



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: Ian Gray
2. a. Name of Accompanying Relative: _____ OR None
 b. Relationship to Traveler: Spouse Child Other (specify): _____
3. a. Dates: Departure: Jan. 17, 2020 Return: Jan. 19, 2020
 b. Dates at Personal Expense, if any: _____ OR None
4. Departure City: Washington, DC Destination: Cambridge, MD Return City: Washington, DC
5. Sponsor(s), Who Paid for the Trip: Aspen Institute (Socrates Program)
6. Describe Meetings and Events Attended: A non-partisan educational seminar on leadership, responsible governance, and the role of Congress; designed to encourage candid exchanges of ideas between staffers.
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: _____

OFFICE OF THE CLERK
U.S. HOUSE OF REPRESENTATIVES
LEGISLATIVE RESOURCE CENTER
2020 FEB 14 AM 10:54

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

Signature of Traveler: Date: Jan. 31, 2020

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: Tom Malinowski Date: Jan. 31, 2020

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: Aspen Institute Inc. (Socrates Program)

2. Travel Destination(s): Hyatt Regency Cambridge, Maryland

3. Date of Departure: January 17, 2020 Date of Return: January 19, 2020

4. Name(s) of Traveler(s): Please see attached list.

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	\$98.00	\$238.00	\$122.00	\$110.00
Accompanying Family Member				

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: *Elliot Gerson* Date: 1/29/2020

Name: Elliot Gerson Title: EVP, Policy & Public Programs

Organization: The Aspen Institute

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

Address: 2300 N St NW, Washington DC, 20037

Telephone: (202) 736-5859- Lisa Jones; General Deputy Counsel Email: lisa.jones@aspeninstitute.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.



TRAVELER FORM

- 1. Name of Traveler: Ian Gray
- 2. Sponsor(s) who will be paying for the trip: Aspen Institute (Socrates Program)
- 3. City and State **OR** Foreign Country of Travel: Cambridge, MD
- 4. a. Date of Departure: January 17, 2020 Date of Return: January 19, 2020
 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.**

The Aspen Institute's Socrates Program convenes Capitol Hill staffers to engage in non-partisan dialogue on leadership and the role of Congress. This presents a professional development opportunity.
Ian Gray, Legislative Assistant, Office of Congressman Tom Malinowski

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 Tom Malinowski Date 12/17/2019



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: Aspen Institute Inc (Socrates Program).
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: Democracy Fund, William and Flora Hewlett Foundation
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.
5. Is travel being offered to an accompanying family member of the House invitee(s)? Yes No
6. Date of Departure: January 17, 2020 Date of Return: January 19, 2020
7. a. City of departure: Washington DC
b. Destination(s): Cambridge, MD
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: _____



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:
The Aspen Institute's Socrates Program (AISP) has an 8 year history of providing non-partisan educational programs for Congressional Staff. The purpose of this trip is to convene to discuss leadership, responsible governance, and the role of Congress. AISP is solely responsible for organizing/conducting this seminar.
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: Chartered bus)
 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): The daily cost of meals is \$61.00 per day. We selected the Hyatt due to the close proximity to D.C. and availability of conference space.
 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: Hyatt Chesapeake City: Cambridge MD Cost Per Night: \$119.00
 Reason(s) for Selecting: Proximity to D.C, Conference Space Availability
 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	\$98.00 for bus	\$238.00 for two nights (\$119.00 per night)	\$122.00
For each Accompanying Family Member			

	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	\$110.00	Conference room fees including meeting facilities, set up, take down, cleaning).
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:  Date: 12/16/19

Name: Elliot Gerson

Title: Executive Vice President, Policy and Public Programs

Organization: The Aspen Institute

Address: 2300 N St NW, Suite 700, Washington DC, 20037

Telephone: 202-736-5859 (Lisa Jones, Deputy General Counsel)

Email: lisa.jones@aspeninstitute.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

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

February 18, 2020

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

Mr. Ian Gray
Office of the Honorable Tom Malinowski
426 Cannon House Office Building
Washington, DC 20515

Dear Mr. Gray:

This responds to your request, received on February 7, 2020, seeking retroactive approval of travel expenses in connection with a privately-sponsored trip. Specifically, you seek retroactive approval to accept travel expenses in connection with your participation in a trip to Cambridge, Maryland, from January 17 to 19, 2020, sponsored by the Aspen Institute, Inc. (Socrates Program), with financial support from the Democracy Fund and the William and Flora Hewlett Foundation.

FACTUAL BACKGROUND

According to your request, supporting documents, and additional information provided to Committee counsel, the background on this matter is as follows. You are a Legislative Assistant to Representative Tom Malinowski and are paid below the senior staff rate.¹ The Aspen Institute invited you to Cambridge, Maryland, to attend a seminar related to your official duties. You accepted travel expenses from the sponsor that totaled approximately \$568. You are seeking retroactive approval from the Committee for your travel expenses.

Our records show that you submitted to the Committee your travel request on December 17, 2019, within 30 days before the start of the trip. However, because of a clerical error, you were not sent a letter that the Committee approved your trip. When you realized that you had not received an approval letter, you immediately contacted the Committee after the trip had concluded. Committee counsel asked you to submit a letter to the Committee seeking retroactive approval for acceptance of the travel from the sponsor.

¹ In 2020, staff are considered to be "senior staff" for financial disclosure purposes if they are paid at or above the annual rate of \$131,239 for 60 days or more during the calendar year.

LEGAL BACKGROUND AND ANALYSIS

Members and staff are required to request and receive approval from the Committee *before* accepting privately-sponsored travel.² This requirement has been in place since March 1, 2007, pursuant to the House rules for the 110th Congress that were passed on January 4 and 5, 2007. We note further that the rules related to privately-sponsored travel are laid out in the Travel Regulations issued by the Committee.³

One appropriate remedy when a House employee has accepted travel benefits in violation of House rules is to require the employee's employing Member to reimburse the donor in the full amount of the travel expenses improperly accepted. However, in view of the fact that this trip otherwise complied with House rules, your good-faith efforts to file the required papers more than 30 days before the start of the trip, and your attempt to quickly remedy this oversight after your return, the Committee grants your request and will not require reimbursement in this matter.

This letter serves as a reminder to you of the rule requiring you to receive explicit Committee approval *before* you accept privately-sponsored travel. Committee approval is granted by way of a letter signed by the Committee Chairwoman and Ranking Member. In the future, you may not accept privately-sponsored travel without this letter.

You should file a Post-Travel Disclosure Form at the Legislative Resource Center as soon as practicable with all required attachments, including this letter in lieu of a Committee letter pre-authorizing your travel. Finally, if you are required to file an annual Financial Disclosure Statement under the Ethics in Government Act (EIGA), 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 2020.⁴

LIMITATIONS

The response above constitutes an advisory opinion concerning the application of House Rule 25 and the EIGA. The following limitations apply to this opinion:

- This advisory opinion is issued only to Ian Gray, the requestor of this opinion. This advisory opinion cannot be relied upon by any other individual or entity.
- This advisory opinion is limited to the current provision and interpretation of the House rule and federal statute specifically noted above. No opinion is expressed or implied herein regarding the application of any other federal, state, or local statute, rule, regulation, ordinance, or other law that may be applicable to the proposed conduct described in this letter, including the Internal Revenue Code.

² House Rule 25, cl. 5(d)(2).

³ See generally *Travel Regulations* (December 2012).

⁴ 5 U.S.C. app. §§ 101 *et seq.*

- This advisory opinion will not bind or obligate any entity other than the Committee on Ethics of the United States House of Representatives.
- This advisory opinion is limited in scope to the specific proposed conduct described in this letter, the specific facts represented to the Committee, and the understanding of those facts to the extent indicated in this letter, and does not apply to any other conduct or facts, including that which appears similar in nature or scope to that described in this letter. Should this letter mis-state any facts in this matter, the opinion and advice may no longer apply and you should inform the Committee as soon as possible to determine if the advice and opinion in this letter apply to the accurate factual basis.

The Committee will take no adverse action against you in regard to any conduct that you undertake, or have undertaken, in good faith reliance upon this advisory opinion, so long as you have presented a complete and accurate statement of all material facts relied upon herein, and the proposed conduct in practice conforms with the information you provided, as addressed in this opinion.

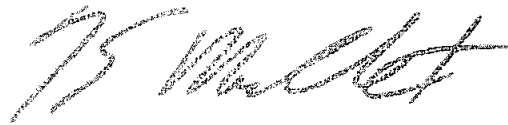
Changes or other developments in the law (including, but not limited to, the Code of Official Conduct, House rules, Committee guidance, advisory opinions, statutes, regulations, or case law) may affect the analysis or conclusions drawn in this advisory opinion. The Committee reserves the right to reconsider the questions and issues raised in this advisory opinion and to rescind, modify, or terminate this opinion if required by the interests of the House. However, the Committee will rescind an advisory opinion only if relevant and material facts were not completely and accurately disclosed to the Committee at the time the opinion was issued. In the event that this advisory opinion is modified or terminated, the Committee will not take any adverse action against you with respect to any action taken in good faith reliance upon this advisory opinion so long as such conduct or such action was promptly discontinued upon notification of the modification or termination of this advisory opinion.

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:jls



The following participants were selected because they are bipartisan, emerging leaders equipped to convene and engage in non-partisan dialogue on leadership and the role of congress.

Nate Beltran

Legislative Assistant
Congressman Filemon Vela

Chelsea Angelo

Scheduler
Congressman Jim Cooper

Ian Gray

Legislative Assistant
Congressman Tom Malinowski

Taylor Smith

Staff Assistant
House Committee on Ways and Means

David Thompson

Legislative Correspondent
Office of Congressman Charlie Christ

Fabiola Pagan

Public Policy Fellow
House Committee on Natural Resources, Office of Insular Affairs

Curt Bliamptis

Legislative Correspondent
Congressman Alex Mooney

Daniel Lopez

New York Life Public Policy Fellow
Congressman Joe Negue

Fiona Flory

Legislative Assistant
Congressman Connor Lamb

Auburn Bell

Clerk
House Committee on Natural Resources

Appendix to Private Sponsor Travel Certification Form, Aspen Institute
Socrates Program for the Emerging Governance Leaders Seminar, August 16-18,
2019

Question 5. Name and titles of Senate Invitees:

Sol Ortega

Deputy Director of Engagement
Office of Senator Charles Schumer

Jasmin Palomares

Legislative Aide
Office of Senator Kirsten Gillibrand

Jenna Valle-Riestra

Digital Assistant
Office of Senator Bob Casey

Steph Niaupari

Pepsi Co. Foundation National Graduate Fellow
Office of Senator Robert Menendez

Andre J. Barnett

Tax Counsel
United States Senate Committee on Finance

Anna Shepard

Legislative Correspondent
Senator Dianne Feinstein

Anthony Reyes

Staff Assistant
Office of Senator Chris Murphy

Question 12. Briefly describe the role of each sponsor in organizing and conducting the trip (response continued) – The Aspen Institute Socrates Program received general, unrestricted funding from the Democracy Fund to support the Socrates Program. The funding was not earmarked for this trip. Democracy Fund did not play a role in organizing or planning the conference, including, but not limited to the content, agenda, moderators, attendees or other logistics.

Questions 13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to the mission (response continued) –The Socrates Program seeks to provide a forum for emerging leaders from various professions to convene and explore contemporary issues through expert-moderated dialogue. The

purpose of the trip is to conduct a non-partisan educational seminar on leadership, responsible governance and the role of Congress that encourages off-the-record, candid exchanges of ideas to support staffers' learning and development.

Question 15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips) (response continued) - Socrates Program organizes seminars every year bringing together a diverse group of professional to explore issues, discuss current topics and encourage dialogue and exchange of ideas.

Emerging Governance Leaders Seminar
Leadership & the Role of Congress

All sessions will be moderated by Colleen Shogan, Ph.D.

Seminar Weekend Schedule

January 17-19, 2020

Hyatt Regency Chesapeake Bay Resort
Cambridge, MD

Friday, January 17th

- | | |
|-----------------------|--|
| 5:00 p.m. | Shuttle departure from Capitol Hill |
| 6:45 p.m. | Shuttles arrives at Hyatt Chesapeake Bay |
| 7:00 p.m. - 8:00 p.m. | Seminar Check-In & Registration |
| 8:00 p.m. – 9:30 p.m. | Socrates Opening Dinner and Program
Conversation will consider the governance challenges of Congress, exploring what resources and knowledge inform Congress and how technology and changing norms of representation are affecting governance. |

Saturday, January 17th

- | | |
|------------------------|---|
| 7:45 a.m. – 9:00 a.m. | Breakfast |
| 9:00 a.m. – 12:00 p.m. | Seminar Session I: The Evolution of Congress: How Did We Get Here?
Seminar discussion based on the following texts and videos:
<i>Origins:</i> <ul style="list-style-type: none">• Hamilton/Madison, <i>Federalist 57</i> and <i>63</i>, selection Davidson, Oleszek, Lee, and Schickler, <i>Congress and Its Members</i>, "Institutional Evolution" |

- Nelson Polsby, *How Congress Evolves*, “Causes of Liberalization” and “Overview of the House”
- Barbara Sinclair, *Congress Reconsidered*, “The New World of U.S. Senators”
- David, Olezek, Lee, and Schickler. “Institutional Evolution,” *Congress and Its Members*, 16th edition, pp. 28-40

What Does It Mean to Represent? Mr. Smith versus Charlie Wilson

- “Mr. Smith Goes To Washington” [movie clip](#). 1939
- “Charlie Wilson’s War” [movie clip](#). 2007
- Note: Brief movie clips are shown specifically for discussion purposes around the subject matter of working in Washington and to guide discussion (not for entertainment purposes).

