



# 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, B-81 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: Stephen Cote
2. a. Name of Accompanying Relative: N/A OR None   
 b. Relationship to Traveler:  Spouse  Child  Other (specify): \_\_\_\_\_
3. a. Dates: Departure: April 5, 2019 Return: April 7, 2019  
 b. Dates at Personal Expense, if any: N/A 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 a series of bipartisan panel discussion including healthcare, immigration, constitutional issues, and the current state of politics in America, as well as other bipartisan discussions.
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 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 statement is true by checking the box:**   
 b. If not, explain: \_\_\_\_\_

2019 APR 11 PM 4:34

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

Signature of Traveler:  Date: 4/11/19

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: Rep. Patrick McHenry Date: 4/11/19

Signature of Supervising Member:



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: Center Forward

2. Travel Destination(s): Middleburg, VA

3. Date of Departure: 04/05/19 Date of Return: 04/07/19

4. Name(s) of Traveler(s): Stephen Cote, Shuwanza Goff, Zach Howell, Rachel Kelly, Eric Lausten, Brooke Lillard


*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	\$0.00	\$250.00	\$250.00	\$250.00 (waived registration fee)
Accompanying Family Member	\$0.00	\$0.00	\$0.00	\$0.00

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: 04/08/19

Name: Riley Kilburg Title: Director of Outreach

Organization: Center Forward

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

Address: 777 6th Street, NW, 11th Floor, Washington, D.C. 20001

Telephone: (563) 542-6821 Email: riley@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: Stephen Cote
- 2. Sponsor(s) who will be paying for the trip: Center Forward
- 3. Travel Destination(s): Middleburg, VA
- 4. a. Date of Departure: April 5, 2019 Date of Return: April 7, 2019
- b. Will you be extending the trip at your personal expense?  Yes  No  
If yes, list dates at personal expense: \_\_\_\_\_
- 5. a. Will you be accompanied by a family member at the sponsor's expense?  Yes  No If yes:
  - (1) Name of Accompanying Family Member: \_\_\_\_\_
  - (2) Relationship to Traveler:  Spouse  Child  Other (specify): \_\_\_\_\_
  - (3) Accompanying Family Member is at least 18 years of age:  Yes  No
- 6. a. 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)?  Yes  No
- b. If yes, and you are requesting lodging for two nights, explain why the second night 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.

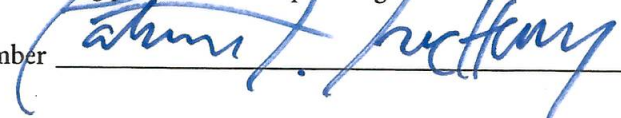
8. Explain why participation in the trip is connected to the traveler's individual official or representational duties. **Staff should include their job title and how the activities on the itinerary relate to their duties.**  
This is an issues conference focused on staff education, which will be beneficial to my work as the Republican Staff Director of the House Financial Services Committee. In that role, I advise Members of Congress on policy alternatives when business is before the committee or on the House floor.

9. **Is the traveler aware of any registered federal lobbyists or foreign agents involved planning, organizing, requesting, 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.

Signature of Employing Member  Date 3/6/19



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: 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 family member of the House invitee(s)?  Yes  No
6. Date of Departure: April 5, 2019 Date of Return: April 7, 2019
7.
  - a. City of departure: Washington, D.C.
  - b. Destination(s): Middleburg, VA
  - 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:
  - 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 you checked this box, explain why the second night of lodging is warranted: \_\_\_\_\_



U.S. House of Representatives

# COMMITTEE ON ETHICS

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:  
 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. **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): \_\_\_\_\_  
 \_\_\_\_\_
  - 2) Provide the 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 and Spa City: Middlebura Cost Per Night: \$125.00  
 Reason(s) for Selecting: Ample meeting space with necessary A/V near Washington, D.C.
- 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:*



U.S. House of Representatives

# COMMITTEE ON ETHICS

### 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	\$60.00	\$250.00	\$250.00
For each Accompanying Family Member	\$60.00	\$0.00	\$250.00

