

Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:
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2023 JAN -4 PM 12:32

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.)

Private Sponsor(s) (list all): Gates Global Policy Center

Travel date(s): December 8 - 10, 2022

Name of accompanying family member (if any): _____

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	\$311.62	\$568.00	\$416.41	Shuttle to and from all events
☒ Actual Amount				\$75.00

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.):

I attended briefings on the research papers and group discussions with senior administration

officials on legislative and administrative actions to improve our strategic communications. See attachment for further detail.

1/3/2023
(Date)

Elizabeth O'Bagy
(Printed name of traveler)

Elizabeth O'Bagy
(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.

1/3/2023
(Date)

Chris Coons
(Signature of Supervising Senator/Officer)

Provide a Description of all meetings and events attended.

The Forum started with a welcome dinner to meet the other participants and learn about the objectives for the Forum. The first day I attended a series of briefings on the research findings and discussions with senior administration officials on our strategic communication efforts and how to improve them. These briefings are outlined in the itinerary (attached). The final day was a half-day session on lessons learned and a group discussion with senior officials and other congressional staff on legislative and administrative actions to take to improve our public diplomacy and strategic communication programs and initiatives.

GF1 Strategic Communications**Agenda****Thursday, 8 December**

1200-1800: Arrival Transportation	Airport to Lodge	As arranged
1600-1830: Check-In	Lodge, Williamsburg	Conferees
1820-1830: Shuttle	Lodge to Inn	Conferees
1830-1930: Cocktail Hour.	East Lounge, Inn	Conferees & 4+1s, Secretary Gates, President Rowe, Chiarelli, Condon, Tierney
1930-2100: Ice Breaker Dinner	East Lounge, Inn	Same as above
2100-2130: Shuttle	Inn to Lodge	Same as above

Friday, 9 December

0800-0830: Shuttles	Lodge to Alumni House	All
0800-0900: Breakfast	Alumni House	All
0900-0915: Opening Remarks/	Alumni House	All

Introductions: President Rowe – Welcome (5 Minutes)
Secretary Gates – Explains Conference Expectations (10 Minutes)

0915-1030: Research Recaps	Alumni House	All, Researchers
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Papers 1 (15 min), 2 (10 min), 3A (20 min): Researchers present what they think is most relevant to the broader discussion on fixing U.S. Strategic Communications: four or five major takeaways and what they would do about them. All researcher presentations followed by 10 min for questions and answers.

1030-1045: Break

1045-1200: Research Recaps	Alumni House	All, Researchers
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Papers 3B (10 min), 4 (10 min): Researchers present what they think is most relevant to the broader discussion on fixing U.S. Strategic Communications: four or five major takeaways and what they would do about them. All researcher presentations followed by 10 min for questions and answers.

1200-1230: Lunch	Alumni House	All, Researchers
1230-1400: Framing the problem	Alumni House	All, Researchers

Papers 6 (to include PEPFAR paper recommendations among the options) (30 min) followed by 15 min for questions and discussion.

1400-1415: Break

1415-1630: Identifying the options/ solutions	Alumni House	All, Researchers
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1630-1645: Shuttles	Alumni House to Lodge	All
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1645-1800: Executive Time	Lodge	All
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1800-1815: Shuttle	Lodge to Wren Building	All
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1815-1900: Cocktails	Wren Building	All, Conferees & 4+1s, Secretary Gates, President Rowe, Chiarelli, Condon, Tierney, Custer, Musto Brown, Researchers
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1900-2100: Dinner	Wren Building	All
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2100-2115: Shuttle(s)	Wren to Lodge	All
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Saturday, 10 December

0745-0830: Shuttles	Lodge to Alumni House	All
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0745-0830: Breakfast	Alumni House	All
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0830-1000: Decision on options/ recommendations	Alumni House	All
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1000-1015: Break	Alumni House	All
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1015-1200: Implementation	Alumni House	All
Capabilities, structure, resources substance, and strategy		
1200-1230: Adjournment and Lunch	Alumni House	All
1230-1245: Shuttle to Lodge	Alumni House to Lodge	All
1245-1600: Transportation to Airport	Lodge to Airport	As arranged

Papers

1. U.S. Historical Strategic Communications at Key Points in Time – Resourcing, Organization Coordination and Governance, AidData (Samantha Custer, Austin Baehr, Bryan Burgess, Emily Dumont)
2. “Public Diplomacy and the Road to Reputational Security: Analogue Lessons from U.S. History for a Digital Age” – In-Depth Case Studies of U.S. Strategic Practice, Nick Cull
- 3a. A Quantitative Look at the Strategic Communications Influence: Playbook of China and Russia – Audiences, Tools, Reach and returns (outward looking – how China and Russia engage other countries to project narratives and advance interests), AidData
- 3b. “China-Russia Strategic Communications: The Evolving Visions and Practices” – A Qualitative Look at China and Russia Strategic Communications Goals, Practices and Organization (inward looking – how Chinese and Russian leaders think about, strategize, and operationalize strategic communications in their foreign policy apparatus and goals), Maria Repnikova
4. “Autocratic Approaches to Information Manipulation: A Comparative Case Study” – Interplay of Strategic Communications, Influence and Technology, Jessica Brandt
6. Alternative Models and Options for U.S. Strategic Communications, AidData (Samantha Custer)
7. Synthesis of All of the Above, AidData (Samantha Custer, Emily Dumont, Divya Matthew)



October 21, 2022

Dear Senator Coons:

Thank you for your willingness to participate in the December Forum at William & Mary on U.S. strategic communications. As we contemplate long-term competition/rivalry with China and Russia (and others), all of you who have agreed to participate seem to share the view that the U.S. needs to up its game dramatically in the strategic communications arena.

