



U.S. House of Representatives COMMITTEE ON ETHICS

EMPLOYEE POST-TRAVEL DISCLOSURE FORM [X] 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, by email at gifttravelreports@mail.house.gov, 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: Robert Carretta
2. a. Name of Accompanying Relative: Nancy Carretta OR None
b. Relationship to Traveler: Spouse Child Other
3. a. Dates: Departure: 10/15/2021 Return: 10/16/2021
b. Dates at Personal Expense, if any: OR None
4. Departure City: Washington, DC Destination: Philadelphia, PA Return City: Washington, DC
5. Sponsor(s), Who Paid for the Trip: PEW Charitable Trusts

6. Describe Meetings and Events Attended: PEW presentation on emerging trends in voter preference data. Panel discussion on the city of Philadelphia's approach to recovery from the COVID-19 pandemic. Tour of Independence Hall with anti-slavery and women's suffrage re-enactors. Presentation by Dr. Joanne Freeman on violence in Congress prior to the Civil War.

- 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 Additional Sponsor Form(s);
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: [Signature] Date: 10/25/2021

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: Jake Ellzey Date: 10/25/2021

Signature of Supervising Member: [Signature]



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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: _____
2. Travel Destination(s): _____
3. Date of Departure: _____ Date of Return: _____
4. Name(s) of Traveler(s): _____

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				
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: Tamera Luzzatto Date: _____

Name: _____ Title: _____

Organization: _____

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

Address: _____

Email: _____ Telephone: _____

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.



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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: Robert Carretta

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: 

Name of Signatory (if other than traveler): _____

For Staff (name of employing Member or Committee): Jake Ellzey

Office Address: 1725 Longworth House Office Building

Telephone Number: 202-225-2002

Email Address of Contact Person: bob.carretta@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 e-mail: travel.requests@mail.house.gov.



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TRAVELER FORM

1. Name of Traveler: Robert Carretta

2. Sponsor(s) who will be paying for the trip: the PEW Charitable Trusts

3. City and State or Foreign Country of Travel: Philadelphia, PA

4. a. Date of Departure: 10/15/2021 Date of Return: 10/16/2021

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: Nancy Carretta

(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.

As a new Chief of Staff, I am interested in developing bipartisan relationships with more experienced Chiefs of staff and learning about how a large city is recovering from the pandemic.

9. Is the traveler aware of any registered federal lobbyists or foreign agents involved planning, organizing, requesting, or arranging the trip? Yes No

10. For staff travelers, to be completed by your employing Member:

ADVANCED AUTHORIZATION OF EMPLOYEE TRAVEL

I hereby authorize the individual named above, an employee of the U.S. House of Representatives who works under my direct supervision, to accept expenses for the trip described in this request. I have determined that the above-described travel is in connection with my employee's official duties and that acceptance of these expenses will not create the appearance that the employee is using public office for private gain.

Signature of Employing Member

Date 09/07/2021



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PRIMARY TRIP SPONSOR FORM

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

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

1. Sponsor who will be paying for the trip:
The Pew Charitable Trusts
2. I represent that the trip will not be financed, in whole or in part, by a registered federal lobbyist or foreign agent. Signify that the statement is true by checking box.
3. Check only one. I represent that:
 - a. The primary trip sponsor has not accepted from any other source, funds intended directly or indirectly to finance any aspect of the trip: OR
 - b. The trip is arranged without regard to congressional participation and the primary trip sponsor has accepted funds only from entities that will receive a tangible benefit in exchange for those funds: OR
 - c. The primary trip sponsor has accepted funds from other source(s) intended directly or indirectly to finance all or part of this trip and has enclosed disclosure forms from each of those entities.
If "c" is checked, list the names of the additional sponsors:
The William and Flora Hewlett Foundation, and the Democracy Fund
4. Provide names and titles of ALL House Members and employees you are inviting. For each House invitee, provide an explanation of why the individual was invited (include additional pages if necessary):
Please see attached list. Each individual is invited due to their role as a house Chief of Staff
5. Yes No Is travel being offered to an accompanying family member of the House invitee(s)?
6. Date of departure: October 15, 2021 Date of return: October 16, 2021 (no programming this day)
7. a. City of departure: Washington, DC
b. Destination(s): Philadelphia, PA
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: OR
 - b. I checked 8(c) above but am not offering any lodging: OR
 - 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:



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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:
Please see attached.

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: private rail car)

c. If travel will be first class, or by chartered or private aircraft, explain why such travel is warranted:
n/a

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 the 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):
10/15/21 -- \$61; 10/16/21 -- \$30

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

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

Hotel Name: Philadelphia Marriott Downtown City: Philadelphia, PA Cost Per Night: \$129

Reason(s) for Selecting: It can provide the necessary meeting space and number of rooms at a per diem rate

Hotel Name: _____ City: _____ Cost Per Night: _____

Reason(s) for Selecting: _____

Hotel Name: _____ City: _____ Cost Per Night: _____

Reason(s) for Selecting: _____

17. I represent that all expenses connected to the trip will be for actual costs incurred and not a per diem or lump sum payment. *Signify that the statement is true by checking the box.*



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18. Total Expenses for each Participant:

<input type="checkbox"/> Actual Amounts <input checked="" type="checkbox"/> Good Faith Estimates	Total Transportation Expenses per Participant	Total Lodging Expenses per Participant	Total Meal Expenses per Participant
For each Member, Officer, or Employee	Train -- \$67 MotorCoach -- \$125	\$129	\$91
For each Accompanying Family Member	Train -- \$67 MotorCoach -- \$125		\$91

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

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

19. Check only one:

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

20. I certify by my signature that

- a. I read and understand the Committee's Travel Regulations;
 b. I am not a registered federal lobbyist or registered foreign agent; and
 c. The information signed by me on this form is true, complete, and correct to the best of my knowledge.

Signature: Tamera Luzzatto Date: 8/18/2021
0E614E5130D2482
 Name: Tamera Luzzatto Title: Senior Vice President
 Organization: The Pew Charitable Trusts
 Address: 901 E Street NW, Washington, DC 20004
 Email: tluzzatto@pewtrusts.org Telephone: 202/552-2000

INSTRUCTIONS

Complete the *Primary Trip Sponsor Form* and submit the agenda, invitation list, any attachments, and any *Additional Trip Sponsor Forms* directly to the Travelers.

Written approval from the Committee on Ethics is required before traveling on this trip. The Committee on Ethics will notify the House invitees directly and will not notify the trip sponsors.

Willful or knowing misrepresentation on this form may be subject to criminal prosecution under 18 U.S.C. § 1001. Signatures must comply with section 104f(bb) of the Travel Regulations.

For questions, please contact the Committee on Ethics at:

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

ethicscommittee@mail.house.gov | 202-225-7103
 More information and forms available at ethics.house.gov



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ADDITIONAL TRIP SPONSOR FORM

This form should be completed by an organization that provides funds, services, or in-kind assistance to another entity to underwrite, in whole or in part, a trip or an event, meal, or activity that will occur during a trip, or a necessary expense that will be incurred during a trip, with express or implicit knowledge or understanding that one or more House Members or employees may participate in or attend that trip or event, or otherwise may be beneficiaries of the gift or donation. Provide a copy of your completed form to the primary sponsor of the trip.

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

1. Name of Primary Trip Sponsor: Pew Charitable Trusts
2. Name of your organization: Democracy Fund
3. Yes No Is your organization designated a § 501(c)(3) charitable organization by the Internal Revenue Service?
4. Yes No Does your organization receive funding from any foreign government or multinational organization?
5. Check one. I certify that my organization:
 - a. Has provided a grant, gift, or donation to the above-named Primary Trip Sponsor and conducts an audit or review of its grant, gift, or donation to ensure that the funds are spent in accordance with the terms of its grant, gift, or donation. OR
 - b. Has had a direct role in the organizing, planning, or conducting of a trip to
Destination: _____ on Date: _____
that is being organized or arranged by the above-named Primary Trip Sponsor. OR
 - c. Has provided in-kind support to the above-named Primary Trip Sponsor (e.g., meeting planning assistance, meeting space and set-up, and paying for expenses related to this trip directly to the service provider).
6. Check only one:
 - a. My organization does not employ or retain a registered federal lobbyist or foreign agent OR
 - b. My organization employs a registered federal lobbyist or foreign agent, but their involvement in planning, organizing, or arranging the trip was *de minimis* under the travel regulations.
7. I certify by my signature that
 - a. I read and understand the Committee's Travel Regulations;
 - b. I am not a registered federal lobbyist or registered foreign agent;
 - c. I am an officer of this organization and am duly authorized to sign this form; and
 - d. The information on this form is true, complete, and correct to the best of my knowledge.

Signature:  Date: 8/6/21

Name: Joe Goldman Title: President

Organization: Democracy Fund

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

Email: jgoldman@democracyfund.org Telephone: 202-420-7900

Theodore E. Deutch, Florida
Chairman

Jackie Walorski, Indiana
Ranking Member

Susan Wild, Pennsylvania
Dean Phillips, Minnesota
Veronica Escobar, Texas
Mondaire Jones, New York

Michael Guest, Mississippi
Dave Joyce, Ohio
John H. Rutherford, Florida
Kelly Armstrong, North Dakota



ONE HUNDRED SEVENTEENTH CONGRESS

U.S. House of Representatives

COMMITTEE ON ETHICS

Thomas A. Rust
Staff Director and Chief Counsel

David W. Arrojo
Counsel to the Chairman

Kelle A. Strickland
Counsel to the Ranking Member

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

October 12, 2021

Mr. Robert Carretta
Office of the Honorable Jake Ellzey
1725 Longworth House Office Building
Washington, DC 20515

Dear Mr. Carretta:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your and your spouse's proposed trip to Philadelphia, Pennsylvania, scheduled for October 15 to 16, 2021, sponsored by the Pew Charitable Trusts, Democracy Fund, and William and Flora Hewlett Foundation.

This approval represents the Committee's determination that the proposed trip complies with relevant House rules, federal laws, and Travel Regulations promulgated by the Committee. You should engage in your own assessment of the risks and implications of engaging in travel during the current COVID-19 pandemic.

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 \$415 from a single source on the "Travel" schedule of your annual Financial Disclosure Statement covering this calendar year. Finally, Travel Regulation § 404(d) also requires you to keep a copy of all request forms and supporting information provided to the Committee for three subsequent Congresses from the date of travel.

If you have any further questions, please contact the Committee's Office of Advice and Education at extension 5-7103.

Sincerely,

Handwritten signatures of Theodore E. Deutch and Jackie Walorski in blue ink. Theodore E. Deutch's signature is on the left, and Jackie Walorski's signature is on the right.

Theodore E. Deutch
Chairman

Jackie Walorski
Ranking Member

TED/JW:adw



Bipartisan House Chiefs of Staff Conference
Philadelphia | October 15-16, 2021



Friday, October 15, 2021

- 7:00 am** **Check in at Union Station, Gate G** (*Spouses unable to obtain a COVID test thru the Office of the Attending Physician should arrive at 6:30 am for a test*)
- 7:30 am Board Reserved Rail Car in Advance
Boxed Continental Breakfast provided at departure
- 8:00 am Depart for Philadelphia via Amtrak #56
- 9:58 am Arrive Philadelphia 30th Street Station
Minibus to Philadelphia Marriott Downtown
1201 Market Street
- 10:30 am Arrive at Hotel; Registration in Franklin Hall
(check in will be after 3 pm)
- 11:15 am -
12:45pm **Working lunch:** Presentation from Pew
Research on emerging data on general trends
and issues related to current events and
official duties
- 1:15 pm Walk to City Hall
- 1:30-3:00 pm **Panel Discussion** on Philadelphia's approach to recovery from the effects of
the COVID-19 pandemic on the city's economy and citizens' health with
Michael Rashid, COP Commerce Director; Jeff Guaracino, CEO Visit Philly;
Frazierita Klasen, SVP, Pew (Moderator)
- 3:00-3:30 pm Coffee and Refreshments
- 3:30 pm Return to Hotel; check in and free time
- 5:00 pm Depart Hotel; Walk/transfer to Independence Hall (Minibus available)
- 5:30 – 6:30 pm Tour Independence Hall with re-enactors who will
discuss struggles for enfranchisement, and resolution
via collaboration in the face of partisanship, through
key moments in American history, and how that
process can inform the work of this bipartisan group
of congressional chiefs of staff today.



Bipartisan House Chiefs of Staff Conference
Philadelphia | October 15-16, 2021



6:45 pm Walk to National Constitution Center

7:00 – 9:00 pm **Dinner and Program at the National Constitution Center**
Jane Campbell, President, United States Capitol Historical Association, and
Dr. Joanne Freeman, Author, *The Field of Blood: Violence in Congress and the
Road to Civil War*.

Saturday October 16, 2021

7:30 – 9:30 am Breakfast on your own, Marriott
Hotel or elsewhere

9:00-10:30 am Free Time; Check Out by 11:00 am

10:30-11:00 am Pick up Boxed Lunch in Franklin Hall for Train Ride Home
11:00 am Meet in Hotel Lobby; Check Out and Load Luggage
onto Minibus

11:30 am Depart Marriott Hotel via Minibus for Philadelphia 30th
Street Station

12:34 pm Depart Philadelphia 30th Street Station via Amtrak # 195 for Washington Union
Station

2:30 pm Arrive Washington Union Station

12. The Pew Charitable Trusts seeks to inform and advance the development of sound public policy in the U.S. and strengthen the institutions that form the foundations of our democracy. The purpose of this retreat is to strengthen bipartisan relationships among House Chiefs of Staff and provide leadership and management skills training. Pew is the sole organizer of this trip; The William and Flora Hewlett Foundation and Democracy Fund provide funding for the House Chiefs of Staff initiative but play no role in choosing participants, selecting the destination or designing the itinerary.

U.S. House of Representatives
Committee on Ethics

GRANTMAKING TRIP SPONSOR FORM

This form should be completed by a public charity or private foundation (both as defined under section 501(c)(3) of the Internal Revenue Code) that provides a grant of funds to another entity to underwrite, in whole or in part, a trip or an event, meal, or activity that will occur during a trip, or a necessary expense that will be incurred during a trip, with express or implicit knowledge or understanding that one or more House Members or employees may participate in or attend that trip or event, or otherwise may be beneficiaries of the gift or donation. Provide a copy of your completed form to the primary sponsor of the trip.

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

1. I certify that (name of your organization): The William and Flora Hewlett Foundation
has been designated a § 501(c)(3) nonprofit charitable organization by the Internal Revenue Service.
 Yes No
2. Name of Primary Trip Sponsor: Pew Charitable Trusts
3. I certify that my organization (complete a or b):
 - a. Has provided a grant, gift, or donation to the above-named Primary Trip Sponsor and conducts an audit or review of its grant, gift, or donation to ensure that the funds are spent in accordance with the terms of its grant, gift, or donation. or
 - b. Has had a direct role in the organizing, planning, or conducting of a trip to
(destination) _____ on (date) _____ that is
being organized or arranged by the above-named Primary Trip Sponsor.
4. Check one:
 - a. My organization does not employ or retain a registered federal lobbyist or foreign agent or
 - b. My organization employs a registered federal lobbyist or foreign agent, but their involvement in planning, organizing, or arranging the trip was *de minimis* under the travel regulations.
5. I certify that I am not a registered federal lobbyist or foreign agent for any sponsor of this trip.
6. I certify by my signature that the information contained in this form is true, complete, and correct to the best of my knowledge.

Signature: Kristy Tsadick
Name: Kristy Tsadick Title: Deputy General Counsel
Organization: The William and Flora Hewlett Foundation
Address: 2121 Sand Hill Road, Menlo Park, CA 94025
Telephone number: 650-234-4000 Email: ktsadick@hewlett.org

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

Committee on Ethics
U.S. House of Representatives
1015 Longworth House Office Building
Washington, DC 20515
(202) 225-7103 (phone)
(202) 225-7392 (general fax)



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

August 11, 2021

Re: The Pew Charitable Trusts Bipartisan House Chiefs of Staff 2021 Conference

Dear Chairman Deutch,

This letter is submitted in connection with The Pew Charitable Trusts' Bipartisan House Chiefs of Staff Conference in Philadelphia, to which House of Representatives staff have been invited. We understand that the Committee on Ethics, which is charged with reviewing and approving privately-funded, officially-connected travel by Members of the House of Representatives and House staff, may consider the Foundation to be a "source" of funds associated with The Pew Charitable Trusts' study trip that must be identified under House rules.

The William and Flora Hewlett Foundation (the "Foundation"), a non-profit foundation established in 1967, made a grant to The Pew Charitable Trusts to support the House Chiefs of Staff Project (Grant 2018-7107). The Foundation's grant supports efforts to provide a nonpartisan, nonpolitical "safe space" to foster bipartisan relationship building and management best practices that can lead to better informed and more effective public policy. Please note that the William and Flora Hewlett Foundation is aware of the study trip, the participants, and its agenda. However, there is no agreement, written or oral, between the Foundation and The Pew Charitable Trusts whereby the Foundation may direct the activities of the House Chiefs of Staff project, including the conduct of the study trip, or cause the selection of any invited congressional participant. The Pew Charitable Trusts exercises control over that selection process and makes the selection completely independent from the Foundation.

Furthermore, please note that the Foundation is not a registrant under the Federal Lobbying Disclosure Act ("LDA"), does not retain or employ a registered federal lobbyist to lobby on its behalf, and has not received funds from any lobbyist or LDA registrant. Moreover, the Foundation has not accepted any source funds earmarked for The Pew Charitable Trusts or any congressional travel.

If we can provide any additional information, please contact me at 650-234-4771 or ktsadick@hewlett.org.

Sincerely,

Kristy Tsadick
Deputy General Counsel



Bipartisan House Chiefs of Staff Conference
Philadelphia | October 15-16, 2021



Friday, October 15, 2021

- 7:30 am Check in at Union Station, Gate G
- 8:10 am Depart for Philadelphia via Amtrak
Box Continental Breakfast provided on board
- 9:58 am Arrive Philadelphia 30th Street Station
Motorcoach to Philadelphia Marriott Downtown
1201 Market Street
- 10:30 am Arrive at Hotel (check in will
be after 3 pm)
- 11:15 am **Working lunch:** Presentation
from Pew Research on Current
Trends and Attitudes
- 1:15 pm Walk to City Hall
- 1:30-3:00 pm **Panel Discussion** on Philadelphia's approach to recovery from
the effects of the COVID-19 pandemic on the city's economy
and citizens' health with Michael Rashid, COP Commerce Director,
Jeff Guaracino, CEO Visit Philly; Frazierita Klasen, SVP, Pew
(Moderator)
- 3:00 pm Return to Hotel; check in and free time
- 5:00 pm Depart Hotel; Walk/transfer to Independence Hall (Motorcoach
available)
- 5:30 pm Tour Independence Hall
- 6:45 pm Walk to National Constitution Center
- 7:00 – 10:00 pm **Dinner and Program at the National Constitution Center**
Jane Campbell, President, US Capitol Historical Association
(invited) and Joanne Freeman, Author, *The Field of Blood:
Violence in Congress and the Road to Civil War* (confirmed)



Bipartisan House Chiefs of Staff Conference
Philadelphia | October 15-16, 2021



Saturday October 16, 2021

- | | |
|-----------------------|---|
| 7:30 – 9:00 am | Breakfast on your own, Marriott Hotel or elsewhere |
| 9:00 -11:00 am | Free Time; Check Out by 11:00 am |
| 11:30 am | Depart Marriott Hotel via Motorcoach for Philadelphia 30th Street Station |
| 12:43 pm | Depart Philadelphia 30th Street Station for Washington Union Station. |
| 2:30 pm | Arrive Washington Union Station |

List of Chiefs of Staff Invited to the House Chiefs of Staff Management and Leadership Conference

Representative	State	District	First Name	Last Name	Email
Speaker of the House			Terri	McCullough	Terri.McCullough@mail.house.gov
Jerry Carl	AL	1st	Chad	Carlough	Chad.Carlough@mail.house.gov
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