	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	\$250.00	Registration Fee
For each Accompanying Family Member	\$0.00	

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 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:  Date: \_\_\_\_\_  
Riley Kilburg

Name: \_\_\_\_\_  
Director of Outreach and Engagement

Title: \_\_\_\_\_  
Center Forward

Organization: \_\_\_\_\_  
777 6th Street, NW, 11th Floor, Washington, D.C. 20001

Address: \_\_\_\_\_  
(563) 542-6821

Telephone: \_\_\_\_\_  
riley@center-forward.org

Email: \_\_\_\_\_

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, D.C. 20515

Phone: 202-225-7103 General Fax: 202-225-7392

Theodore E. Deutch, Florida  
*Chairman*  
Kenny Marchant, Texas  
*Ranking Member*

Grace Meng, New York  
Susan Wild, Pennsylvania  
Dean Phillips, Minnesota  
Anthony Brown, Maryland

John Ratcliffe, Texas  
George Holding, North Carolina  
Jackie Walorski, Indiana  
Michael Guest, Mississippi



ONE HUNDRED SIXTEENTH CONGRESS

**U.S. House of Representatives**  
COMMITTEE ON ETHICS

Thomas A. Rust  
*Staff Director and Chief Counsel*

David W. Arrojo  
*Counsel to the Chairman*

Christopher A. Doneso  
*Counsel to the Ranking Member*

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

April 4, 2019

Mr. Stephen Cote  
Committee on Financial Services  
4340 O'Neill House Office Building  
Washington, DC 20515

Dear Mr. Cote:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to Middleburg, Virginia, scheduled for April 5 to 7, 2019, 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,

Theodore E. Deutch  
Chairman

Kenny Marchant  
Ranking Member

TED/KM:re

**Private Sponsor Travel Certification Form: Supplemental**

4.				
First	Last	Title	Affiliation	Reason
Joel	Bailey	Chief of Staff	Office of Representative Jimmy Panetta	Mr. Bailey has worked for a number of centrist Member offices and can speak to the importance of pragmatic approaches to critical issues.
Jon	Boughtin	Member Services Director	New Democratic Coalition	Mr. Boughtin can speak to the New Democratic Coalition's efforts to advance bipartisan dialogue and pragmatic legislation.
Jenifer	Bradley	Legislative Director	Office of Representative John Rutherford	As Legislative Director to a Member of the Appropriations Committee, Ms. Bradley will speak to the ongoing legislative efforts to prioritize and provide solutions for all Americans to access quality health care.
John	Byers	Chief of Staff	Office of Representative Will Hurd	As Chief of Staff for a Republican Member who values working across the aisle, Mr. Byers can provide advice and guidance about working with Democrats.
Ryan	Carney	Chief of Staff	Office of Representative Bryan Steil	Mr. Carney can speak to legislative priorities of a freshmen Member representing a district that spans rural, urban, and suburban areas and the need for a bipartisan approach in developing solutions to the challenges his constituents face.



Jeff	Carroll	Majority Staff Director	House Energy and Commerce Committee	Mr. Carroll will add to the conversation surrounding healthcare reform.
Chris	Cooper	Chief of Staff	Office of Representative David Joyce	As Chief of Staff to an Appropriations Committee member, Mr. Cooper can provide valuable insights about the current budget process and fiscal priorities.
Stephen M.	Cote	Republican Staff Director for the Committee on Financial Services	Committee on Financial Services	As Staff Director for the Committee on Financial Services, Mr. Cote can offer insights as to the policy goals and direction of the Financial Services Committee.
Alexis	Covey Brandt	Chief of Staff	Office of Majority Leader Steny Hoyer	As Chief of Staff to the Majority Leader, Ms. Covey Brandt will offer a unique perspective about working for a leadership office in the new session of Congress.
Emily	Crerand	Chief of Staff	Office of Representative Harley Rouda	Ms. Crerand will offer insight from the perspective of a freshman office and its legislative priorities.
Abby	Curran Horrell	Chief of Staff	Office of Representative Ann McLane Kuster	Ms. Curran Horrell will contribute her perspective of working for a Member who sits on Energy and Commerce and represents a rural district; bringing a unique, pragmatic perspective to the conference.
Natasha	Dabrowski	Communications Director, New Democratic Coalition	New Democrat Coalition	As the Communications Director for the New Democrat Coalition, Ms. Dabrowski will share her insights and guidance about speaking to the challenges of communicating the legislative priorities of centrist Members.

Jennifer	Daulby	Republican Staff Director for House Administration Committee	House Administration Committee	As Staff Director for the House Administration Committee, Ms. Daulby can offer valuable insights to the policy direction of the Administration Committee.
Michelle	Dorothy	Chief of Staff	Office of Representative Chrissy Houlahan	As Chief of Staff to the freshman leadership representative to the New Democrat Coalition, Ms. Dorothy will be able to speak to the legislative priorities of many of her freshmen colleagues.
Erin	Doty	Legislative Director	Office of Representative Raul Ruiz	As the Legislative Director for an active member of the Energy and Commerce Committee, Ms. Doty will be able to speak to the challenges of reaching bipartisan consensus on healthcare reform options.
Nichole	Dunn	Chief of Staff	Office of Representative Ben McAdams	As the Chief of Staff to a moderate Democrat Member and Blue Dog leader, Ms. Dunn will share valuable insights about bipartisan legislative efforts in the Financial Services Committee.
Andy	Flick	Chief of Staff	Office of Representative David Trone	As the Chief of Staff to a new Member on the Education and Labor Committee, Mr. Flick can offer valuable insights about the future direction of workforce policy.
Carmen	Frias	Chief of Staff	Office of Representative Ann Kirkpatrick	As Chief of Staff to an Appropriations Committee member, Ms. Frias can provide valuable insights about the current budget process and fiscal priorities.

Paul	Gage	Chief of Staff	Office of Representative Kurt Schrader	As Chief of Staff to Rep. Kurt Schrader, Mr. Gage can offer insight into bipartisan legislative efforts and solutions in the Blue Dog Coalition and the Problem Solvers Caucus.
Shuwanza	Goff	Floor Director to Majority Leader Steny Hoyer	Office of Majority Leader Steny Hoyer	As Floor Director for Majority Leader Steny Hoyer, Ms. Goff can offer a unique perspective to the participants at the conference about the legislative priorities of the 116th Congress.
Katie	Grant	Communications Director	Office of Majority Leader Steny Hoyer	As the Communications Director in the Majority Leader's office, Ms. Grant offers perspective on the messaging of important issues within the Democratic caucus.
Hana	Greenberg	Chief of Staff	Office of Representative Ron Kind	Ms. Greenberg serves as the Chief of Staff to Rep. Ron Kind, a long-time leader in the New Democrat Coalition, who focuses on issues impacting small businesses. She will offer important insights to efforts in this area.
JD	Grom	Executive Director, New Democrat Coalition	New Democrat Coalition	As Executive Director of the New Democrat Coalition, Mr. Grom is actively engaged in efforts to advance bipartisan dialogue and pragmatic legislation.
Tiffany	Guarasico	Deputy Staff Director	Energy and Commerce Committee	As the Deputy Staff Director for the Energy and Commerce Committee, Ms. Guarasico can add to the committee's perspective to the discussion on healthcare policy and reform.

Juan	Hinojasa	Chief of Staff	Office of Representative Mark Quigley	As Chief of Staff to an Appropriations Committee member, Mr. Hinojasa can provide valuable insights about the current budget process and fiscal priorities.
Bradley	Howard	Chief of Staff	Office of Representative Stephanie Murphy	As the Chief of Staff to a Member who is the co-chair of the Blue Dog Coalition, Mr. Howard can relay his experiences with moderate members and bipartisanship.
Adam	Howard	Chief of Staff	Office of Representative Mike Turner	As a Chief of Staff for a Member that has participated in past Center Forward programming, Mr. Howard can speak to the need for bipartisan cooperation.
Zach	Howell	Chief of Staff	Office of Representative John Katko	As a Chief of Staff to a member on the House Homeland Security Committee and leader of the Tuesday Group, Mr. Howell will be able to speak to immigration solutions and the priorities of the Tuesday Group in the 116th Congress.
Sarah	Kaplan Feinmann	Chief of Staff	Office of Representative Lizzie Fletcher	As Chief of Staff to a Member that serves on the Committee on Transportation and Infrastructure, Ms. Kaplan Feinmann will be able to speak to transportation priorities from the perspective of an office focused on finding common ground and pragmatic solutions.
Rachel	Kelly	Chief of Staff	Office of Representative Derek Kilmer	As a Chief of Staff to the Chair of the New Democrat Coalition, Ms. Kelly will be able to address the priorities of the New Democrat Coalition.

Desiree	Koetzle	Chief of Staff	Office of Representative Pete Stauber	As Chief of Staff for a Member on the Small Business Committee, Ms. Koetzle can offer insights about issues impacting small businesses.
Eric	Lausten	Chief of Staff	Office of Representative Dan Lipinski	Mr. Lausten will be able to speak to transportation priorities from the perspective of an office focused on finding common ground and pragmatic solutions.
Eduardo	Lerma	Chief of Staff	Office of Representative Veronica Escobar	As Chief of Staff for a member on the Judiciary Committee, Mr. Lerma will offer valuable insights from the Judiciary committee.
James	Leuschen	Senior Policy Advisor	Office of Majority Leader 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.
Brooke	Lillard	Communications Director	Office of Representative Lou Correa	As Communications Director of the Blue Dog Coalition, Ms. Lillard will be able to speak to the legislative and communications agenda of the fiscally conservative group.
Bret	Manley	Chief of Staff	Office of Representative Rodney Davis	As Chief of Staff for a leader of the Republican Main Street Partnership, Mr. Manley can relay his experiences with pragmatic Members and bipartisanship.

Michael	Mansour	Legislative Director	Office of Representative Adam Kinzinger	As the Legislative Director for a Member that serves on the Energy and Commerce Committee, Mr. Mansour will be able to speak to the challenges of reaching bipartisan consensus on healthcare reform options.
John	McCarthy	Chief of Staff	Office of Representative Brendan Boyle	As a Chief of Staff for a Ways and Means Committee Member, Mr. McCarthy will be able to share his experience advising a Member that passes laws on critical taxation issues.
Pete	Meachum	Chief of Staff	Office of Representative Sean Duffy	Mr. Meachum will be able to share his experiences working in the office of a Financial Services committee Member.
Bruce	Miller	Chief of Staff	Office of Representative Mark Amodei	As Chief of Staff to an Appropriations Committee Member, Mr. Miller can provide valuable insights about the current budget process and fiscal priorities.
Virgil	Miller	Chief of Staff	Office of Representative Cedric Richmond	As the Chief of Staff for a Member on the Judiciary Committee and an active member of the Congressional Black Caucus, Mr. Miller can speak to the agenda of the group and the committee.
Tim	Monahan	Director of Oversight for the Minority	House Administration Committee	As Staff Director for the House Administration Committee, Mr. Monahan offers insight and familiarity with House protocol and shares interest in exploring ways to work together in Congress.

Sam	Morgante	Deputy Chief of Staff/ Legislative Director	Office of Representative Susie Lee	As the Deputy Chief of Staff and Legislative Director for a member on the Veterans Affairs Committee, Mr. Morgante will share valuable insights about the goals of the committee.
Rene	Munoz	Chief of Staff	Office of Representative Xochitl Torres Small	As Chief of Staff for a member on the Homeland Security Committee, Mr. Munoz can speak to Homeland Security priorities.
Jeremy	Nordquist	Chief of Staff	Office of Representative Tom O'Halleran	As the Chief of Staff for the Policy Co-Chair of the moderate Blue Dog Coalition, Mr. Nordquist can speak to the priorities of an office that is involved in bipartisan legislation.
Casey	O'Shea	Chief of Staff	Office of Representative Brad Schneider	Mr. O'Shea will share his experiences in the office of a Ways and Means committee member, and as a long-time Blue Dog Chief of Staff, Mr. O'Shea brings valuable insight to building bipartisan coalitions.
Chad	Obermiller	Chief of Staff	Office of Representative Ami Bera	As Chief of Staff for Rep. Bera, Mr. Obermiller can offer a unique perspective on healthcare and small business issues.
Jonathan	Pyatt	Chief of Staff	Office of Representative Cheri Bustos	As Chief of Staff to a Member who represents a rural, more pragmatic district, Mr. Pyatt will be able to offer valuable insights about the importance of bipartisanship.
Mitchell	Rivard	Chief of Staff	Office of Representative Dan Kildee	Mr. Rivard will share his experience as Chief of Staff to an active House Ways and Means Member.

