list all): Conservative Partnership Institute (CPI)

Travel date(s): September 1, 2022 - September 3, 2022

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

Destination(s): Cambridge, MD

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

As a Press Assistant to Senator Paul, I am responsible for communicating the Senator's message. This program trains staff on Senate procedure and strategy. Attending this trip will help me communicate the Senator's message in a more effective and timely manner.

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:

9/30/22
(Date)

Jackson Berryman
(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):

Rand Paul

Jackson Berryman

I, _____ hereby authorize _____
(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) ☐

9/30/22
(Date)

Rand Paul
(Signature of Supervising Senator/Officer)

Friday, September 30, 2022 at 11:30:10 Eastern Daylight Time

Subject: Senate Procedure Symposium
Date: Tuesday, July 26, 2022 at 1:19:30 PM Eastern Daylight Time
From: James Holland
To: Berryman, Jackson (Paul)
CC: Lauren Baldwin
Attachments: CPI Sponsored Travel Form Addendum.docx, CPISymposiumAgenda v1.0.docx, CPI Sponsored Travel Form.pdf

All,

On behalf of the Conservative Partnership Institute, I would like to invite you to participate in our Senate Procedure Symposium hosted on the Eastern Shore of Maryland, September 1-3, 2022.

At this retreat, you will learn about the Senate's rules, amending in the Senate, Appropriations and Rule 16, and much more. I've attached the trip sponsor paperwork as well as the agenda to this email. In addition, each traveler should visit the Senate Ethics Committee website and view the employee checklist

here: https://www.ethics.senate.gov/public/_cache/files/5a5650a7-7295-4cd5-b456-2fe5c6095b9f/employee-privately-sponsored-travel-checklist.pdf.

If you are able to attend, please send an email reply to this invitation and make sure to submit all of your paperwork to the Senate Ethics Committee no later than August 1st.

All the best,

James

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James P. Holland
Director of External Relations
Conservative Partnership Institute
(630) 707-2284

CPI's Senate Procedure & Strategy Symposium

September 1st – 3rd

Thursday

- 9:00 – 11:00 am** **Travel from 300 Independence Ave, SE to Cambridge, MD**
- 11:00 – 12:00 pm** **Arrival at CPI Property and Check-in**
- 12:00 – 2:30 pm** **Lunch and SESSION 1 – The Basics**
The Senate floor, role of the parliamentarian, Senate calendars, regular order, unanimous consent, hotlines, Senate rules vs precedents.
Speakers: Ed Corrigan (CPI)
- 2:30 – 3:00 pm** **Break**
- 3:00 – 5:30 pm** **SESSION 2 – The Senate's Rules: Digging In**
Holds, cloture & the filibuster, Rule 22 germaneness, the nuclear option.
Speakers: Ed Corrigan (CPI)
- 5:30 – 7:00 pm** **Dinner and Keynote Address**
Fixing What's Broken—Is the Senate as dysfunctional as many believe? What does history teach us, and what proposed reforms are worth considering?
Keynote Speaker: Kelly Johnston, Former Secretary of the Senate

Friday

- 9:00 – 10:00 am** **Breakfast**
- 10:00 – 12:30 pm** **SESSION 3 – Amending in the Senate**
Drafting, filing, and offering amendments, types of amendments, amendment trees.
Speakers: Ed Corrigan (CPI)
- 12:30 – 3:00 pm** **Lunch and SESSION 4 – Appropriations & Rule 16**
Drafting amendments for appropriations, Rule 16 germaneness, defense of germaneness.
Speakers: Ed Corrigan (CPI)
- 3:00 – 3:30 pm** **Break**
- 3:30 – 6:00 pm** **SESSION 5 – The Wrap Up**
Amending conference rules, resolving differences between the bodies, motions to divide & the clay pigeon.
Speakers: Ed Corrigan (CPI)

6:00 – 6:30 pm **Break**

6:30 – 8:00 pm **Dinner and Special Presentation**
Navigating the Senate floor: Getting your boss an amendment vote during regular order. Are there options when the amendment tree is filled?
Guest Speaker: Phil Reboli (CPI)

Saturday

8:30 am **Breakfast & Checkout**

9:30 – 11:30 am **Travel from Cambridge, MD to 300 Independence Ave., SE**

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): Conservative Partnership Institute (CPI)
2. Description of the trip: Senate Procedure and Strategy Symposium
3. Dates of travel: September 1, 2022 - September 3, 2022
4. Place of travel: Cambridge, MD
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:

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:
CPI is solely responsible for organizing and conducting this trip.

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

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

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

See attached.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
☒ Good Faith estimate	\$141.54	\$198	\$118	\$0
☐ Actual Amounts				

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 trip is organized specifically with regard to congressional participation.

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

Location is owned by the trip sponsor CPI, economical, and conducive to education and training.

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

Camp Rydin, 3675 Decoursey Bridge Rd., Cambridge, MD 21613

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

Location is owned by the trip sponsor CPI, economical, and conducive to education and training.

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:

The estimated cost of meals (\$59/day) is less than the federal government per diem rate of \$64/day.

The cost of lodging (\$99/night) is less than the federal government per diem rate of \$161/night.

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:

CPI will provide round-trip coach class bus transportation

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:

No entertainment will be provided to, paid for, or reimbursed to Senate invitees.

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: _____

Ed Corrigan

Name and Title: _____

Conservative Partnership Institute

Name of Organization: _____

300 Independence Avenue, SE, Washington, DC 20003

Address: _____

(202) 742-8988

Telephone Number: _____

(202) 595-0282

Fax Number: _____

info@cpi.org

E-mail Address: _____

1. Clare Basil, Legislative Assistant, Office of Sen. Tom Cotton (Drove self)
 - a. Clare_Basil@cotton.senate.gov,
2. Alexa Henning, Deputy Chief of Staff, Office of Sen. Ron Johnson (Drove self)
 - a. Alexa_Henning@ronjohnson.senate.gov>,
3. Corinne Day, Deputy Communications Director, Office of Sen. Ron Johnson (Drove self)
 - a. corinne_day@ronjohnson.senate.gov
4. Mark Wait, Scheduler, Office of Sen. Mike Lee (Drove self)
 - a. mark_wait@lee.senate.gov,
5. Jack Heekin, General Counsel, Office of Sen. Rick Scott (Drove self)
 - a. Jack_Heekin@rickscott.senate.gov,
6. Nicholas Ganjei, General Counsel, Committee on the Judiciary (Bus)
 - a. Nicholas_Ganjei@judiciary-rep.senate.gov
7. Pierson Furnish, Legislative Correspondent, Office of Sen. Josh Hawley (Bus)
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