RE-2 Employee Post Travel Disclosure of Travel Expenses

Date/Time Stamp

SECRETARY OF THE SENATE
2026 FEB -3 PM 5:23

Post Travel Filing Instructions: Complete this form within **30 days** of returning from travel. Submit all forms to the Office of Public Records in 144 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):
Innovative Future Collective

Travel Dates:
01/20/2026 to 01/22/2026

Name of accompanying family member (if any):

Relationship to Traveler:

Expenses

Transportation Expenses	Lodging Expenses	Meals Expenses	Other Expenses (Amount & Description)
$347.00	$678.00	$211.00	$10.00

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.

2/3/26
Date

Lucas Smith
Printed Name of Traveler

Signature of Traveler

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER

I have made a determination that the expenses set out above in connections with travel described in the Employee Pre-Travel Authorization form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

2/3/26
Date

Signature of Supervising Senator/Officer

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
Transportation	$347.00	The final total transportation cost was less than the original total. This was due to a refund on the departure ticket cost from Amtrak because of a significant delay on the departure train from DC to New York on January 20.

Were there any changes to the pre-approved itinerary?

Yes No

Explanation: Due to change in scheduling availability, the speakers at Palantir were Andrew Ehrich, Forward Deployed Engineer, and Beth Holz, Deployment Strategist. Additional speakers at Meta were Simon Whitcomb, Vice President, Global Business Group, North America, Tony Wang, Owner of the Cat Cafe, Erica Pietrzyk, owner of Pietrzyk Pierogis, Victoria Jeffries, Director of AI Policy, and Darren Touch, Wearables Public Policy Manager.

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

Yes No

Explanation: There were no additional changes to the pre-approved trip.

Innovative Future Collective
100 M St. SE
Suite 330
Washington, DC 20003

December 5, 2025

Dear Lucas,

As you know, IFC is a nonpartisan 501(c)(3) organization committed to helping the public, Congress, and federal agencies better understand artificial intelligence, its applications across industries, and its implications for our future. Our mission is to provide educational experiences that are dynamic, hands-on, and grounded in real-world examples.

To enhance understanding of AI's application in business and its development, **we are pleased to invite you to an educational trip to New York City, scheduled for January 20-22, 2026.**

Attached, you will find all the necessary information to submit your approval to the Ethics Committee. It includes a draft of the schedule for the trip, a list of attendees invited, and IFC's sponsor form.

Due to limited space, we kindly request that you confirm your intention to participate and submit your documents **before 5:00 PM ET on Friday, December 12.** If you are unable to attend and will not be submitting materials to the Ethics Committee, please let us know as soon as possible.

If you have any questions regarding the programming or the trip, please do not hesitate to reach out to me directly at (615) 948-8550 or lacy@innovativefuturecollective.com.

Sincerely,

Lacy Broemel
Director of Programming and Sponsor Engagement
Innovative Future Collective (IFC)



RE-1 Employee Pre-Travel Authorization

Date/Time Stamp

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:
Lucas Smith

Employing Office/Committee:
MERKLEY, JEFF

Private Sponsor(s):
Innovative Future Collective

Destination(s):
New York, New York

Travel Dates:
01/20/2026 to 01/22/2026
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 advise the Senator on a range of policy issues including artificial intelligence. This trip would expand my knowledge and understanding of the technology and its implications for policymakers. It would provide important and practical insights into how the technology is and can be used.

Do you have an accompanying family member or spouse on this trip?
No

Name and Relationship to Traveler:
N/A

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

12/10/25
Date

Lucas Smith
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 Jeffrey A. Merkley
(Print Senator's/Officer's Name)

hereby authorize Lucas Smith
(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)

Jeffrey A. Merkley
Signature of Supervising Senator/Officer

Date

Innovative Future Collective: Innovative Future Collective NYC Educational Trip January 2026

Lucas Smith

Title:
Legislative Director

Employing Office/Committee:
MERKLEY, JEFF

Duty Station:
WASHINGTON,DC

Destination(s):
New York, New York

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

I advise the Senator on a range of policy issues including artificial intelligence. This trip would expand my knowledge and understanding of the technology and its implications for policymakers. It would provide important and practical insights into how the technology is and can be used.

