



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: Jon Anzur
2. a. Name of Accompanying Relative: _____ **OR** None ☒
b. Relationship to Traveler: ☐ Spouse ☐ Child ☐ Other (specify): _____
3. a. Dates: Departure: Feb. 19, 2020 Return: Feb. 21, 2020
b. Dates at Personal Expense, if any: _____ **OR** None ☒
4. Departure City: Washington, D.C. Destination: White Sulphur Springs Return City: Washington, D.C.
5. Sponsor(s), Who Paid for the Trip: Congressional Institute
6. Describe Meetings and Events Attended: Chiefs of Staff retreat -- planning sessions, best practices, Ethics training,
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: _____

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

Signature of Traveler: Jonathan Anzur Date: 2/28/2020

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: Fred Keller Date: 2/28/2020

Signature of Supervising Member: Fred Keller



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: Congressional Institute

2. Travel Destination(s): White Sulphur Springs, WV

3. Date of Departure: February 19, 2020 Date of Return: February 21, 2020

4. Name(s) of Traveler(s): 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	\$0.00	\$222.50	\$144.77	\$397.91 - Room Rental
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: Mark Strand Date: February 27, 2020

Name: Mark Strand Title: President

Organization: Congressional Institute

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

Address: 1700 Diagonal Road #300, Alexandria, VA 22314

Telephone: 703-837-8812 Email: strand@conginst.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: Jonathan Anzur
2. Sponsor(s) who will be paying for the trip: Congressional Institute
3. Travel Destination(s): The Greenbrier
4. 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? ☐ 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.
I am attending this retreat in my official role as Chief of Staff, in order to learn more about the roles and responsibilities of the Chief of Staff.
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

Fred Keller

Date

1/16/2020



U.S. House of Representatives

COMMITTEE ON ETHICS

TRAVELER FORM

This form should be completed by House Members, officers, or employees seeking Committee approval of privately-sponsored travel or reimbursement for travel under House Rule 25, clause 5. The completed form should be submitted directly to the Committee by each invited House Member, officer, or employee, together with the completed and signed trip sponsor form(s) and any attachments. A copy of this form, minus this initial page, will be made available for public inspection. This form, and any attachments, may be faxed to the Committee at 202-225-7392, sent or delivered to the Committee at 1015 Longworth, or e-mailed to travel.requests@mail.house.gov.

Your completed request must be submitted to the Committee no less than 30 days before your proposed departure date. Absent exceptional circumstances, permission will not be granted for requests received less than 30 days before the trip commences. You must receive explicit approval from the Committee before you depart on this trip.

Name of Traveler: Jonathan Anzur

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

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

Signature: Jonathan Anzur

Name of Signatory (if other than traveler): _____

For Staff (name of employing Member or Committee): Congressman Fred Keller

Office Address: 1717 Longworth House Office Building, Washington, D.C. 20515

Telephone Number: 202-225-37331

Email Address of Contact Person: jon.anzur@mail.house.gov

☐ Check this box if the sponsoring entity is a media outlet, the purpose of the trip is to make a media appearance sponsored by that entity, and these forms are being submitted to the Committee less than 30 days before the trip departure date.

NOTE: You must complete all of the contact information fields above, as Committee staff may need to contact you if additional information is required.

KEEP A COPY OF THIS FORM. Page 2 (but not this page) must be submitted to the Clerk as part of the post-travel disclosure required by House Rule 25. Travel Regulation § 404(d) also requires you to keep a copy of all request forms and supporting paperwork for three subsequent Congresses from the date of travel.

If there are any questions regarding this form, please contact the Committee on Ethics at 202-225-7103 or via travel e-mail: travel.requests@mail.house.gov.



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: 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. **Check only one.** I represent that:
 - a. The primary trip sponsor has not accepted from any other source, funds intended directly or indirectly to finance any aspect of the trip: ☒ **OR**
 - b. The trip is arranged without regard to congressional participation and the primary trip sponsor has accepted funds only from entities that will receive a tangible benefit in exchange for those funds: ☐ **OR**
 - c. The primary trip sponsor has accepted funds from other source(s) intended directly or indirectly to finance all or part of this trip and has enclosed disclosure forms from each of those entities. ☐If "c" is checked, list the names of the additional sponsors: _____
4. Provide names and titles of **ALL** House Members *and* employees you are inviting. **For each House invitee, provide an explanation of why the individual was invited** (include additional pages if necessary):
See Addendum & Attached Invitation List
5. Is travel being offered to an accompanying family member of the House invitee(s)? ☒ Yes ☐ No
6. Date of Departure: February 19, 2020 Date of Return: February 21, 2020
7. a. City of departure: Washington, DC
b. Destination(s): _____
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 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): 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, Availability, 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 payment. *Signify that the statement is true by checking box:* ☐



U.S. House of Representatives

COMMITTEE ON ETHICS

18. Total Expenses for each Participant:

☐ Actual Amounts ☐ Good Faith Estimates	Total Transportation Expenses per Participant	Total Lodging Expenses per Participant	Total Meal Expenses per Participant
For each Member, Officer, or Employee	\$90	\$236	\$138
For each Accompanying Family Member	\$90	\$0	\$111

	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	\$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. 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: Mark Strand Date: _____

Name: Mark Strand

Title: President

Organization: Congressional Institute

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

Telephone: 703-837-8812

Email: strand@conginst.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



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COMMITTEE ON ETHICS

Primary Trip Sponsor Form

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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. **Check only one.** I represent that:
 - a. The primary trip sponsor has not accepted from any other source, funds intended directly or indirectly to finance any aspect of the trip: ☒ OR
 - b. The trip is arranged without regard to congressional participation and the primary trip sponsor has accepted funds only from entities that will receive a tangible benefit in exchange for those funds: ☐ OR
 - c. The primary trip sponsor has accepted funds from other source(s) intended directly or indirectly to finance all or part of this trip and has enclosed disclosure forms from each of those entities. ☐If "c" is checked, list the names of the additional sponsors: _____
4. Provide names and titles of ALL House Members and employees you are inviting. For each House invitee, provide an explanation of why the individual was invited (include additional pages if necessary): _____
See Addendum & Attached Invitation List
5. Is travel being offered to an accompanying family member of the House invitee(s)? ☒ Yes ☐ No
6. Date of Departure: February 19, 2020 Date of Return: February 21, 2020
7. a. City of departure: Washington, DC
b. Destination(s): White Sulphurs Springs, WV
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

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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 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): 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, Availability, 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 payment. *Signify that the statement is true by checking box:* ☒



U.S. House of Representatives

COMMITTEE ON ETHICS

18. Total Expenses for each Participant:

☐ Actual Amounts	Total Transportation Expenses per Participant	Total Lodging Expenses per Participant	Total Meal Expenses per Participant
☒ Good Faith Estimates			
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 "Other" Expenses (e.g., taxi, parking, registration fee, etc.)
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. 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: Mark Strand Date: 1/10/2020

Mark Strand

Name: _____

President

Title: _____

Congressional Institute

Organization: _____

1700 Diagonal Road #730, Alexandria, VA 22314

Address: _____

703-837-8812

Telephone: _____

strand@conginst.org

Email: _____

If there are any questions regarding this form, please contact the Committee at the following address:

Committee on Ethics

U.S. House of Representatives

1015 Longworth House Office Building, Washington, D.C. 20515

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

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

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

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



ONE HUNDRED SIXTEENTH CONGRESS

U.S. House of Representatives
COMMITTEE ON ETHICS

Thomas A. Rust
Staff Director and Chief Counsel

David W. Arrojo
Counsel to the Chairman

Christopher A. Donesa
Counsel to the Ranking Member

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

February 13, 2020

Mr. Jonathan Anzur
Office of the Honorable Fred Keller
1717 Longworth House Office Building
Washington, DC 20515

Dear Mr. Anzur:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your 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	Lunch 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	Hotel Lobby Entrance

