☒ *Original* ☐ *Amendment*

U.S. House of Representatives
Committee on Ethics

LEGISLATIVE RESOURCE CENTER
17 OCT 16 PM 5:00
OFFICE OF HOUSE
U.S. HOUSE OF REPRESENTATIVES

EMPLOYEE POST-TRAVEL DISCLOSURE FORM

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: David Wysong

2. a. Name of accompanying relative: — *or* None ☒
   b. Relationship to Traveler: ☐ Spouse ☐ Child ☐ Other (specify): _____

3. a. Dates of departure and return: Departure: 10/7/17 Return: 10/8/17
   b. Dates at personal expense (if any): — *or* None ☒

4. Departure city: Washington DC Destination: Philadelphia Return city: Washington DC

5. Sponsor(s) (who paid for the trip): PEW

6. Describe meetings and events attended: Presentation skills, Customer Service, Dinner w/ Keynote Walter Isaacson

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: Dal Wy DATE: 10/16/17

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: Beto O'Rourke DATE: 10/16/17

SIGNATURE OF SUPERVISING MEMBER: Beto O'Rourke.

Version date 2/2015 by Committee on Ethics

☐ *Original* ☐ *Amendment*

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): The Pew Charitable Trusts

2. Travel Destination(s): Philadelphia, PA

3. Date of Departure: October 7, 2017 Date of Return: October 8, 2017

4. Name(s) of Traveler(s): David Wysong
(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	$115.20	$183	$59	$102.78 (local charter bus transportation)
Accompanying Relative				

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: Tamera Luzzatto

Name: Tamera Luzzatto Title: Senior Vice President

Organization: The Pew Charitable Trusts

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

Address: 901 E Street, NW
Washington, DC 20004

Telephone number: (202) 552-2000

Email Address: tluzzatto@pewtrusts.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: DAVID Wysong
2. Sponsor(s) (who will be paying for the trip): The Pew Charitable Trusts
3. Travel destination(s): Philadelphia
4. a. Date of departure Oct 7, 2017 Date of return: Oct 8 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.
   Bipartisan Chief of Staff training & networking specific to my job. See attached. I am the Chief of Staff for Congressman O'Rourke.
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: 9/7/17 Beto O'Rourke.

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): The Pew Charitable Trusts

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: The William and Flora Hewlett Foundation; The Democracy Fund

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 attached list. Each person on the list is invited due to their position as a chief of staff in order to participate in this bipartisan chiefs of staff retreat.

5. Is travel being offered to an accompanying relative of the House invitee(s)? ☒ Yes ☐ No

6. Date of departure: October 7, 2017 Date of return: October 8, 2017

7. a. City of departure: Washington, DC
   b. Destination(s): Philadelphia, PA
   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:

    The Pew Charitable Trusts seeks to inform and advance the development of sound public policy in the United States, as well as to strengthen the institutions that form the foundations of our ~~democracy. The purpose of this retreat is to strengthen bipartisan relationships among the House~~ Chiefs of Staff and provide leadership and management skills training. Pew is the sole organizer of this trip. The William and Flora Hewlett Foundation and the Democracy Fund provide funding for the ~~House Chiefs of Staff initiative, but play no role in choosing participants, selecting the destination, or~~ designing the itinerary for this retreat.

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): Saturday lunch ($16); Saturday dinner ($28); Sunday breakfast ($15)

    2) Provide reason for selecting the location of the event or trip: Philadelphia was chosen due to its proximity to Washington, DC, ease of travel via Amtrak and its historical significance.

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

    Hotel name: Sofitel City: Philadelphia Cost per night: $183
    Reason(s) for selecting: Can provide necessary meeting space and number of rooms required and meet the per diem rate.

    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:

☐ 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	$115.20 r/t coach fare	$183/ one night	$59
For each accompanying relative	$115.20 r/t coach fare	$183/ one night	$59

	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	$102.78	Local charter bus transportation
For each accompanying relative	$102.78	Local charter bus transportation

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: Tamera Luzzatto

Name: Tamera Luzzatto

Title: Senior Vice President

Organization: The Pew Charitable Trusts

Address: 901 E Street NW, 10th floor

Telephone number: 202-552-2000

Email address: tluzzatto@pewtrusts.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)