Name of accompanying family member (if any):
Not Entered

Name and Relationship to Traveler:
None

Organization Information

Organization Name
Innovative Future Collective

§501(c)(3) Organization Type
Public Charity

Address 2 (Optional)
Suite 330

Phone Number
6159488550

Is your organization classified as a §501(c)(3)?
Yes No

Address
100 M St SE

City, State Zip
Washington, District Of Columbia 20003 United States

Organization URL
www.innovativefuturecollective.com

History of Congressional Travel

Innovative Future Collective (IFC) is a 501(c)3 with IRS-approved tax-exempt status that was formed in 2024. In June 2025, it sponsored its first Congressional Travel with a staff delegation to the San Francisco area that provided educational opportunities on the use of Artificial Intelligence (AI) in business, as well as the development of AI. IFC hosted a similar staff delegation educational trip to London in November 2025.

Educational Activities

IFC hosts educational briefings open to the public throughout the country and in Washington, DC. This includes a "scholar series" program, where we bring experts and academics together for panel discussions and Q and A that are open to the public to learn, understand, and question how AI is influencing and shaping industry. We also provide opportunities for the community to see, learn, and experience developments in AI technology.

Lobbyist and Foreign Agent Registration Information

Lobbyist Registration Status: *I certify that the sponsor is not a federally registered lobbyist and do not retain or employ a federally registered lobbyist.*

Foreign Agent Registration Status: *I certify that the sponsor is not an agent of a foreign principal and do not retain or employ an agent of a foreign principal.*

Foreign Government Involvement

Foreign Agent Registration Status:

I certify that the sponsor is not a foreign government.

I certify that the sponsor is not an entity that is owned or operated by a foreign government.

I certify that the sponsor does not receive funding from a foreign government.

Comments

Signature Page

The signature page is below.

Purpose and Details

Provide a brief description of the trip.

This is a trip to New York City, with one calendar day of programming, to provide an opportunity for Senate staff to learn about current applications and future prospects of AI technology. It will also include conversations and education on safety and privacy as well as AI in the healthcare and defense industries.

Explain how the purpose of the trip relates to your organization's mission.

The trip will bring together academics, researchers, AI enterpreneurs, and federal policymaklers to share knowledge about AI, including future and current uses. It will address the pros and cons associated with AI. The trip will allow for discussion around AI and visualization of the technology and how it is developed.

Is your organization the only sponsor for this trip?

Yes No

Grantmaking Organizations (Optional)

There are no grantmaking organizations.

With or Without Regard for Congressional Participation

The trip is arranged or organized specifically with regard to congressional participation.

Lobbyist/Foreign Agent Involvement in Planning, Organizing, Requesting or Arranging

The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal, other than de minimis involvement.

Lobbyist/Foreign Agent Financing

The trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.

No funds or in-kind contributions were 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.

Lobbyist/Foreign Agent Accompaniment

Complete if all sponsors are §501(c)(3) organizations

The trip is limited to three days (for trips inside the continental United States) or seven days (for trips outside the continental United States), and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip

The trip is limited to 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

The trip is limited to 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

> In order to maximize the one day of programming, we begin programming at breakfast time. Due to the train times offered from DC to NYC, participants must arrive the night before programming. This will allow for a night of sleep and early morning programming the following day.

Complete if any of the sponsors is not a §501(c)(3) organizations.

The trip is limited to three days (for trips inside the continental United States) or seven days (for trips outside the continental United States), and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip

The trip is limited to 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

The trip is limited to 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

Certification of No Recreational Activity and No Alcohol

Travel expenses paid for will not include expenditures for recreational activities.

Travel expenses paid for will not include expenditures for alcohol, except as permitted by the Regulations Governing Privately Sponsored Travel.

