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STATE ETHICS COMMISSION


2014 NOV 25 AM 10:02

**DISCLOSURE BY ELECTED PUBLIC EMPLOYEE  
OF TRAVEL EXPENSES SERVING A LEGITIMATE PUBLIC PURPOSE**

**AS REQUIRED BY 930 C.M.R. 5.08(2)(d)2.**

Name of employee:	Michael O. Moore
Title/ Position	State Senator
Agency:	Massachusetts Legislature
Agency address:	Room 109B, State House, Boston, MA 02133
Office phone:	617-722-1485
Write an X to confirm each statement.	<p>I am filing this disclosure because:</p> <p><input checked="" type="checkbox"/> I am going to engage in an activity that serves a legitimate public purpose, i.e., is intended to promote the interests of the Commonwealth, a county or a municipality; and</p> <p><input type="checkbox"/> A non-public entity (but not a lobbyist) has offered to reimburse, waive or pay travel expenses and costs worth more than \$50.</p>
Identify the person or organization that offered to reimburse, waive or pay your travel expenses.	Complete College America
Address of person or organization.	Complete College America c/o The Balcom Group 992 Locust Cove Road Heathsville, VA 22473 804-580-8353 - phone ccaconference@thebalcomgroup.com
Describe the event that you will attend.	It is a two day forum discussing the current policy issues and trends in higher education.

Describe your participation in the event.	I am the Senate Chairman of the Committee on Higher Education. I will be attending the conference to enhance my knowledge of the national issues facing Higher education and the policies being implemented to effectively dealing with them.
Date, time and location of event.	December 1-2, 2014 Loews Miami Beach Hotel 1601 Collins Avenue Miami Beach, FL 33139 305.604.1601
Please explain how the activity will promote the interests of the Commonwealth, a county or a municipality.	As the chairman of the Senate Committee on Higher Education, I will be able to use the data and information obtained to develop policy and legislation to address issues facing our higher education community.
Provide information in as much detail as possible:	<b>Itemization and explanation of amounts offered:</b>
Transportation:	Air, train, bus, and taxi fare and rental car hire, etc. Airfare is \$448.20
Lodging:	Overnight accommodations. \$202.27
Meals:	Breakfast, lunch, dinner, special events. N/A
Admission:	Registration, admission, tickets, etc. N/A
Other (please list):	Refreshment, instruction, materials, entertainment, etc. N/A
Total:	\$650.47
Write an X beside any relevant statement.	<input checked="" type="checkbox"/> <b>I have attached the relevant itinerary.</b> <input checked="" type="checkbox"/> <b>I have attached the relevant agenda.</b>
For the exemption to apply, <u>both statements</u> must be checked.	Having disclosed the facts above, I determine that:  <input checked="" type="checkbox"/> Acceptance of the reimbursement, waiver or payment of travel expenses will serve a legitimate public purpose i.e., will promote the interests of the Commonwealth, a county or a municipality; AND  <input checked="" type="checkbox"/> Such public purpose outweighs any special non-work related benefit to me or to the person providing the reimbursement, waiver or payment.

Employee signature:	
Date:	11/24/14

Attach additional pages if necessary.

Elected state or county employees – file with the State Ethics Commission.

Members of the General Court – file with the House or Senate clerk or the State Ethics Commission.

Elected municipal employee – file with the City Clerk or Town Clerk.

Elected regional school committee member – file with the clerk or secretary of the committee.

**DRAFT AGENDA**  
**FIFTH ANNUAL CONVENING**  
**of the ALLIANCE OF STATES**

**Monday, Dec. 1**

- 2:00      **Welcome and National Report Release: *The Four-Year Myth***
- 2:15      **The Chronicle of Higher Education: *The Four-Year Myth***  
On-stage interviews about CCA's latest report
- 3:00      **"Busting the Myth: Lumina's Investment in Guided Pathways to Success (GPS)**  
Lumina Foundation for Education is taking GPS to scale in three states
- 3:25      **GPS in STEM: Five States Partner with CCA and the Helmsley Trust**  
Institutions across several states are creating structured STEM degree maps
- 3:50      ***Purpose First: Enhancing GPS to Help Students Make the "Big Choice"***  
Announcement: New initiative launched by USA Funds and CCA
- 4:20      **Uncovering the Momentum of *15 to Finish***  
Credit-taking intensity is on the rise across the country
- 4:30      **LIVE: University of Akron *Finish in Time* Infomercial**  
A live-action performance of a fun institutional effort to boost on-time completion
- 4:32      **Dramatic Results with *15 to Finish***  
Campus-based initiatives are rapidly increasing credit accumulation
- 5:00      **Plenary Session Ends**
- 5:10      **State Team Time**  
Discussion: Using GPS to Get Your State on Track
- 6:10      **State Team Time Ends**
- 6:30      **Evening Reception @Loews Miami Beach Resort**
- 8:30      **Reception Ends**

**Tuesday, Dec. 2**

- 7:00-8:15 A     **CCA Legislative Breakfast**  
State legislators and their SHEEOs only
- CCA Alliance Liaison Breakfast  
Alliance Liaisons only
- 8:30             **Welcome Back and National Release: Game Changer Data by State**  
A live demonstration of CCA's new web-based state data pages
- 8:45             **Leveraging the Power of Data to Inspire and Reward Reform**  
The right metrics move stakeholders and enhance outcomes-based funding
- 9:25             **Corequisite Remediation at Scale**  
Redesigned gateway courses for underprepared students are sweeping the nation
- 10:05           **COMPLETE CONVERSATION**  
The Shortcomings of High-Stakes Placement Tests  
Stan Jones and Tom Bailey of CCRC discuss in-depth the problems of placement
- 10:25           **Gateways to Pathways: Innovations in College-Level Math**  
States are aligning mathematics to programs of study
- 11:00           **"Structure Saved My Life"**  
A recent graduate shares her story of academic success
- 11:15           **Expansion of Structured Schedules and Introduction of Keynote Speaker**  
CCA President Stan Jones calls on states to help working students
- 11:25           **Annual Convening Keynote Address**
- 11:50           **Closing Remarks**
- 12:00           **State Team Time and Lunch**  
Discussion: Moving Forward with the Game Changers
- 1:00             **Annual Convening Ends**

## **Guidelines for Reimbursable Expenses**

### **COMPLETE COLLEGE AMERICA**

Annual Convening 2014

Miami Beach, Florida • December 1 - 2, 2014

NOTE: *Original receipts* must be attached to the Complete College America Travel Reimbursement Form. Reimbursements will not be made until accounting requirements are met. Complete College America covers the following expenses:

• AIRLINE LUGGAGE FEE: Complete College America covers the cost of airline luggage fees.

• PERSONAL TRANSPORTATION: For those driving to their departure airport or to Miami, reimbursement for use of personal vehicles will be made at the rate published in the Federal Register, which is currently \$0.56 per mile. To be reimbursed for mileage, please submit documentation showing the total distance driven, such as a Google map.

Attendees may receive mileage reimbursement for distances driven with a personal vehicle that would otherwise be made by air. In these cases, total reimbursement will not exceed the lowest available round-trip coach airfare for the same destination. Travelers must supply documentation to support what the airfare would have been at that time if the attendee's personal car is used for these trips.

• PARKING: Complete College America covers daily parking charges for personal vehicles at the event hotel or at the departure airport.

• TRANSPORTATION BETWEEN HOTEL AND AIRPORT: Complete College America reimburses costs of taxis, shuttles, or public transportation. Rental car costs or limo services will not be reimbursed.

• MEALS: Complete College America reimburses for meal expenses not provided during the meeting and during travel time under the following conditions:

• Meals must occur during your travel period in order to be reimbursed.

• You cannot be reimbursed for meals offered during the meeting. Meals that will be provided are: 12/01 Dinner, 12/02 Breakfast and 12/02 Lunch.

• Receipts required for all expenses.

• Maximum reimbursement per meal is:

- \$12 – Breakfast
- \$18 – Lunch
- \$36 – Dinner
- \$5 – Incidentals

© NON-ELIGIBLE EXPENSES: Complete College America does not reimburse for entertainment, alcoholic beverages, photocopies, dry cleaning, pay-television, health club costs, or expenses for spouses or other guests.

To ensure prompt reimbursement, please submit reports immediately after the event. Be certain that expense reports are complete and all receipts are attached upon submission. Please allow four weeks after submitting expense report for payment.

