RE-2 Employee Post Travel Disclosure of Travel Expenses

Date/Time Stamp

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. **This form is a public disclosure. The form and all attachments will be made publicly available.**

Certification: *In compliance with the Regulations Governing Privately Sponsored Travel, Senate Rule 35, and the Honest Leadership and Open Government Act of 2007, I certify that I accepted the following gift of privately sponsored travel:*

Private Sponsor(s):

Partnership for a Secure America

Travel Dates:

03/09/2024-03/10/2024

Name of accompanying family member (if any):

Relationship to Traveler:

Total Expenses

Transportation Expenses	Lodging Expenses	Meals Expenses	Other Expenses (Amount & Description)
$35	$107	$59	$279-Conference Room Services, Breakout rooms, A/V

I also certify that attached to this form are all required documents for post travel disclosure, including:

- **The final Employee Pre-Travel Authorization** (Form RE-1)
- The final **Private Sponsor Travel Certification Form** with all attachments
- The final invitation
- The final approved itinerary

Finally, I certify that all trip information reflected in the attachments above accurately reflects the travel that I accepted. If there were any changes to the trip after I received approval from the Committee, the changes are described in ATTACHMENT 1.

3/18/24
Date

Carol E. Wayman
Printed Name of Traveler

Carol Wayman Digitally signed by Carol Wayman Date: 2024.03.19 17:14:50 -04'00'
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.

3/20/24
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 dsicussions.

3. Dates of travel: March 9-10

4. Place of travel: Airlie Hotel & Conference Center, 6809 Airlie Rd, 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 14th year of this program and trip. The last conference was held in 2023.

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
☒ Good Faith estimate ☐ Actual Amounts	$35 (coach bus)	$107	$59	$279- 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 Hotel & Conference Center 6809 Airlie Rd, 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: John Sullivan

Name and Title: John Sullivan, Executive Director

Name of Organization: Partnership for a Secure America

Address: 1110 Maryland Ave. NE, Wahsington DC 20002

Telephone Number: 202-293-8580

Fax Number:

E-mail Address: sullivan@psaonline.org

Grantmaking Organization Certification Form

Instructions: If a sponsor receives funds from a grantmaking organization, the sponsor must disclose this on the *Private Sponsor Travel Certification Form*, and the grantmaking organization must complete the *Grantmaking Organization Certification Form.* The completed *Grantmaking Organization Certification Form* must be submitted to the Senate Select Committee on Ethics by the trip sponsor at least 30 days prior to the travel departure date.

Grantmaking Organization: Carnegie Corporation of New York

Private Sponsor: Partnership for a Secure America

Trip Name: Congressional Partnership Program Conference

Travel Date(s): March 9-10, 2024

Destination(s): Airlie Hotel & Conference Center 6809 Airlie Rd, Warrenton, VA 20187

In compliance with the *Regulations Governing Privately Sponsored Travel*, I certify the following:

- ☑ The grantmaking organization is a § 501(c)(3) organization.
- ☑ The grantmaking organization is not a lobbyist, lobbying firm, or foreign agent, nor an entity that retains or employs a lobbyist or foreign agent.
- ☑ The grantmaking organization provides funds under an established grant program, or in a manner that is otherwise consistent with the mission and practices of the organization.
- ☑ The grantmaking organization is not involved, directly or indirectly, in organizing and conducting the trip. This includes selecting participants for a trip.
- ☑ The grantmaking organization does not directly pay or reimburse travel expenses for any Senate Member, officer, or employee.

Nicole Howe Buggs	CAO & Corporate Secretary
(Printed name of grantmaking organization representative)	*(Title)*
NHBuggs	1/31/2024
(Signature of grantmaking organization representative)	*(Date)*