U.S. House of Representatives
Committee on Ethics

GRANTMAKING TRIP SPONSOR FORM

This form should be completed by a public charity or private foundation (both as defined under section 501(c)(3) of the Internal Revenue Code) that provides a grant of funds to another entity to underwrite, in whole or in part, a trip or an event, meal, or activity that will occur during a trip, or a necessary expense that will be incurred during a trip, with express or implicit knowledge or understanding that one or more House Members or employees may participate in or attend that trip or event, or otherwise may be beneficiaries of the gift or donation. **Provide a copy of your completed form to the primary sponsor of the trip.**

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. I certify that (name of your organization): The William and Flora Hewlett Foundation has been designated a § 501(c)(3) nonprofit charitable organization by the Internal Revenue Service. ☒ Yes ☐ No
2. Name of Primary Trip Sponsor: Pew Charitable Trusts
3. I certify that my organization (*complete a or b):*
   a. ☒ Has provided a grant, gift, or donation to the above-named Primary Trip Sponsor and conducts an audit or review of its grant, gift, or donation to ensure that the funds are spent in accordance with the terms of its grant, gift, or donation. ***or***
   b. ☐ Has had a direct role in the organizing, planning, or conducting of a trip to (destination) _____ on (date) _____ that is being organized or arranged by the above-named Primary Trip Sponsor.
4. Check one:
   a. ☒ My organization does not employ or retain a registered federal lobbyist or foreign agent ***or***
   b. ☐ My organization employs a registered federal lobbyist or foreign agent, but their involvement in planning, organizing, or arranging the trip was *de minimis* under the travel regulations.
5. I certify that I am not a registered federal lobbyist or foreign agent for any sponsor of this trip. ☒
6. 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: Elizabeth H. Peters Title: General Counsel

Organization: The William and Flora Hewlett Foundation

Address: 2121 Sand Hill Road, Menlo Park, CA 94025

Telephone number: 650-234-4787 Email: epeters@hewlett.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)

U.S. House of Representatives
Committee on Ethics

GRANTMAKING TRIP SPONSOR FORM

This form should be completed by a public charity or private foundation (both as defined under section 501(c)(3) of the Internal Revenue Code) that provides a grant of funds to another entity to underwrite, in whole or in part, a trip or an event, meal, or activity that will occur during a trip, or a necessary expense that will be incurred during a trip, with express or implicit knowledge or understanding that one or more House Members or employees may participate in or attend that trip or event, or otherwise may be beneficiaries of the gift or donation. **Provide a copy of your completed form to the primary sponsor of the trip.**

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. I certify that (name of your organization): Democracy Fund
has been designated a § 501(c)(3) nonprofit charitable organization by the Internal Revenue Service.
☒ Yes ☐ No
2. Name of Primary Trip Sponsor: Pew Charitable Trusts
3. I certify that my organization (*complete a or b*):
   a. ☒ Has provided a grant, gift, or donation to the above-named Primary Trip Sponsor and conducts an audit or review of its grant, gift, or donation to ensure that the funds are spent in accordance with the terms of its grant, gift, or donation. ***or***
   b. ☐ Has had a direct role in the organizing, planning, or conducting of a trip to
   (destination) _____ on (date) _____ that is being organized or arranged by the above-named Primary Trip Sponsor.
4. Check one:
   a. ☐ My organization does not employ or retain a registered federal lobbyist or foreign agent ***or***
   b. ☒ My organization employs a registered federal lobbyist or foreign agent, but their involvement in planning, organizing, or arranging the trip was *de minimis* under the travel regulations.
5. I certify that I am not a registered federal lobbyist or foreign agent for any sponsor of this trip. ☒
6. I certify by my signature that the information contained in this form is true, complete, and correct to the best of my knowledge.

Signature: Elizabeth Hawkings

Name: Betsy Wright Hawkings Title: Director, Governance Program

Organization: Democracy Fund

Address: 1200 17th St. NW #300, WDC 20036

Telephone number: 202/420-7900 Email: bhawkings@democracyfund.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

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

Thomas A. Rust
Staff Director and Chief Counsel

Donna Herbert
Director of Administration

Megan Savage
Chief of Staff and Counsel to the Chairwoman

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

September 27, 2017

Mr. David Wysong
Office of the Honorable Beto O'Rourke
1330 Longworth House Office Building
Washington, DC 20515

Dear Mr. Wysong:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to Philadelphia, Pennsylvania, scheduled for October 7 to 8, 2017, sponsored by the Pew Charitable Trusts, with financial support from the William and Flora Hewlett Foundation and Democracy Fund. We remind you that, because the trip sponsor employs a federal lobbyist, you may participate in officially-connected activity on one calendar day only.

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.

