U.S. House of Representatives
COMMITTEE ON ETHICS

EMPLOYEE POST-TRAVEL DISCLOSURE FORM

☒ *Original* ☐ *Amendment*

This form is for disclosing the receipt of travel expenses from private sources for travel taken in connection with official duties. This form does not eliminate the need to report privately-funded travel on the annual *Financial Disclosure Statements* of those employees required to file them. In accordance with House Rule 25, clause 5, **you must complete this form and *file it with the Clerk of the House, by email at gifttravelreports@mail.house.gov*, within 15 days after travel is completed.** Please ***do not*** file this form with the Committee on Ethics.

NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001.

1. Name of Traveler: Caleb Kostreva
2. a. Name of Accompanying Relative: _____ ***OR*** None ☒
   b. Relationship to Traveler: ☐ Spouse ☐ Child ☐ Other (specify): _____
3. a. **Dates:** Departure: 10/13/2022 Return: 10/14/2022
   b. Dates at Personal Expense, if any: _____ ***OR*** None ☒
4. Departure City: Washington, D.C. Destination: Lexington, VA Return City: Washington, D.C.
5. Sponsor(s), Who Paid for the Trip: The Heritage Foundation
6. Describe Meetings and Events Attended:
   Guided tour of the Marshall museum and library; discussion with VMI faculty about the Yalta Conference; Yalta Conference simulation and after-action discussion.
7. Attached to this form are ***each*** of the following, *signify that each item is attached by checking the corresponding box*:
   a. ☒ a completed *Sponsor Post-Travel Disclosure Form*;
   b. ☒ the *Primary Trip Sponsor Form* completed by the trip sponsor ***prior*** to the trip, ***including all*** attachments ***and*** the *Additional Sponsor Form(s)*;
   c. ☒ page 2 of the completed *Traveler Form* submitted by the employee; ***and***
   d. ☒ the letter from the Committee on Ethics approving my participation on this trip.
8. a. ☒ I represent that I participated in each of the activities reflected in the attached sponsor's agenda.
   Signify statement is true by checking the box.
   b. If not, explain:

I certify that the information contained on this form is true, complete, and correct to the best of my knowledge.

Signature of Traveler: _____ **Date:** 10/24/2022

I authorized this travel in advance. I have determined that all of the expenses listed on the attached *Sponsor Post-Travel Disclosure Form* were necessary and that the travel was in connection with the employee's official duties and would not create the appearance that the employee is using public office for private gain.

Name of Supervising Member: Ken Buck **Date:** 10/24/2022

Signature of Supervising Member: Ken Buck

Version date 3/2021 by Committee on Ethics

U.S. House of Representatives
COMMITTEE ON ETHICS

SPONSOR POST-TRAVEL DISCLOSURE FORM

☒ *Original* ☐ *Amendment*

This form must be completed by an officer of any organization that served as the primary trip sponsor in providing travel expenses or reimbursement for travel expenses to House Members, officers, or employees under House Rule 25, clause 5. A completed copy of the form must be provided to each House Member, officer, or employee who participated on the trip ***within ten days of their return.*** You must answer all questions, and check all boxes, on this form for your submission to comply with House rules and the Committee's travel regulations. Failure to comply with this requirement may result in the denial of future requests to sponsor trips and/or subject the current traveler to disciplinary action or a requirement to repay the trip expenses.

NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001.

1. Sponsor(s) who paid for the trip: The Heritage Foundation
2. Travel Destination(s): Marshall Foundation, 340 VMI Parade, Lexington, VA 24450
3. Date of Departure: 10/13/2022 Date of Return: 10/14/2022
4. Name(s) of Traveler(s): Hannah Arvey, Collin Miller, Caleb Kostreva

   Note: You may list more than one traveler on a form only if ***all*** information is ***identical*** for each person listed.
5. **Actual amount** of expenses paid on behalf of, or reimbursed to, each individual named in Question 4:

	Total **Transportation** Expenses	Total **Lodging** Expenses	Total **Meal** Expenses	Total **Other** Expenses (dollar amount per item and description)
Traveler	$150.93	$126.82	$96.16	
Accompanying Family Member				

6. ☒ All expenses connected to the trip were for actual costs incurred and not a *per diem* or lump sum payment. *Signify statement is true by checking box.*

I certify that the information contained in this form is true, complete, and correct to the best of my knowledge.