River House Main Conference Room

10:30 a.m. – 10:45 a.m.

Morning Break

12:00 p.m. – 1:00 p.m.

Working Lunch with Discussion of Seminar Session I

Conversation will consider the evolution of Congress and what it means to represent.

1:00 p.m. – 4:00 p.m.

Seminar Session II: Congress and Its Governance Challenges

Seminar discussion based on the following texts:

- Davidson Oleszek, Lee, and Schickler. “Congress as Institution” in *Congress and Its Members*, 16th edition, pp. 468-479
- Barbara Sinclair, *Unorthodox Lawmaking*, 5th edition, “Assessing Unorthodox Lawmaking,” pp. 271-274

Resources and Knowledge in Congress

- Kevin Kosar and various authors. “[Restoring Congress as the First Branch](#).” R Street Policy Study #50. Pp. 1-12
- Matthew Glassman, “[Why Congress Doesn't Always Do The Right Thing](#).” New York Times. February 7, 2018

Technology and Changing Norms of Representation

- Samantha McDonald, “[Staff Perspectives on the State of Constituent Correspondence in the U.S. Congress](#),” Leg Branch Blog
- Lorelei Kelley and Robert Bjarnason, “[Our Modern Congress Doesn't Understand 21st Century Technology](#),” TechCrunch

Is Congress a Dysfunctional Place to Work?

- Paul Hanges, Frances Lee, Kristina Miller, Jennifer Wessel,
“Report on the Organizational Climate of Congress.”
University of Maryland, October, 2019 pp. 9-20 and 46-56

Partisanship and Policymaking

2:30 p.m. – 2:45 p.m.

Afternoon Break

4:00 p.m. - 5:30 p.m.

Networking Period

5:30 p.m. – 6:30 p.m.

Break and dinner preparation

7:00 p.m. – 8:30 p.m.

Working Dinner with Discussion of Seminar Session II

Responsible Governance and Your Role in Congress”

A conversation addressing norms of governance, hyper-partisanship, political polarization, and the experiences of Congressional staffers.

Moderated by **Cordell Carter**, Socrates Program Director

8:45 p.m. – 10:00 p.m.

“Life & Lessons in Congress”

A conversation with **William Hoagland**, Bipartisan Policy Center Senior Vice President, this conversation will entail lessons learned from 33 years of federal government service including 25 years served on the hill. The conversation will include generalized advice for succeeding in careers in public service as well as a Q & A with program participants.

Moderated by **Cordell Carter**, Socrates Program
Director

Sunday, January 19th

7:45 a.m. – 9:00 a.m.

Breakfast

9:00 a.m. – 12:00 p.m.

Seminar Session III: Congressional Reform

Seminar discussion based on the following texts:

What’s Working Well and What Isn’t

- Colleen Shogan, "Defense Authorization: The Senate's Last Best Hope," in *Party and Procedure in the United States Congress*, edited by Jacob Straus, 2012 edition, pp. 195-216
- Josh Huder, "Democrats Want to Modernize the House. Good Luck With That." Monkey Cage blog

Reform Proposals

- "Modernizing Congressional Capacity- A report of the APSA Presidential Task Force Subcommittee on Congressional Capacity" *American Political Science Association*
- Claire Abernathy, Kevin Esterling, and Marci Harris. "Report from the Subcommittee on Technology and Innovation," *American Political Science Association*, September 2019

River House Main Conference Room

10:30 a.m. – 10:45 a.m.

Morning Break

12:00 p.m.

Check-out

12:00 p.m. – 1:00 p.m.

Working Lunch with Discussion of Seminar Session III
Conversation will consider the Articles 1 and 2 of the Constitution, and how foundations of the U.S. government inform and influence the role of Congress today.

1:00 p.m.

Shuttle departs for Capitol Hill

3:00 pm

Shuttle drops off participants