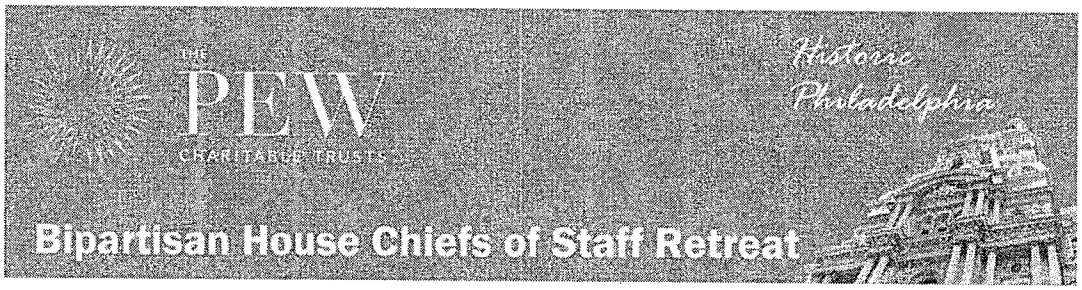
If you have any further questions, please contact the Committee's Office of Advice and Education at extension 5-7103.

Sincerely,

Susan W. Brooks
Chairwoman

Theodore E. Deutch
Ranking Member

SWB/TED:adw



House Chiefs of Staff Retreat Itinerary

Saturday, October 7, 2017

9:25am	Depart Union Station via Amtrak 164
11:17am	Arrive 30th Street Station, Philadelphia
11:30am	Travel via bus to Sofitel, 120 S. 17th Street
11:45am	Check into Sofitel
12:15-1:15pm	Lunch, Sofitel. **Lee Rainie, Director, Internet, Science and Technology, Pew Research Center.**
1:30-3:30pm	**Jeanne Meserve – "Presentation Skills"** Participants will learn the research behind audience attention spans and how to quickly connect and keep the interest of various groups. Storytelling best practices are demonstrated along with strategies for handling challenging Q&A scenarios. Methods are also presented to help take complex messages and make them more clear and succinct. In addition to tips and techniques, participants are engaged in discussion about the strengths and weaknesses of current presentations in the news and how those critiques may be applied to their own work. Following the interactive discussion, the session will also engage participants with small group exercises where each Chief of Staff has the opportunity to deliver a short segment of a presentation or meeting introduction. Then the presenter receives critique from his or her peers.
3:30-3:40pm	Break
3:40-5:40pm	**Marty Clarke, "Customer Service – Creating the Standout Experience"** In this fast, funny, and highly content-rich workshop, Marty Clarke discusses, in detail, real world strategies that give attendees the tools to communicate well with both internal and external audiences. Attendees learn techniques that will help them create the "standout experience" even when the stakes are high and tempers are running hot. Specific topics will include: Creating the Culture of Harmony; Flexibility and How We Make the Service Connection; The 3 Expectations of Every Interaction; Communication and Credibility; Irate Colleagues! Strategies for a Soft Landing; and Blame vs. Resolution.
6:30pm	Depart via bus to Independence Hall

6:45-7:30pm	Private tour of Independence Hall
7:30-9:30pm	Reception and Dinner at Constitution Center **Keynote Address by Walter Isaacson**

Walter Isaacson is the president and CEO of the Aspen Institute. He previously served as the chairman and CEO of CNN and the editor of TIME magazine.

Isaacson's most recent book, *Leonardo da Vinci (2017),* is based on thousands of pages from Leonardo's astonishing notebooks and new discoveries about his life and work. Isaacson weaves a narrative that connects his art to his science. He shows how Leonardo's genius was based on skills we can improve in ourselves, such as passionate curiosity, careful observation, and an imagination so playful that it flirted with fantasy. is a biographical tale of the people who invented the computer, Internet and the other great innovations of the digital age.

Walter Isaacson is the author of the acclaimed best sellers *Steve Jobs*, *Einstein: His Life and Universe*, and *Benjamin Franklin: An American Life.*

9:30pm	Depart via bus to Sofitel

Sunday, October 8, 2017

9:00-10:30am	Breakfast at your leisure, Sofitel
10:30-11:30am	Hotel check-out and bag call
11:45am	Bus departs Sofitel for 30th Street Station
12:34pm	Depart 30th Street Station via Amtrak 195
2:25pm	Arrive Union Station

