

Date/Time Stamp:

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**.

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.)

The Heritage Foundation

Private Sponsor(s) (list all):

Travel date(s): October 13-14, 2022

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

Relationship to Traveler: ☐ Spouse ☐ Child

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

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☐ Good Faith Estimate	\$69	\$145	\$67.23	\$14.50
☒ Actual Amount				(conference space)

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.): Attended the Emerging Leader Conference 2022 hosted by the Heritage Foundation at the Omni Hotel in Richmond, VA between the dates of October 13-14, 2022.

The meetings and events attended during this conference provided me with leadership principles to navigate my career with purpose and drive.

10/28/2022
(Date)

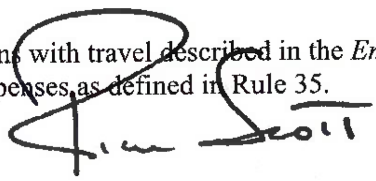
Brandon Morales
(Printed name of traveler)


(Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

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

10/28/2022
(Date)


(Signature of Supervising Senator/Officer)

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: Brandon MoralesEmploying Office/Committee: Senator Rick ScottPrivate Sponsor(s) (list all): The Heritage FoundationTravel date(s): October 13-14, 2022

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

Destination(s): Richmond, VA

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

As a Senior Staff Assistant for Senator Rick Scott, I am responsible for managing our Staff Assistants and Interns and constituent services such as answering the phones, logging opinions, etc. This program will lead discussions on leadership development and provide policy education. Attending this trip will help me become a better leader of my team and allow me to understand policy that our constituents express their concerns over.

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:

9/15/2022

(Date)



(Signature of Employee)

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

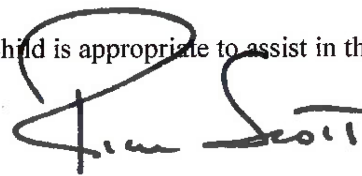
I, Senator Rick Scott hereby authorize Brandon Morales
(Print Senator's/Officer's Name) (Print Traveler's Name)

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) ☐

9/15/2022

(Date)



(Signature of Supervising Senator/Officer)

Morales, Brandon (Rick Scott)

From: Scott Zipperle <Scott.Zipperle@heritage.org>
Sent: Thursday, August 25, 2022 3:18 PM
To: Morales, Brandon (Rick Scott)
Subject: Invitation: Heritage's Emerging Leaders Conference 2022



You are invited to:
Emerging Leaders Conference 2022

Hello Brandon –

On behalf of The Heritage Foundation, I'd like to invite you to our annual **Emerging Leaders Conference** for rising Hill staffers on **October 13-14th!**

If you are looking to:

- Become a main influence in your office
- Make work more meaningful and advance your career with purpose
- Bring about substantive change to American public policy

... then the Emerging Leaders Conference is for you!

RSVP

What's it all about?

The American people are facing tough times. We are up against an aggressive administrative state run by progressive ideologues who despise you and the people you advocate for. The sooner we wake up to that, the sooner we can turn this ship around. But our window of time is short, and the weak-kneed approach of old isn't going to cut it.

As we head into the 118th Congress, the Heritage Foundation is going **on offense**, and we want you to join us in this endeavor.

As a Hill staffer, you have the opportunity to make a real difference in the lives of everyday Americans by providing a **clear vision of what America** is truly about and how we can restore hope of living the good life in the world's greatest nation.

The conversations at this conference are designed to paint the vision, light the path, and move forward while providing you with leadership principles that will enable you to navigate your career with purpose and drive.

Details:

- Thursday, Oct. 13 – Friday Oct. 14
- Omni Hotel in Richmond, Virginia
- All meals included
- The bus will arrive at 214 Mass Ave NE at 8:30am and depart at 9:00am
- Conference lineup will be posted soon

Space is limited, so please RSVP as soon as possible if you would like to attend. All aspects of the trip will be within guidelines of Ethics Committee Rules.

See you there,
Scott Zipperle



214 Massachusetts Ave., NE | Washington, DC 20002
(202) 546-4400 | heritage.org

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.

- The Heritage Foundation
1. Sponsor(s) of the trip (please list all sponsors): _____
2. Description of the trip: This is a 1.5 day trip to lead discussions on leadership development and provide policy education to junior -mid level congressional staff
3. Dates of travel: October 13-14th, 2022
4. Place of travel: Richmond, VA
5. Name and title of Senate invitees: List of attendees attached at the end of this document
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:

The Heritage Foundation hosts the Emerging Leaders Conference annually for junior congressional staff who seek to strengthen their leadership and professional skills and learn about policy research conducted by Heritage analysts.

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

The Heritage Foundation's mission is to formulate and promote public policies based on the principles of free enterprise, limited government, individual freedom, traditional American values, and a strong national defense. This trip discusses current events through this lens.

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

The Heritage Foundation was established in 1973, and has sponsored many congressional trips for nearly 50 years. Emerging Leaders Conference has been hosted annually since 2017 and continues to gather junior staffers who have served on the Hill for 2 years or less.

