



## 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: JUAN LOPEZ
2. a. Name of Accompanying Relative: WILLIAM LEPSCH OR None   
 b. Relationship to Traveler:  Spouse  Child  Other (specify): \_\_\_\_\_
3. a. Dates: Departure: MAY 18, 2019 Return: MAY 19, 2019  
 b. Dates at Personal Expense, if any: NONE OR None
4. Departure City: WASHINGTON D.C. Destination: RICHMOND, VA Return City: WASHINGTON D.C.
5. Sponsor(s), Who Paid for the Trip: THE PEWS CHARITABLE TRUSTS
6. Describe Meetings and Events Attended: Bi-partisan conference for House Chiefs of Staff - leadership strategies, Historical Presidential recordings, relationship w/Executive branch & bipartisan collaboration, policy presentations.
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: \_\_\_\_\_

LEGISLATIVE RESOURCE CENTER  
219 JUNE-3 PM 2:34  
HOUSE OF REPRESENTATIVES

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

Signature of Traveler:  Date: JUNE 3, 2019

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. JIM COSTA Date: JUNE 3, 2019  
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: The Pew Charitable Trusts

2. Travel Destination(s): Richmond, Virginia

3. Date of Departure: May 18, 2019 Date of Return: May 19, 2019

4. Name(s) of Traveler(s): Juan Lopez

*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	\$96.83	\$147	\$66	
Accompanying Family Member	\$96.83		\$66	

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 Date: May 21, 2019

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: (202) 552-2000 Email: 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

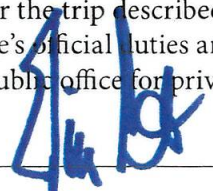
# COMMITTEE ON ETHICS

## TRAVELER FORM

1. Name of Traveler: Juan Lopez
2. Sponsor(s) who will be paying for the trip: The Pew Charitable Trusts
3. Travel Destination(s): Richmond, VA
4. a. Date of Departure: May 18, 2019 Date of Return: May 19, 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: William Lepsch  
 (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 a bipartisan House Chiefs of Staff retreat that will enhance our interaction with one another. As a chief of staff, this will help me foster and strengthen my work relationships with other chiefs.  
 \_\_\_\_\_  
 \_\_\_\_\_
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 04/12/2019



# U.S. House of Representatives COMMITTEE ON ETHICS

## Primary Trip Sponsor Form

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

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

1. Sponsor who will be paying for the trip: The Pew Charitable Trusts

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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 and  
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 is invited due to their role as chief of staff.
5. Is travel being offered to an accompanying family member of the House invitee(s)?  Yes  No
6. Date of Departure: May 18, 2019 Date of Return: May 19, 2019
7. a. City of departure: Washington, DC  
 b. Destination(s): Richmond, VA  
 c. City of return: Washington, DC
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:  
 See attached addendum.
- 
- 

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): \$66
- 

2) Provide the reason for selecting the location of the event or trip: Richmond was selected due to its proximity to Washington, DC and its historical significance.

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

Hotel Name: Jefferson Hotel City: Richmond, VA Cost Per Night: \$147

Reason(s) for Selecting: It can provide the necessary meeting space and number of rooms at 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:*



U.S. House of Representatives

# COMMITTEE ON ETHICS

### 18. Total Expenses for each Participant:

<input type="checkbox"/> Actual Amounts	Total Transportation Expenses per Participant	Total Lodging Expenses per Participant	Total Meal Expenses per Participant
<input checked="" type="checkbox"/> Good Faith Estimates			
For each Member, Officer, or Employee	\$96.83	\$147	\$66
For each Accompanying Family Member	\$96.83		\$66

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

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

### 19. Check only one:

- a. I certify that I am an officer of the organization listed below:  **OR**
- b. *Not Applicable.* Trip sponsor is an individual or a U.S. institution of higher education.

20. I certify 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 Date: 3/27/19

Name: Tamera Luzzatto

Title: Senior Vice President

Organization: The Pew Charitable Trusts

Address: 901 E Street NW, Washington, DC, 20004

Telephone: (202) 552-2000

Email: 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, D.C. 20515

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

12. 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.