List of Invited Staff

Sal	First Name	Last Name	Member Office
Mr.	Todd	Adams	Rep. Jim R. Langevin
Mr.	Robert	Adkerson	Rep. Barry D. Loudermilk
Ms.	Kara	Ahern	Rep. Liz L. Cheney
Ms.	Beverly	Aimaro Pheto	Rep. Rosa L. DeLauro
Ms.	LaVerne	Alexander	Rep. Donald M. Payne Jr.
Ms.	Nicole	Alioto	Rep. Jerry McNerney
Mr.	Matthew	Alpert	Rep. Jose E. Serrano
Mr.	Eric	Amidon	Rep. Lee M. Zeldin
Ms.	Wendy	Anderson	Rep. Valdez B. Demings
Ms.	Naomi	Andrews	Rep. Carol Shea-Porter
Mr.	William	Archer	Rep. Jeff L. Fortenberry
Ms.	Natalie	Armijo	Rep. Michelle Lujan Grisham
Mr.	Cyrus	Artz	Rep. Virginia A. Foxx
Mr.	Issac	Avant	Rep. Bennie G. Thompson
Mr.	Luis	Baco	Del. Jenniffer A. Gonzalez Colon
Mr.	Timothy	Baker	Rep. Rick W. Allen
Ms.	Aneiry	Batista	Rep. Adriano Espaillat
Ms.	Megan	Bel Miller	Rep. Steve J. Scalise
Mr.	Brendan	Belair	Rep. Doug A. Collins
Ms.	Megan	Bell	Rep. Hal D. Rogers
Mr.	Josh	Bell	Rep. Ron Estes
Mr.	Andrew	Bell	Rep. Ted P. Budd
Ms.	A. Brooke	Bennett	Rep. French Hill
Mr.	Eric	Bergren	Rep. Brett Guthrie
Mr.	Stephen	Billy	Rep. Robert M. Pittenger
Mr.	Igor	Birman	Rep. Tom McClintock
Ms.	Christine	Biron	Rep. Darren M. Soto
Mr.	Matthew	Bisenius	Rep. Jim Sensenbrenner
Mr.	Eric	Bohl	Rep. Jason T. Smith
Mr.	Kyle	Bonini	Rep. David A. Trott
Mr.	Jose	Borjon	Rep. Vicente Gonzalez
Ms.	Rachael	Bornstein	Rep. Suzanne M. Bonamici
Ms.	Lorissa	Bounds	Rep. Greg P. Walden
Mr.	Joshua	Bowlen	Rep. Walter B. Jones Jr.
Mr.	Casey	Bowman	Rep. Jaime L. Herrera Beutler
Mr.	Matthew	Brennan	Rep. Glenn W. Thompson Jr.
Ms.	Kelli	Briggs	Rep. Pat J. Tiberi
Mr.	Christopher	Brinson	Rep. Mike D. Rogers
Mr.	Clinton	Britt	Rep. Paul D. Tonko
Mrs.	Perry	Brody	Rep. Filemon B. Vela
Mr.	Marcus	Brubaker	Rep. Bill Posey
Mr.	Eric	Burgeson	Rep. Bill F. Shuster
Ms.	Jami	Burgess	Rep. Denny Heck

List of Invited Staff

Sal	First Name	Last Name	Member Office
Mr.	Stoney	Burke	Rep. Will Hurd
Mr.	Jonathan	Burks	Speaker of the House
Ms.	Emily	Burns	Rep. John Garamendi
Mr.	Stuart	Burns	Rep. Brian Babin
Mr.	Jeff	Butler	Rep. Patrick T. McHenry
Mr.	Larry	Calhoun	Rep. Theodore S. Yoho
Mr.	Ronald	Carara	Rep. Daniel M. Donovan Jr.
Mr.	Adam	Carbullido	Del. Madeleine Z. Bordallo
Mr.	Chad	Carlough	Rep. Bradley R. Byrne
Mr.	Dustin	Carmack	Rep. Ron D. DeSantis
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Retreat Schedule

