# **Employee Post-Travel Disclosure Form**

Original	Amendmen

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.

CO	mpleted. Please <i>do not</i> file this form with the Committee on Ethics.	
NO	OTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to	18 U.S.C. § 1001
1.	Name of Traveler: Robert Adkerson	
2.	a. Name of Accompanying Relative: Ashley Adkerson	OR None □
	b. Relationship to Traveler:  Spouse  Child  Other (specify):	
3.	a. Dates: Departure: February 19, 2020 Return: February 21, 2020	
	b. Dates at Personal Expense, if any:	OR None 🗸
4.	Departure City: Washington, DC Destination: White Sulphur Springs Return City: Adairs	ville, GA
5.	Sponsor(s), Who Paid for the Trip:  The Congressional Institute	
6.	Describe Meetings and Events Attended: See attached Itinerary	
7.	Attached to this form are each of the following, signify that each item is attached by checking the correstable.   a completed Sponsor Post-Travel Disclosure Form;  b.   the Primary Trip Sponsor Form completed by the trip sponsor prior to the trip, including all attached 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.  a. I represent that I participated in each of the activities reflected in the attached sponsor's agendating if y statement is true by checking the box:   b. If not, explain:	
I ce	ertify that the information contained on this form is true, complete, and correct to the best of my kno	wledge.
Sig	nature of Traveler: Date: 3/5/2020	
Dis crea	athorized this travel in advance. I have determined that all of the expenses listed on the attached Sponsoric sclosure Form were necessary and that the travel was in connection with the employee's official duties and attended to the appearance that the employee is using public office for private gain.  The provising Member:  Barry Lowernik  Date: 3/5/2020	r Post-Travel d would not
Sig	nature of Supervising Member:	

<b>Sponsor</b>	Post-Travel	Disclosure	<b>Form</b>
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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.

NOT	E: Willful or knowing	g misrepresentations on this	form may be subj	ect to crim	inal prosecution pursu	ant to 18 U.S.C. § 1001.
	Company or in mall limited by					
2.	Travel Destination	(s): White Sulphur Spring	gs, WV			
3.	Date of Departure:	February 19, 2020	Da	ite of Retu	rn: February 21, 20	)20
4.	Name(s) of Travele	r(s): See Attached List				
		more than one traveler o	n a form only if	<i>all</i> inform	nation is <i>identical</i> for	each person listed.
5	Actual amount of	expenses paid on behalf o	of, or reimbursed	d to, each	individual named in	Question 4:
		Total Transportation Expenses	Total Lodging Expenses		Total <b>Meal</b> Expenses	Total Other Expenses (dollar amount per item and description
	Traveler	\$0.00	\$222.50		\$144.77	\$397.91 - Room Rental
	Accompanying Family Member	\$0.00	\$0.00		\$118.69	\$397.91 - Room Rental
6. <i>1</i>	All expenses conne statement is true by	cted to the trip were for a	actual costs incu	rred and	not a <i>per diem</i> or lun	np sum payment. Signify
		nation/contained in this	form is true, co	mplete, a	nd correct to the bes	at of my knowledge
	11//	// //		proto, u		
Sign	ature: Mark	Shan			Date: Febru	ary 27, 2020
Nam	Name: Mark Strand Title: President					
Orga	nization: Congres	ssional Institute				
I am	an officer of the al	pove-named organization	ı. Signify statem	ent is tru	e by checking box:	3
Addı	ress: _1700 Diagor	nal Road #300, Alexandri	a, VA 22314	nuvydan		
Гeleр	ohone: <u>703-837-88</u>	12			_ Email: _strand@co	onginst.org
	Committe	e staff may contact the al	bove-named ind	ividual if	additional informat	ion 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: Robert Adkerson
	Sponsor(s) who will be paying for the trip: Congressional Institute
3.	White Sulphurs Springs, WV Travel Destination(s):
	a. Date of Departure: February 19, 2020 Date of Return: February 21, 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? <b>Z</b> Yes \(\sum \) No If yes:  (1) Name of Accompanying Family Member: Ashley Adkerson
	(2) Relationship to Traveler:  Spouse  Other (specify):
	(3) Accompanying Family Member is at least 18 years of age:  Yes  No
	<ul> <li>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</li> <li>b. If yes, and you are requesting lodging for two nights, explain why the second night is warranted:</li> </ul>
8.	Primary Trip Sponsor Form is attached, including agenda, invitee list, and any other attachments and contributing sponsor forms: Z 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.  Explain why participation in the trip is connected to the traveler's individual official or representational duties. Staff
	should include their job title and how the activities on the itinerary relate to their duties.  As a Chief of Staff for a Member of Congress, participation in this trip will enhance my professional knowledge,
	skills, and value by better equipping me to manage staff, organize our offices and calendar, and support my boss's agenda.
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
dir tra	ereby authorize the individual named above, an employee of the U.S. House of Representatives who works under my ect supervision, to accept expenses for the trip described in this request. I have determined that the above-described well is in connection with my employee's official duties and that acceptance of these expenses will not create the bearance that the employee is using public office for private gain.
Sig	nature of Employing Member Date 1/21/2020

# **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: Congressional Institute
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.	<ul> <li>Check only one. I represent that:</li> <li>a. The primary trip sponsor has not accepted from any other source, funds intended directly or indirectly to finance any aspect of the trip: <ul> <li>✓ OR</li> </ul> </li> </ul>
	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 <i>and</i> employees you are inviting. For each House invitee, provide an explanation of why the individual was invited (include additional pages if necessary):  See Addendum & Attached Invitation List
5.	Is travel being offered to an accompanying family member of the House invitee(s)?
6.	Date of Departure: February 19, 2020 Date of Return: February 21, 2020
7.	a. City of departure: Washington, DC
	b. Destination(s): White Sulphur Springs, WV
	c. City of return: Washington, DC
8.	<ul> <li>Check only one. I represent that:</li> <li>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</li> </ul>
	<ul> <li>b. The sponsor of the trip does not retain or employ a registered federal lobbyist or foreign agent: OR</li> <li>c. The sponsor employs or retains a registered federal lobbyist or foreign agent, but the trip is for attendance at a one-day event <i>and</i> lobbyist / foreign agent involvement in planning, organizing, requesting, or arranging the trip was <i>de minimis</i> under the Committee's travel regulations. </li> </ul>
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). <i>Indicate agenda is attached by checking box:</i>				
11.	<ul> <li>Check only one of the following:</li> <li>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</li> </ul>				
	b. <i>Not Applicable</i> . Trip sponsor is a U.S. institution of higher education:				
12.	For <i>each</i> sponsor required to submit a sponsor form, describe the sponsor's interest in the subject matter of the trip <i>and</i> its role in organizing and/or conducting the trip:  See Addendum				
13.	Answer parts a and b. Answer part c if neccessary:  a. Mode of travel: Air □ Rail □ Bus ☑ Car □ Other □ (specify:				
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.	<ul> <li>Check only one. I represent that either:</li> <li>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:</li></ul>				
	b. The trip involves events that are arranged specifically <i>with regard</i> to congressional participation:   If "b" is checked:				
	1) Detail the cost per day of meals (approximate cost may be provided): Wed-\$43, Thur-\$78, Fri-\$16				
	2) Provide the reason for selecting the location of the event or trip: Relative proximity to Washington, DC and capacity to handle a large event.				
16.	Name, nightly cost, and reasons for selecting each hotel or other lodging facility:				
	Hotel Name: The Greenbrier City: White Sulphur Springs, WV Cost Per Night: \$96				
	Reason(s) for Selecting: Proximity to DC, Availablity, Security & Facility size				
	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				