Signature: Date: 10/19/2022

Name: Eric Teetsel Title: Vice President Government Relations

Organization: The Heritage Foundation

☒ *I am an officer of the above-named organization. Signify statement is true by checking box.*

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

Email: eric.teetsel@heritage.org ; andrew.braun@heritage.org Telephone: 2026081631

Committee staff may contact the above-named individual if additional information is required.

If you have questions regarding your completion of this form, please contact the Committee on Ethics at 202-225-7103.

U.S. House of Representatives
COMMITTEE ON ETHICS

TRAVELER FORM

1. Name of Traveler: Caleb Kostreva

2. Sponsor(s) who will be paying or providing in-kind support for the trip:
   The Heritage Foundation

3. City and State **OR** Foreign Country of Travel : Lexington, VA

4. a. Date of Departure: 10/13/2022 Date of Return: 10/14/2022
   b. Yes ☐ No ☒ Will you be extending the trip at your personal expense?
   If yes, list dates at personal expense: _____

5. a. Yes ☐ No ☒ Will you be accompanied by a family member at the sponsor's expense? **If yes:**
   (1) Name of Accompanying Family Member: _____
   (2) Relationship to Traveler: ☐ Spouse ☐ Child ☐ Other (specify): _____
   (3) Yes ☐ No ☐ Accompanying Family Member is at least 18 years of age:

6. a. Yes ☐ No ☒ Did the trip sponsor answer "Yes" to Question 8(c) on the *Primary Trip Sponsor Form* (i.e., travel is sponsored by an entity that employs a registered federal lobbyist or a foreign agent)?
   b. **If yes**, and you are requesting lodging for two nights, explain why the second night is warranted:

7. Yes ☒ No ☐ *Primary Trip Sponsor Form* is attached, including agenda, invitee list, and any other attachments and Additional Sponsor Forms.

   NOTE: The agenda should show the traveler's individual schedule, including departure and arrival times and identify the specific events in which the traveler will be participating.

8. Explain why participation in the trip is connected to the traveler's individual official or representational duties. **Staff should include their job title and how the activities on the itinerary relate to their duties.**
   As a Legislative Assistant, my responsibilities for Rep. Buck include foreign affairs and defense policy. The purpose of this trip to the George C. Marshall Museum & Library is to strengthen Fellows' leadership development and understanding of grand strategy.

9. **Yes ☐ No ☒ Is the traveler aware of any registered federal lobbyists or foreign agents involved planning, organizing, requesting, or arranging the trip?**

10. For staff travelers, to be completed by your employing Member:

ADVANCED AUTHORIZATION OF EMPLOYEE TRAVEL

I hereby authorize the individual named above, an employee of the U.S. House of Representatives who works under my direct supervision, to accept expenses for the trip described in this request. I have determined that the above-described travel is in connection with my employee's official duties and that acceptance of these expenses will not create the appearance that the employee is using public office for private gain.

Signature of Employing Member Ken Buck Date 09/13/2022

U.S. House of Representatives
COMMITTEE ON ETHICS

PRIMARY TRIP SPONSOR FORM

This form should be completed by private entities offering to provide travel or reimbursement for travel to House Members, officers, or employees under House Rule 25, clause 5. A completed copy of the form (and any attachments) should be provided to each invited House Member, officer, or employee, who will then forward it to the Committee together with a *Traveler Form* **at least 30 days before the start date of the trip**. The trip sponsor should *NOT* submit the form directly to the Committee. The Committee website (ethics.house.gov) provides detailed instructions for filling out the form.

NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001. Failure to comply with the Committee's Travel Regulations may also lead to the denial of permission to sponsor future trips.