Saturday, October 7, 2017

9:25am	Depart Union Station via Amtrak 164
11:17am	Arrive 30th Street Station, Philadelphia
11:30am	Travel via bus to Sofitel, 120 S. 17th Street
11:45am-1:00pm	Lunch, Sofitel. **Lee Rainie, Director, Internet, Science and Technology, Pew Research Center.** (Paris Ballroom)
1:15-3:15pm	**Jeanne Meserve – "Presentation Skills"** (Paris Ballroom) Participants will learn the research behind audience attention spans and how to quickly connect and keep the interest of various groups. Storytelling best practices are demonstrated along with strategies for handling challenging Q&A scenarios. Methods are also presented to help take complex messages and make them more clear and succinct. In addition to tips and techniques, participants are engaged in discussion about the strengths and weaknesses of current presentations in the news and how those critiques may be applied to their own work. Following the interactive discussion, the session will also engage participants with small group exercises where each Chief of Staff has the opportunity to deliver a short segment of a presentation or meeting introduction. Then the presenter receives critique from his or her peers.
3:15-3:30pm	Break
3:30-5:30pm	**Marty Clarke, "Customer Service – Creating the Standout Experience"** (Paris Ballroom) In this fast, funny, and highly content-rich workshop, Marty Clarke discusses, in detail, real world strategies that give attendees the tools to communicate well with both internal and external audiences. Attendees learn techniques that will help them create the "standout experience" even when the stakes are high and tempers are running hot. Specific topics will include: Creating the Culture of Harmony; Flexibility and How We Make the Service Connection; The 3 Expectations of Every Interaction; Communication and Credibility; Irate Colleagues! Strategies for a Soft Landing; and Blame vs. Resolution.

6:30pm	Depart via bus to Independence Hall
6:45-7:30pm	Private tour of Independence Hall
7:30-7:40pm	Travel via bus to the Constitution Center
7:45-9:30pm	Reception and Dinner at Constitution Center **Keynote Address by Walter Isaacson**

Walter Isaacson is the president and CEO of the Aspen Institute. He previously served as the chairman and CEO of CNN and the editor of TIME magazine.

Isaacson's most recent book, *Leonardo da Vinci (2017),* is based on thousands of pages from Leonardo's astonishing notebooks and new discoveries about his life and work. Isaacson weaves a narrative that connects his art to his science. He shows how Leonardo's genius was based on skills we can improve in ourselves, such as passionate curiosity, careful observation, and an imagination so playful that it flirted with fantasy. is a biographical tale of the people who invented the computer, Internet and the other great innovations of the digital age.

Walter Isaacson is the author of the acclaimed best sellers *Steve Jobs*, *Einstein: His Life and Universe*, and *Benjamin Franklin: An American Life.*

9:30pm	Depart via bus to Sofitel

Sunday, October 8, 2017

9:00-10:30am	Breakfast at your leisure, Sofitel (Montpelier Room) Bring luggage to Lyon Room
10:30-11:30am	Hotel check-out
11:30am	Bus departs Sofitel for 30th Street Station
12:34pm	Depart 30th Street Station via Amtrak 195
2:25pm	Arrive Union Station

THE WILLIAM AND FLORA HEWLETT FOUNDATION

May 30, 2017

The Honorable Susan Brooks, Chairwoman
Committee on Ethics
U.S. House of Representatives
1015 Longworth House Office Building
Washington, DC 20515

Re: Pew Charitable Trusts' Bipartisan Leadership and Management Retreat in Philadelphia, PA

Dear Chairwoman Brooks:

This letter is submitted in connection with the October 7-8 bipartisan leadership and management retreat to Philadelphia, PA sponsored by the Pew Charitable Trusts, to which congressional staff have been invited. We understand that the Committee on Ethics, which is charged with reviewing and approving privately-funded, officially-connected travel by House Members and staff, may consider the Foundation to be a "source" of funds associated with the Pew Charitable Trusts' congressional study trip that must be identified under House rules.

The William and Flora Hewlett Foundation (the "Foundation"), a non-profit foundation established in 1967, made a grant to the Pew Charitable Trusts ("Pew") to support its House Chiefs of Staff project (Grant #2015-2725). The Foundation's grant funds are intended to enable Pew to work with the U.S. House of Representatives' chiefs of staff in an effort to build, strengthen and sustain a bipartisan organization that will foster relationships, share best practices and strengthen the capacity of Congress. The Foundation is aware Pew's educational activities and the study trip, the participants, and its agenda. However, there is no agreement, written or oral, between the Foundation and Pew whereby the Foundation may direct the activities of Pew, including the conduct of the study trip, or cause the selection of any invited congressional participant. Pew exercises control over that selection process and makes the selection completely independent from the Foundation.

Furthermore, please note that the Foundation is not a registrant under the Federal Lobbying Disclosure Act ("LDA"), does not retain or employ a registered federal lobbyist to lobby on its behalf, and has not received funds from any lobbyist or LDA registrant. Moreover, the Foundation has not accepted any source funds earmarked for Pew or any congressional travel.

If we can provide any additional information, please me at 650-234-4787 or epeters@hewlett.org.

Sincerely,

Elizabeth H. Peters
General Counsel