18.	<b>Total</b>	<b>Expenses</b>	for each	Participant:
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☐ Actual Amounts ☐ Good Faith Estimates	Total <b>Transportation</b> Expenses per Participant	Total <b>Lodging</b> Expenses per Participant	Total Meal Expenses per Participant
For each Member, Officer, or Employee	\$90	\$236	\$138
For each Accompanying Family Member	\$90	\$0	\$111
	Other Expenses (dollar amount per item)	Identify Specific Nature of (e.g., taxi, parking, registra	_
For each Member, Officer, or Employee	\$467	Room Rental	
For each Accompanying Family Member	\$467	Room Rental	

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

19.	C	reck	conl	y one:

	a. I certify that I am an officer of the organization listed below: U OR
	b. Not Applicable. Trip sponsor is an individual or a U.S. institution of higher education. $\Box$
20.	I certify that I am not a registered federal lobbyist or foreign agent for any sponsor of this trip. 🗾
	I certify by my signature that the information contained in this form is true, complete, and correct to the best of my knowledge.
Sig	nature: Date: 3/5/2020

Mark Strand Name:

President Title: \_

Organization: Congressional Institute

Address: \_\_\_\_\_ 1700 Diagonal Road #730, Alexandria, VA 22314

Telephone: \_\_\_\_

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

Mr. Robert Adkerson

Washington, DC 20515

Dear Mr. Adkerson:

Office of the Honorable Barry Loudermilk

422 Cannon House Office Building



Thomas A. Rust

Staff Director and Chief Counsel

David W. Arrojo 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

COMMITTEE ON ETHICS

U.S. House of Representatives

February 13, 2020

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your and your spouse's proposed trip to White Sulphur Springs, West Virginia, scheduled for February 19 to 21, 2020, sponsored by Congressional Institute.

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:adw



**Chiefs of Staff Conference** 

February 19-21, 2020



DOWNLOAD THE APP TODAY!



# Wednesday, February 19, 2020

10:00 AM	Bus Departs	Rayburn Horseshoe
2:00 PM	Check-In	Colonial Ballroom Foyer
3:00-3:05 PM	Welcome Mark Strand, Congressional Institute	Chesapeake Ballroom
3:05-4:05 PM	Lay of the Land David Winston, The Winston Group Myra Miller, The Winston Group	Chesapeake Ballroom
4:10-5:30 PM	Congressional Institute Study on Social Media Patrick Ruffini, Echelon Insights Kelsey Patten, Echelon Insights	Chesapeake Ballroom
6:30-9:00 PM	Reception & Dinner Keynote: The Honorable Jim Justice, Governor of West Virginia	Colonial Ballroom
	Thursday, February 20, 2020	
8:00 AM	Breakfast	Colonial Ballroom
9:00-10:00 AM	The 2020 Agenda Moderator: Mark Strand Dan Meyer, Office of Minority Leader Bill Hughes, Office of Minority Whip Kara Ahern, House Republican Conference	Chesapeake Ballroom
10:00-11:00 AM	Working with the White House Moderator: Mark Strand Michael McKenna, White House Office of Legislative Affairs	Chesapeake Ballroom

11:00-12:00 PM	Best Ethics Practices Elliot Berke, Berke Farah LLP Erin Clark, NRCC	Chesapeake Ballroom
12:00-1:30 PM	<b>Lunch</b> Keynote: Charlie Cook, The Cook Political Report	Colonial Ballroom
1:45-2:45 PM	House Administration Committee Changes Moderator: Mark Strand Tim Monahan, House Administration Committee	Chesapeake Ballroom
2:45-3:45 PM	A Conservative Perspective on Congressional Reform Moderator: Bruce Patton, Rebuild Congress Initiative Jason Pye, Freedom Works Neil Bradley, US Chamber of Commerce John Malcolm, Heritage Foundation Jake Olson, Select Committee on the Modernization of Congress	Chesapeake Ballroom
3:45-6:00 PM	Break	
6:30-9:00 PM	Reception & Dinner Keynote: Yuval Levin, American Enterprise Institute	Colonial Ballroom
	Friday, February 21, 2020	
8:00 AM	Breakfast	Colonial Ballroom
9:00-11:00 AM	The Effective Congressional Office Manager Mark Horstman, Manager Tools	Chesapeake Ballroom
11:15 AM	Buses Depart for Rayburn House Office Building	<b>Hotel Lobby Entrance</b>

