RE-3 Senators and Officers Post Travel Disclosure of Travel Expenses

Date/Time Stamp

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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):

The Heritage Foundation

Travel Dates:

October 28, 2023-November 2, 2023

Name of accompanying family member (if any):

Sharon Lee

Relationship to Traveler:

Spouse

Total Expenses

Transportation Expenses	Lodging Expenses	Meals Expenses	Other Expenses (Amount & Description)
$15,715.70	1,666.48	$1,792	

I also certify that attached to this form are all required documents for post travel disclosure, including:

- The final **Private Sponsor Travel Certification Form** with all attachments
- The final invitation
- The final approved itinerary

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.

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.

11/27/2023
Date

Mike Lee
Printed Name of Senator/Officer

Signature of 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

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:

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ARC

ARC Conference 2023: Programme

Day 1 - 30th October

09:30 - 10:30 Session 1: **'ARC: A vision for the future'**
Chair: Philippa Stroud

Baroness Philippa Stroud is co-founder and CEO of ARC, Member of the House of Lords, and Chair of the Social Metrics Commission. Prior to this, she was the CEO of the Legatum Institute and Co-Founder and Chief Executive of the Centre for Social Justice. She served as Special Adviser to the Rt. Hon. Iain Duncan Smith MP from 2010-15 and also to the Prime Minister from 2012.

Speakers:

Speaker Kevin McCarthy (not yet announced)

Dr Jordan B Peterson is a psychologist, online educator, and Professor Emeritus at the University of Toronto.

Joshua Luke Smith is a British rapper, poet, and producer with a dramatic, socially conscious style and Christian undertones. (not yet announced)

11:00 - 12:00 Session 2: **'Why do we need ARC now?'**
Chair: Philippa Stroud

Baroness Philippa Stroud is co-founder and CEO of ARC, Member of the House of Lords, and Chair of the Social Metrics Commission. Prior to this, she was the CEO of the Legatum Institute and Co-Founder and Chief Executive of the Centre for Social Justice. She served as Special Adviser to the Rt. Hon. Iain Duncan Smith MP from 2010-15 and also to the Prime Minister from 2012.

Panel Chair: Jordan Peterson

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Dr Jordan B Peterson is a psychologist, online educator, and Professor Emeritus at the University of Toronto.

Speakers:

Tom Holland is an historian, broadcaster, and author, writing on topics including classical and medieval history, the origins of Islam, and the influence of Christianity on the modern West.

Ayaan Hirsi Ali is a research fellow at the Hoover Institution, founder of the AHA Foundation, and host of The Ayaan Hirsi Ali Podcast.

The Hon John Anderson AC FTSE is a former Deputy Prime Minister of Australia and now hosts Australia's pre-eminent politico-cultural video podcast.

Os Guinness is an author and social critic. He holds a DPhil from Oxford University, has been a Visiting Fellow at the Brookings Institution, and was the lead drafter of 'The Global Charter of Freedom of Conscience and Religion'.

12:00 - 12:30 Session 3: **'Strengthening the Social Fabric: Current trends'**

Miriam Cates is the Member of the UK Parliament who campaigns on issues around safeguarding, age-appropriate sex education, and gender ideology in schools.

Jonathan Haidt is a social psychologist and author. He is a Professor of Ethical Leadership at the New York University Stern School of Business.

14:00 - 15:00 Session 4: **'Free markets and Good Governance: Modern challenges'**
Chair: Fraser Nelson (not yet announced)

Fraser Nelson has been editor of The Spectator since 2009 and has overseen a doubling of the magazine's sales. He is also a columnist with The Daily Telegraph and is on the board of the Centre for Social Justice. He was previously a financial journalist with The Times and political editor of The Scotsman. He has presented two Channel Four documentaries on the subject of inequality.

Speakers:

Sir Paul Marshall is CIO and Chairman of Marshall Wace LLP, founder and owner of UnHerd Media and a main shareholder of GB News Ltd. He is a founding Trustee of Ark,

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the children's charity, and Chairman of Ark Schools, which manages 39 primary and secondary academies across England.

Vivek Ramaswamy is an American entrepreneur, political and cultural thought leader, and author. In 2022, he founded Strive Asset Management, an Ohio-based firm, that has a mission to restore the voices of everyday citizens in the American economy by leading companies to focus on excellence over politics.

Baroness Helena Morrissey is a British financier, campaigner, Member of the House of Lords and current Chair of the Board of Directors at the Fidelis Insurance Group. She founded the 30% Club, a campaign for more gender-balanced boards and is Chair of the investment industry's Diversity Project.

Derek Kreifels is the chief executive officer of the State Financial Officers Foundation (SFOF), which he co-founded in 2012. He was appointed by the Kansas Speaker of the House Daniel Hawkins in 2023 to serve a four year term on the board of trustees at the Kansas Public Employees Retirement System. Kreifels also become a member of the Tax and Fiscal Policy Task Force at the American Legislative Exchange Council (ALEC) in 2023. (not yet announced)

Terrence Keeley is the Managing Director and Head of the Official Institutions Group at BlackRock, Inc. In this position, he oversees the development of the relationships and the services BlackRock provides to official institutions around the world. Prior to joining BlackRock, Terry founded and served as the Senior Managing Principal of Sovereign Trends, LLC, an advisory firm for and about sovereign institutions. From 1987-2010 he was a senior managing director at UBS Investment Bank, where he oversaw the firm's transactional and advisory relations with central banks, sovereign wealth funds, ministries of finance, public pension funds and multilateral organizations, including the IMF and World Bank. Terry served as a consultant to Pope Francis' financial reform commission, overseeing the Vatican bank. He is also a founding director of the Financial Hippocratic Oath movement. From 1982-85 he served as one of the first young trustees on the Notre Dame Board. Today he is also a frequent commentator/author on all issues relating to international finance, cross-border capital movements and global financial governance. (not yet announced)

15:00 - 15:30 Session 5: **'Energy and the Environment: Abundance vs Scarcity?'**
Chair: Amanda Stoker

Amanda Stoker is a company director, columnist for the Australian Financial Review and host of the Sunday with Stoker program on Sky News Australia. She is a distinguished fellow of the Menzies Research Centre and was formerly the Assistant Minister for Women

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and Industrial Relations and the Assistant Minister to the Attorney-General whilst serving as a Liberal National Party Senator for Queensland in the Australian Parliament. (not yet announced)

Speakers:

Michael Shellenberger is an energy expert, a best-selling author, and a leading intellectual of the pro-human environmental movement. He is a co-founder of the Breakthrough Institute and the California Peace Coalition, and founder of Environmental Progress. He has also broken major stories including the 'Twitter Files'. (not yet announced)

Alex Epstein is an American author and commentator who advocates for the expansion of fossil fuels. He is the founder and president of the Center for Industrial Progress, a for-profit organization in San Diego, California. (not yet announced)

Marian L. Tupy is the founder and editor of HumanProgress.org, and a senior fellow at the Cato Institute's Center for Global Liberty and Prosperity.

16:00 - 17:00 Session 6: **'The Better Story: The Liberal Democratic Ideal'**
Chair: John Anderson

The Hon John Anderson AC FTSE is a former Deputy Prime Minister of Australia and now hosts Australia's pre-eminent politico-cultural video podcast.

Panel Chair: Greg Sheridan

Greg Sheridan is The Australian's foreign editor. His most recent book, Christians, the urgent case for Jesus in our world, became a best seller weeks after publication. It makes the case for the historical reliability of the New Testament and explores the lives of early Christians and contemporary Christians. He is one of the nation's most influential national security commentators, who is active across television and radio, and also writes extensively on culture and religion. He has written eight books, mostly on Asia and international relations. A previous book, God is Good for You, was also a best seller. When We Were Young and Foolish was an entertaining memoir of culture, politics and journalism. As foreign editor, he specialises in Asia and America. He has interviewed Presidents and Prime Ministers around the world. (not yet announced)

Speakers:

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Dr Niall Ferguson is the Milbank Family Senior Fellow at the Hoover Institution, Stanford University, and a senior faculty fellow of the Belfer Center for Science and International Affairs at Harvard

Congressman Mike Johnson is an American attorney, politician, and former talk radio host serving as the U.S. representative for Louisiana's 4th congressional district. First elected in 2016, he is the vice chair of the House Republican Conference. (not yet announced)

Andrew Hastie is an Australian politician, and a former military officer, serving as the Shadow Minister for Defence since 2022. (not yet announced)

Rebeccah L Heinrichs is a senior fellow and director of the Keystone Defence Initiative. She specialises in US national defence policy with a focus on strategic deterrence. (not yet announced)

ARC

ARC Conference 2023: Programme

Day 2 - 31st October

09:30 - 10:30 Session 1: **'The Better Story: Our foundational values'**
Chair: Philippa Stroud

Baroness Philippa Stroud is co-founder and CEO of ARC, Member of the House of Lords, and Chair of the Social Metrics Commission. Prior to this, she was the CEO of the Legatum Institute and Co-Founder and Chief Executive of the Centre for Social Justice. She served as Special Adviser to the Rt. Hon. Iain Duncan Smith MP from 2010-15 and also to the Prime Minister from 2012.

Speakers: Konstantin Kisin, Joshua Luke Smith, Amy Orr-Ewing

Konstantin Kisin is a Russian-British satirist, podcaster, author and political commentator. Kisin has written for a number of publications including *Quillette*, *The Spectator*, *The Daily*

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Telegraph and *Standpoint* on issues relating to tech censorship, woke culture, comedy and culture war topics in the past but currently publishes articles on these subjects on his Substack. He has co-hosted *Triggernometry* since 2018, a YouTube channel and podcast featuring fellow comedian and co-host Francis Foster.

Joshua Luke Smith is a British rapper, poet, and producer with a dramatic, socially conscious style and Christian undertones. (not yet announced)

Dr Amy Orr-Ewing is an international author, speaker and theologian who addresses the deep questions of our day with meaningful answers found in the Christian Faith. Amy is the author of multiple books including 'Where is God in All the Suffering?' and bestselling, 'Why Trust The Bible?' Over the last twenty years, Amy has given talks and answered hundreds of questions on university campuses around the world. She has also addressed Parliamentarians in the Speakers Rooms and Chapel at the UK Parliament and staffers on Capitol Hill, and at the West Wing of the White House. Amy is interested in the intersection of questions of meaning and faith with the marketplace, education, leadership and policymaking. (not yet announced)

11:00 - 12:30 Session 2: **'Rebuilding the Social Fabric: Freedom and responsibility'**
Chair: Miriam Cates

Miriam Cates is the Member of the UK Parliament who campaigns on issues around safeguarding, age-appropriate sex education, and gender ideology in schools.

Speakers:

Erica Komisar is a clinical social worker, author, psychoanalyst, psychological consultant and parent guidance expert who has been in private practice in New York City for over 30 years.

Bishop Robert Barron is the Bishop of the Diocese of Winona-Rochester (Minnesota, USA), the founder of Word on Fire Catholic Ministries, and a theologian, speaker, and author.

Dr Jordan B Peterson is a psychologist, online educator, and Professor Emeritus at the University of Toronto.

14:00 - 14:45 Session 3: **'Free markets and Good Governance: Crony capitalism and the left behind'**
Chair: Merryn Somerset Webb

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Merryn Somerset Webb is an award winning commentator on economics, financial markets and personal finance as well as a popular speaker and broadcaster. She is a Senior Columnist at Bloomberg. Until recently she was Editor in Chief of Moneyweek, the UK's best selling financial magazine and Contributing Editor to the Financial Times where she had a weekly column. She still has a monthly column in Moneyweek. Her new book Share Power looks at how ordinary people can use the power they already have to make capitalism work for everyone.

Speakers:

JD Vance is an American venture capitalist, author, and the junior United States senator from Ohio since 2023. A member of the Republican Party, he came to prominence with his 2016 memoir, Hillbilly Elegy. (not yet announced)

Andy Haldane CBE FAcSS FRS FRSA is a British economist who worked at the Bank of England between 1989 and 2021 as the chief economist and executive director of monetary analysis and statistics. He resigned from the Bank of England in June 2021 to become chief executive of the Royal Society for Arts.

Lord Maurice Glasman is an English political theorist, academic, social commentator, and Labour life peer in the House of Lords.

Angus Taylor is an Australian politician. A member of the Liberal Party, he has represented the Division of Hume since 2013. He is affiliated with the party's National Right faction. Following the 2022 Australian federal election, he became Shadow Treasurer. (not yet announced)

15:00 - 15:45 Session 4: **'Energy and the Environment: Trade-off denial'**
Chair: Amanda Stoker

Amanda Stoker is a company director, columnist for the Australian Financial Review and host of the Sunday with Stoker program on Sky News Australia. She is a distinguished fellow of the Menzies Research Centre and was formerly the Assistant Minister for Women and Industrial Relations and the Assistant Minister to the Attorney-General whilst serving as a Liberal National Party Senator for Queensland in the Australian Parliament. (not yet announced)

Panel Chair: Robert Bryce

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Robert Bryce is an author, journalist, filmmaker, and the host of the Power Hungry Podcast. He has been writing about energy, power, innovation, and politics for more than three decades. Bryce has authored six books in which he has covered Enron's bankruptcy, corn ethanol, digital drilling rigs, renewables, batteries, nuclear energy, and the future of the electric grid. His latest book, *A Question of Power: Electricity and the Wealth of Nations*, was published in 2020.

Speakers:

Scott Tinker works to bring industry, government, academia, and nongovernmental organizations together to address major societal challenges in energy, the environment, and the economy. Dr. Tinker is Director of the 250-person Bureau of Economic Geology, the State Geologist of Texas, and a professor holding the Edwin Allday Endowed Chair in the Jackson School of Geosciences at The University of Texas at Austin. With Director Harry Lynch, Tinker coproduced and is featured in the award-winning energy documentary film "Switch," which has been screened in over 50 countries to more than 15 million viewers and is used on thousands of K-through-12 and college campuses. Dr. Tinker formed the nonprofit Switch Energy Alliance in 2016 and has completed two new films: "Switch On", a feature length documentary addressing global energy poverty, and "Energy Makes our World," a 5 minute, Hollywood-quality film made for global museums and giant screens. He is the voice of "EarthDate", a two-minute weekly program that focuses on remarkable stories of Earth. "EarthDate" is produced by the Bureau of Economic Geology and is featured on over 400 NPR and public radio stations in all 50 United States. Dr. Tinker has served as president of several associations including the American Geosciences Institute (AGI), the Association of American State Geologists (AASG), the American Association of Petroleum Geologists (AAPG), and the Gulf Coast Association of Geological Societies (GCAGS). Dr. Tinker is an AGI Campbell Medalist, AAPG Halbouty Medalist, GCAGS Boyd Medalist, and a Geological Society of America Fellow. In his visits to some 65 countries, he has given over 850 keynote and invited lectures.

Doug Stokes is a distinguished Professor in International Security at the University of Exeter, UK, and serves as a Senior Advisor at the Legatum Institute. With a focus on American foreign policy, geopolitics, and the 'culture wars,' Stokes is a prolific writer and commentator in these domains. His expertise in these subjects has led to a body of published work that engages with some of the most pressing issues facing global politics today. His latest book, "Against Decolonisation: The Campus Culture Wars and the Decline of the West,"published in September 2023, delves into the intricacies of the current ideological conflicts shaping the socio-political and geopolitical landscapes of the West. Highly regarded for his nuanced perspectives, Stokes remains a sought-after authority in academic, media and policy circles. (not yet announced)

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Magatte Wade is an entrepreneur and advocate for African dignity and prosperity. She serves as the Director for The Centre for African Prosperity of Atlas Network. Throughout her career, she has created retail brands inspired by diverse African traditions, most recently SkinIsSkin.com. Her first book, A Bright Future for Africa, will be published in in the Autumn 2023.

16:00 - 17:00 Session 5: **'The Better Story: Can Decline be Reversed?'**
Chair: Rebeccah Heinrichs

Rebeccah L Heinrichs is a senior fellow and director of the Keystone Defense Initiative. She specialises in US national defense policy with a focus on strategic deterrence.

Speakers:

David Stroud is the founder and senior leader of Christ Church London and heads up our Central London service. He loves to help people grow in their faith and contribute to their communities. David has been leading churches for over 25 years and has trained others to start churches in many parts of the world. He is the founder of the Everything Conference, an annual conference that equips Christians to work for the cultural renewal of their communities. (not yet announced)

Ron Dermer is an American-born Israeli political consultant and diplomat serving as the Israeli Minister of Strategic Affairs. He previously served as the Israeli Ambassador to the United States from 2013 to 2021. (not yet announced)

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ARC Conference 2023: Programme

Day 3 - 1st November

9:30 - 10:30 Session 1: **'The Better Story: Hope'**
Chair: Philippa Stroud

Baroness Philippa Stroud is co-founder and CEO of ARC, Member of the House of Lords, and Chair of the Social Metrics Commission. Prior to this, she was the CEO of the Legatum Institute and Co-Founder and Chief Executive of the Centre for Social Justice. She served as Special Adviser to the Rt. Hon. Iain Duncan Smith MP from 2010-15 and also to the Prime Minister from 2012.

Speakers:

Jonathan Pageau is an artist, writer and public speaker. He is the host of 'The Symbolic World' podcast, where he promotes 're-enchantment' in the world.

Agu Irukwu is the Senior Pastor of Jesus House for all Nations and co-founder of Bright Futures for African Children.

Makoto Fujimura is an American artist. He is considered to be one of the leading figures of "slow art" movement. He has coined the terms "Culture Care" and "Theology of Making".

Joshua Luke Smith is a British rapper, poet, and producer with a dramatic, socially conscious style and Christian undertones. (not yet announced)

11:00 - 12:00 Session 2: **'Rebuilding the Social Fabric: A vision for families and communities'**
Chair: Mehmet and Lisa Oz

Mehmet Öz, known professionally as Dr. Oz, is an American television presenter, physician, author, professor emeritus of cardiothoracic surgery at Columbia University, and former political candidate. (not yet announced)

Lisa Oz is an American author and radio and television personality who has been an occasional co-host of The Dr. Oz Show. She has appeared on the Oprah and Friends XM radio telecasts. Oz

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has authored or co-authored several books, including the You: The Owner's Manual series, and is host of The Lisa Oz Show. (not yet announced)

Speakers:

The Hon John Anderson AC FTSE is a former Deputy Prime Minister of Australia and now hosts Australia's pre-eminent politico-cultural video podcast.

Katy Faust is the founder and director of the children's rights organization, Them Before Us. She is the Washington State leader for CanaVox and currently appears in a video series called Dear Katy. (not yet announced)

John Howard is a former Prime Minister of Australia (1996-2007) who delivered major economic reform in taxation, workplace relations, privatisation and welfare.

Danny Kruger MBE is a British Conservative Party politician who has been the Member of Parliament for Devizes in Wiltshire since 2019. (not yet announced)

Eduardo Verástegui is a Mexican actor, singer, and activist. He was part of the band Kairo and later embarked on a solo music career, before he started appearing in Mexican telenovelas and, the latter two produced by his own production company, Metanoia. He is a former presidential candidate in Mexico. (not yet announced)

13:30 - 14:15 Session 3: **'Free Markets and Good Governance: Prosperity'**
Chair: Freddie Sayers

Freddie Sayers is a journalist and interviewer who runs the UK-based alternative media platform UnHerd, and presents the site's breakout YouTube interview series, LockdownTV. The series includes interviews with some of the world's most influential scientists, economists, and politicians. (not yet announced)

Speakers:

Robert Breedlove is a Bitcoin-focused entrepreneur, writer, and philosopher. He was raised in Tennessee attending Southern Baptist Churches but spent most of his life spiritual yet agnostic. Through his explorations down the proverbial "Bitcoin rabbit hole," Robert found himself becoming reacquainted with Christiantity at the age of 33. He was particularly inspired by Austrian economics and the teachings of Jordan Peterson, which helped him reconcile his purely objective outlook on reality with its more subjective dimensions of valuation, morality, and meaning. Robert considers himself a Freedom

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Maximalist and believes he has found his life's work in the Bitcoin space as a contributor to the separation of money and state. Through his writing and media work, Robert aims to elucidate the importance of freedom and self-sovereignty across all spheres of human action. (not yet announced)

Charles Gave is a French essayist , financier and entrepreneur, founding director of Gavekal, a financial consulting company, and president of the think tank the Institute of Liberties. (not yet announced)

Manuel Stotz is the Founder, Director, Chief Investment Officer & Chief Executive Officer at Kingsway Capital (not yet announced)

Magatte Wade is an entrepreneur and advocate for African dignity and prosperity. Her TED talk, "Why it is too hard to start a business in Africa - and how to change it" has been seen by more than 600K people. (not yet announced)

14:15 - 15:00 Session 4: **'Energy and the Environment: Innovation and stewardship'**
Chair: Robert Bryce

Robert Bryce is an author, journalist, filmmaker, and the host of the Power Hungry Podcast. He has been writing about energy, power, innovation, and politics for more than three decades. Bryce has authored six books in which he has covered Enron's bankruptcy, corn ethanol, digital drilling rigs, renewables, batteries, nuclear energy, and the future of the electric grid. His latest book, *A Question of Power: Electricity and the Wealth of Nations*, was published in 2020.

Speakers:

Chris Wright serves as Chief Executive Officer and Chairman of the Board of Liberty Energy. Chris is a dedicated humanitarian with a passion for bringing the benefits of energy to every community in the world. This passion has inspired a career in energy working not only in oil and gas but also fusion, solar, and geothermal. (not yet announced)

Kirk Sorensen is founder of Flibe Energy and is an advocate for nuclear energy based on thorium and liquid-fluoride fuels. For five years he has authored the blog "Energy from Thorium" and helped grow an online community of thousands who support a renewed effort to develop thorium as an energy source. (not yet announced)

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Simon Irish is chief executive officer of Terrestrial Energy Inc. He has twenty years of global investment banking and investment management experience in New York and London. (not yet announced)

Francis Barram is a thought leader in Energy Management, a leading Sustainability Adviser, and the Founder and Director of Ensight, a multi-award winning energy management company. He's a published author of a book, "How to Profit From Climate Change: A Breakthrough Approach to Increase Business Profits With Energy Efficiency Despite the Carbon Tax". He's also founder and director energy management software platform – Enspara, and renewable energy company – Barren Energy. (not yet announced)

Garth Sheldon-Coulson - Co-Founder & CEO - Stealth Renewable Energy and Ocean Technology Startup (not yet announced)

Bjørn Lomborg is a Danish author and the president of the think tank Copenhagen Consensus Center. He is the former director of the Danish government's Environmental Assessment Institute in Copenhagen. He became internationally known for his best-selling and controversial book The Skeptical Environmentalist.

15:30 - 17:00 Session 5: **'The Better Story: How now do we live?'**
Chair: Jordan Peterson

Dr Jordan B Peterson is a psychologist, online educator, and Professor Emeritus at the University of Toronto.

Speakers:

Christopher Chandler is the Chairman and Founding Partner of Legatum. In addition to a career in international investment, he has worked with his partners to establish a number of the firm's key philanthropic endeavours, including the END Fund, Freedom Fund, Luminos Fund, and the Legatum Institute Foundation in London. (not yet announced)

Sir Paul Marshall is CIO and Chairman of Marshall Wace LLP, founder and owner of UnHerd Media and a main shareholder of GB News Ltd. He is a founding Trustee of Ark, the children's charity, and Chairman of Ark Schools, which manages 39 primary and secondary academies across England.

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Alan McCormick is a Partner of the investment group Legatum. With his partners he founded and now plays a governance role for organisations including the END Fund, Freedom Fund, Luminos Fund, the Legatum Center for Entrepreneurship at MIT and the Legatum Institute Foundation. He is also the co-creator of the Legatum Prosperity Index and Chairman of GB News, Britain's newest television news network. (not yet announced)

Baroness Philippa Stroud is co-founder and CEO of ARC, Member of the House of Lords, and Chair of the Social Metrics Commission. Prior to this, she was the CEO of the Legatum Institute and Co-Founder and Chief Executive of the Centre for Social Justice. She served as Special Adviser to the Rt. Hon. Iain Duncan Smith MP from 2010-15 and also to the Prime Minister from 2012.

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ARC IN THE EVENING CODEL PROGRAMME

DAY 0 – SUNDAY 29TH OCTOBER – ARC PROGRAMME

19:00 – 22:00

Inaugural ARC Dinner for Speakers, Honoured Guests and Advisory Board

Baroness Philippa Stroud is co-founder and CEO of ARC, Member of the House of Lords, and Chair of the Social Metrics Commission. Prior to this, she was the CEO of the Legatum Institute and Co-Founder and Chief Executive of the Centre for Social Justice. She served as Special Adviser to the Rt. Hon. Iain Duncan Smith MP from 2010-15 and also to the Prime Minister from 2012.

The Hon John Anderson AC FTSE is a former Deputy Prime Minister of Australia and now hosts Australia's pre-eminent politico-cultural video podcast.

Dr Jordan B Peterson is a psychologist, online educator, and Professor Emeritus at the University of Toronto.

Christopher Chandler is the Chairman and Founding Partner of Legatum. In addition to a career in international investment, he has worked with his partners to establish a number of the firm's key philanthropic endeavours, including the END Fund, Freedom Fund, Luminos Fund, and the Legatum Institute Foundation in London.

Sir Paul Marshall is CIO and Chairman of Marshall Wace LLP, founder and owner of UnHerd Media and a main shareholder of GB News Ltd. He is a founding Trustee of Ark, the children's charity, and Chairman of Ark Schools, which manages 39 primary and secondary academies across England.

DAY 1 – MONDAY 30th OCTOBER – ARC PROGRAMME

19:00 – 22:00

Regional Drinks: US, Canada & Latin America

Possible speakers we are approaching:

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(Welcome) David Stroud is the founder and senior leader of Christ Church London and heads up our Central London service. He loves to help people grow in their faith and contribute to their communities. David has been leading churches for over 25 years and has trained others to start churches in many parts of the world. He is the founder of the Everything Conference, an annual conference that equips Christians to work for the cultural renewal of their communities.

Congressman Mike Johnson is an American attorney, politician, and former talk radio host serving as the U.S. representative for Louisiana's 4th congressional district. First elected in 2016, he is the vice chair of the House Republican Conference.

Dr Leslyn Lewis is a Canadian Parliamentarian who made history when she ran for leader of the Conservative Party of Canada in 2020 and won the popular vote on the second ballot. She is currently the Opposition Critic for Intergovernmental Affairs, Infrastructure, and Communities.

Kelly Craft is an American businesswoman, politician, and former diplomat who served as the 30th United States Ambassador to the United Nations from 2019 to 2021 under President Donald Trump.

Kevin D. Roberts was named President of The Heritage Foundation in October 2021. He succeeded former Heritage President Kay C. James as the seventh President in the organization's 50-year history. Roberts previously served as the Chief Executive Officer of the Texas Public Policy Foundation (TPPF), an Austin-based nonprofit, nonpartisan research institute and the largest state think tank in the nation.

DAY 2 – TUESDAY 31st – OCTOBER PROGRAMME

19:00 – 22:00

Serving our Nations: Politics & Responsible Citizenship – Politicians Dinner

Possible speakers we are approaching:

Baroness Philippa Stroud is co-founder and CEO of ARC, Member of the House of Lords, and Chair of the Social Metrics Commission. Prior to this, she was the CEO of the Legatum Institute and Co-Founder and Chief Executive of

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the Centre for Social Justice. She served as Special Adviser to the Rt. Hon. Iain Duncan Smith MP from 2010-15 and also to the Prime Minister from 2012.

Andrew Hastie is an Australian politician, and a former military officer, serving as the Shadow Minister for Defence since 2022.

Dr Gudrun Kugler is a Member of the Austrian Parliament for the Austrian People's Party and is the human rights spokesperson and the spokesperson of displaced people of her party. She is a member of the Parliamentary Assembly of the OSCE where she serves as the vice chair of the committee on migration and the rapporteur of the committee on economic affairs, science, technology and environment

DAY 3 – NOVEMBER 1st – ARC PROGRAMME

19:00 – 22:00

ARC Geostrategy Dinner

Scott Morrison is an Australian politician who served as the 30th prime minister of Australia from 2018 to 2022, holding office as leader of the Liberal Party of Australia. He is currently the member of parliament for the New South Wales seat of Cook, a position he has held since 2007.

Dennis Kwok is a former member of the Hong Kong Legislative Council from 2012 to 2020 and founding member of Civic Party.

Trip Name: Heritage Foundation Trip to Alliance for Responsible Citizenship Conference

Organization Information

Organization Name:
The Heritage Foundation

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

If Yes, §501(c)(3) Organization Type:
[ ] Private Foundation [✓] Public Charity

Address:
214 Massachusetts Ave, NE

City, State, Zip:
Washington, DC 20002

Phone Number:
202-546-4400

Organization URL:
www.heritage.org

History of Congressional Travel

Describe your organization's history of sponsoring congressional travel.

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. As such Heritage has frequently sponsored educational trips in the past for groups of individuals including Members of Congress and Congressional staff that are based around these fundamental principles.

Educational Activities

Describe the educational activities performed by your organization other than sponsoring congressional travel.

We write policy papers, host educational briefings and seminars both on and off site, and submit articles for journals. We provide educational research on a wide variety of issues.

Lobbyist and Foreign Agent Registration Information

Lobbyist Registration Status (Select one):

(●) I certify that the sponsor is not a federally registered lobbyist and does not retain or employ a federally registered lobbyist.

( ) I certify that the sponsor is not a federally registered lobbyist but does retain or employ one or more federally registered lobbyists.

Foreign Agent Registration Status (Select one):

(●) I certify that the sponsor is not an agent of a foreign principal and does not retain or employ an agent of a foreign principal.

( ) I certify that the sponsor is not an agent of a foreign principal but does retain or employ one or more agents of a foreign principal.

Foreign Government Involvement

Foreign Agent Registration Status (Must select all):

[✓] 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.

Purpose and Details

Provide a brief description of the trip.

Heritage will be sponsoring a group of Members and Senators to attend the first annual Alliance for Responsible Citizenship ("ARC") Conference. This Conference will feature leading individuals across the business, political, and arts world for a thought-provoking agenda of imagining a future where empowered citizens take responsibility for bringing prosperity to all sectors of society. Attendees will also be meeting with British officials such as the Rt. Hon. Liz Truss, MP. and the Rt. Hon. Oliver Dowden, DPM.

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

Heritage'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. The ARC conference and our meetings while in London are focused on looking at solutions to public policy questions globally that embody these principles.

Is your organization the only sponsor for this trip?

(●) Yes ( ) No

If No, describe your organization's role in planning the trip.

If there are multiple sponsors, each sponsor must submit Organization Information (Page 1 of the Private Sponsor Travel Certification Form) and a Signature Page Form.

Grantmaking Organizations (Optional)

If you have a Grantmaking Organization, you must attach a Grantmaking Organization Certification Form.

1.

2.

3.

With or Without Regard to Congressional Participation (Select one):

- ○ The trip is arranged or organized without regard to congressional participation.
- ◉ The trip is arranged or organized 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 (Must select all):

- ☑ 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 (Select one):

- ◉ 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

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

- ○ No sponsor retains or employs a registered lobbyist or agent of a foreign principle, 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

Required if selecting the third option in either column - Please explain why the second overnight stay is practically required and necessary to accomplish the purpose of the trip.

Certification of No Recreational Activity and No Alcohol (Must select all):

- ☑ 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 list

- ☑ A list of all Senate invitees is attached to this form (required).
- ☑ Members and staff from the House of Representatives will also receive invitations.

Travel Details (Submit additional pages as needed)

Trip Start Date/Time:	⇄	Trip End Date/Time:
October 28, 2023/6:55 PM		November 2, 2023/4:35 PM

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

(●) Yes ( ) No

Transportation (Member/Officer/Employee: $$7857.8$ Accompanying Family Member: $$7857.8$)

Transportation Type	Class	Amount
Airfare	Business Class	$7,440.35
Bus within London		$300
Car service to and from Heathrow Airport (LHR)		$117.5

Details (optional)

Lodging (Member/Officer/Employee: $833.24 Accompanying Family Member: $833.24)

Check-In	Check-Out	Facility	City	State	Country
10/29/23	11/2/23	Intercontinental London -	London		United Kingdom

Nights	Cost/Night	Cost Exceed Per Diem (Yes/No)	If Yes, please explain why expenses over the per diem rate are reasonable and necessary.
4	208.31/p	No	

Check-In	Check-Out	Facility	City	State	Country

Nights	Cost/Night	Cost Exceed Per Diem (Yes/No)	If Yes, please explain why expenses over the per diem rate are reasonable and necessary.

Check-In	Check-Out	Facility	City	State	Country

Nights	Cost/Night	Cost Exceed Per Diem (Yes/No)	If Yes, please explain why expenses over the per diem rate are reasonable and necessary.

Meals (Member/Officer/Employee: $$896 Accompanying Family Member: $$896)

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem (Y/N)
10/29/23			$245.61		$245.61	London		United Kingdom	Y
10/30/23		$80	$78.71	$30	$188.71	London		United Kingdom	Y
10/31/23		$80	$121.75	$30	$231.75	London		United Kingdom	Y
11/1/23		$80	$121.75	$30	$231.75	London		United Kingdom	Y

If costs exceed the federal per diem, please explain why expenses over the per diem rate are reasonable and necessary.

Please note the above food and incidental costs are included in the $1,486.84 conference fee. To the extent they exceed the per diem, we understand that they reflect the cost inherent in a large conference involving high profile, senior individuals in a number of fields taking place in one of the most expensive cities in the world. In our experience such increased costs are standard for conferences of this type.

Reasonable Miscellaneous Expenses

(Member/Officer/Employee: $$1486.84 Accompanying Family Member: $$1486.84)

Expense Type	Amount	Notes
Conference fee	$1486.84	Includes meals and materials

Additional Details (optional)

PRIVATELY SPONSORED TRAVEL

SPONSOR SIGNATURE PAGE

I hereby certify that the information submitted in connection with the trip listed below is true, complete, and correct to the best of my knowledge and belief.

Trip Name: Heritage Foundation Trip to Alliance for Responsible Citizen

Travel Date(s): October 28, 2023 to November 2, 2023

Travel Destination(s): London, United Kingdom

Sponsor: The Heritage Foundation

Daniel D. Mauler — *(printed name of sponsor representative)*

General Counsel & Secretary — *(title)*

(signature of sponsor representative)

9/25/23 *(date)*

0000000010913 RECEIVED BY: SECRETARY OF THE SENATE Date: November 30, 2023

Addendum for Heritage trip to ARC conference:

The Members that were invited on the Heritage trip to the Alliance for Responsible Citizenship conference embody the spirit of the conferences purpose – that every citizen can prosper, contribute and flourish. They also have an interest in the policies that will be discussed throughout the conference.

Invited Senators:

Senator J.D Vance

Senator Ted Cruz

Senator Mike Lee

Senator Josh Hawley

Senator Ted Budd

Staff:

Jacob Reses, Chief of Staff, Senator J.D. Vance

+ Spouses of Senators/Members of Congress were also invited to attend subject to all applicable restrictions.

0000000010914 RECEIVED BY: SECRETARY OF THE SENATE Date: November 30, 2023

The Heritage Foundation

214 Massachusetts Avenue, NE
Washington, DC 20002
(202) 546-8400
heritage.org

Thursday, September 21, 2023

Dear Senator Lee,

I am writing to invite you and your spouse to join The Heritage Foundation's trip to London, England to attend the Alliance for Responsible Citizenship (ARC) Inaugural Conference.

Scheduled to take place Sunday, October 29th – Wednesday, November 1st, 2023, at the Magazine London conference centre, this invite-only international conference will gather world-leading thinkers, business leaders, policy makers, and culture formers to discuss some of today's most important social, economic, cultural, and moral questions.

As part of Heritage's delegation to ARC Conference 2023, you can also join me for meetings with British Members of Parliament, the conservative U.K. media, and think tanks for the purpose of strengthening the special relationship between the U.S. and U.K. conservative movements.

The Heritage Foundation will provide transportation, overnight accommodations, and meals throughout the trip in accordance with the House/Senate Ethics Committee.

A detailed agenda will be forthcoming in the weeks ahead.

We kindly ask that you respond by September 21st. Please contact my deputy chief of staff Ericka Morris at ericka.morris@heritage.org to RSVP and to answer any questions you may have.

Sincerely,

Kevin Roberts

Kevin D. Roberts, PhD
President

0000000010915 RECEIVED BY: SECRETARY OF THE SENATE Date: November 30, 2023

The Heritage Foundation

DRAFT SCHEDULE (SUBJECT TO CHANGE)

The Heritage Foundation Congressional Delegation to London, England

Sunday, October 29 – Thursday, November 2, 2023

SUNDAY, OCTOBER 29, 2023

Travel Day

- *Airport transfer to hotel will be arranged.*

7:00 p.m. - 10:00 p.m. **Alliance for Responsible Citizenship Welcome Dinner**
Banqueting Hall, Whitehall, London, SW1A 2ER
Dress code: Business Smart
7:00 p.m. - Reception
7:30 p.m. - Dinner

Dinner Speakers:

- Baroness Philippa Stroud : CEO of ARC, Member of the House of Lords
- The Hon John Anderson AC FTSEL: Former Deputy Prime Minister of Australia
- Dr Jordan B Peterson: Psychologist, Online Educator, and Professor
- Christopher Chandler: Chairman and Founding Partner of Legatum.
- Sir Paul Marshall: CIO and Chairman of Marshall Wace LLP

MONDAY, OCTOBER 30, 2023

Breakfast is available in the hotel lobby. A light breakfast is available on site at the conference.

9:00 a.m. Meet Delegation in hotel lobby to walk to conference.
Hotel Lobby, InterContinental London – the O2

9:30 a.m. - 5:00 p.m. **Alliance for Responsible Citizenship (ARC) Conference**
Magazine London 11 Ordnance Cres, London SE10 0JH

Schedule:
9:30 a.m. – 10:30 a.m. ARC: A Vision for the Future

The Heritage Foundation

Chair: Baroness Philippa Stroud, ARC Co-Founder and CEO

Speakers:

- U.S. House Speaker Kevin McCarthy
- Joshua Luke Smith: British Rapper, Poet, and Producer

11:00 a.m. – Noon Why do we need ARC now?

Chair: Jordan Peterson, Professor Emeritus, University of Toronto
Speakers:

- Tom Holland: Historian and Author
- Ayaan Hirsi Ali: Research Fellow, Hoover Institution
- The Hon John Anderson AC FTSE: Former Deputy Prime Minister of Australia
- Os Guinness: Author

Noon – 12:30 p.m. Strengthening the Social Fabric: Current Trends

Speakers:

- Miriam Cates: Member of UK Parliament
- Jonathan Haidt: Professor, New York University Stern School of Business

12:30 – 2:00 p.m. Afternoon Tea Service

2:00 p.m. – 3:00 p.m. - Free markets and Good Governance: Modern challenges

Chair: Fraser Nelson, Editor, The Spectator
Speakers:

- Sir Paul Marshall: CIO and Chairman, Marshall Wace LLP
- Vivek Ramaswamy: American Entrepreneur
- Baroness Helena Morrissey: Member, House of Lords
- Derek Kreifels: CEO, State Financial Officers Foundation
- Terrence Keeley: Managing Director and Head of the Official Institutions Group, Blackrock, Inc.

3:00 – 3:30 p.m. - Energy and the Environment: Abundance vs Scarcity?

Chair: Amanda Stroker, Former Senator of Australia
Speakers:

- Michael Shellenberger: Author
- Alex Epstein: Author
- Marian L. Tupy: Founder, HumanProgress.org

4:00 p.m. – 5:00 p.m. -. The Better Story: The Liberal Democratic Ideal

Chair: Greg Sheridan, Foreign Editor, The Australian

The Heritage Foundation

Speakers:

- Dr. Niall Ferguson: Milbank Family Senior Fellow, Hoover Institution
- U.S. Congressman Mike Johnson
- Andrew Hastie: Australian Member of Parliament
- Rebeccah L Heinrichs: Senior Fellow, Keystone Defence Initiative

5:00 p.m. - 5:30 p.m. Transportation to Reception

5:30 p.m. - 6:45 p.m. **Reception hosted by Former PM Liz Truss with Conservative Members of Parliament**
House of Commons, Whitehall

Attended by other Members of Parliament. Liz Truss and Heritage President Kevin Roberts will provide short remarks.

6:45 p.m. – 7:00 p.m. Transportation to US & Canadian Delegation Reception

7:00 p.m. - 10:00 p.m. **US, Canada & Latin America Delegation Reception/Dinner**
The Riverside Rooms, County Hall, Westminster Bridge Road, London SE1 7PB
Dress Code: Business Casual/Smart

Speakers:

- David Stroud: Founder and senior leader of Christ Church London
- U.S. Congressman Mike Johnson
- Dr Leslyn Lewis: Canadian Parliamentarian
- Kelly Craft: 30th United States Ambassador to the United Nations
- Kevin D. Roberts: President of The Heritage Foundation

10:00 p.m. - 11:00 p.m. Transportation to Hotel
Magazine London 11 Ordnance Cres, London SE10 0JH

TUESDAY, OCTOBER 31, 2023

Breakfast is available in the hotel lobby. A light breakfast is available on site at the conference.

9:30 a.m. - 10:30 a.m. Transportation to meeting.
Meet in hotel lobby for shuttle no later than 9:30 a.m.

10:45 a.m. - 11:30 a.m. **Meeting with Deputy Prime Minister Oliver Dowden CBE MP**
70 WhiteHall, Cabinet Office

11:30 a.m. - 12:30 p.m. Transportation to ARC Conference

The Heritage Foundation

12:30 p.m. - 2:00 p.m. **Lunch with GB News CEO Angelos Frangopoulos**
Magazine London 11 Ordnance Cres, London SE10 0JH

2:00 p.m. – 5:00 p.m. **Alliance for Responsible Citizenship (ARC) Conference**
Magazine London 11 Ordnance Cres, London SE10 0JH

Schedule:
2:00 p.m. – 2:45 p.m. Free Markets & Good Governance: Crony Capitalism & The Left Behind

Chair: Merryn Somerset Webb, Senior Columnist, Bloomberg
Speakers:

- U.S. Senator J.D. Vance
- Andy Haldane: CEO, Royal Society for Arts
- Lord Maurice Glasman: English Political Theorist
- Angus Taylor: Australian Member of Parliament

3:00 p.m. – 3:45 p.m. Energy and the Environment: Trade-off Denial

Chair: Robert Bryce, Author and Journalist
Speakers:

- Scott Tinker: Director, Bureau of Economic Geology
- Doug Stokes: Professor, University of Exeter
- Magatte Wade: Director for the Centre for African Prosperity, Atlas Network

4:00 p.m. - 5:00 p.m. 'The Better Story: Can Decline be Reversed'

Chair: Rebeccah Heinrichs, Senior Fellow, Keystone Defence Initiative
Speakers:

- David Stroud: Founder, Christ Church London
- Ron Dermer: Israeli Minister of Strategic Affairs

5:00 p.m. – 6:00 p.m. **Executive Time**
Attendees return to hotel

6:00 p.m. – 7:00 p.m. Transportation to Politician's Dinner

7:00 p.m. - 10:00 p.m. **Serving our National: Politics & Responsible Citizenship – Politician's Dinner**
Cholmondeley Room and Terrace, House of Lords, Palace of Westminster, Parliament Square, London, SW1A 0PW
Topic: "Decline is not inevitable: A better future for politics"
Dress Code: Business Smart (jacket and tie required for gentlemen)
7:00 p.m. - Drinks Reception
7:30 p.m. - Seated for Dinner

The Heritage Foundation

Speakers:

- Baroness Philippa Stroud: CEO of ARC, Member of the House of Lords
- Andrew Hastie: Australian politician
- Dr. Gudrun Kugler: Member of the Austrian Parliament

10:00 p.m. - 11:00 p.m. Transportation to Hotel
Magazine London 11 Ordnance Cres, London SE10 0JH

WEDNESDAY, NOVEMBER 1, 2023
Breakfast is available in the hotel lobby.

9:15 a.m. Meet Delegation in hotel lobby to walk to conference.
Hotel Lobby, Intercontinental

9:30 p.m. – 5:00 p.m. **Alliance for Responsible Citizenship (ARC) Conference**
Magazine London 11 Ordnance Cres, London SE10 0JH

Schedule:
9:30 a.m. - 10:30 a.m. The Better Story: Hope

Chair: Philippa Stroud, ARC Co-Founder and CEO
Speakers:

- Jonathan Pageau: Artist, Writer
- Agu Irukwu: Pastor, Jesus House for All Nations
- Makoto Fujimura: Artist and Author
- Joshua Luke Smith: British Rapper, Poet and Producer

11:00 a.m. – 12:00 p.m. 'Rebuilding the Social Fabric: A Vision for Families & Communities'

Chair: Mehmet and Lisa Oz
Speakers:

- The Hon John Anderson AC FTSE
- Katy Faust: Founder & President, Them Before Us
- The Hon. John Howard: Former Prime Minister of Australia
- Danny Kruger MBE: Member of Parliament
- Eduardo Verastegui: Actor

12:00 p.m. – 1:30 p.m. Lunch at Conference

1:30 p.m. - 2:15 p.m. - Free Markets & Good Governance: Prosperity

Chair: Freddie Sayers
Speakers:

The Heritage Foundation

- Robert Breedlove: Entrepreneur
- Charles Gave: French Essayist
- Manuel Stotz: Founder, Kingsway Capital
- Magatte Wade: Director, Centre for African Prosperity of Atlas Network.

2:15 p.m. - 3:00 p.m. - Energy and the Environment: Innovation & Stewardship

Chair: Robert Bryce, Author and Journalist
Speakers:

- Chris Wright: CEO, Liberty Oil and Gas
- Kirk Sorensen: Founder, Flibe Energy
- Simon Irish: CEO, Terrestrial Energy
- Francis Barram: Founder and Director, Ensight
- Garth Sheldon- Coulson: CEO, Stealth Renewable Energy
- Bjorn Lomborg: President, Copenhagen Consensus Center

3:30 p.m. - 5:00 p.m. The Better Story: How Now Do We Live?

Chair: Dr. Jordan Peterson
Speakers:

- Christopher Chandler: Chairman, Legatum
- Sir Paul Marshall: CIO and Chairman, Marshall Wace
- Alan McCormick: Partner, Legatum

5:00 p.m. – 6:00 p.m. **Executive Time**
Delegation returns to Hotel

6:00 p.m. – 7:00 p.m. Transportation to Dinner
Please meet in hotel lobby for a 6:00 p.m. shuttle departure

7:00 p.m. - 10:00 p.m. **Geostrategy Foreign Policy Dinner**
Parliament
Dress Code: TBD

Speakers:

- Scott Morrison: 30th Prime Minister of Australia
- Dennis Kwok: Former Member of the Hong Kong Legislative Council

10:00 p.m. - 11:00 p.m. Transportation to Hotel
Magazine London 11 Ordnance Cres, London SE10 0JH

The Heritage Foundation

THURSDAY, NOVEMBER 2, 2023

Hotel check out/travel day
Airport transfers will be arranged based on individual flight times.