Invitees

Members and staff from the House of Representatives **will not** receive invitations.

The list of invitees is below.

Travel Details

Trip Start Date/Time:
01/20/2026 @ 02:50 PM

Trip End Date/Time:
01/22/2026 @ 01:00 PM

Will the traveler be accompanied by a family member for whom the sponsor will pay travel expenses?

Yes No

Itinerary

The itinerary is below.

Transportation (Per Member/Officer/Employee: $443.00 | Accompanying Family Member: $0.00)

Transportation Type	Class	Amount
Ground Transportation	Coach	$123.00
Note Bus charter, minibus on programming day		
Ground Transportation	Coach	$53.00
Note Bus charter, minibus transport on travel day to hotel		
Train	Business	$267.00
Note Round trip train. Business is the only class offered on Acela.		

Lodging (Per Member/Officer/Employee: $678.00)

Check-In	Check-Out	Facility	City	State	Country	Nights	Cost/Night	Cost Exceed Per Diem
01/20/2026	01/22/2026	The Kimberly Hotel	New York	New York	United States	2	$339.00	Yes

Cost Exceeds Per Diem Reason
See attached document.

Meals (Per Member/Officer/Employee: $211.00)

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem
01/20/2026	$0.00	$0.00	$38.00	$0.00	**$38.00**	New York	New York	United States	No
01/21/2026	$30.00	$35.00	$85.00	$0.00	**$150.00**	New York	New York	United States	Yes

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem
Cost Exceeds Per Diem Reason See attached document.									
01/22/2026	$23.00	$0.00	$0.00	$0.00	**$23.00**	New York	New York	United States	No

Reasonable Miscellaneous Expenses (Per Member/Officer/Employee: $10.00)

Expense Type	Amount	Notes
Other (Snacks + water)	$10.00	Snacks and water for travelers on the programming day on the bus

Additional Attachments All additional attachments are below.

Document Name

NYC Meal Justification

NYC Hotel Justification

I hereby certify that the in
and correct to the best of r

Trip Name: I

Travel Date(s): J

Travel Destination(s): N

Casey	Contress	Senator Eric Schmitt (R-MO)	Chief of Staff
Max	Katz	Committee on Energy and Natural Resources	Technology Policy Advisor
Nikitha	Rai Shah	Senator Andy Kim (D-NJ)	Legislative Assistant- AI
Hunter	Koski	Senator Bill Cassidy (R-LA)	AI Policy Advisor
Pat	Hayes	Sen. John Hickenlooper (D-CO)	Chief of Staff
Corin	Stone	Senator Elissa Slotkin (D-MI)	Chief Counsel & Senior Advisor
Lucas	Smith	Senator Jeff Merkley (D-OR)	Legislative Director
Joy	Russell	Senator Angela Alsobrooks	Senior Advisor
Rebecca	Avitia	Sen Martin Heinrich (D-NM)	Chief of Staff
Sean	Riley	Senator Ron Johnson (R-WI)	Chief of Staff
Nicolas	Malatesta	Senator Mark Warner (D-V/	Policy Advisor
Connor	Lynch	Senator James Risch (R-ID	Legislative Assistant- AI
Al David	Saab	Senator Roger Wicker (R-M	Policy Advisor
Henson	Webre	Senator John Neely Kenne	Lead AI Senior Legislative Assistant
Liz	Falcone	Senator Mark Warner (D-V/	Chief of Staff
Ayla	Neumeyer	Risch, Sen. Jim (R-ID)	Deputy Legislative Director
Sarah	Drake	Wicker, Sen. Roger (R-MS)	Deputy Chief of Staff
Stephen	Newton	Britt, Sen. Katie (R-AL)	Legislative Director
Nathan	Mark	Marshall, Sen. Roger (R-KS	Legislative Director
Kendall	Moore	Hyde-Smith, Sen. Cindy (R	Legislative Director
Dahvi	Cohen	Senator Adam Schiff (D-CA)	Lead AI Legislative Assistant
Jake	Bornstein	Curtis, Sen. John (R-UT)	Deputy Chief of Staff/Legislative Director
Connor	Glisson	Senator Marsha Blackburn (R-TN)	Tech Policy Counsel
Beth	Spivey	Senator Roger Wicker (R-M	Chief of Staff
Carl	Mica	Cruz, Sen. Ted (R-TX)	Deputy Chief of Staff/State Director
Josh	Smith	Sen Ted Cruz (R-TX)	Lead AI staff