0000000002279 RECEIVED BY: SECRETARY OF THE SENATE Date: April 02, 2024

PARTNERSHIP FOR A SECURE AMERICA

Congressional Partnership Program Conference

Saturday, March 9th
1:30 PM-Departure from Union Station, Washington D.C.
2:30 PM-3:30PM-Arrive at Airlie Hotel & Conference Center & Check-in
3:30 PM-4:00PM-Opening Remarks & Event Review Attendees will review their substantive materials for the retreat. John Sullivan, Executive Director of Partnership for a Secure America (PSA), will outline the retreat agenda and provide logistical information for the day (i.e., location of restrooms, where to store any bags, etc.).
4:00 PM-5:30PM-Trade Simulation Facilitated by John Sullivan. 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 the negotiation during this session and part two will take place the following day.
5:30 PM-6:15PM-Pre-Dinner Reception Attendees will break for a reception in the Pavilion. Participants will have an opportunity to informally engage their colleagues, PSA staff, and speakers. Participants will converse with colleagues, PSA staff, and speakers on matters relevant to their duties and the scheduled event discussions.
6:15 PM-8:30PM-Keynote Dinner Featuring: Andrew Scobell, Distinguished Fellow at the United States Institute of Peace, and Robert Sutter, Professor at George Washington University. The speakers will discuss great power competition with China in the Indo-Pacific, and how the U.S. can understand the current diplomatic and security environment in the region. For approximately half the time, staff will have the opportunity to directly ask speakers questions relevant to their duties.
8:30 PM-9:00PM-After-Dinner Reception Participants will have an opportunity to informally engage their colleagues, PSA staff, and speakers. Participants will converse with colleagues, PSA staff, and speakers on matters relevant to their duties and the scheduled event discussions.
Sunday, March 10th
8:00 AM-9:30AM-Breakfast Participants will gather for breakfast.
Participants will be split up into groups.

9:30 AM-11:30PM Group A - *Trade Simulation* Facilitated by John Sullivan. Participants will do part two of a mock trade simulation that will take place over the two days. The exercise is based on	**9:30-10:30 AM Group B – Critical Minerals** Featuring: Dr. Gracelin Baskaran, Research Director and Senior Fellow at the Center for Strategic & International Studies. Speaker will focus on energy dependence and the challenges of harvesting and processing the necessary critical minerals. For approximately half the time, staff will have the opportunity to directly ask speakers questions relevant to their duties.

<table>
<tr><td>fictional countries negotiating a trade agreement.</td><td>10:30 -11:30 AM Group B – Foreign Influence in Africa
Featuring: Dr. Joseph Sany, Vice President- Africa Program at the United States Institute of Peace. Speaker will discuss current U.S. foreign adversaries' interests in Africa: how should the U.S. understand the current efforts of Russia and China to be present in Africa. For approximately half the time, staff will have the opportunity to directly ask speakers questions relevant to their duties.</td></tr>
<tr><td colspan="2">12:00 -1:00 PM Group A & B – Lunch
Attendees will break for lunch. 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.</td></tr>
<tr><td>1:00-2:00 PM Group A – American Diplomacy in Africa
Featuring: Dr. Joseph Sany, Vice President- Africa Program at the United States Institute of Peace. Speaker will discuss current U.S. foreign adversaries' interests in Africa: how should the U.S. understand the current efforts of Russia and China to be present in Africa. For approximately half the time, staff will have the opportunity to directly ask speakers questions relevant to their duties.</td><td rowspan="2">1:00 - 3:00 PM Group B – Trade Simulation
Facilitated by John Sullivan. 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.</td></tr>
<tr><td>2:00-3:00PM Group A – Critical Minerals
Featuring: Dr. Gracelin Baskaran, Research Director and Senior Fellow at the Center for Strategic & International Studies. Speaker will focus on energy dependence and the challenges of harvesting and processing the necessary critical minerals. For approximately half the time, staff will have the opportunity to directly ask speakers questions relevant to their duties.</td></tr>
<tr><td colspan="2">3:00 PM Retreat Debrief & Event Ends
Participants will briefly meet with PSA to review the retreat's events before departure.</td></tr>
<tr><td colspan="2">3:40 PM Departure
Departure from Airlie. Buses will return to Union Station, Washington DC, for drop off.</td></tr>
</table>

PARTNERSHIP FOR A SECURE AMERICA

Name	Office	Title
Adriana Rivera	Sen. Michael Bennet	Military Legislative Aide
Bryce Barros	Sen. Ed Markey	Legislative Assistant
Carol Wayman	Sen. Cortez Masto	Staff Director
Essam Attia	Sen. Bernie Sanders	Policy Advisor
Zack Linick	Senate Committee on Homeland Security and Governmental Affairs	Professional Staff Member
Soribel Feliz	Sen. Bill Cassidy	AI/Tech Policy Advisor
Bowen Peard	Sen. Chris Murphy	Defense Policy Advisor
Joy Craig	Sen. Mazi Hirono	Military Legislative Assistant
Alexander Moree	Sen. Marco Rubio	Legislative Aide
Cody Garner	Sen. John Boozman	Legislative Assistant
Charles Orta	Senate Foreign Relations Committee	Legislative and Policy Analyst
Paul Burdette	Senate Foreign Relations Committee	Legislative Policy Analyst
John Poulson	Sen. Mitt Romney	Professional Staff Member
Daniel Gottfried	Senate Foreign Relations Committee	Legislative and Policy Analyst
Natasha Dabrowski	Sen. Tom Carper	Communications Director
Bessie Chen	Senate Foreign Relations Committee	Policy Analyst
Carson Tester	Sen. Mike Crapo	Legislative Correspondent