0000000010922 RECEIVED BY: SECRETARY OF THE SENATE Date: November 30, 2023

CHRISTOPHER A. COONS, DELAWARE, CHAIRMAN
JAMES LANKFORD, OKLAHOMA, VICE CHAIRMAN

BRIAN SCHATZ, HAWAII
JEANNE SHAHEEN, NEW HAMPSHIRE
JAMES E. RISCH, IDAHO
DEB FISCHER, NEBRASKA

SHANNON HAMILTON KOPPLIN, CHIEF COUNSEL AND STAFF DIRECTOR
WILLIAM B. CABLE, CHIEF CLERK

HART SENATE OFFICE BUILDING, ROOM 220
SECOND AND CONSTITUTION AVENUE, NE
WASHINGTON, DC 20510-6425

TELEPHONE: (202) 224-2981
FACSIMILE: (202) 224-7416
TDD: (202) 228-3752

United States Senate

SELECT COMMITTEE ON ETHICS

October 20, 2023

The Honorable Mike Lee
United States Senate
Washington, DC 20510

Dear Senator Lee:

This responds to your recent correspondence requesting approval from the Select Committee on Ethics (the Committee) to accept an invitation you and your spouse received to travel to the Alliance for Responsible Citizenship Conference in London, United Kingdom on October 28–November 2, 2023, sponsored by the Heritage Foundation (Heritage). Provided that you adhere to the guidance set forth below, it appears that it is permissible for you to accept necessary expenses from Heritage in connection with this trip.

Background

Based on your communication with the Committee, the background in this matter is as follows.[1] You are employed as a Senator in the United States Senate. Heritage invited you and your spouse to travel to the Alliance for Responsible Citizenship Conference in London, United Kingdom on October 28–November 2, 2023. Heritage certified to the Committee that it will pay the necessary expenses[2] related to the travel and that it is neither a lobbyist, lobbying firm, agent of a foreign principal, or otherwise acting as a representative or agent of a foreign government. Heritage has certified that it does not retain or employ a registered lobbyist or agent of a foreign principal and that no registered lobbyist or agent of a foreign principal will accompany you at any point throughout your trip.[3]

Discussion

Privately-sponsored travel includes any gift of travel and travel-related expenses for travel outside the Senate duty station, including transportation, lodging, food and refreshments, and conference fees and materials, whether paid for directly, reimbursed, or provided directly, from a private individual or entity, in connection with a Member's, officer's, or employee's official Senate duties. Incorporating reforms from the Honest Leadership and Open Government

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[1] If this letter does not correctly recite the facts, contact the Committee immediately.

[2] The term "necessary expenses" has a specific definition. *See Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel – Glossary of Terms* at 8.

[3] The term "any point throughout your trip" has a specific definition. *See Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel – Glossary of Terms* at 2.

Act of 2007 (HLOGA), Pub. L. 110–81 (2007), Senate Rule 35.2 permits Members, officers, and employees to accept privately-sponsored travel only with the prior written approval of the Committee.

The Committee's approval process is governed by the *Regulations and Guidelines for Privately-Sponsored Travel and Glossary of Terms* (collectively, *Travel Regulations*). The *Travel Regulations* contain detailed requirements regarding who may sponsor travel; time limits for trips; and the type and amount of expenses that can be reimbursed.

Entities that do not retain or employ a lobbyist or foreign agent and all non-profit organizations designated as tax-exempt organizations under § 501(c)(3) of the Internal Revenue Code of 1986, regardless of whether they retain or employ a lobbyist or foreign agent, may sponsor foreign trips for up to seven days. The seven-day limitation means seven 24-hour periods, calculated from the time of arrival in the trip location to the time of departure from the trip location. For such trips, neither lobbyists nor foreign agents may accompany a Senate invitee at any point throughout the trip, other than in a *de minimis* way.[4] This means that neither lobbyists nor foreign agents may accompany Senate invitees at any point to and from the event, at the event itself, or at the location being visited.[5]

The Committee has determined that § 501(c)(3) non-profit organizations that are classified as private foundations, as opposed to public charities, may not pay for transportation from the United States to a foreign country.[6] However, Heritage represented to the Committee that it is a § 501(c)(3) public charity, as opposed to a private foundation, pursuant to the Internal Revenue Code.[7]

Under Senate Rule 35, a Senator or officer who receives payment or reimbursement for necessary expenses related to fact-finding travel must disclose those expenses to the Secretary of the Senate by filing the completed *Senators and Officers Post-Travel Disclosure of Travel Expenses* (Form RE-3), along with a copy of the *Private Sponsor Travel Certification Form*, and all relevant attachments (e.g., the private sponsor's invitation and itinerary) **within 30 days of the conclusion of Privately-Sponsored Travel**.

Consistent with these standards and Committee precedent, Heritage's factual representations, it appears that it is permissible for you to accept necessary expenses from Heritage in connection with this trip, provided that the actual travel and travel-related expenses

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[4] The term "*de minimis*" has a specific definition. *See Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel – Glossary of Terms* at 3.

[5] *See Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel* at 5; *see also Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel – Glossary of Terms* at 2-3.

[6] *See* 26 U.S.C. § 4941 et seq. Section 501(c)(3) of the Internal Revenue Code broadly defines non-profit, charitable, tax-exempt organizations. These § 501(c)(3) organizations are then further defined or designated as "public charities" and "private foundations."

[7] 26 U.S.C. § 501(c)(3).

conform to the information and materials you provided, and the travel and all required documents are disclosed to the Secretary of the Senate (Office of Public Records). Necessary expenses may include travel expenses for the spouse of a Member if the Member determines that the attendance of the spouse is appropriate to assist in the representation of the Senate.

Please be advised that the United States Constitution prohibits the acceptance of any gift, including a meal, from a foreign government without the consent of Congress. In the Foreign Gifts and Decorations Act (FGDA), Congress consented to the acceptance by federal government officials of: (1) gifts of minimal value and (2) travel or the expenses for travel taking place entirely outside the United States, from a foreign government (which includes those acting as a representative or agent of a foreign government).[8] The Senate has defined minimal value as $100 or less. Further, pursuant to FGDA, there are certain reporting and procedural requirements that are imposed upon Members, officers, and employees who accept gifts from a foreign government. Please review the Committee's "Dear Colleague" letter of January 11, 2019, setting forth the items to be included in filing that report.

Finally, Senate Rule 34 requires a Member on his or her Financial Disclosure Report, to make an annual disclosure of the receipt of payments or reimbursements under Senate Rule 35 from a private sponsor for officially-related travel expenses where, in the aggregate, travel expenses exceed $480 from that sponsor during a calendar year. However, if a Member, officer, or employee properly reports the receipt of necessary expenses for such travel to the Secretary of the Senate within 30 days of the travel, as discussed above, the travel expenses need not be disclosed a second time on their Financial Disclosure Report.

I hope you find this information helpful. If you have any additional questions, please do not hesitate to contact the Committee.

Sincerely,

Shannon Hamilton Kopplin
Chief Counsel and Staff Director

Enclosure: Travel Checklist

[8] 5 U.S.C. § 7342.