

2013 NOV 19 PM 3:53

# MEMBER / OFFICER POST-TRAVEL DISCLOSURE FORMSE OF REPRESENTATIVES

This form is for disclosing the receipt of travel expenses from a private source for travel taken in connection with a Member or officer's official duties. This form does not eliminate the need to report privately-funded travel on the Member or officer's annual Financial Disclosure Statement. In accordance with House Rule 25, clause 5, you must complete this form and file it with the Clerk of the House, B-106 Cannon House Office Building, 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. 8 1001.

	subject to criminal prosecution pursuant to 16 C.S.C. § 1001.
1.	Name of Traveler: Congressman Marlin Stutzman
2.	a. Name of accompanying relative: <u>or</u> None
	b. Relationship to Traveler: ☐ Spouse ☐ Child . ☐ Other (specify):
3.	a. Dates of departure and return: Departure: 11/9/2013 Return: 11/10/2013
	b. Dates at personal expense:
4.	Departure city: Orlando Destination: San Diego Return city: Atlanto
	Sponsor(s) (who paid for the trip): The Heritage Foundation
6.	Describe meetings and events attended (attach additional pages if necessary): Congressmar
Stutzma	an attended the Heritage Eundation's leadershi
	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 Grantmaking or Non-Grantmaking Sponsor Forms;  c. Page 2 of the completed Traveler Form submitted by the Member or officer; and d. The letter from the Committee on Ethics approving my participation on this trip.  a. I represent that I participated in each of the activities reflected in the sponsor's agenda. (Signify that statement is true by checking box):  b. If not, explain:
kno For U.S priv	ertify that the information contained in this form is true, complete, and correct to the best of my owledge. I have determined that all of the expenses on the attached Sponsor Post-Travel Disclosure of were necessary and that the travel was in connection with my duties as a Member or officer of the S. House of Representatives and would not create the appearance that I am using public office for wate gain.  SNATURE OF MEMBER:
Vers	ion date 2/2013 by Committee on Ethics  DATE: 11/18/2013

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	0	
	Ortginal	Amendment

### SPONSOR POST-TRAVEL DISCLOSURE FORM

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 10 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 Herita	age Founda	ation
	San Di	ogo CA		
	nation(s): San Di			and the state of t
B. Date of Dep	arture: 11/09/20	13	Date o	of Return: 11/10/2013
. Name(s) of	Traveler(s): Marli	n Stutzman		
	AND		form only if al	l information is identical for each person listed.)
. Actual amo	unt of expenses paid	on behalf of, or	reimbursed to,	each individual named in response to Question 4:
	Total Transportation Expenses	Total Lodging Expenses	Total Meal Expenses	Other Expenses (dollar amount per item and description)
Traveler	\$569.20	\$370.26	\$130.00	n/a
Accompanyi Relative	n/a	n/a	n/a	n/a
statement is I certify that	true by checking box	tained in this form		d and not a per diem or lump sum payment. (Signalete, and correct to the best of my knowledge.
200	Shuunu ( nianne Chatarje	The state of the s		Title: Special Events Assistant
	The Heritage		,	Title: Special Events Assistant
100				
			on (signify state	ement is true by checking box):
	14 Massachus			
	/ashington, DC			***************************************
	umber: 202-608-		••	
Email Addre	snianne.ch	atarjee@he	ritage.org	
10 1	1.77	577		vidual if additional information is required.
If you have	questions regarding yo	our completion of t	his form, please	contact the Committee on Ethics at (202) 225-7103.

Version date 2/2013 by Committee on Ethics

#### TRAVELER FORM

This form should be completed by House Members, officers, or employees seeking Committee approval of privately-sponsored travel or reimbursement for travel under House Rule 25, clause 5. The completed form should be submitted directly to the Committee by each invited House Member, officer, or employee, together with the completed and signed trip sponsor form(s) and any attachments. A copy of this form, minus this initial page, will be made available for public inspection. Form (and any attachments) may be faxed to the Committee at (202) 225-7392, sent or delivered to the Committee at 1015 Longworth, or e-mailed to travel.requests@mail.house.gov.

YOUR COMPLETED REQUEST MUST BE SUBMITTED TO THE COMMITTEE NO LESS THAN 30 DAYS BEFORE YOUR PROPOSED DEPARTURE DATE. Absent exceptional circumstances, permission will not be granted for requests received less than 30 days before the trip commences. You must receive explicit approval from the Committee before you depart on this trip.

Name of Traveler: Congressman Marlin Stutzman
NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001.
I certify that the information contained on both pages of this form is true, complete, and correct to the best of my knowledge.
Signature:
Name of signatory (if other than traveler):
For staff, name of employing Member or committee:
Office address: 1728 Longworth House Office Building Washington, DC 20003 Telephone number: (202) 225-4436
Email address of contact person: Mary Vells @ mail house gov
Check this box if the sponsoring entity is a media outlet, the purpose of the trip is to make a media appearance sponsored by that entity, <u>and</u> these forms are being submitted to the Committee less than 30 days before the trip departure date.
NOTE: You must complete all of the contact information fields above, as Committee staff may need to

N contact you if additional information is required.

KEEP A COPY OF THIS FORM. Page 2 (but not this page) must be submitted to the Clerk as part of the post-travel disclosure required by House Rule 25. Travel Regulation § 404(d) also requires you to keep a copy of all request forms and supporting paperwork for three subsequent Congresses from the date of travel.

If there are any questions regarding this form please contact the Committee:

Committee on Ethics 1015 Longworth House Office Building Washington, DC 20515 (202) 225-7103 (phone) (202) 225-7392 (fax)

Travel email: travel.requests@mail.house.gov

### TRAVELER FORM

1.	Name of Traveler: Congressman Marlin Stutzman
2.	Name of Traveler: Congress man Marlin Stutzman  Sponsor(s) (who will be paying for the trip): The Heritage Foundation
3.	Travel destination(s): San Diego, California
	<ul> <li>a. Date of departure</li></ul>
5.	<ul> <li>a. Will you be accompanied by a relative at the sponsor's expense? ☐ Yes</li> <li>b. If yes: <ul> <li>(1) Name of accompanying relative:</li> </ul> </li> </ul>
	(2) Relationship to traveler: ☐ Spouse ☐ Child ☐ Other (specify):
	(3) Accompanying relative is at least 18 years of age: ☐ Yes ☐ No
6.	<ul> <li>a. Did the trip sponsor answer "yes" to Question 9(d) on the Primary Trip Sponsor Form (i.e., travel is sponsored by an entity that employs a registered federal lobbyist or foreign agent and you are requesting lodging for two nights)? ☐ Yes ☐ No</li> <li>b. If yes, explain why the second night of lodging is warranted:</li> </ul>
7.	Primary Trip Sponsor Form is attached, including agenda, invitee list, and any other attachments and contributing sponsor forms:  Ves  No 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.
	Explain why participation in the trip is connected to the traveler's <u>individual</u> official or representational duties. Staff should include their job title and how the activities on the itinerary relate to their duties.  Congressman Marlin Stutzman is attending the Heritage Foundation's Annual Leadership Conference to Speak regarding Changing the Is the traveler aware of any registered federal lobbyists or foreign agents involved in planning, organizing, requesting, and/or arranging the trip?   Yes No
10.	
	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.
	Date: 10   29   20   3
	Signature of Employing Member

### 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 <u>at least 30 days before the start date of the trip</u>. The trip sponsor should NOT submit the form directly to the Committee. The Committee Web site (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.	<ul> <li>Check only one: I represent that:</li> <li>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</li> <li>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</li> <li>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:</li> </ul>
4.	Provide names and titles of ALL House Members <u>and</u> employees you are inviting. For each House invitee, provide an explanation of why the individual was invited (include additional pages if necessary):  Congressman Marlin Stutzman, Congressman Jim Bridenstine - both are rising star in the House
	fighting for shared principles. Both were invited to participate on panels.
_	Is travel being offered to an accompanying relative of the House invitee(s)? Yes No
5.	Is travel being offered to an accompanying relative of the House invitee(s)?
6.	Date of departure: 11/9/2013 Date of return: 11/10/2013
7.	a. City of departure: Orlando, FL
	b. Destination(s): San Diego, CA
	c. City of return: Orlando, FL
8.	I represent that (check one of the following):
	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: $\square$ <u>or</u>
	<ul> <li>b. The sponsor of the trip does not retain or employ a registered federal lobbyist or foreign agent:  are or</li> <li>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. </li> </ul>
9.	Check one of the following:
	a. I checked 8(a) or (b) above:
	b. I checked 8(c) above but am not offering any lodging: □
	c. I checked 8(c) above and am offering lodging and meals for one night: $\Box \underline{or}$
	d. I checked 8(c) above and am offering lodging and meals for two nights:   If "d" is checked, explain why the second night of lodging is warranted:

10.	. Attached is a detailed agenda of the activities to an hourly description of planned activities for tr	he House invitees will ip invitees) (indicate ag	be participating in during the travel (i.e., genda is attached by checking box):
11.	Check one:     a. I represent that a registered federal lobby employees on any segment of the trip (signs, b. N/A – trip sponsor is a U.S. institution of high	ify that the statement is	will not accompany House Members or true by checking box): $\blacksquare$ or
12.	For each sponsor required to submit a sponsor trip and its role in organizing and/or conducting The Heritage Foundation has planned and donors. We are hoping to give them insight on policies and the changing culture in Wa	g the trip: organized this event t into the work our org	as a cultivation opportunity for
13.	a. Mode of travel: Air ■ Rail □ Bus □		(Specify:
	b. Class of travel: Coach ■ Business □		
	c. If travel will be first class or by chartered o	or private aircraft, expla	in why such travel is warranted:
14.	I represent that the expenditures related to lo recreational activities of the invitee(s). (signify	ocal area travel during	the trip will be unrelated to personal or
15.	<ul> <li>i. I represent that either (check one of the following a. The trip involves an event that is arranged that meals provided to congressional particle event attendees:  or</li> <li>b. The trip involves events that are arranged sp. If "b" is checked:</li> <li>1) Detail the cost per day of meals (approximate)</li> </ul>	ng): I or organized without is cipants are similar to pecifically with regard to	regard to congressional participation and those provided to or purchased by other to congressional participation:
	Provide reason for selecting the location	n of the event or trip: _	
16.	6. Name, nightly cost, and reasons for selecting ear Hotel name: The Grand Del Mar	City. San Die	go Cost per night: \$305
	Reason(s) for selecting: High-level donor	event with many option	nal activities for donors to participate in
	Hotel name:		
	Reason(s) for selecting:		
	Hotel name:		Cost per night:
	981 01979 B Q5	ouj	

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 box):

### 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	\$569.20	\$370.26	\$130.00
For each accompanying relative	n/a	n/a	n/a

	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	n/a	n/a
For each accompanying relative		

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

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If there are any questions regarding this form please contact the Committee at the following address:

Committee on Ethics U.S. House of Representatives 1015 Longworth House Office Building Washington, DC 20515 (202) 225-7103 (phone) (202) 225-7392 (general fax) K. Michael Conaway, Texas Chairman Linda T. Sánchez, California Ranking Member

Charles W. Dent, Pennsylvania Patrick Meehan, Pennsylvania Trey Gowdy, South Carolina Susan W. Brooks, Indiana

Pedro R. Pierluisi, Puerto Rico Michael E. Capuano, Massachusetts Yvette D. Clarke, New York Ted Deutch, Florida



#### ONE HUNDRED THIRTEENTH CONGRESS

# U.S. House of Representatives

COMMITTEE ON ETHICS

November 4, 2013

Daniel A. Schwager Staff Director and Chief Counsel

Joanne White

Administrative Staff Director

Jackie M. Barber

Daniel J. Taylor Counsel to the Ranking Member

1015 Longworth House Office Building Washington, D.C. 20515–6328 Telephone: (202) 225–7103 Facsimile: (202) 225–7392

The Honorable Marlin A. Stutzman U.S. House of Representatives 1728 Longworth House Office Building Washington, DC 20515

Dear Colleague:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to San Diego, California, scheduled for November 9 to 10, 2013, sponsored by the Heritage Foundation. Committee travel regulations require that, for any trip leaving on or after April 1, 2013, you submit your complete pre-trip approval request to the Committee at least 30 days before the commencement of the trip or it will not be granted. Despite your failure to do so in this instance, given the newness of the rule, we are approving your current request. However, any future requests should adhere to the 30-day requirement.