# COS - House Staff

First Name	Last Name	Institution	Job Title
Robert	Adkerson	Office of Rep. Loudermilk	Chief of Staff
Jeremy	Adler	House Republican Conference	Communications Director
Kara	Ahern	House Republican Conference	Chief of Staff
Mike	Albares	Office of Rep. Roby	Chief of Staff
Anna	Alburger	Office of Rep. Joyce (OH)	Chief of Staff
Eric	Amidon	Office of Rep. Zeldin	Chief of Staff
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Caroline	Cash	Office of Rep. Comer	Chief of Staff
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Pamela	Day	Office of Rep. Young	Chief of Staff	
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nop	Dewitte	Office of Rep. Huizenga	Chief of Staff	
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Kevin	Eichinger	Office of Rep. Jordan	Chief of Staff	
Jaryn	Emhof	Office of Rep. Webster	Chief of Staff	
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Laura	Engquist	Office of Rep. Balderson	Deputy Chief of Staff	
John	Etue	Office of Rep. Williams	Chief of Staff	
Michele	Exner	Office of the Leader	Communications Director	. 4
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Kathee	Facchiano	Office of Rep. Higgins	Chief of Staff	

John	Ferland	Office of Rep. Massie	Chief of Staff	
Lauren	Fine	Office of the Whip	Communications Director	effet.
Kevin	Fitzpatrick	Committee on Small Business	Staff Director	;
Paul	Fitzpatrick	Office of Rep. Meadows	Chief of Staff	
Kevin	Fogarty	Office of Rep. King (NY)	Chief of Staff	
Cameron	Foster	Office of Rep. Hern	Chief of Staff	
Laura	Fullerton	Committee on Foreign Affairs	Deputy Staff Director	
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Cesar	Gonzalez	Office of Rep. Diaz-Balart	Chief of Staff	
Ellen	Gosnell	Office of the Whip	Director of Operations & Scheduler	
hsol	Green	Office of Rep. Tipton	Chief of Staff	
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Josh	Grogis	Office of Rep. Cole	Chief of Staff	
Hillary	Gross	Office of Rep. Gibbs	Chief of Staff	
Connie	Hair	Office of Rep. Gohmert	Chief of Staff	٠,
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Hayden	Haynes	Office of Rep. Johnson (LA)	Chief of Staff	
Christine	Heggem	Office of Rep. Gianforte	Chief of Staff	
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Preston		Office of the Leader	Policy Advisor	
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Liz	Hittos	Office of Rep. Bilirakis	Chief of Staff	

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mil.	Joice	Office of Rep. Watkins	Chief of Staff
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H. C.	Laukitis	Office of Rep. Walberg	Chief of Staff

Jason	Lawrence	Office of Rep. Scott	Chief of Staff	
John	Leganski	Office of the Leader	Director of Floor Operations	
Roz	Leighton	Office of Rep. Armstrong	Chief of Staff	
Joe	Lillis	Office of Rep. Long	Chief of Staff	a. 7
Hunter	Lipscomb	Office of Rep. Palazzo	Chief of Staff	
Tony	Lis	Office of Rep. Bergman	Ohief of Staff	Jan 19
Tim	Lolli	Office of Rep. Gonzalez (OH)	Chief of Staff	
Michael	Lowry	Office of Rep. Dunn	Chief of Staff	
Kelly	Lungren McCollum	Office of Rep. Griffith	Chief of Staff	
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Katie	Meyer	Office of the Leader	Senior Policy Advisor	
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Matt	Miller	Office of Rep. Cline	Chief of Staff	
Megan Bel	Miller	Office of Rep. Scalise	Chief of Staff	
Wade	Miller	Office of Rep. Roy	Chief of Staff	. :-
James	Min	Office of the Leader	Deputy Chief of Staff & Counsel	
Annie	Minkler	Office of the Whip	Deputy Floor Director	Tily tew Tily te

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