

## 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, by email at <u>gifttravelreports@mail.house.gov</u>, within 15 days after travel is completed. Please <i>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: Lauren Fine	
2.	a. Name of Accompanying Relative:	OR None
	b. Relationship to Traveler: 🔲 Spouse	Child Other (specify):
3.	a. Dates: Departure: 5/4/22	Return: 5/6/22
	b. Dates at Personal Expense, if any:	OR None
4.	Departure City: Washington DC	Destination: Williamsburg, VA Return City: Washington DC
5.	Sponsor(s), Who Paid for the Trip: Cor	igressional Institute

 Describe Meetings and Events Attended: The sessions included informative updates from leadership chiefs and other policy and communications experts on best practices for Congressional offices and for legislating, messaging, and carrying out an agenda for the coming year.

- 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. In the *Primary Trip Sponsor Form* completed by the trip sponsor *prior* to the trip, *including all* attachments *and* the *Additional Sponsor Form(s)*;
  - c. I 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.

	P	5 12 00	
Signature of Traveler:		Date: 5-13-22	
-			

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: Republican Whip Steve Scalis	e Date: 5-13-22
Signature of Supervising Member: Steve Scal	
Version date 3/2021 by Committee on Ethics	- 388



# 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): Williamsburg, VA
- 3. Date of Departure: May 4, 2022 Date of Return: May 6, 2022
- 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 <b>Meal</b> Expenses	Total <b>Other</b> Expenses (dollar amount per item and description)
Traveler	\$0.00	\$267	\$159	\$360 - Room Rental
Accompanying Family Member	n/a	n/a	n/a	n/a

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

Date: May 12, 2022

Name: Mark Strand

Date: May 12, 2022

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

Email: strand@conginst.org

\_\_\_\_\_ Telephone: 703-837-8812

Committee staff may contact the above-named individual if additional information is required. If you have questions regarding your completion of this form, please contact the Committee on Ethics at 202-225-7103.



#### TRAVELER FORM

This form should be completed by House Members, officers, or employees seeking Committee approval of privatelysponsored 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 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: Lauren Fine

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): Office of Republican Whip Steve Scalise

Office Address: H-148, US Capitol

Telephone Number: 202-226-9113

Email Address of Contact Person: auren.fine@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*.



#### TRAVELER FORM

1.	N	ame of Traveler: Lauren Fine
2.		oonsor(s) who will be paying or providing in-kind support for the trip: Congressional Institute
3.	Ci	ity and State OR Foreign Country of Travel : Williamsburg, VA
4.	a.	Date of Departure:         5-4-22         Date of Return:         5-6-22
	b.	Yes No 🔳 Will you be extending the trip at your personal expense?
		If yes, list dates at personal expense:
5.	a.	Yes 🔲 No 🔳 Will you be accompanied by a family member at the sponsor's expense? If yes:
		(1) Name of Accompanying Family Member:
		(2) Relationship to Traveler: Spouse Child Other (specify):
		(3) Yes No Accompanying Family Member is at least 18 years of age:
6.	a.	Yes No Did the trip sponsor answer "Yes" to Question 8(c) on the <i>Primary Trip Sponsor Form</i> (i.e., travel is sponsored by an entity that employs a registered federal lobbyist or a foreign agent)?
	b.	If yes, and you are requesting lodging for two nights, explain why the second night is warranted:

7. Yes No Primary Trip Sponsor Form is attached, including agenda, invitee list, and any other attachments and Additional Sponsor Forms.

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. In order to perform my official duties, it is important I attend the sessions at this conference, in particular, the leadership and policy presentations.
- 9. Yes No III Is the traveler aware of any registered federal lobbyists or foreign agents involved planning, organizing, requesting, or arranging the trip?
- 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





#### 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. Yes No Is travel being offered to an accompanying family member of the House invitee(s)?
- 6. Date of departure: May 4, 2022 Date of return: May 6, 2022
  7. a. City of departure: Washington, DC
  b. Destination(s): Williamsburg, VA
  - c. City of return: Washington, DC
- 8. Check only one. I represent that:
  - a. The sponsor of the trip is an institution of higher education within the meaning of section 101 of the Higher Education Act of 1965: OR
  - b. 🔲 The sponsor of the trip does not retain or employ a registered federal lobbyist or foreign agent: OR
  - c. The sponsor employs or retains a registered federal lobbyist or foreign agent, but the trip is for attendance at a one-day event *and* lobbyist / foreign agent involvement in planning, organizing, requesting, or arranging the trip was *de minimis* under the Committee's travel regulations.
- 9. Check only one of the following:
  - a. 📕 I checked 8(a) or (b) above; 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:



- 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

. 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 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:
    - Detail the cost *per day* of meals (approximate cost may be provided): Day 1- \$52, Day 2 - \$90, Day 3 - \$18
    - Provide the reason for selecting the location of the event or trip: Relative proximity to DC and capacity to handle a large event
- 16. Name, nightly cost, and reasons for selecting each hotel or other lodging facility:

Hotel Name: Williamsburg Lodge	City: Williamsburg, VA	Cost Per Night: \$118 +taxes
Reason(s) for Selecting: proximity to DC, avai	lability, security & facility size	
Hotel Name:	City:	Cost Per Night:
Reason(s) for Selecting:		
Hotel Name:	City:	Cost Per Night:
Reason(s) for Selecting:		

17. Irrepresent 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.* 



#### 18. Total Expenses for each Participant:

Actual Amounts Good Faith Estimates	Total Transportation Expenses per Participant	Total <b>Lodging</b> Expenses per Participant	Total <b>Meal</b> Expenses per Participant
For each Member, Officer, or Employee	\$106	\$268	\$160
For each Accompanying Family Member	\$106	n/a	\$160

	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	\$406	Room Rental
For each Accompanying Family Member	\$406	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 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 on this form is true, complete, and correct to the best of my knowledge.

Signature: Mark Strund	Date:
Name: Mark Strand	Title: President
Organization: Congressional Institute	
Address: 1700 Diagonal Road #300, Alexandria, VA 22314	

Email: strand@conginst.org

\_Telephone: 703-837-8812

#### 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 104(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



#### 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. Yes No Is travel being offered to an accompanying family member of the House invitee(s)?
- 6. Date of departure: May 4, 2022 Date of return: May 6, 2022
- 7. a. City of departure: Washington, DC
  - b. Destination(s): Williamsburg, VA
  - c. City of return: Washington, DC

#### 8. Check only one. I represent that:

- a. The sponsor of the trip is an institution of higher education within the meaning of section 101 of the Higher Education Act of 1965: OR
- b. 🔳 The sponsor of the trip does not retain or employ a registered federal lobbyist or foreign agent: OR
- c. The sponsor employs or retains a registered federal lobbyist or foreign agent, but the trip is for attendance at a one-day event *and* lobbyist / foreign agent involvement in planning, organizing, requesting, or arranging the trip was *de minimis* under the Committee's travel regulations.

#### 9. Check only one of the following:

- a. I checked 8(a) or (b) above; 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:



- 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.

- 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 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. **I** 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): Day 1- \$52, Day 2 - \$90, Day 3 - \$18
- Provide the reason for selecting the location of the event or trip: Relative proximity to DC and capacity to handle a large event

6.	Name, nightly cost, and reasons for selecting eac	h hotel or other lodging facility:	
	Hotel Name: Williamsburg Lodge	City: Williamsburg, VA	Cost Per Night: \$118 +taxes
	Reason(s) for Selecting: proximity to DC, avail	ability, security & facility size	
	Hotel Name:	City:	Cost Per Night:
	Reason(s) for Selecting:		
	Hotel Name:	City:	Cost Per Night:
	Reason(s) for Selecting:		

17. Irrepresent 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.



#### 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	\$106	\$314	\$160
For each Accompanying Family Member	\$106	\$314	\$160

	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	\$406	Room Rental
For each Accompanying Family Member	\$406	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 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 on this form is true, complete, and correct to the best of my knowledge.