Participants in the Forum will include:

- Senator Chris Coons (DE)
- Senator Todd Young (PA)
- Representative Gregory Meeks (NY)
- Representative Michael McCaul (TX)
- Adm. (ret.) John Kirby, NSC Coordinator for Strategic Communications
- Acting Under Secretary of State Elizabeth Allen
- Assistant Secretary of Defense Dr. Mara Karlin
- Assistant Secretary of State Daniel Kritenbrink
- Deputy Assistant Director of CIA Michael Collins
- Assistant to the Secretary of Defense Chris Meagher
- Tom Gjelten, National Public Radio (ret.)
- Vivek Varma, CEO Emes Project LLC
- Thom Shanker, New York Times (ret.)
- Brent Colburn, University of California SVP for External Relations and Communications

Working together, I hope (and believe) we can develop recommendations for action that will find broad support in the Administration and bipartisan support in Congress. I look forward to your individual expertise and contribution as we convene, discuss and develop recommendations. I will chair the sessions and we will operate under Chatham House rules, allowing everyone afterward to discuss what was said in our sessions but not who said it.

In partnership with William & Mary's Global research Institute (GRI) and outside contributors, we are preparing several background papers that will be shared with you well prior

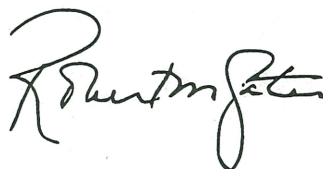
to the Forum. The GRI papers will diagnose the strategic challenge and offer various solutions from three perspectives:

1. A retrospective look at U.S. strategic communications when our capabilities were at their most robust and most successful.
2. An assessment of the scope, scale and reach of Chinese and Russian strategic communications today and lessons to be learned.
3. An assessment of alternative models and emerging technologies that should inform our recommendations.

The research papers, along with a synthesis paper, will be sent to you electronically and by mail no later than November 11, 2022.

I look forward to seeing you for informal cocktails and dinner on December 8 if you can make it, and, otherwise, for the Forum starting Friday morning. I believe that, together, we can develop nonpartisan recommendations – based on a foundation of high-quality research and spirited discussion – that can lead to meaningful improvement in this area so vital to our national interest.

If your office has not responded to the Welcome Letter sent by email from General (ret.) Pete Chiarelli (pete@gatesglobalpolicy.org), please encourage a response. Identifying a person of contact for the forum staff will guarantee that research materials arrive as promised. In addition, we want to ensure that transportation, lodging and special requirements are provided, as requested, when you arrive and depart Williamsburg. The Gates Global Policy Center will reimburse conferees for all travel expenses, meals and lodging associated with attendance at the Gates Forum, December 8-10, 2022.



Robert M. Gates

ROBERT M. GATES GLOBAL POLICY CENTER
P.O. BOX 1257
NEWINGTON, VIRGINIA 22122-1257
509.876.4647

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.

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1. Sponsor(s) of the trip (please list all sponsors): Gates Global Policy Center
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2. Description of the trip: Conferee participation at the inaugural Gates Forum on Strategic Communication.
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3. Dates of travel: December 8, 2022 - December 10, 2022
4. Place of travel: Williamsburg, Virginia
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:

The Gates Global Policy Center is the only organizer and funder of the inaugural forum on Strategic Communications and is responsible for conducting all aspects of the trip.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:
The purpose of the Gates Strategic Communications Forum is to devise policies, strategies, and

institutional reforms capable yielding bipartisan support.

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

This is the first Gates Global Policy Center's sponsored congressional trip.

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

N/A

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
☒ Good Faith estimate	Car Service to Williamsburg \$734.48 Train to DC \$40.00	Hotel 2 nights \$568.00	\$416.41 (all meals/breaks provided)	Shuttle to/from all events \$75.00
☐ Actual Amounts				

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 Forum is organized with regard to congressional participation.

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

The Gates Global Policy Center commissioned the Forum research from William & Mary's Global Research Institute. Williamsburg was chosen due to its easy access for participants to travel to and from Washington, DC.

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

The Williamsburg Lodge, 310 S England Street, Williamsburg, Virginia 23185

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

The Williamsburg Lodge was selected due to its proximity to the location of the William and Mary campus, the site of the forum.

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 daily expenses for lodging and meals are greater than the maximum per diem rates due to the timing of the event. The expenses reflect the best available Colonial Williamsburgs December seasonal rates. All Forum attendees will have the same accommodations.

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:

Liz O'bagy will arrive by car service and return by train.

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:

N/A

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: 

General Peter W. Chiarelli, President

Name and Title:

Gates Global Policy Center

Name of Organization:

PO Box 1257, Newington, Virginia 22122

Address:

254-449-0580

Telephone Number:

N/A

Fax Number:

pete@gatesglobalpolicy.org

E-mail Address: