

LEGISLATIVE RESOURCE CENTER

U.S. House of Representatives
Committee on Ethics

2017 APR -6 PM 4:03

EMPLOYEE POST-TRAVEL DISCLOSURE FORM

OFFICE OF THE CLERK
U.S. HOUSE OF REPRESENTATIVES

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, 135 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. § 1001.

1. Name of Traveler: Erin O'Quinn
2. a. Name of accompanying relative: _____ *or* None
 b. Relationship to Traveler: Spouse Child Other (specify): _____
3. a. Dates of departure and return: Departure: 3/24/17 Return: 3/26/17
 b. Dates at personal expense (if any): _____ *or* None
4. Departure city: Washington DC Destination: Middleburg, VA Return city: Washington, DC
5. Sponsor(s) (who paid for the trip): Center Forward
6. Describe meetings and events attended: Attended panels and discussions on the path forward in 2017 for health care, national security and tax policy.
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 Grantmaking or Non-Grantmaking Sponsor Forms;
 - 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 that statement is true by checking 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: E.O.O. DATE: 4/6/17

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: Ami Bera DATE: 4/6/17

SIGNATURE OF SUPERVISING MEMBER: Ami Bera

U.S. House of Representatives
Committee on Ethics

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): Center Forward

2. Travel Destination(s): Middleburg, VA

3. Date of Departure: 3/24/17 Date of Return: 3/26/17


4. Name(s) of Traveler(s): Morgan Jones, Eric Lausten, Jeremy Nordquist, Erin O'Quinn, Steven Smith
(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 response to Question 4:

	Total Transportation Expenses	Total Lodging Expenses	Total Meal Expenses	Other Expenses (dollar amount per item and description)
Traveler	0	\$250	\$250	
Accompanying Relative	0	0	0	

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: 
Name: April Beeman Title: Program Director
Organization: Center Forward

I am an officer of the above-named organization (signify statement is true by checking box):

Address: 1440 G St, NW
Washington, DC 20005

Telephone number: (202) 550-4325

Email Address: april@center-forward.org

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: Erin O'Quinn
2. Sponsor(s) (who will be paying for the trip): Center Forward
3. Travel destination(s): Middleburg, VA
4. a. Date of departure March 24, 2017 Date of return: March 26, 2017
b. Will you be extending the trip at your personal expense? Yes No
If yes, dates at personal expense: _____
5. a. Will you be accompanied by a relative at the sponsor's expense? Yes No
b. If yes:
(1) Name of accompanying relative: _____
(2) Relationship to traveler: Spouse Child Other (specify): _____
(3) Accompanying relative is at least 18 years of age: Yes No
6. 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
b. If yes, explain why the second night of lodging is warranted:

7. Primary Trip Sponsor Form is attached, including agenda, invitee list, and any other attachments and contributing sponsor forms: Yes 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.
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 legislative director for a Member who is a Dr., this conference will give me the opportunity to share our perspective and learn about the future of health and tax policy from other offices and stakeholders.
9. 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. **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.

Date: 2/21/2017



Signature of Employing Member

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 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): _____
Center Forward
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):
Please see attachment.

5. Is travel being offered to an accompanying relative of the House invitee(s)? Yes No
6. Date of departure: March 24, 2017 Date of return: March 26, 2017
7. a. City of departure: Washington, DC
b. Destination(s): Middleburg, VA
c. City of return: Washington, DC
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: 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 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: 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 the 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 one:

- 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. N/A – 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:
Please see attachment.

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 box):

15. I represent that either (check one of the following):

- 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): _____

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

16. Name, nightly cost, and reasons for selecting each hotel or other lodging facility:

Hotel name: Salamander Resort City: Middleburg, Cost per night: \$125
Reason(s) for selecting: Ample meeting space and proximity to DC with a/v capabilities

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 box):

18. TOTAL EXPENSES FOR EACH PARTICIPANT:

<input type="checkbox"/> actual amounts <input checked="" type="checkbox"/> good faith estimates	Total Transportation Expenses per Participant	Total Lodging Expenses per Participant	Total Meal Expenses per Participant
For each Member, Officer, or employee	\$60	\$250	\$250
For each accompanying relative	\$60	\$0	\$250

	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	\$0	
For each accompanying relative	\$0	

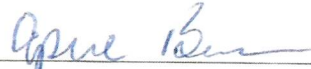
NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001.

19. Check one:

- a. I certify that I am an officer of the organization listed below. *or*
 b. N/A – sponsor is an individual or a U.S. institution of higher education.

20. I certify that I am not a registered federal lobbyist or foreign agent for any sponsor of this trip.

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

Signature: 
 Name: April Beeman
 Title: Program Director
 Organization: Center Forward
 Address: 925 15th St, NW, 4th Floor Washington, DC 20005
 Telephone number: (202) 550-4325
 Email address: april@center-forward.org

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)

Susan W. Brooks, Indiana
Chairwoman
Theodore E. Deutch, Florida
Ranking Member



Thomas A. Rust
Staff Director and Chief Counsel

Donna Herbert
Director of Administration

Sheria A. Clarke
Counsel to the Chairwoman

Daniel J. Taylor
Counsel to the Ranking Member

Patrick Meehan, Pennsylvania
Trey Gowdy, South Carolina
Kenny Marchant, Texas
Leonard Lance, New Jersey

Yvette D. Clarke, New York
Jared Polis, Colorado
Anthony Brown, Maryland
Steve Cohen, Tennessee

ONE HUNDRED FIFTEENTH CONGRESS

U.S. House of Representatives

COMMITTEE ON ETHICS

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

March 22, 2017

Ms. Erin O'Quinn
Office of the Honorable Ami Bera
1431 Longworth House Office Building
Washington, DC 20515

Dear Ms. O'Quinn:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to Middleburg, Virginia, scheduled for March 24 to 26, 2017, sponsored by Center Forward.

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 \$390 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 W. Brooks
Chairwoman

Theodore E. Deutch
Ranking Member

SWB/TED:re



Agenda

2017 Center Forward Issues Conference

Friday, March 24- Sunday, March 26, 2017

The Salamander

Middleburg, VA

Friday, March 24

3:00 pm – 5:00 pm

Registration – Business Center of the Salamander

5:30 pm – 7:30 pm

Welcome Reception - Red Fox Inn, downtown
Middleburg, VA

Casual discussion of Centrist Policy Priorities in
2017.

Second Floor

Attire is business casual.

Saturday, March 25

8:30 am

Breakfast Buffet - Middleburg Foyer

Daytime attire is casual

Program Location

Middleburg I and II

9:00 am – 9:15 am

Welcome Remarks

Cori Kramer, Executive Director, Center Forward

9:15- 9:45 am

Opening Remarks

Legislating from the Center

Congressman Jim Costa, Co-Chair, The Blue Dog Coalition and Congressman Jim Himes, Chair, The New Democrat Coalition

9:45 am – 11:00 am

Discussion Panel

ACA Repeal and Replace – Where do we go from here?

Panelists include: Congressman Ami Bera

Moderated By the Honorable Bud Cramer

11:00 – 11:15 am

Break

11:15am – 12:00 pm

At the Center of the Target: how foreign entities work to erode America's middle ground

Opening Remarks and Introduction by Congresswoman Stephanie Murphy

The Honorable Sean O'Brien, Chief Speechwriter for Secretary of Defense Ashton B. Carter

- 12:00 pm – 1:15 pm Lunch- Middleburg Foyer
Redistricting our Future
Kelly Ward, Interim Executive Director
National Democratic Redistricting Committee
- 1:15pm – 1:30 pm Break
- 1:30 – 2:45 pm Discussion Panel
Corporate Tax Reform
Panelists include:
James Leuschen, Senior Policy Advisor, Democratic Whip
Steny Hoyer
Bill Miller, Senior Vice President, Business Roundtable
Moderated by the Honorable Bud Cramer
- 3:00– 4:30 pm Moderate Round table discussions – perspectives from
House offices on the 2017 legislative session
- 4:30-6:00 pm Break
- 6:00 pm – 7:00 pm Reception - Middleburg Foyer
Attire is business casual
- 7:00 pm – 8:30 pm Dinner – Middleburg II and III

Navigating a Rapidly Changing Political Environment

*Keynote Address by Amy Walter, National Editor of the
Cook Political Report*

Sunday, March 26

8:00 am – 10:00 am

Breakfast Buffet – Middleburg Foyer

				it moving forward in this Congress.
Ashley	Jones	Chief of Staff	Office of Representative Brad Schneider	Ms. Jones has extensive legislative and administration experience and will lend her perspective to the current legislative session.
Austin	Durrer	Chief of Staff	Office of Representative Charlie Crist	Mr. Durrer will be able to discuss the challenges and priorities of a freshman office and the impact of changes to financial services regulations.
Michelle	Dorothy	Chief of Staff	Office of Representative Scott Peters	Ms. Dorothy offers a perspective gained as a chief of staff for a moderate California Member after previously serving as chief for a conservative Pennsylvania Democrat.
Jeremy	Nordquist	Chief of Staff	Office of Representative Tom O'Halleran	Mr. Nordquist will contribute the perspective of a freshman Blue Dog office and its policy priorities.
Ami	Bera	Congressman	7 th District of California	Rep. Bera will participate in discussions on healthcare reform and broader policy perspectives for the 2017 legislative agenda.

Jim	Himes	Congressman	4 th District of Connecticut	Congressman Himes will discuss the priorities and focus of the New Democrat Coalition, of which he is the chair.
Stephanie	Murphy	Congresswoman	7 th District of Florida	Congresswoman Murphy is a national security specialist who will participate in the program segment focused on the role of the center in shaping foreign policy.
Brad	Howard	Chief of Staff	Office of Representative Stephanie Murphy	Mr. Howard has extensive experience with the Blue Dog Coalition and moderate issues across the country and will be able to offer this perspective combined with his role in organizing a freshman office.
Alexis	Anderson	Legislative Assistant	Office of Representative Donald Payne	Ms. Anderson's portfolio includes both healthcare and foreign affairs and she will be able to add to the discussion of both issues.
Juan	Hinojosa	Chief of Staff	Office of Representative Mike Quigley	As chief of staff to a Member focused on improving infrastructure needs in his district, Mr. Hinojosa can address the issue and probability of

			Josh Gottheimer	Israel, Ms. Russell now leads a freshman office and has a valued perspective from a variety of offices and can speak to enduring legislative bipartisan priorities.
Erin	Doty Georges	Legislative Director	Office of Representative Raul Ruiz	Ms. Doty Georges is a veteran legislative professional who will be able to lend her perspective from a variety of different offices on common sense legislation.
Drew	Kent	Chief of Staff	Office of Representative Charlie Dent	As chief of staff for a chair of the Tuesday Group and an active Republican Member, Mr. Kent will contribute to the discussions of common ground and bipartisan legislative solutions.
Jeff	Carroll	Democratic Staff Director	House Energy and Commerce Committee	Mr. Carroll will be able to add the committee's perspective to the discussion on healthcare reform.
Jim	Costa	Congressman	16 th District of California	As Co-Chair of the Blue Dog Coalition, Congressman Costa will be addressing their legislative initiatives and focus.

				engaged in efforts to advance bipartisan dialogue and pragmatic legislation.
Andy	Flick	Deputy Chief of Staff	Office of Representative Seth Moulton	Mr. Flick can provide insight from the perspective of a Freshman office and its legislative priorities.
Katie	Grant	Communications Director	Office of House Democratic Whip Steny Hoyer	As the communications director in the Minority Whip's office, Ms. Grant offers perspective on the messaging of important issues within the caucus.
James	Leuschen	Senior Policy Advisor	Office of House Democratic Whip Steny Hoyer	Mr. Leuschen has extensive policy experience and can speak to corporate tax reform ideas in great detail as well as provide insight into other legislative priorities.
Michael	Lukso	Legislative Director	Office of Representative Josh Gottheimer	Mr. Lukso is legislative director to a freshman Congressman and will offer his take on legislations based on experience working in a variety of offices.
Tricia	Russell	Chief of Staff	Office of Representative	After many years with Rep. Steve

				Republican agenda for the 2017 legislative session.
David	Bond	Deputy Chief of Staff/Legislative Director	Office of Representative Katherine Clark	Mr. Bond has served in many offices currently engages in outreach to progressive groups and offers the perspective of those entities as well as his work on numerous pieces of legislation.
Mike	Goodman	Chief of Staff	Office of Representative Ron Kind	Mr. Goodman serves as Chief of Staff to Rep. Kind, a long-time leader in the New Democrats, who focuses on issues impacting small businesses. He will offer important insights to efforts in this area.
Mark	Henson	Chief of Staff	Office of Representative Jim Himes	As the Chief of Staff to a Member of the Financial Services Committee, Mr. Henson can offer insight into legislative efforts regarding those issues. He will also be able to address the priorities of the New Democrat Coalition, of which Mr. Himes is Chair.
Andrew	Connery	Senior Policy Advisor, New Democrat Coalition	Office of Rep. Jim Himes	As senior policy advisor of the New Democrats, Mr. Connery is actively

Private Sponsor Travel Certification Form: Supplemental

4. Name and Title House Invitees:

First	Last	Title	Affiliation	Reason
Scott	Petersen	Deputy Chief of Staff/Legislative Director	Office of Representative Jim Costa	As Legislative Director for Congressman Costa, Chair of the Blue Dog Coalition, Mr. Petersen offers insight into the priorities of an office that is involved in bipartisan legislation on the agriculture committee.
Morgan	Jones	Legislative Director	Office of Representative Donald Norcross	As Legislative Director to Congressman Norcross, Mr. Jones can speak to the challenges of forging bipartisan relationships and common legislative ground.
Jonathan	Smith	Chief of Staff	Office of Representative Derek Kilmer	As Chief of Staff to a Member focused on corporate tax reform, Mr. Smith can offer insight into bipartisan efforts on this issue.
Erin	O'Quinn	Legislative Director	Office of Representative Ami Bera	As Legislative Director to Rep. Bera, a medical doctor, Ms. O'Quinn can offer a unique perspective on healthcare and small business issues.
Bruce	Miller	Chief of Staff	Office of Representative Mark Amodei	In his role as chief of staff for Rep. Amodei, Mr. Miller can speak to the anticipated

Steven	Smith	Communications Director	Office of Representative Paul Gosar	As the communications director for a Republican Member, Mr. Smith will contribute his insight on the legislative priorities for the upcoming year and where common ground may be found.
--------	-------	-------------------------	-------------------------------------	---

12. Sponsor's interest in the subject matter and role in organizing the trip:

Center Forward's Issues Retreat is being convened to bring together centrists from various industries, organizations and the public sector to focus on pragmatic solutions. Center Forward's organizational mission is to provide centrists the information they need to craft common sense solutions and provide support in turning those ideas into results. Center Forward brings together Members of Congress, not-for profits, academic experts, trade associations, corporations and unions to find common ground.

Center Forward is the sole organizer of the trip. Center Forward is planning the retreat and is responsible for the organization and execution of the event logistics as well as the programming content. Discussion topics will include healthcare reform, corporate tax reform, foreign policy and the 2017 political landscape. Participants are expected to include policymakers and advocate groups as well as business leaders and some researchers.