1. Sponsor who will be paying for the trip:
   The Heritage Foundation
2. ☑ I represent that the trip will not be financed, in whole or in part, by a registered federal lobbyist or foreign agent. *Signify that the statement is true by checking box.*
3. ***Check only one.*** I represent that:
   a. ■ The primary trip sponsor has not accepted from any other source, funds intended directly or indirectly to finance any aspect of the trip: **OR**
   b. ☐ The trip is arranged without regard to congressional participation and the primary trip sponsor has accepted funds only from entities that will receive a tangible benefit in exchange for those funds: **OR**
   c. ☐ The primary trip sponsor has accepted funds from other source(s) intended directly or indirectly to finance all or part of this trip and has enclosed disclosure forms from each of those entities.
   If "c" is checked, list the names of the additional sponsors:
4. Provide names and titles of **ALL** House Members *and* employees you are inviting. **For each House invitee, provide an explanation of why the individual was invited** (include additional pages if necessary):
   SEE ATTACHMENT
5. Yes ☐ No ■ Is travel being offered to an accompanying family member of the House invitee(s)?
6. Date of departure: 10/13/22 Date of return: 10/14/22
7. a. City of departure: Washington, D.C.
   b. Destination(s): George C. Marshall Museum & Library 340 VMI Parade, Lexington, VA 24450
   c. City of return: Washington, D.C.
8. ***Check only one.*** I represent that:
   a. ☐ The sponsor of the trip is an institution of higher education within the meaning of section 101 of the Higher Education Act of 1965: **OR**
   b. ■ The sponsor of the trip does not retain or employ a registered federal lobbyist or foreign agent: **OR**
   c. ☐ The sponsor employs or retains a registered federal lobbyist or foreign agent, but the trip is for attendance at a one-day event *and* lobbyist / foreign agent involvement in planning, organizing, requesting, or arranging the trip was *de minimis* under the Committee's travel regulations.
9. ***Check only one of the following***:
   a. ■ I checked 8(a) or (b) above; **OR**
   b. ☐ I checked 8(c) above but am not offering any lodging; **OR**
   c. ☐ I checked 8(c) above and am offering lodging and meals for one night; **OR**
   d. ☐ I checked 8(c) above and am offering lodging and meals for two nights. If you checked this box, explain why the second night of lodging is warranted:

10. ■ Attached is a detailed agenda of the activities House invitees will be participating in during the travel (i.e., an hourly description of planned activities for trip invitees). *Indicate agenda is attached by checking box.*

11. ***Check only one of the following***:
    a. ■ I represent that a registered federal lobbyist or foreign agent will not accompany House Members or employees on any segment of the trip. *Signify that the statement is true by checking box;* **OR**
    b. ☐ *Not Applicable.* Trip sponsor is a U.S. institution of higher education.

12. For ***each*** sponsor required to submit a sponsor form, describe the sponsor's interest in the subject matter of the trip ***and*** its role in organizing and/or conducting the trip:

    The Heritage Foundation holds a Marshall Fellowship Program each year for mid-career level national security professionals working in Washington, D.C. The Program focuses on grand strategy and career development, and we use the trip to the George C. Marshall Museum & Library for educational and professional developmental purposes. The Heritage Foundation is an educational institution

13. ***Answer parts a and b. Answer part c if necessary***:
    a. Mode of travel: Air ☐ Rail ☐ Bus ■ Car ☐ Other ☐ (specify:_____)
    b. Class of travel: Coach ☐ Business ☐ First ☐ Charter ■ Other ☐ (specify: _____)
    c. If travel will be first class, or by chartered or private aircraft, explain why such travel is warranted:

14. ☑ I represent that the expenditures related to local area travel during the trip will be unrelated to personal or recreational activities of the invitee(s). *Signify that the statement is true by checking the box.*

15. ***Check only one.*** I represent that either:
    a. ☐ The trip involves an event that is arranged or organized *without regard* to congressional participation and that meals provided to congressional participants are similar to those provided to or purchased by other event attendees; **OR**
    b. ■ The trip involves events that are arranged specifically *with regard* to congressional participation.
    If "b" is checked:
    1) Detail the cost *per day* of meals (approximate cost may be provided):

       $60 (approximately $120 total based on current catering estimate)

    2) Provide the reason for selecting the location of the event or trip:

       The Marshall Fellows will visit the Marshall Museum & Library at VMI in Lexington, VA

16. Name, nightly cost, and reasons for selecting each hotel or other lodging facility:
    Hotel Name: Holiday Inn Express City: Lexington, VA Cost Per Night: $109.99
    Reason(s) for Selecting:_____
    Hotel Name: _____ City: _____ Cost Per Night: _____
    Reason(s) for Selecting:_____
    Hotel Name: _____ City: _____ Cost Per Night: _____
    Reason(s) for Selecting:_____

17. ■ I represent that all expenses connected to the trip will be for actual costs incurred and not a per diem or lump sum payment. *Signify that the statement is true by checking the box.*

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18. **Total Expenses for each Participant:**

☐ Actual Amounts ☒ Good Faith Estimates	Total **Transportation** Expenses per Participant	Total **Lodging** Expenses per Participant	Total **Meal** Expenses per Participant
For each Member, Officer, or Employee	$200	$109.99	$120
For each Accompanying Family Member			

	Other Expenses (dollar amount per item)	Identify Specific Nature of "Other" Expenses (e.g., taxi, parking, registration fee, etc.)
For each Member, Officer, or Employee		
For each Accompanying Family Member		

NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001.