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Mark	Isakowitz	Senator Dave McCormick (	Chief of Staff
Meredith	West	Senate Small Business and Entrepreneurship Committee	Staff Director, Majority
Maggie	Ward	Senator Jon Husted (R-OH)	Legislative Director
Scott	Luginbill	Senator Jim Banks (R-IN)	Senior Advisor & Deputy Chief of Staff
Tom	DeMatteo	Senate Judiciary Committe	Chief Counsel
Megan	Owen	Senator John Thune (R-SD	Chief Counsel
Jon	Cardinal	Democratic Leader Chuck Schumer	Director of Economic Development
Penne	Barton	Grassley, Sen. Chuck (R-IA	Deputy Chief of Staff
Ryan	Alban	Budd, Sen. Ted (R-NC)	Deputy Chief of Staff/Legislative Director
Adam	Wek	Thune, Sen. John (R-SD)	Legislative Director
Alyssa	Burleson	Sheehy, Sen. Tim (R-MT)	Deputy Chief of Staff
Ashton	Hedgepeth	Hawley, Sen. Josh (R-MO)	Deputy Chief of Staff/Assistant to the Chief of Staff
Corey	Messervy	Hawley, Sen. Josh (R-MO)	Deputy Chief of Staff
Rosie	Heiss	Boozman, Sen. John (R-AF	Deputy Chief of Staff/Legislative Director
Wendy	Baig	Senate Energy and Natural Resources Committee	Staff Director
Brad	Grantz	Senate Commerce, Science and Transportation Committee	Staff Director
Alexander	Gonzalez	Senator Marsha Blackburn	Deputy Legislative Director
Rebecca	Angelson	Senator Jon Husted (R-OH	Chief of Staff
JT	Jezierski	Senator Shelley Moore Cap	Chief of Staff
Lynda	Garcia	Judiciary Committee, Competition Policy, Antitrust and Consumer Rights Subcommittee (Senator Booker)	Staff Director
Alejandro	Renteria	Senator Jacky Rosen (D-NV)	Legislative Director

INNOVATIVE FUTURE COLLECTIVE

AGENDA FOR:
Innovative Future Collective's Staff Delegation Learning Trip to New York City

*All times listed are local to New York (ET)

Tuesday, January 20, 2025

2:50 PM - 5:48 PM	**Amtrak Acela Train #2170** *WAS to NYP*
5:48 PM - 6:45 PM	**Transport to Hotel - The Kimberly Hotel** *145 E 50th St, New York, NY 10022* *1.6 miles, 24 minutes driving* *Via Private Charter Bus*
6:45 PM - 7:15 PM	**Hotel Check In** *145 E 50th St, New York, NY 10022*
7:15 PM- 9:00 PM	**Executive Time for Travellers Before Programming Day**

Wednesday, January 21, 2025

7:00 AM- 8:30 AM	**Breakfast and Overview Briefing of Day at Hotel** *145 E 50th St, New York, NY 10022* *Upstairs at the Kimberly* ***Speaker:*** *Lacy Broemel, Director of Programming and Sponsor Engagement, IFC*
8:30 AM- 9:00 AM	**Transport NYU Langone Health** *Tisch Main Hospital, 550 First Avenue between 34th-33rd* *2.1 miles, 20 minutes driving*
9:00 AM - 10:15 AM	**Visit and Demonstration with NYU Langone Health** *Tisch Main Hospital, 550 First Avenue between 34th-33rd* ***Speakers:***

Dr. Marc Triola, Professor of Medicine at NYU Grossman School of Medicine, and the Founding Director of the Institute for Innovations in Medical Education (IIME)