Signature: Mark Strand	Date:	March 25, 2022
Mark Strand Name:	Title:	President
Organization:		
1700 Diagonal Road #300, Alexandria, VA 22314 Address:		
strand@conginst.org	Telephone:	703-837-8812

#### **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 104(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 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

April 28, 2022

Ms. Lauren Fine Office of the Minority Whip H-148, The Capitol Washington, DC 20515

Dear Ms. Fine:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to Williamsburg, Virginia, scheduled for May 4 to 6, 2022, 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 \$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,

Theodore E. Deutch Chairman

Jackie Walorski Ranking Member

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

TED/JW:mc

## 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 Minority and Senate Majority personal offices, the Staff Director in House Minority 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 \$406 as disclosed on the sponsor form.

**COVID Safety Precautions:** We will have over the counter testing available to participants as needed.



#### Wednesday, May 4

- 11:30 AM Bus Departs from Hill
- 2:00 PM Nametag Pickup
- 4:15 PM Welcome
- 4:30 PM New Findings on Public Opinion David Winston, The Winston Group Myra Miller, The Winston Group Dave Sackett, The Tarrance Group BJ Martino, The Tarrance Group
- 6:00 PM Reception
  7:00 PM Dinner
  Marcus Buckingham, The Marcus Buckingham Company

## Thursday, May 5

8:00 AM	Breakfast
9:00 AM	Leadership Chiefs of Staff Moderated by: Mark Strand, Congressional Institute Dan Meyer, Office of the Republican Leader Brett Horton, Office of the Republican Whip
10:00 AM	Patrick Hester, House Republican Conference Preparing to Manage In the 118 <sup>th</sup> Congress Mark Horstman, Manager Tools, LLC (confirmed)
12:00 PM	Lunch The Honorable Winsome Sears, Lieutenant Governor of Virginia (invited)
1:15 PM	Ethics: Official, Campaigns, and Redistricting Moderator: Kelle Strickland

	Elliot Berke, Berke Farah LLC Erin Clark, NRCC Tim Monahan, Committee on House Administration
2:30 PM	Maximizing the MRA Brad Fitch, Congressional Management Foundation
3:30 PM	A Policy Agenda for the 118 <sup>th</sup> Congress: Task Force Breakouts Moderator: Mark Strand
4:30 PM	Break
6:00 PM	Reception & Dinner Katie Pavlich, <i>Townhall</i>
	Friday, May 6
8:00 AM	Breakfast
9:00 AM	Schoolhouse Rocks Revisited: Getting Your Member's Bill Passed Anne Bradbury, former leadership staffer Gary Andres, Committee on Ways and Means Craig Stephens, DCI Group
10:00 AM	Growing Your Staff's Talent Ardine Williams, Amazon
11:15 AM	Open Mic Discussion Moderator: Mark Strand, Congressional Institute
12:30 PM	Conference Concludes Bus departs from the Williamsburg Lodge

# 2022 House Republican Chiefs of Staff Conference Williamsburg, VA

## Wednesday, May 4

11:30 AM - 2:30 PM	<b>Bus Departs from Hill</b> Box lunches will be available on the	S. Capitol St (Between Rayburn & Longworth) bus.
2:00 PM – 7:00 PM	Nametag Pickup	Hotel Lobby
3:00 PM – 3:15 PM	Welcome	Virginia Room ABCD
3:15 PM – 4:15 PM	<b>New Findings on Public Opinion</b> David Winston, The Winston Group Myra Miller, The Winston Group Dave Sackett, The Tarrance Group BJ Martino, The Tarrance Group	Virginia Room ABCD
4:15 PM – 5:15 PM	Supporting Ukraine, Strengthenin Moderator: Mark Strand, Congressic His Excellency Andrei Muraru, Amba Adam Krzywosądzki, Deputy Chief o Senay Bulbul, Political Counselor, E	ssador of Romania f Mission, Embassy of Poland
6:00 PM – 9:00 PM	<b>Reception</b> <b>Dinner</b> The Honorable Newt Gingrich, 50 <sup>th</sup> S	<b>Virginia Lawn &amp; Foyer</b> <b>Virginia Room EF</b> Speaker of the U.S. House of Representatives
	Thursday, Ma	ay 5
8:00 AM - 9:00 AM	Breakfast	Virginia Room EF
9:00 AM – 10:00 AM	<b>Leadership Chiefs of Staff</b> Dan Meyer, Office of the Republican Brett Horton, Office of the Republica Patrick Hester, House Republican Co	an Whip
10:00 AM - 12:00 PM	<b>Preparing to Manage In the 118<sup>th</sup> C</b> Mark Horstman, Manager Tools, LLC	