01 DEC 14 - MONDAY

AIR AMERICAN AIRLINES FLT:1441 ECONOMY FOOD FOR PURCHASE  
LV BOSTON 750A EQP: BOEING 757  
DEPART: TERMINAL B 03HR 36MIN  
AR MIAMI INTERNTNL 1126A NON-STOP  
REF: BHQZJA  
MOORE/MICHAEL O SEAT-29C

LOEWS MIAMI BEACH HOTEL 1 NIGHT OUT-02DEC  
1601 COLLINS AVE 1 ROOM  
MIAMI BEACH FL 33139  
PHONE 305-604-1601 GUARANTEED LATE ARRIVAL  
CONFIRMATION 11745892

02 DEC 14 - TUESDAY

AIR AMERICAN AIRLINES FLT:1355 ECONOMY FOOD FOR PURCHASE  
LV MIAMI INTERNTNL 305P EQP: BOEING 737-800  
03HR 13MIN  
AR BOSTON 618P NON-STOP  
ARRIVE: TERMINAL B REF: BHQZJA  
MOORE/MICHAEL O SEAT-23D

AMERICAN CONFIRMATION BHQZJA

**DISCLOSURE BY ELECTED PUBLIC EMPLOYEE  
OF TRAVEL EXPENSES SERVING A LEGITIMATE PUBLIC PURPOSE**

**AS REQUIRED BY 930 C.M.R. 5.08(2)(d)2.**

You are an **elected state, municipal or county employee**, and you are going to engage in an activity that serves a **legitimate public purpose**. You are disclosing that a **non-public entity will reimburse, waive or pay your travel expenses**.

An activity has a "**legitimate public purpose**" if it is intended to promote the interests of the Commonwealth, a county or a municipality.

If you are reporting travel expenses related to a "**legitimate speaking engagement**" that serves a legitimate public purpose, instead please use the Disclosure by Appointed Public Employee of Travel Expenses Related to a Legitimate Speaking Engagement.

**TRAVEL EXPENSES**

A **non-public entity** (but not a lobbyist) has offered to reimburse, waive or pay \$50 or more of the following types of expenses and costs:

- **Travel expenses**, including air, train, bus, and taxi fare and rental car hire.
- **Travel-related expenses**, including meals and lodging.
- **Expenses related to attendance at an event involving travel**, including the costs of registration, admission, tickets, food, refreshments, instruction, materials and entertainment.

These expenses may cover only the day or days on which you have participation or presentation responsibilities and the days on which you must travel to the meeting, conference, event or legitimate speaking engagement and return to the Commonwealth

**WHAT SHOULD YOU DO TO COMPLY WITH THE CONFLICT OF INTEREST LAW?**

Before you travel or attend the event, **you must file a written disclosure:**

- **Disclose** the facts relating to the offer, including an itemization and explanation of the travel expenses or costs related to the event;
- Provide any relevant **itinerary or agenda**.

You must **determine in writing** prior to any travel or attendance **both** that:

- Acceptance of such reimbursement, waiver or payment will serve a **legitimate public purpose**, and
- Such **public purpose outweighs any special non-work related benefit** to you or the person providing the reimbursement, waiver or payment.

**If you are attending an event with members of your staff**, you may make a **single disclosure for both you and your staff members**.



**RECONCILIATION STATEMENT**

If you are offered travel expenses and your actual travel expenses differ from the original proposal by \$50 or more, then within two weeks of your return, you must submit a statement of reconciliation. See the form for **Reconciliation Statement** as Required by 930 C.M.R. § 5.08(2)(d)3.

**ADDITIONAL § 23(b)(3) DISCLOSURE**

Under § 23(b)(3), as a state, county or municipal employee, you must file a disclosure before performing official duties if an affiliation or relationship with a person or party involved would cause a reasonable person to conclude that you might show undue favoritism or be improperly influenced by the person or party. In addition to the disclosures explained above, you will be required to **file a disclosure under § 23(b)(3)** if a particular matter involving the person or organization that reimbursed, paid or waived your travel expenses, travel-related expenses, or expenses related to an event involving travel comes before you during the **six months after** you accepted them.

**If you need advice about completing the disclosure, please call the Attorney of the Day at (617) 371-9500 or e-mail the State Ethics Commission at [opinions@eth.state.ma.us](mailto:opinions@eth.state.ma.us).**

**Please scroll down to the form below.**