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
Dale	Anderson	Office of Rep. Lamborn	Chief of Staff
Taylor	Andreae	Office of Rep. Gallagher	Chief of Staff
Gary	Andres	Committee on Ways and Means	Staff Director
Jon	Anzur	Office of Rep. Keller	Chief of Staff
Reyn	Archer	Office of Rep. Fortenberry	Chief of Staff
Eliza	Baker	Office of Rep. Crenshaw	Chief of Staff
Tim	Baker	Office of Rep. Allen	Chief of Staff
Peter	Barnes	Office of Rep. Bishop	Chief of Staff
Stacy	Barton	Office of Rep. Chabot	Chief of Staff
Clifford	Bayer	Office of Rep. Fulcher	Chief of Staff
Mark	Bednar	Office of the Leader	Chief of Staff
Brendan	Belair	Committee on Judiciary	Communications
Josh	Bell	Office of Rep. Estes	Staff Director
Brooke	Bennett	Office of Rep. Hill	Chief of Staff
Eric	Bergren	Office of Rep. Guthrie	Chief of Staff
Chris	Bien	Office of the Leader	Chief of Staff
Matt	Bisenius	Office of Rep. Sensenbrenner	Deputy Director of Floor Operations
Alex	Blair	Office of Rep. Steube	Chief of Staff
Mike	Bloomquist	Committee on Energy and Commerce	Chief of Staff
Gabriella	Boffelli	Office of Rep. Gonzalez (PR)	Staff Director
			Chief of Staff

Office of Rep. Reschenthaler	Chief of Staff
House Republican Conference	Member Services Director
Office of Rep. Walden	Chief of Staff
Office of Rep. Herrera	Chief of Staff
Committee on Natural Resources	Staff Director
Office of Rep. Rutherford	Chief of Staff
Office of Rep. Thompson	Chief of Staff
Office of Rep. Rogers (AL)	Chief of Staff
Office of Rep. Wenstrup	Chief of Staff
Office of Rep. Posey	Chief of Staff
Office of Rep. McHenry	Chief of Staff
Office of Rep. Hurd	Chief of Staff
Office of Rep. Yoho	Chief of Staff
Office of Rep. Byrne	Chief of Staff
Office of Rep. Ratcliffe	Chief of Staff
Office of Rep. Steil	Chief of Staff
Office of the Leader	General Counsel
Office of Rep. Hudson	Chief of Staff
Office of Rep. Rooney	Chief of Staff
Office of Rep. Comer	Chief of Staff
Office of Rep. Wright	Chief of Staff
Committee on Appropriations	Staff Director
Office of Rep. Johnson (SD)	Chief of Staff
Office of the Whip	Digital Director
Office of Rep. Hartzler	Chief of Staff
Office of Rep. Woodall	Chief of Staff
Committee on Financial Services	Staff Director
Office of Rep. Babin	Chief of Staff
Office of Rep. Carter (GA)	Chief of Staff

Quincy	Cunningham	Office of Rep. Baird	Chief of Staff
Mike	Dankler	Office of Rep. Walorski	Chief of Staff
David	David	Office of Rep. Brady	Chief of Staff
Jonathan	Day	Office of Rep. Wilson	Chief of Staff
Pamela	Day	Office of Rep. Young	Chief of Staff
James	Decker	Office of Rep. Burgess	Chief of Staff
Chris	DelBeccaro	Office of Rep. McCaul	Chief of Staff
Jon	Dewitte	Office of Rep. Huizenga	Chief of Staff
Monica	Didiuk	Office of Rep. Smith (NE)	Chief of Staff
Lonnie	Dietz	Office of Rep. Taylor	Chief of Staff
Katherina	Dimenstein	Office of Rep. Schweikert	Chief of Staff
Kelly	Dixon	Committee on Rules	Staff Director
Emily	Domenech	Office of the Leader	Senior Policy Advisor
Chris	Donesa	Committee on Ethics	Counsel to Kenny Marchant
Matthew	Donnellan	Office of Rep. Miller	Chief of Staff
John	Donnelly	Office of Rep. Graves (GA)	Chief of Staff
Jordan	Downs	Office of Rep. Guest	Chief of Staff
Mark	Dreiling	Office of Rep. Bacon	Chief of Staff
John	Drzewicki	House Republican Conference	Policy Director
Will	Dunham	Office of the Leader	Deputy Chief of Staff for Policy
John	Dutton	Office of Rep. Harris	Chief of Staff
Kevin	Eichinger	Office of Rep. Jordan	Chief of Staff
Jaryn	Emhof	Office of Rep. Webster	Chief of Staff
Max	Engling	Office of the Leader	Deputy Member Services Director
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
Greg	Facchiano	Office of Rep. Smucker	Chief of Staff
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
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
Steven	Giaier	Office of the Leader	Senior Policy Advisor
Cesar	Gonzalez	Office of Rep. Diaz-Balart	Chief of Staff
Ellen	Gosnell	Office of the Whip	Director of Operations & Scheduler
Josh	Green	Office of Rep. Tipton	Chief of Staff
Michael	Gridler	Office of Rep. Burchett	Chief of Staff
Drew	Griffin	Office of Rep. Latta	Chief of Staff
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
Marty	Hall	Select Committee on the Climate Crisis	Staff Director
Mike	Hamilton	Office of Rep. McKinley	Chief of Staff
Aaron	Harris	Office of Rep. Gooden	Chief of Staff
Tyler	Haymore	Office of Rep. Budd	Chief of Staff
Hayden	Haynes	Office of Rep. Johnson (LA)	Chief of Staff
Christine	Heggem	Office of Rep. Gianforte	Chief of Staff
Patrick	Hester	Office of Rep. Stefanik	Chief of Staff
Adam	Hewitt	Office of Rep. Davidson	Chief of Staff
Preston	Hill	Office of the Leader	Policy Advisor
Van	Hilleary	Office of Rep. Rose	Chief of Staff
Joan	Hillebrands	Office of Rep. Upton	Chief of Staff
Jim	Hippe	Office of Rep. Fleischmann	Chief of Staff
Liz	Hittos	Office of Rep. Bilirakis	Chief of Staff

Chris	Hixon	Committee on Oversight and Reform	Staff Director
Nate	Hodson	Office of Rep. McMorris Rodgers	Chief of Staff
Brett	Horton	Office of the Whip	Chief of Staff
Michael	Hough	Office of Rep. Mooney	Chief of Staff
Adam	Howard	Office of Rep. Turner	Chief of Staff
Paul	Howell	Office of Rep. Kelly (MS)	Chief of Staff
Zach	Howell	Office of Rep. Katko	Chief of Staff
Bill	Hughes	Office of the Whip	Policy Director
Allie	Humes	Office of the Leader	Member Services Coordinator
Kyle	Jackson	Office of Rep. Bucshon	Chief of Staff
Jakob	Johnsen	Office of Rep. Rogers (KY)	Chief of Staff
Jim	Joice	Office of Rep. Watkins	Chief of Staff
Natalie	Joyce	Office of the Leader	Senior Advisor and Head of Strategy
Dave	Karvelas	Office of Rep. Buchanan	Chief of Staff
Joel	Katz	Office of Rep. Collins	Chief of Staff
Charlie	Keller	Office of Rep. Wagner	Chief of Staff
David	Keller	Office of Rep. Banks	Chief of Staff
Melissa	Kelly	Office of Rep. Olson	Chief of Staff
Dave	Kennett	Office of Rep. Calvert	Chief of Staff
Micah	Ketchel	Office of Rep. Waltz	Chief of Staff
Carolyn	King	Office of Rep. Wittman	Chief of Staff
Kyle	Kizzier	Office of Rep. Mitchell	Chief of Staff
Allen	Klump	Office of Rep. Duncan	Chief of Staff
Kerry	Knott	Office of Rep. Aderholt	Chief of Staff
Joe	Knowles	Office of Rep. Fitzpatrick	Chief of Staff
Desiree	Koetzle	Office of Rep. Stauber	Chief of Staff
Jillian	Lane-Wyant	Office of Rep. Gaetz	Chief of Staff
James	Langenderfer	Office of Rep. Mast	Chief of Staff
RJ	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
Hunter	Lipscomb	Office of Rep. Palazzo	Chief of Staff
Tony	Lis	Office of Rep. Bergman	Chief of Staff
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
Adam	Magary	Office of Rep. Cloud	Chief of Staff
Christopher	Maneval	Office of Rep. Emmer	Chief of Staff
Bret	Manley	Office of Rep. Davis	Chief of Staff
Josh	Mathis	Committee on Science, Space, and Technology	Staff Director
Deborah	Mazol	Office of Rep. Biggs	Chief of Staff
Matt	McCullough	Office of Rep. Bost	Chief of Staff
Moutray	McClaren	Office of Rep. Timmons	Chief of Staff
Chara	McMichael	Office of Rep. Weber	Chief of Staff
Carrie	Meadows	Office of Rep. Newhouse	Chief of Staff
Matt	Meyer	Office of Rep. Roe	Chief of Staff
Dan	Meyer	Office of the Leader	Chief of Staff
Katie	Meyer	Office of the Leader	Senior Policy Advisor
Carson	Middleton	Office of Rep. Foxx	Deputy Chief of Staff
Bruce	Miller	Office of Rep. Amodei	Chief of Staff
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

Jack	Minor	Office of Rep. Walker	Chief of Staff
Vivian	Moeglein	Office of Rep. Westerman	Chief of Staff
Steve	Moffitt	Office of Rep. Murphy	Chief of Staff
Tim	Monahan	Committee on House Administration	Director of Oversight
Lauren	Muglia	Office of Rep. Perry	Chief of Staff
Melissa	Murphy	Office of Rep. Rouzer	Chief of Staff
Luke	Murry	Office of the Leader	Senior Policy Advisor
Ben	Napier	Office of the Whip	Director of Floor Operations
Dave	Natonski	Office of Rep. Riggleman	Chief of Staff
Mary	Noonan	Office of Rep. Smith (NJ)	Chief of Staff
Corey	Norman	Office of Rep. Curtis	Chief of Staff
Ryan	O'Toole	Office of the Leader	Cloakroom Floor Director
Jon	Oehmen	Office of Rep. Flores	Chief of Staff
Jake	Olson	Select Committee on the Modernization of Congress	Deputy Staff Director
Nancy	Peele	Office of Rep. Graves (MO)	Chief of Staff
Mark	Pettitt	Office of Rep. Brooks (AL)	Chief of Staff
Steve	Prang	Office of Rep. LaHood	Chief of Staff
Mark	Piland	Office of Rep. Norman	Chief of Staff
Jilian	Plank	Office of Rep. Nunes	Chief of Staff
John	Porter	Office of Rep. Arrington	Chief of Staff
Megan	Porter	House Republican Conference	Member Services Assistant
Kayla	Priebs	Office of Rep. Mullin	Chief of Staff
Chad	Ramey	Office of Rep. Luetkemeyer	Chief of Staff
Marty	Reiser	Office of the Whip	Deputy Policy Director
Bart	Reising	Office of the Whip	Director of Member Services
Tim	Reitz	Office of Rep. Hice	Chief of Staff
Becky	Relic	Committee on Budget	Staff Director
Brandon	Renz	Committee on Education and Labor	Staff Director

Craig
Brent
Kyle
Ritika
Jamie
Kevin
Mark
Patrick
Mary
Matthew
David
Bobby
Paul

Megan
Matt
Robert
Michael
Dan
Becca
Jeremy
Jonah
Stephen
Matthew
Jordon
Alison
Lindsay
Katie
William

Roberts
Robertson
Robertson
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Robinette
Roig
Roman
Rooney
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Russell
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Savage
Schertz
Schroeder
Seeds
Sennott
Shaw
Shoemaker
Shumate
Siao
Simon
Sims
Slagell
Slater
Smith
Smith

Office of Rep. Shimkus
Office of Rep. Marshall
Office of Rep. Pence
Office of Rep. Buck
Office of Rep. Spano
Office of Rep. Graves (LA)
Office of Rep. Smith (MO)
Office of Rep. Meuser
Office of Rep. Barr
Office of Rep. Conaway
Office of Rep. Moolenaar
Office of the Chief Deputy Whip
Committee on Transportation and Infrastructure
Office of Rep. Brooks (IN)
Committee on Agriculture
Office of Rep. Carter (TX)
Office of Rep. Thornberry
Committee on Armed Services
Office of Rep. Hollingsworth
Office of Rep. Joyce (PA)
Office of Rep. Crawford
Office of Rep. Green
Office of Rep. Lesko
Office of Rep. Granger
Office of Rep. Lucas
Office of Rep. Simpson
Office of Rep. Holding
Office of Rep. Palmer