Nader Mherabi, Head of Information Technology at NYU Langone Health

Topic of Discussion: *Demonstration from speakers on implications of AI on patient care, research, and operations. Demonstration will include a tour of the hospital and information on current and future use of AI by the health industry.*

10:15 AM - 10:30 AM

Transport to Amazon's Builder Studio
12 West 39th Street, New York, NY, 10018, between 5th and 6th
1.3 miles, 13 minutes driving

10:30 AM - 11:45 AM

Visit at Amazon's Builder Studio
12 West 39th Street, New York, NY, 10018, between 5th and 6th

Presenters:
Danny Mason, Senior Solutions Architect, Amazon Web Services (AWS)

Shaown Nandi, Director AGS Technology, Amazon Web Services (AWS)

Topic of Discussion: *Experience cutting-edge AWS capabilities through interactive demonstrations in the Builder Studio. This dynamic environment showcases how global enterprises across industries leverage AI to transform complex challenges. Presenters will lead staff through the demonstrations.*

11:45 AM- 12:00 PM

Transport to Lunch, Rosa Mexicano
9 E 18th St, New York, NY 10003, between 5th and Broadway
1.1 miles, 10 minutes driving

12:00 PM - 1:30 PM

Lunch and Group Discussion, Rosa Mexicano
9 E 18th St, New York, NY 10003, between 5th and Broadway

Speaker: *Todd O'Boyle, Executive Director, US AI & Data Policy, JP Morgan Chase*

Topic of Discussion: *Brief presentation followed by internal staff delegation group discussion on takeaways and learnings from the programming day.*

1:30 PM - 1:45 PM

Transport to Palantir Offices
45 W 18th St, New York, NY 10011, between 5th and 6th
.2 miles, 4 minutes walking

1:45 PM - 3:00 PM

Visit and Demonstration at Palantir Offices
45 W 18th St, New York, NY 10011, between 5th and 6th

Presenter:
Tanu Balla, Deployment Strategist-Hospital Ops, Palantir

Topic of Discussion: *Demonstrations of Palantir's shipbuilding and commercial healthcare platforms.*

3:00 PM - 3:20 PM

Transport to Meta Offices
50 Hudson Yards New York, NY 10001, between 10th and 11th Ave
1.6 miles, 15 minutes driving

3:20 PM - 4:40 PM

Visit Meta Offices
50 Hudson Yards New York, NY 10001, between 10th and 11th Ave

Presenter: *Victoria Jeffries, AI Policy Director and AI Subject Matter Expert*

Topic of Discussion: *Demonstration and discussion about superintelligence, AI chatbots, AI-powered ads, and accessibility through AI wearables.*

4:40 PM- 5:00 PM

Transport to Universal Music Group
220 W 18th St, New York, NY 10011
1.8 miles, 20 minutes driving

5:00 PM- 6:15 PM

Visit Universal Music Group
220 W 18th St, New York, NY 10011

Speaker: *Chris Horton, Executive Vice President, Strategic Technology, Universal Music Group*

Carla Miller, Senior Vice President, Business & Legal Affairs, Litigation Counsel, Universal Music Group

Topic of Discussion: *Educational tour of the recording studio complex and a briefing to learn about the nexus between music intellectual property (IP) and technology, and how each are utilized by UMG. Additional topics addressed during this highly interactive session will include: the value of artist-label partnerships; music's contributions to the U.S. economy; the risks and opportunities presented by generative artificial intelligence (AI); and how UMG's groundbreaking and innovative licensing deals are establishing a growing AI training market that ensures all parties in the music ecosystem mutually benefit, both commercially and creatively.*

6:15 PM - 6:45 PM	**Transport to Hotel Before Dinner** *145 E 50th St, New York, NY 10022* *1.1 miles, 12 minutes driving*
6:45 PM- 7:15 PM	**Regroup at Hotel Before Dinner** *145 E 50th St, New York, NY 10022*
7:15 PM- 9:30 PM	**Dinner- Bistango at The Kimberly** *145 E 50th St, New York, NY 10022*

