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):

Heritage Foundation

Travel Dates:

Oct 13-14 2022

Name of accompanying family member (if any):

Relationship to Traveler:

Total Expenses

Transportation Expenses	Lodging Expenses	Meals Expenses	Other Expenses (Amount & Description)
$150.93	$126.82	$96.16	N/A

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.

4/25/23
Date

Anna Hardage
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.

4/25/23
Date


Signature of Supervising Senator/Officer

0000000001975 RECEIVED BY: SECRETARY OF THE SENATE Date: April 25, 2023

amended, original submitted on 9/19/22

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: Anna Hardage

Employing Office/Committee: Senator John N. Kennedy

Private Sponsor(s) (list all): The Heritage Foundation

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

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

Destination(s): George C. Marshall Museum (Lexington, VA)

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

this trip is an educational experience that will foster leadership skills and contribute to my knowledge of American grand strategy and defense policy. My duties as a congressional staffer include the defense and foreign policy portfolios, and my participation in this seminar will contribute to my understand of the topics I handle in the office.

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:

9/21/2022
(Date)

Anna Hardage
(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 Kennedy hereby authorize Anna Hardage

(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)* ☐

9-21-22
(Date)

John Kennedy
(Signature of Supervising Senator/Officer)

(Revised 10/19/15)

Form RE-1

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:

Hardage, Anna (Kennedy)

From: Braun, Andrew <Andrew.Braun@heritage.org>
Sent: Tuesday, September 6, 2022 12:12 PM
To: Hardage, Anna (Kennedy); Anna Hardage
Subject: Invitation to VMI/George C. Marshall Museum & Library Trip for Marshall Fellowship
Attachments: Primary Trip Sponsor Form -- Senate VMI.pdf

Good morning Anna,

You are cordially and officially invited to join The Heritage Foundation on our Marshall Fellowship Program trip to the Virginia Military Institute and George C. Marshall Museum & Library on October 13 & 14. This is an official invitation.

Please find attached a detailed itinerary and complete primary trip sponsor form. As you know, you will need to complete and fill out the employee pre-travel authorization form here.

Please let me know if you need anything from me. You hope you can join.

VR
Andy

Andrew Braun
Government Relations Manager, Congressional Relations
The Heritage Foundation
214 Massachusetts Avenue, NE
Washington, DC 20002
202-608-1631
heritage.org

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): The Heritage Foundation

2. Description of the trip: Two-day trip to George C. Marshall Museum & Library at Virginia Military Institute (VMI) in Lexington, VA to discuss grand strategy and run a simulation of Yalta Conference and its impact

3. Dates of travel: Thursday, October 13, 2022 - Friday, October 14, 2022

4. Place of travel: George C. Marshall Museum & Library (340 VMI Parade, Lexington, VA 24450)

5. Name and title of Senate invitees: Ashley Satterfield, Celia Morte, Ryan Rasins, Anna Hardage

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 is the sole sponsor and organizer of this trip. The Heritage Foundation funds the expenses for congressional trips from its general operating budget.

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 cultivates national security professionals to support a strong defense.

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. The Marshall Fellowship Program includes an annual VMI and Marshall Museum & Library trip (this trip) every year and has done so for over a decade.

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

The Heritage Foundation hosts hundreds of educational programs annually at its D.C headquarters and around the country, focused on a variety of policy issues. Heritage also produces thousands of publications on public policy, read by the general public and policymakers.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
☒ Good Faith estimate ☐ Actual Amounts	$200 (charter bus)	$109.99 (per person)	$85 (total per person per trip)	

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

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

VMI in Lexington, VA is home to the George C. Marshall Museum & Library. Heritage's Marshall Fellowship is named for Marshall. We will conduct a site survey of the facility and discuss his impact.

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

Holiday Inn Express Lexington (880 N. Lee Highway, Lexington, VA 24450).

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

This hotel is the lowest cost hotel which meets both the accessibility and safety requirements we have when considering accommodations for our Marshall Fellows (other hotels are in isolated locations adjacent to the North Lee Highway and many participants will be walking back to the hotel at night after dinner).