Brian	Romick	Deputy Chief of Staff	Office of Majority Leader Steny Hoyer	Mr. Romick actively engages with moderate Members during legislative negotiations and will speak to the challenges expected in the new session of Congress.
Patrick	Rooney	Legislative Director	Office of Representative Dan Meuser	As the Legislative Director for a Member who serves on the Budget Committee, Mr. Rooney can offer valuable insights into the legislative direction and the ongoing budget process and fiscal priorities of the Budget Committee.
Laurie	Saroff	Chief of Staff	Office of Representative Lou Correa	As the Chief of Staff for Rep. Lou Correa, Ms. Saroff can speak to the priorities of the Homeland Security Committee particularly as it relates to immigration solutions.
Megan	Savage	Chief of Staff	Office of Representative Susan Brooks	As the Chief of Staff for a Member that serves on the Energy and Commerce Committee, Ms. Savage will bring valuable, bipartisan insight related to conversations on healthcare, trade, and more.
Kelly	Simpson	Chief of Staff	Office of Representative John Rutherford	As Chief of Staff to a Member of the Financial Services Committee, Ms. Simpson will be able to speak to the ongoing budget process and fiscal priorities.
Steven	Smith	Communications Director	Office of Representative French Hill	As the Communications Director to a Member of the Financial Services Committee, Mr. Smith can offer insight into legislative and messaging efforts regarding those issues.



Lea	Sulkala	Chief of Staff	Office of Representative Linda Sanchez	Ms. Sulkala can offer valuable insights as the Chief of Staff for a Member of the House Ways and Means Committee and as a Congressional Hispanic Caucus leader.
Allison	Teixeira	Chief of Staff	Office of Representative Sharice Davids	As Chief of Staff to a Member on the Transportation and Infrastructure and Small Business Committees, Ms. Teixeira can offer insights about the legislative priorities of the committees.
Jeremy	Tittle	Chief of Staff	Office of Representative Salud Carbajal	Mr. Tittle will be able to share his experience as a Chief of Staff for a Member focusing on issues specifically related to infrastructure and agriculture.
Yelberton	Watkins	Chief of Staff	Office of Majority Whip James Clyburn	Mr. Watkins will speak to his extensive policy experience and provide insight into legislative priorities.
Wintta	Woldemariam	Policy Director	Office of Majority Whip James Clyburn	Ms. Woldemariam will speak to her role in coordinating the policy agenda for the Democratic Caucus.

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 pragmatic policy influencers from various industries, organizations, and the public sector to focus on common-sense 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 and coverage options, immigration policy solutions, an examination of constitutional crises, and the 2019 political and legislative landscape. Participants are expected to include policymakers and advocate groups as well as business leaders and academic researchers.



2019 Center Forward Issues Conference  
Salamander Resort and Spa  
Middleburg, Virginia — April 5-7, 2019  
Conference Agenda

**Friday, April 5, 2019**

Casual Attire

**3:00 pm - 5:00 pm\***      Registration – Business Center of the Salamander

**6:00 pm - 8:00 pm**      Mt. Defiance Cider Barn  
495 E. Washington Street, Middleburg, VA

This evening is family-friendly. We will be enjoying live music with Trailer Grass Orchestra and Blue Sky Picnics for fair night! A shuttle will be running continuously from 6:00 pm - 8:30 pm between the Salamander Resort and Mt. Defiance Cider Barn.