You must complete a Member/Officer Post-Travel Disclosure Form 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. You must also report all travel expenses totaling more than \$350 from a single source on the "Travel" schedule of your annual Financial Disclosure Statement.

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

Sincerely,

K. Michael Conaway Chairman Linda T. Sánchez Ranking Member

KMC/LTS:jls

### 2013

# Annual Leadership Conference THE HERITAGE FOUNDATION

### FRIDAY, NOVEMBER 8 - SATURDAY, NOVEMBER 9, 2013 The Grand Del Mar, San Diego, California

"Reconnecting with America"

### AGENDA

### Friday, November 8, 2013

8:00 a.m. - 6:00 p.m.

Conference Registration

10:00 a.m. - 12:00 p.m.

Tennis Tournament (Optional Activity)

10:45 a.m. - 3:30 p.m.

Golf Scramble at The Grand Golf Club (Optional Activity)

11:30 a.m. – 1:30 p.m.

The Grand Culinary Demonstration (Optional Activity)

1:00 - 3:00 p.m.

Painting Class and Cocktails (Optional Activity)

5:30 - 7:00 p.m.

Welcome Reception

7:00 - 9:00 p.m.

Dinner

Address Jim DeMint

President, The Heritage Foundation

### Saturday, November 9, 2013

7:30 - 9:00 a.m.

Breakfast

Hosted by the Heritage Legacy Society

Address

Scott Rasmussen

Founder and President, Rasmussen Media Group

9:15 - 10:45 a.m.

Session I

"The Message Matters: The American Perceptions Initiative"

Moderator: Geoffrey J. Lysaught

Group Vice President, Strategic Communications, The Heritage Foundation

Dee Allsop, Ph.D.

Chief Executive Officer and Managing Partner, Heart + Mind Strategies

Genevieve Wood

Vice President, Marketing, The Heritage Foundation

10:45 a.m. - 12:15 p.m.

Session II

"Effective Leadership: Success Stories from the States"

Moderator: Ed Corrigan

Group Vice President, Policy Promotion, The Heritage Foundation

Robert Alt

President, The Buckeye Institute for Public Policy Solutions, and Visiting Fellow, The Heritage Foundation

Lindsey Burke

Will Skillman Fellow in Education, The Heritage Foundation

T.W. Shannon

Speaker of the House of Representatives of the State of Oklahoma

12:30 - 2:00 p.m.

Luncheon

Address

The Honorable Scott Walker

Governor of Wisconsin

2:15 - 3:15 p.m.

Session III

Capella

"Heritage Action: Raising an Army of Conservative Activists"

Michael A. Needham

Chief Executive Officer, Heritage Action for America

3:15 - 3:30 p.m.

Break

3:30 - 5:00 p.m.

Session IV

Capella

"Out in Front: Changing the Culture in Congress"

Moderator: Tim Chapman

Chief Operating Officer, Heritage Action for America

The Honorable Jim Bridenstine (R-OK)

United States Representative

The Honorable Marlin Stutzman (R-IN)

United States Representative

5:00 - 6:00 p.m.

Leisure Time

6:00 - 7:00 p.m.

Reception

North Foyer & Courtyard

7:00 - 9:00 p.m.

Dinner

Elizabeth Ballroom B

Address

The Honorable Ted Cruz (R-TX)

United States Senator

Concluding Remarks

Jim DeMint

President, The Heritage Foundation

9:00 - 10:30 p.m.

Dessert Reception

Capella

# 2013

# Annual Leadership Conference

# FRIDAY, NOVEMBER 8 - SATURDAY, NOVEMBER 9, 2013

# The Grand Del Mar, San Diego, California SATURDAY, NOVEMBER 9, 2013

### SESSION IV TIMELINE (3:30 – 5:00 P.M.)

Room: Capella

### "Out in Front: Changing the Culture in Congress"

3:30 p.m.	<b>Tim Chapman</b> delivers opening remarks, introduces panelists, and begins the discussion (5 minutes)
3:35 p.m.	Tim Chapman moderates Informal Discussion with The Hon. Jim Bridenstine and The Hon. Marlin Stutzman **on stools, via lav mics** (45 minutes)
4:20 p.m.	Question and answer moderated by <b>Tim Chapman</b> via live mics (38 minutes)
4:58 p.m.	<b>Tim Chapman</b> delivers closing remarks, announces hour-long break, and reminds guests that the evening reception will begin at 6:00 p.m. in the Elizabeth Ballroom foyer, followed by dinner at 7:00 p.m. (2 minutes)
5:00 p.m.	Session IV concludes