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 (check and 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 only 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: [Signature] Date: 02/06/2019

Name: Joe Goldman Title: President

Organization: Democracy Fund

Address: 1200 17th Street NW Suite #300 Washington, DC 20036

Telephone: (202) 550-3566 Email: jgoldman@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, D.C. 20515

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





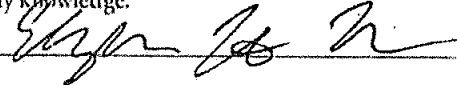
U.S. House of Representatives  
**COMMITTEE ON ETHICS**

**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: The Pew Charitable Trusts
3. I certify that my organization (check and 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 only 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:  Date: 3/20/19  
 Name: Elizabeth H. Peters Title: General Counsel

Organization: The William and Flora Hewlett Foundation

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

Telephone: 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, D.C. 20515  
 Phone: 202-225-7103 General Fax: 202-225-7392



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 (check and 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 only 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: [Signature] Date: 02/06/2019

Name: Joe Goldman Title: President

Organization: Democracy Fund

Address: 1200 17th Street NW Suite #300 Washington, DC 20036

Telephone: (202) 550-3566 Email: jgoldman@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, D.C. 20515  
Phone: 202-225-7103 General Fax: 202-225-7392



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: The Pew Charitable Trusts
3. I certify that my organization (check and 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 only 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:  Date: 3/20/19

Name: Elizabeth H. Peters Title: General Counsel

Organization: The William and Flora Hewlett Foundation

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

Telephone: 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, D.C. 20515  
Phone: 202-225-7103 General Fax: 202-225-7392

Version date 12/2018 by Committee on Ethics

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*

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*Counsel to the Chairman*

Christopher A. Donesa  
*Counsel to the Ranking Member*

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

May 13, 2019

Mr. Juan Lopez  
Office of the Honorable Jim Costa  
2081 Rayburn House Office Building  
Washington, DC 20515

Dear Mr. Lopez:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your and your spouse's proposed trip to Richmond, Virginia, scheduled for May 18 to 19, 2019, sponsored by Pew Charitable Trusts, with financial support from 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,

Handwritten signature of Theodore E. Deutch in blue ink.

Theodore E. Deutch  
Chairman

Handwritten signature of Kenny Marchant in blue ink.

Kenny Marchant  
Ranking Member

TED/KM:adw



The Honorable Ted Deutch, Chairman  
Committee on Ethics  
U.S. House of Representatives  
1015 Longworth House Office Building  
Washington, DC 20515

March 20, 2019

Re: The Pew Charitable Trusts Bipartisan House Chiefs of Staff Conferences 2019

Dear Chairman Deutch,


This letter is submitted in connection with The Pew Charitable Trusts' Bipartisan House Chiefs of Staff Conferences, to which House of Representatives staff have been invited. We understand that the Committee on Ethics, which is charged with reviewing and approving privately-funded, officially-connected travel by Members and staff of the House, may consider the Foundation to be a "source" of funds associated with The Pew Charitable Trusts' study trips 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 to support the House Chiefs of Staff Project (Grant #2018-7107). The Foundation's grant supports efforts to provide a nonpartisan, nonpolitical "safe space" to foster bipartisan relationship building and management best practices that can lead to better informed and more effective public policy. Please note that the William and Flora Hewlett Foundation is aware of the study trips, the participants, and the agenda. However, there is no agreement, written or oral, between the Foundation and The Pew Charitable Trusts whereby the Foundation may direct the activities of the House Chiefs of Staff Project, including the conduct of the study trips, or cause the selection of any invited congressional participant. The Pew Charitable Trusts 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 The Pew Charitable Trusts or any congressional travel.

If we can provide any additional information, please contact me at 650-234-4787 or [epeters@hewlett.org](mailto:epeters@hewlett.org).