Welcome Remarks – Coming Together to Find Common Ground in the 116th Congress

Libby Greer, Board Member, Center Forward

*\*If you arrive after registration is closed, please join us at Mt. Defiance. The registration desk will be open again at 8:30 am Saturday.*

**Saturday, April 6, 2019**

**Conference Program – Middleburg Ballroom**

Casual Attire

- 8:30 am** Breakfast Buffet – Middleburg Foyer
- Registration Desk Re-Opens
- 9:00 am - 9:05 am** Welcome Remarks and Introduction, Cori Kramer, Executive Director, Center Forward
- 9:05 am - 9:30 am** Breakfast Remarks – Building Consensus in a Divided Congress
- Speaker, TBD
- 9:30 am - 10:45 am** Panel Discussion — Assessing New Federal Health Care Proposals
- Buzz words such as “Medicare for all” and “Repeal and replace” have dominated the recent health care debate. But beyond the slogans there are a range of complex and potentially far reaching new plans being proposed. This session will unpack the details of current federal health care proposals and examine their impact on health insurance coverage, access to care, benefits, federal spending and taxes. Joined by special guests:
- Larry Levitt, Senior Vice President for Health Reform, Kaiser Family Foundation
  - Paul Kidwell, Vice President of Policy, Federation of American Hospitals
  - Moderated by Libby Greer, Board Member, Center Forward
- 10:45 am - 11:00 am** Break

**11:00 am - 12:00 pm** Panel Discussion — Fronteras and Families: Immigration Solutions in 2019

With the immigration debate at the policy forefront and disagreements over border security and a broken immigration system, Congress continues to look for solutions that allow communities to thrive. This discussion examines policy solutions that can reshape the debate and break through partisan gridlock. Joined by special guests:

- Claudia Flores, Immigration Campaign Manager, Center for American Progress
- Ali Noorani, Executive Director, National Immigration Forum
- Portia Wu, Director of Workforce Policy, Microsoft
- Moderated by Todd Schulte, President, FWD.us

**12:00 pm - 1:15 pm** Lunch — Middleburg Foyer

Lunch Remarks — Legislating in the Age of Rising Populism

Bill Schneider, Professor, Schar School of Policy and Government at George Mason University and Author of *Standoff: How America Became Ungovernable*

**1:15 pm - 1:30 pm** Break

**1:30 pm - 2:45 pm** Panel Discussion — Constitutional Crises and Congress' Role in Turbulent Times

Constitutional experts and presidential historians examine the role of the President and Congress in times of turbulent leadership. The panel will address questions related to current events placed in a historical context in an effort to consider what may happen in the months ahead. Joined by special guests:

- Caroline Fredrickson, President, American Constitution Society
- Louis Michael Seidman, Carmack Waterhouse Professor of Constitutional Law, Georgetown University Law Center
- Julie Silverbrook, Executive Director, The Constitutional Sources Project (Invited)
- Moderated by Hon. Glenn Nye, President and CEO, Center for the Study of the Presidency and Congress

Closing Remarks, Cori Kramer, Executive Director, Center Forward

**3:00 pm - 4:30 pm** Moderate round table discussions – perspectives from House offices on the 2019 legislative session – casual conversation on the Middleburg Terrace, adjacent to the main living room

**4:30 pm - 6:00 pm** Break

### **Conference Closing Reception and Dinner**

#### *Business Casual Attire*

**6:00 pm - 7:00 pm** Reception – Culinary Garden

In event of inclement weather – Middleburg Foyer

Virginia Wine Tasting

- Greenhill Winery, Boxwood Winery, Stone Tower Winery

**7:00 pm - 8:30 pm** Dinner – Middleburg Ballroom

Establishment vs. Outsiders: The Reshaping of Congress and the White House

Steve Kornacki, Host & Political Correspondent, MSNBC

Closing Remarks, Cori Kramer, Executive Director, Center Forward

**8:30 pm - 12:00 am** Harriman's fire pit is reserved exclusively for the use of Center Forward attendees

**Sunday, April 7, 2019**

Casual Attire

**8:00 am - 10:00 am**      Breakfast Buffet – Middleburg Foyer

*Hotel Check Out is 11:00 am*