ATTACHMENT 1 – CHANGES FROM APPROVED PRE-TRAVEL

Note: Material changes to a trip that occur after the Committee has issued an approval letter may invalidate the Committee's approval. Please contact the Committee with any questions regarding changes to an approved trip.

Were there any changes to the pre-approved travel expenses? (Transportation, Meals, Lodging, Other)?

○ Yes ◉ No

Expense Change	Revised Amount	Explanation

Were there any changes to the pre-approved itinerary?

○ Yes ◉ No

Explanation:

Were there any additional changes to the pre-approved trip?

○ Yes ◉ No

Explanation:

0000000002283 RECEIVED BY: SECRETARY OF THE SENATE Date: April 02, 2024

PARTNERSHIP FOR A SECURE AMERICA

January 31, 2024

Dear Carol Wayman,

As a participant in Partnership for a Secure America's (PSA) Congressional Partnership Program (CPP), you are invited to attend the CPP Conference. The event is scheduled for Saturday-Sunday, March 9-10, 2024. The retreat will take place at the Airlie Hotel & Conference Center, located at 6809 Airlie Rd, 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, February 8th, 2024**. This is critical in order to attend the event.

Please notify us if you have any questions or concerns.

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

0000000002284 RECEIVED BY: SECRETARY OF THE SENATE Date: April 02, 2024

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

March 5, 2024

Carol Wayman
Office of Senator Catherine Cortez Masto
United States Senate
Washington, DC 20510

Dear Ms. Wayman:

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 the 2024 Congressional Partnership Program (CPP) Conference on March 9–10, 2024, sponsored by 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 a Senior Policy Advisor in the Office of Senator Catherine Cortez Masto. PSA invited you to travel to the CPP Conference in Warrenton, VA on March 9–10, 2024. PSA certified to the Committee that it will pay the necessary expenses[2] related to the travel and that it is neither a lobbyist, lobbying firm, agent of a foreign principal, or otherwise acting as a representative or agent of a foreign government. 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 employees to accept privately sponsored travel only with the prior written approval of the Committee.

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

[2] The term "necessary expenses" has a specific definition. *See Select Committee on Ethics Regulations and Guidelines for Privately Sponsored Travel* at 10-13.

[3] The term "any point throughout your trip" has a specific definition. *See Select Committee on Ethics Regulations and Guidelines for Privately Sponsored Travel* at 15.

The Committee's approval process is governed by the *Regulations and Guidelines for Privately Sponsored Travel* (*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.[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, 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).

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[4] The term "*de minimis*" has a specific definition. *See Select Committee on Ethics Regulations and Guidelines for Privately Sponsored Travel* at 6-8.

[5] *See Select Committee on Ethics Regulations and Guidelines for Privately Sponsored Travel* at 6-10.

Finally, Senate Rule 34 requires a reporting individual,[6] 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 $480 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: Employee Privately Sponsored Travel Checklist

[6] A reporting individual is someone whose salary equals or exceeds 120% of the basic rate of pay for GS-15 ($147,649 for CY 2024) or is a political fund designee and is required to file financial disclosure reports.

RE-1 Employee Pre-Travel Authorization

Date/Time Stamp
ETHIC FEB 2'24PM 3:48

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.

Name of Traveler:
Carol Wayman

Employing Office/Committee:
Senator Catherine Cortez Masto

Private Sponsor(s):
Partnership for a Secure America

Destination(s):
Warrenton VA

Travel Dates:
March 9-10, 2024

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

Explain how this trip is specifically connected to the traveler's official or representational duties.
I staff the Senator on the Banking Committee which covers many foreign affairs topics such as sanctions, national security and banking regulations.

Do you have an accompanying family member or spouse on this trip? **Name and Relationship to Traveler:**

☐ (signify "yes" by checking box)

I certify that the information contained in this form is true, complete and correct to the best of my knowledge.