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

The Heritage Foundation routinely provides expert analysis on nearly every topic to government

employees and congressional staff. We provide free educational seminars to congressional staffers, host

public lectures and debates, and regularly provide policy briefs to Members of Congress and their staff. 16.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
☐ Good Faith estimate ☒ Actual Amounts	\$69	\$145	\$67.23	\$14.50 (conference space)

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 involves an event arranges or organized specifically with regard to congressional participation.

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

Emerging Leaders is typically held at historically significant cities. Richmond was a location that offered significance, the space for our group, and reasonable rates.

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

Omni Richmond Hotel in Richmond, VA.

100 S 12th St, Richmond, VA 23219

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

Conference is held at a venue that can accommodate the large group free from distraction, within GSA

guidelines, and in a space that facilitates camaraderie amongst attendees. Most other locations had

neither the space nor offered rates that stayed within guidelines.

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:

All daily expenses are right at the GSA 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:

Attendees and staff will take a charter bus round trip from D.C. to Richmond, and back to D.C. the next day.

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:

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: 

Name and Title: Eric Teetsel, Vice President of Government Relations

Name of Organization: The Heritage Foundation

Address: 214 Massachusetts Ave NE, Washington D.C. 20002

Telephone Number: 202-608-6001

Fax Number:

E-mail Address: eric.teetsel@heritage.org



Thursday, October 13 – Friday, October 14, 2022
Omni Richmond Hotel | Richmond, VA

Thursday, October 13

8:30 – 9:00 a.m. **Congressional Staff Arrive at Heritage**
Staff check-in and put bags on bus

9:15 a.m. **Bus Departs Heritage**

11:00 a.m. **Arrive at Omni Richmond Hotel**

11:00 a.m. – 12:00 p.m. **Conference Introduction and Opening Remarks**

12:00 – 1:15 p.m. **Lunch with Session I: First Principles**

Clint Brown
Vice President, Government Relations
The Heritage Foundation

1:15 – 1:30 p.m. **Break**

1:30 – 2:45 p.m. **Budget Stimulation Game**

Richard Stern
Senior Policy Analyst, Budget Policy,
Grover M. Hermann Center for the Federal Budget,
The Heritage Foundation

Jack Parsh
Assistant, Government Relations
The Heritage Foundation

2:45 – 3:00 p.m. **Break**

3:00 – 4:15 p.m. **Session II: Challenges and Opportunities: Enemies of the People**

Andy Olivastro
Vice President, Outreach
The Heritage Foundation

Dakota Wood
Senior Research Fellow, Defense Programs, Center for National Defense
The Heritage Foundation

Will Thibeaun
Policy Analyst, Tech Policy Center
The Heritage Foundation

4:15 – 5:30 p.m. **Session III: Our Moment to Lead**

Andy Olivastro
Vice President, Outreach
The Heritage Foundation

5:30 – 6:30 p.m. **Session IV: Navigation Congressional Procedure**

Garrett Bess
Executive Vice President,
Heritage Action for America

6:30 – 7:00 p.m. **Reception**

7:00 – 8:30 p.m. **Dinner and Session V: Building a Culture of Human Flourishing**

Delano Squires
Research Fellow, Richard and Helen DeVos Center for
Life, Religion, and Family
The Heritage Foundation

Friday, October 14

8:30 – 9:30 a.m. **Breakfast and Breakout Session for Budget Simulation**

9:30 – 10:45 a.m. **Session VI: Challenges and Opportunities – The American Family**

Richard Stern
Senior Policy Analyst, Budget Policy,
Grover M. Hermann Center for the Federal Budget,
The Heritage Foundation

Adam Kissel
Visiting Fellow, Higher Education Reform
Center for Education Policy
The Heritage Foundation

10:45 – 11:00 a.m. **Break**

11:00 a.m. – 12:00 p.m. **Session VII: The Importance of Congressional Oversight**

Roman Jankowski
Senior Investigative Counsel, Oversight Project,
Government Relations
The Heritage Foundation

12:15 – 1:30 p.m. **Lunch and Session VIII: Becoming a Great Communicator**

Rob Bluey
Vice President, Communications and
Executive Editor, The Daily Signal
The Heritage Foundation

Scott Zipperle

Congressional Communication Outreach Manager,

Government Relations

The Heritage Foundation

1:30 – 2:00 p.m.

Budget Simulation Results

2:30 p.m.

Depart from Omni Richmond Hotel

4:30 p.m.

Arrive back at Heritage

CONFIDENTIAL

Name and title of attendees:

Benjamin Tardif, Staff Assistant
Cayden Connelly, Legislative Correspondent
Brandon Morales, Senior Staff Assistant
Liz Slezak, Legislative Aide

Explanation of why the individual was invited:

Each of the individuals invited has previously participated in Heritage fellowship or other Heritage programming. This is a conference for rising congressional staffers who are interested in developing their professional and leadership skills and learning about a pro-human flourishing approach to public policy.