Thursday, January 22, 2025

8:00 AM - 9:00 AM	**Breakfast at Hotel** *145 E 50th St, New York, NY 10022*
9:00 AM- 10:00 AM	**Transport to Moynihan Train Hall** *350 W 33rd St, New York, NY 10001*
10:00 AM- 1:00 PM	**Amtrak Acela Train #2153** *NYP to DC*

New York City Hotel Justification

We explored numerous hotel options. However, given the characteristics we needed in a hotel to fulfill the purposes of the trip, we had to choose a hotel that exceeded the GSA's stipend in January for the area. The characteristics we needed in a hotel are:

1) Audio/Visual and use of a meeting space for briefing the group before the morning departure
2) Proximity to restaurants and meeting locations to decrease transportation cost and travel time, due to the very brief time for programming
3) Safe area where participants can walk outside
4) On-site hotel food and beverage options late at night and early in the morning due to the tight schedule.

When identifying possibilities that met these qualifications, and had the availability for the group of our size, the selected hotel offered the most competitive rate.

Background:

Traffic Time:
Traffic in and around New York is incredibly heavy and time consuming. Due to the brief nature of the trip– 24 hours "on the ground" of programming– we wanted to minimize the group's time in traffic. Therefore, the hotel selected is within close driving proximity to the site visits and we are also able to host breakfast and lunch at the hotel to reduce transportation time and costs.

Cost of Transportation:
The cost of providing group transportation in New York City is very high per hour. Due to the location of this hotel, we are able to reduce the transportation costs by allowing the group to have breakfast and dinner at the hotel and be nearby the site visits.

Safety:
As the group of staff can be a high target for crime, we were very mindful to do all that is possible to ensure the safety of our group. Therefore, safety of the neighborhood and walkability was an important factor when considering hotels.

Private space in reception/meeting area with AV/Mac Hook up Capabilities:
In order to gather our group ahead of the programming day, we wanted a hotel that enabled us to meet and give a brief overview of the day via a slide presentation for the group near the reception without requiring us to reserve a private room (which would increase costs). Few hotels had such space and fewer would allow us to use it. This further restricted the suitable options. We worked with the selected hotel to provide this private space.

NYC Meal Cost Justification 2026

Regarding the meals, we worked to the best of our ability to meet the per diem.

Breakfast:
We need a private room with AV capabilities to provide a briefing ahead of the program day. We also needed to save time on transportation during our one programming day and not transport to another location for breakfast. We worked with the hotel to secure a private space and negotiated a breakfast rate with the hotel to provide food in a private and safe room to brief the group.

Lunch:
In order to maximize the time the group has "on the ground" in New York for one programming day, the lunch is a "working lunch." Therefore, we require private space for safety and candid conversation among the delegation. Additionally, we needed a restaurant within close proximity to our site visits to save time on transportation. As a result, our options are very limited once those factors are factored in. The restaurant we chose worked with us to provide the lowest per person rate compared to other restaurants in the vicinity of the site visits.

Dinner:
We needed a completely private room to provide a safe space for conversation to debrief the learnings of the day. With our staff and speakers, the room size needs to seat at least 25 comfortably. Most venues that are able to fit groups this size have a minimum spend to book the room, regardless of how many people are eating. Our research (ie calling, emailing and checking online) of restaurants or hotels with this type of space available typically starts at $3,500 min spend. However, we were able to negotiate a lower minimum at the dinner venue at the hotel. By hosting dinner at the hotel, we were also able to ensure safety by limiting transportation in New York City at night and we further saved time and money on additional transportation. This will also allow the staff to safely return to their hotel rooms before an early departure the next morning.

Additionally, it is important to note that restaurants that operate in New York City have several added costs: NYC tax is 8.875%, gratuity of 20%, and 5-8% administration fee at restaurants for private dining which increases the cost.This drives up the cost of any meal in a private space significantly.