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

The meals cost estimate is less than the M&IE $44.25 per day for the first and last day of travel.

The hotel is $11.99 over the GSA rate, however, it is the least expensive hotel available which meets our requirements (saftey, accessibility from Lexington).

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:

Charter bus (coach)

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:

There is no entertainment which will be provided to, paid for, or reimbursed to Senate invitees.

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Signature of Travel Sponsor: 

Name and Title: Andrew Braun, Government Relations Manager

Name of Organization: The Heritage Foundation

Address: 214 Massachusetts Ave. N.E., Washington, D.C. 20002

Telephone Number: 202-608-1631

Fax Number:

E-mail Address: andrew.braun@mail.house.gov

Detailed Agenda:

The Heritage Foundation Marshall Fellowship Program Virginia Military Institute & George C. Marshall Museum & Library Trip

Thursday, October 13, 2022

12:00 PM — Meet at The Heritage Foundation (214 Massachusetts Ave NE, Washington, D.C.)

12:30 PM — Depart Washington, D.C. for Holiday Inn Express Lexington (880 N Lee Hwy, Lexington, VA 24450). En route to VMI, we will discuss the historical outcomes of the Yalta Conference, the long-term impact it had on the world such as demarcating most of the boundaries of the Cold War, identify how things might have played out differently if each country involved knew more about the relative strengths and weaknesses of the others, and prepare for the Yalta simulation which will occur on the following day at the Marshall Library.

4:30 PM — Arrive at Holiday Inn Express Lexington (880 N Lee Hwy, Lexington, VA 24450). Check into rooms.

5:00 PM — Depart for Marshall Museum & Library (340 VMI Parade, Lexington, VA 24450).

5:30-6:30 PM — Arrive at Marshall Museum & Library. Begin facility visit, discussing George C. Marshall's leadership, historical contributions, U.S. grand strategy towards the end of World War II and at the outset of the Cold War.

6:30 PM — Depart for Southern Inn (37 S Main St, Lexington, VA 24450) for dinner.

6:45-9:00 PM — Eat dinner. Meet VMI cadets in the political science and history programs and discuss working in national security. Guided discussion with Colonel Dennis Foster, Ph.D. (Department Head of International Studies & Political Science Department at VMI) about the Yalta Conference, including the state of geopolitical affairs when the conference began, the grand strategy of each of the three nations involved, and the historical outcomes.

9:00 PM — Return to Holiday Inn Express Lexington (880 N Lee Hwy, Lexington, VA 24450).

Friday, October 14, 2022

7:00 AM — Depart Holiday Inn Express for Marshall Museum & Library.

7:30-8:30 AM — Breakfast served. Final preparations before Yalta Conference Simulation begins. Each of the teams (U.S., U.K., and U.S.S.R.) will use this time for a final review of the policy priorities of each of the historical factions participating, the geopolitical world-state (the forces and frontlines for each of the belligerents in Europe and in the Pacific), and the opening remarks and duty assignments for the leaders and participants.

8:30 AM – 12:30 PM — Yalta Conference simulation commences. Each of the participants will have been assigned a historical figure (e.g. Winston Churchill, Franklin Roosevelt, Joseph Stalin), and will try to negotiate outcomes for their respective country (U.S., U.K., U.S.S.R.) in keeping with the geopolitical reality at the time of the conference and the goals of the historical participants. The participants will leverage the work they do in the real world working on national security related issues, and what they have been learning about grand strategy throughout the program.

12:30-1:30 PM — After action discussion. The Marshall Fellows will receive a review by the VMI instructors as to how each team performed, how well they adhered to their objectives, and how well each individual was able to achieve their specific historical individual's goals.

1:30 PM — Depart Marshall Museum & Library (340 VMI Parade, Lexington, VA 24450) for The Heritage Foundation.

5:30 PM — Arrive at The Heritage Foundation (214 Massachusetts Ave NE, Washington, D.C.).