19. ***Check only one:***
    a. ☒ I certify that I am an officer of the organization listed below; **OR**
    b. ☐ *Not Applicable.* Trip sponsor is an individual or a U.S. institution of higher education.
20. I certify by my signature that
    a. I read and understand the Committee's Travel Regulations;
    b. I am not a registered federal lobbyist or registered foreign agent; and
    c. The information on this form is true, complete, and correct to the best of my knowledge.

Signature: _____ Date: 09/08/2022

Name: Thomas Binion Title: VP Government Relations

Organization: The Heritage Foundation

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

Email: thomas.binion@heritage.org; andrew.braun@heritage.org Telephone: (202) 608-1631

INSTRUCTIONS

Complete the *Primary Trip Sponsor Form* and submit the agenda, invitation list, any attachments, and any *Additional Trip Sponsor Forms* directly to the Travelers.

Written approval from the Committee on Ethics is required before traveling on this trip. The Committee on Ethics will notify the House invitees directly and will not notify the trip sponsors.

Willful or knowing misrepresentation on this form may be subject to criminal prosecution under 18 U.S.C. § 1001. Signatures must comply with section 104(bb) of the Travel Regulations.

For questions, please contact the Committee on Ethics at:

1015 Longworth House Office Building
Washington, D.C. 20515

ethicscommittee@mail.house.gov | 202-225-7103
More information and forms available at **ethics.house.gov**

Detailed Agenda:

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

Thursday, October 13

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), boxed lunch served ($15/person). En route to VMI, we will discuss the Yalta Conference 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 guided tour. Discuss 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 ($60/person). Meet VMI cadets in the political science and history programs and discuss working in national security. Guided discussion with Dr. Dennis Foster 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

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

7:30-8:30 AM — Breakfast served ($15/person). Final preparations before Yalta Conference Simulation begins.

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, et al), 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 attendees. The participants will leverage the work the 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.).

Additional Trip Sponsor Form

Question #4:

Name and title of Senate invitees:

- Collin Miller, Military Legislative Assistant
- Hannah Arvey, Legislative Assistant
- Caleb Kostreva, Legislative Assistant
- Maggie Goessler, Military Legislative Assistant

Explanation of why the individual was invited:

Each of the individuals invited is a Marshall Fellow at The Heritage Foundation. This is a fellowship for mid-career level professionals who work on national security issues. The program focuses on grand strategy, and each of the individuals was a historical figure who attended the Yalta Conference towards the close of World War II. During this trip, they will visit the George C. Marshall Museum & Library (the man for whom the Marshall Fellowship is named), and participate in a Yalta Conference simulation in which they play the role of the historical figure they have been assigned to try and negotiate and maneuver for geopolitical outcomes commensurate with the goals of their country (U.S., UK, USSR) and/or assigned historical figure.

U.S. House of Representatives

COMMITTEE ON ETHICS

Washington, DC 20515

October 7, 2022

Mr. Caleb Kostreva
Office of the Honorable Ken Buck
2455 Rayburn House Office Building
Washington, DC 20515

Dear Mr. Kostreva:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to Lexington, Virginia, scheduled for October 13 to 14, 2022, sponsored by Heritage Foundation.

You must complete an Employee Post-Travel Disclosure Form (which your employing Member must also sign) and file it, together with a Sponsor Post-Travel Disclosure Form completed by the trip sponsor, with the Clerk of the House within 15 days after your return from travel. As part of that filing, you are also required to attach a copy of this letter and both the Traveler and Primary Trip Sponsor Forms (including attachments) you previously submitted to the Committee in seeking pre-approval for this trip. If you are required to file an annual Financial Disclosure Statement, you must also report all travel expenses totaling more than $415 from a single source on the "Travel" schedule of your annual Financial Disclosure Statement covering this calendar year. Finally, Travel Regulation § 404(d) also requires you to keep a copy of all request forms and supporting information provided to the Committee for three subsequent Congresses from the date of travel.

If you have any further questions, please contact the Committee's Office of Advice and Education at extension 5-7103.

Sincerely,

Susan Wild
Acting Chairwoman

Michael Guest
Acting Ranking Member

SW/MG:kjf