2/2/2024 Carol Wayman Digitally signed by Carol Wayman Date: 2024.02.02 15:34:07 -05'00'

Date Signature of Employee

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER
(President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain)

I Catherine Cortez Masto hereby authorize Carol Wayman
(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)

Catherine Cortez Masto

Date 2/2/2024 Signature of Supervising Senator/Officer

0000000002288 RECEIVED BY: SECRETARY OF THE SENATE Date: April 02, 2024

PARTNERSHIP FOR
A SECURE AMERICA

January 31, 2024

Dear Carol Wayman,

As a participant in Partnership for a Secure America's (PSA) Congressional Partnership Program (CPP), you are invited to attend the CPP Conference. The event is scheduled for Saturday-Sunday, March 9-10, 2024. The retreat will take place at the Airlie Hotel & Conference Center, located at 6809 Airlie Rd, 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, February 8th, 2024**. This is critical in order to attend the event.

Please notify us if you have any questions or concerns.

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

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 dsicussions.

3. Dates of travel: March 9-10

4. Place of travel: Airlie Hotel & Conference Center, 6809 Airlie Rd, 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 14th year of this program and trip. The last conference was held in 2023.

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
☒ Good Faith estimate ☐ Actual Amounts	$35 (coach bus)	$107	$59	$279- 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 Hotel & Conference Center 6809 Airlie Rd, 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: John Sullivan

Name and Title: John Sullivan, Executive Director

Name of Organization: Partnership for a Secure America

Address: 1110 Maryland Ave. NE, Wahsington DC 20002

Telephone Number: 202-293-8580

Fax Number:

E-mail Address: sullivan@psaonline.org

Grantmaking Organization Certification Form

Instructions: If a sponsor receives funds from a grantmaking organization, the sponsor must disclose this on the *Private Sponsor Travel Certification Form*, and the grantmaking organization must complete the *Grantmaking Organization Certification Form.* The completed *Grantmaking Organization Certification Form* must be submitted to the Senate Select Committee on Ethics by the trip sponsor at least 30 days prior to the travel departure date.

Grantmaking Organization: Carnegie Corporation of New York

Private Sponsor: Partnership for a Secure America

Trip Name: Congressional Partnership Program Conference

Travel Date(s): March 9-10, 2024

Destination(s): Airlie Hotel & Conference Center 6809 Airlie Rd, Warrenton, VA 20187

In compliance with the *Regulations Governing Privately Sponsored Travel*, I certify the following:

- ☑ The grantmaking organization is a § 501(c)(3) organization.
- ☑ The grantmaking organization is not a lobbyist, lobbying firm, or foreign agent, nor an entity that retains or employs a lobbyist or foreign agent.
- ☑ The grantmaking organization provides funds under an established grant program, or in a manner that is otherwise consistent with the mission and practices of the organization.
- ☑ The grantmaking organization is not involved, directly or indirectly, in organizing and conducting the trip. This includes selecting participants for a trip.
- ☑ The grantmaking organization does not directly pay or reimburse travel expenses for any Senate Member, officer, or employee.

Nicole Howe Buggs — *(Printed name of grantmaking organization representative)*

CAO & Corporate Secretary — *(Title)*

NHBuggs — *(Signature of grantmaking organization representative)*

1/31/2024 — *(Date)*

PARTNERSHIP FOR A SECURE AMERICA

Name	Office	Title
Adriana Rivera	Sen. Michael Bennet	Military Legislative Aide
Bryce Barros	Sen. Ed Markey	Legislative Assistant
Carol Wayman	Sen. Cortez Masto	Staff Director
Essam Attia	Sen. Bernie Sanders	Policy Advisor
Zack Linick	Senate Committee on Homeland Security and Governmental Affairs	Professional Staff Member
Soribel Feliz	Sen. Bill Cassidy	AI/Tech Policy Advisor
Bowen Peard	Sen. Chris Murphy	Defense Policy Advisor
Joy Craig	Sen. Mazi Hirono	Military Legislative Assistant
Alexander Moree	Sen. Marco Rubio	Legislative Aide
Cody Garner	Sen. John Boozman	Legislative Assistant
Charles Orta	Senate Foreign Relations Committee	Legislative and Policy Analyst
Paul Burdette	Senate Foreign Relations Committee	Legislative Policy Analyst
John Poulson	Sen. Mitt Romney	Professional Staff Member
Daniel Gottfried	Senate Foreign Relations Committee	Legislative and Policy Analyst
Natasha Dabrowski	Sen. Tom Carper	Communications Director
Bessie Chen	Senate Foreign Relations Committee	Policy Analyst
Carson Tester	Sen. Mike Crapo	Legislative Correspondent