Sincerely,



Elizabeth L. Peters  
General Counsel and Corporate Secretary



THE  
**PEW**  
CHARITABLE TRUSTS

## **Bipartisan House Chiefs of Staff Conference** Richmond, Virginia | May 18-19, 2019



# Conference Schedule

### Saturday, May 18, 2019

- 9:00am Buses depart South Capitol between Longworth and Rayburn
- 11:30am Arrive Jefferson Hotel, 101 West Franklin Street, Richmond
- 12:00-1:30pm Lunch  
**A.I., Robotics, and America in 2050.**  
**David Pogue (The New York Times and CBS Sunday Morning)**  
From 2000 to 2013, David Pogue was the New York Times weekly tech columnist. After a five-year detour to Yahoo Finance, he's now he's back at the Times, writing the "Crowdwise" feature for the "Smarter Living" section. He's a four-time Emmy winner for his stories on "CBS Sunday Morning," and a host of 17 science specials on "NOVA" on PBS.
- 1:30-1:45pm Break
- 1:45-3:15pm **Bipartisan Challenges in the Toughest Chief of Staff Job.**  
Chris Whipple, author of "The Gatekeepers: How the White House Chiefs of Staff Define Every Presidency," will moderate a discussion with the chiefs of staff to Presidents Bill Clinton (John Podesta) and George W. Bush (Joshua Bolten).
- 3:15-3:45pm Break and Room Check-in
- 3:45-5:00pm **Presidential Recordings – The Executive/Legislative Branch Relationship Through History, Marc Selverstone, the Miller Center at UVA**  
To assist chiefs in gaining a better understanding of effective working relationships between the legislative and executive branches, this session will explore the interactions between the president and House leadership over the years through the Miller Center's exhaustive collection of Oval Office recordings from Kennedy through Nixon.
- 6:30pm Depart via bus to dinner (Location TBD)
- 6:45-8:30pm Reception and Dinner Program (Keynote speaker TBA)
- 8:30pm Buses depart dinner for Jefferson Hotel

**Sunday, May 19, 2019**

- |               |  |
|---------------|--|
| 9:00-10:30am  | Breakfast at your leisure, Jefferson Hotel<br>Baggage Call |
| 10:30-11:30am | Hotel check-out  |
| 11:30am       | Buses depart Jefferson Hotel for Washington, DC            |
| 2:00pm        | Arrive South Capitol Street between Longworth and Rayburn  |
| 2:25pm        | Arrive Union Station                                       |



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Mr.	Simms	Vernon	Rep. Elijah E. Cummings
Mr.	Simpson	Kelly	Rep. John Rutherford
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Mr.	Skretny	Brian	Rep. Eliot L. Engel
Mr.	Slater	Lindsay	Rep. Mike K. Simpson
Mr.	Smith	William	Rep. Gary J. Palmer
Mr.	Smullen	Mike	Rep. Bill Johnson

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Ms.	Sorenson	Kathryn	Rep. Elaine G. Luria
Mr.	Sours	David	Rep. Jody B. Hice
Mr.	Spannagel	Mark	Rep. Doug LaMalfa
Mr.	Spiro	Pete	Rep. Ro Khanna
Ms.	Stanley	Elizabeth	Rep. Nita M. Lowey
Mr.	Stephanou	Scott	Rep. John B. Larson
Ms.	Stevens	Sarah	Rep. Steve A. King
Ms.	Street	Caren	Rep. Karen R. Bass
Ms.	Strickland	Kelle	House Seargent at Arms
Mr.	Stroia	Matthew	Rep. Mike Kelly Jr.
Mr.	Su	Peter	Rep. James Hagedorn
Mr.	Suh	Joon	Rep. Lucy McBath
Ms.	Sulkala	Lea	Rep. Linda T. Sanchez
Mr.	Summers	Brian	North Carolina District 9
Mr.	Sunstrum	Greg	Rep. Debbie Dingell
Mr.	Suruma	Askia	Rep. Marc A. Veasey
Ms.	Tagen	Julie	Rep. Jamie B. Raskin
Ms.	Teixeira	Allison	Rep. Sharice Davids
Mr.	Terrazas	Rick	Rep. Duncan D. Hunter
Mr.	Thomas	Brian	Rep. Kenny E. Marchant
Mr.	Thompson	Ryan	Rep. Ronald J. Wright
Mr.	Thompson	Tola	Rep. Alfred J. Lawson Jr.
Mr.	Threadgill	Tyler	Rep. David F. Kustoff
Mr.	Tittle	Jeremy	Rep. Salud Carbajal
Mr.	Tranghese	William	Rep. Richard E. Neal
Mr.	Tudor	Chris	Rep. Tom McClintock
Mr.	Turner	Ben	Rep. Dwight Evans
Ms.	Van der Heide	Jennifer	Rep. Debra A. Haaland
Mr.	Van Flein	Thomas	Rep. Paul A. Gosar
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Mr.	Webb	Brandon	Rep. Robin L. Kelly
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