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Chief of Staff

Caleb	Smith	Office of the Leader	Digital Communications Director
Mike	Smullen	Office of Rep. Johnson (OH)	Chief of Staff
John	Sobel	Office of Rep. Cook	Chief of Staff
David	Sours	Office of Rep. Ferguson	Chief of Staff
Allen	Souza	Permanent Select Committee on Intelligence	Staff Director
Mark	Spannagel	Office of Rep. LaMalfa	Chief of Staff
Matt	Sparks	Office of the Leader	Head of Communications
Brittan	Specht	Office of the Leader	Senior Policy Advisor
Sarah	Stevens	Office of Rep. King (IA)	Chief of Staff
Matthew	Stroia	Office of Rep. Kelly (PA)	Chief of Staff
Peter	Su	Office of Rep. Hagedorn	Chief of Staff
Rick	Terrazas	Office of Rep. Hunter	Chief of Staff
Brian	Thomas	Office of Rep. Marchant	Chief of Staff
Tyler	Threadgill	Office of Rep. Kustoff	Chief of Staff
Jon	Towers	Committee on Veterans' Affairs	Staff Director
Chris	Tudor	Office of Rep. McClintock	Chief of Staff
Tom	Van Flein	Office of Rep. Gosar	Chief of Staff
Richard	Vaughn	Office of Rep. DesJarlais	Chief of Staff
Ted	Verrill	Office of Rep. Abraham	Chief of Staff
Rachel	Vervelde	Office of Rep. Grothman	Chief of Staff
Chris	Vieson	Committee on Homeland Security	Staff Director
Beau	Walker	Office of Rep. Womack	Chief of Staff
Jennifer	Watson	Office of Rep. Rice	Chief of Staff
Drew	Wayne	Office of Rep. Reed	Chief of Staff
Austin	Weatherford	Office of Rep. Kinzinger	Chief of Staff
Courtney	Wheatstone	Office of Rep. Stivers	Chief of Staff
Clay	White	Office of Rep. Stewart	Chief of Staff
Devin	Wiser	Office of Rep. Bishop	Chief of Staff
Ina	Yahn	Office of Rep. Radewagen	Chief of Staff

PRIMARY TRIP SPONSOR FORM ADDENDUM

Question 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 invitation list. This Congressional Institute sponsored retreat focuses on the important role of the Chief of Staff in congressional offices. Therefore, the invitation to this retreat is being extended to Chiefs of Staff in House and Senate Majority personal offices, the Staff Director in House and Senate Majority committee offices as well as select leadership staff.

Question 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 purpose of the Congressional Institute (a 501(c)4 organization) is to promote public education about Congress and to hold educational conferences for Members of Congress, staff and others. The Congressional Institute is the sole organizer and conductor of this event. This retreat is designed to strengthen professional relationships among Chiefs of Staff, senior leadership and committee staff, educate them on policy issues and best practices, and encourage the exchange of ideas with colleagues.

Question 18: Total expenses for each participant:

The estimated lodging rate and per participant food/refreshment expense figure for this event (and provided on this form) do not include the separate costs to the Congressional Institute to rent conference/banquet space large enough to accommodate this large event with appropriate security and audio/visual capabilities necessary to conduct our program. Dividing these conference and facility rental costs by the number of participants estimated to attend this event, the estimated figure would be \$467 as disclosed on the sponsor form.



Chiefs of Staff Conference
February 19-21, 2020

Wednesday, February 19, 2020

10:00 AM **Bus Departs from Rayburn Horseshoe**

2:00 PM **Check-In**

3:00-3:05 PM **Welcome**
Mark Strand, Congressional Institute

3:05-4:05 PM **Lay of the Land**
David Winston, The Winston Group (invited)
Myra Miller, The Winston Group (invited)

4:10-5:30 PM **Congressional Institute Study on Social Media**
Patrick Ruffini, Echelon Insights (invited)

6:30-9:00 PM **Reception & Dinner**
Keynote: TBD

Thursday, February 20, 2020

8:00 AM **Breakfast**

9:00-10:00 AM **The 2020 Agenda**
Moderator: Mark Strand
Dan Meyer, Office of Minority Leader
Bill Hughes, Office of Minority Whip
TBD, Office of Republican Conference

10:00-11:00 AM **Working with the White House**
Moderator: Mark Strand
TBD, White House Office of Legislative Affairs

****All invitees are subject to change****