### 2013 ANNUAL LEADERSHIP CONFERENCE

Friday, November 8 – Saturday, November 9
The Grand Del Mar
5300 Grand Del Mar Ct.
San Diego, CA

### SPEAKER INFORMATION FORM

Please email or fax this completed form with a preferred biography to Shianne Chatarjee by Friday, October 11, 2013.

Email: Shianne.chatarjee@heritage.org Phone: 202-608-1534 Fax: 202-675-1778

CONTACT INFORMATION
Speaker Name: Congressman Marlin Stutzman
Title: Congressman
Organization: U.S. House of Representatives Address: 1728 Long Worth House Office Building
Address: 1728 Long Worth House Office Building
City/State/Zip: Washington, DC ZOSIS
Office Phone #: (202) 225 - 4436
Mobile Phone #:
E-mail:
Assistant's Name: Mary Wells
Assistant's Office Phone #: (202) 225 - 4436
Assistant's E-mail: Mary. Wells @mail. house. gov
Assistant's Mobile Phone #: (202) 731 - 5856
Spouse Name (if attending):*

Spouse City & State of residence (if attending):

<sup>\*</sup>Your spouse is welcomed to participate in all Annual Leadership Conference meals. The Heritage Foundation is unable to reimburse for spouse travel to the Conference.

Transportation	
I will arrange transportation through The Heritage Foundation 1-888-979-0400. I will mention the Annual Leadership Conferen Foundation.	's account representative at World Travel at ce to have expenses billed directly to The Heritage
☐ I will arrange my own transportation and email Shianne Chat reimburse travel expenses when provided with a receipt.	arjee my itineraries. The Heritage Foundation will
*Please note: The Heritage Foundation will pay for economy tickets between the airport and hotel. All travel must be booked by <b>Friday,</b> Foundation's preferred agent for making travel arrangements. Shou Shianne Chatarjee at Shianne.chatarjee@heritage.org or (202) 608-	October 11, 2013. World Travel is The Heritage ld you need additional assistance, please contact
HOTEL ACCOMMOD	ATIONS
The Grand Del 5300 Grand Del Mar Ct. S Phone: (858) 314-2000 Fax	an Diego, CA
Check-In Date: 119 2013 Check	-Out Date: 11 10 2013
Special Room Requests:	
*Please note: The Heritage Foundation will reserve your overnight	room at The Grand Del Mar.
REGISTRATION INFO	RMATION
I/ we will attend the following (please indicate number of people):	
Friday, November 8, 2013	Saturday, November 9, 2013
Optional Activity: Tennis Tournament	Breakfast
Optional Activity: Golf Scramble	Luncheon
Optional Activity: Grand Culinary Demonstration	Reception & Dinner
Optional Activity: Painting Class & Cocktails	
Welcome Reception & Dinner	
Please list any dietary restrictions or food allergies: Sea foo	d

Presentation Information	
Handouts:	
☐ I will not have handouts.	
☐ I will bring 250 handouts to the presentation.	
☐ I will email handouts to Shianne.chatarjee@heritage.org by Wednesday, October 30, 2013, and she will make copies of my handouts for the presentation.	
Audio-Visual:	
Please check all that apply:	
I will not have a PowerPoint presentation.	
☐ I will have a PowerPoint presentation. I will email the file to Shianne.chatarjee@heritage.org by <i>Wednesday</i> , <i>October 30</i> , <i>2013</i> , and she will save it to The Heritage Foundation presentation laptop. Please bring a back-up of the PowerPoint on a flash drive.	
My presentation has sound effects and/or video.	
☐ I have the following special audio request:	

Thank you! We look forward to working with you.

\*Please note: Internet access will not be available during presentations.