0000000002295 RECEIVED BY: SECRETARY OF THE SENATE Date: April 02, 2024

PARTNERSHIP FOR A SECURE AMERICA

Congressional Partnership Program Conference

Saturday, March 9th
1:30PM-Departure from Union Station, Washington D.C.
2:30PM-3:30PM-Arrive at Airlie Hotel & Conference Center & Check-in
3:30PM-4:00PM-Opening Remarks & Event Review Attendees will review their substantive materials for the retreat. John Sullivan, Executive Director of Partnership for a Secure America (PSA), will outline the retreat agenda and provide logistical information for the day (i.e., location of restrooms, where to store any bags, etc.).
4:00PM-5:30PM-Trade Simulation Facilitated by PSA Staff. 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 the negotiation during this session and part two will take place the following day.
5:30PM-6:15PM-Pre-Dinner Reception Attendees will break for a reception in the Pavilion. Participants will have an opportunity to informally engage their colleagues, PSA staff, and speakers. Participants will converse with colleagues, PSA staff, and speakers on matters relevant to their duties and the scheduled event discussions.
6:15PM-8:30PM-Keynote Dinner Featuring: Elliot Ackerman, Author of New York Times Best Sellers 2034 (confirmation pending) The speaker will discuss great power competition with Russia and China in the 21st century. How should the U.S. understand the current diplomatic and security 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.
8:30PM-9:00PM-After-Dinner Reception Participants will have an opportunity to informally engage their colleagues, PSA staff, and speakers. Participants will converse with colleagues, PSA staff, and speakers on matters relevant to their duties and the scheduled event discussions.
Sunday, March 10th
8:00AM-9:30AM-Breakfast Participants will gather for breakfast.
Participants will be split up into groups.

9:30AM-11:30PM Group A - *Trade Simulation* Facilitated by PSA Staff. Participants will do part two of a mock trade simulation that will take place over the two days. The exercise is based on	**9:30-10:30 AM Group B – Critical Minerals** Featuring: Dr. Gracelin Baskaran, Research Director and Senior Fellow at the Center for Strategic & International Studies. Speaker will focus on energy dependence and the challenges of harvesting and processing the necessary critical minerals. For approximately half the time, staff will have the opportunity to directly ask speakers questions relevant to their duties.

<table>
<tr><td>fictional countries negotiating a trade agreement.</td><td>10:30 -11:30 AM Group B – Foreign Influence in Africa
Featuring: Dr. Joseph Sany, Vice President- Africa Program at the United States Institute of Peace. Speaker will discuss current U.S. foreign adversaries' interests in Africa: how should the U.S. understand the current efforts of Russia and China to be present in Africa. For approximately half the time, staff will have the opportunity to directly ask speakers questions relevant to their duties.</td></tr>
<tr><td colspan="2">12:00 -1:00 PM Group A & B – Lunch
Attendees will break for lunch. 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.</td></tr>
<tr><td>1:00-2:00 PM Group A – American Diplomacy in Africa
Featuring: Dr. Joseph Sany, Vice President- Africa Program at the United States Institute of Peace. Speaker will discuss current U.S. foreign adversaries' interests in Africa: how should the U.S. understand the current efforts of Russia and China to be present in Africa. For approximately half the time, staff will have the opportunity to directly ask speakers questions relevant to their duties.</td><td rowspan="2">1:00 - 3:00 PM Group B – Trade Simulation
Facilitated by PSA Staff. 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.</td></tr>
<tr><td>2:00-3:00PM Group A – Critical Minerals
Featuring: Dr. Gracelin Baskaran, Research Director and Senior Fellow at the Center for Strategic & International Studies. Speaker will focus on energy dependence and the challenges of harvesting and processing the necessary critical minerals. For approximately half the time, staff will have the opportunity to directly ask speakers questions relevant to their duties.</td></tr>
<tr><td colspan="2">3:00 PM Retreat Debrief & Event Ends
Participants will briefly meet with PSA to review the retreat's events before departure.</td></tr>
<tr><td colspan="2">3:40 PM Departure
Departure from Airlie. Buses will return to Union Station, Washington DC, for drop off.</td></tr>
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