12:00 PM - 1:15 PM	<b>Lunch</b> Jim Geraghty, <i>National Review</i>	Virginia Room EF
	Sim Gerägnty, National Keview	
1:30 PM – 2:30 PM	<b>Ethics: Official, Campaigns, and Redistricting</b> Moderator: Kelle Strickland Elliot Berke, Berke Farah LLC	Virginia Room ABCD
	Erin Clark, NRCC	
2:30 PM – 3:30 PM	<b>Maximizing the MRA</b> George Hadijski, Congressional Management Foundation Tim Monahan, Committee on House Administration Max Engling, Office of the Republican Leader Rachel Wagley, Office of Rep. Blake Moore	Virginia Room ABCD
3:30 PM – 4:30 PM	<b>Getting Your Member's Bill Passed</b> Arne Christenson, Former Chief of Staff for the Speaker of the Ralph Hellmann, Former Policy Director for the Speaker of th	
6:00 PM – 9:00 PM	<b>Reception</b> <b>Dinner</b> The Honorable Winsome Earle-Sears, 42 <sup>nd</sup> Lieutenant Govern	Virginia Lawn & Foyer Virginia Room EF or of Virginia
	Friday, May 6	
8:00 AM - 9:00 AM	Breakfast	Virginia Room EF
9:00 AM – 10:00 AM	<b>Crisis Communications</b> Ed Patru, Direct Communications Co.	Virginia Room ABCD
10:00 AM - 11:00 AM	<b>Growing Your Staff's Talent</b> Mark Strand, Congressional Institute Amy Smith, Coach Program, Office of the House CAO Mark Sobol, Longwave Partners	Virginia Room ABCD
11:00 AM - 11:15 AM	<b>Open Mic Discussion</b> Moderator: Mark Strand, Congressional Institute	Virginia Room ABCD
11:30 AM	<b>Conference Concludes</b> Bus departs from the Williamsburg Lodge Convention Center	Entrance

From: Congressional Institute rsvp@conginst.org Subject: Test - Register Now for the GOP Chiefs of Staff Conference Date: March 27, 2022 at 8:08 PM

To: amym@conginst.org



#### PLEASE NOTE: TRAVELER FORMS ARE DUE TO ETHICS ON MONDAY, APRIL 4, 2022!!!

#### Dear \*/fname/\*,

On behalf of the Congressional Institute, I'm happy to invite you to the annual 2022 Chiefs of Staff Issues Conference, which will be from Wednesday, May 4, 2022, through Friday, May 6, 2022, at Colonial Williamsburg Lodge in Williamsburg, VA. We hope you and your family will join us.

You have many challenges as a Chief of Staff, including the daily management of your office. We're developing an engaging program to help you do your job more effectively. We are inviting House and Senate Republican personal chiefs of staff, committee staff directors and leadership staff so you can get to know colleagues you might not normally meet during a normal workday.

We are working with the Committee on Ethics so that the Congressional Institute is able to cover ceratin costs for you. We ask that you submit your paperwork to the Ethics Committee as soon as possible.

We look forward to seeing you at this issues conference so you can hear about the future of the country and Congress, learn new management ideas, discuss best practices, and strengthen professional relationships

#### To Register:

#### Step 1: Submit Ethics Packet by Monday, April 4, 2022

IF YOU THINK THAT THERE IS EVEN A POSSIBILITY YOU WILL ATTEND, you need pre-authorization from the Committee on Ethics; you may always withdrawl your paperwork.

Download the Institute's <u>Primary Trip Sponsor Form</u> and submit the whole package with your completed Traveler Form by Monday, April 4, 2022, to the Committee on Ethics. This entire package 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.

Failure to submit your completed materials on time means we will be unable to cover the cost of your attendance and your Member's principal campaign fund would need to pay for you.

## DOWNLOAD ETHICS FORMS >

#### Step 2: Register on the Congressional Institute's website

The Congressional Institute will coordinate all logistical arrangements, including room reservations. The Institute will cover the cost of participation for each staff member and spouse. You are welcome to bring your children, though you will be responsible for the costs of their participation. All reservations must be made through the Institute.

## REGISTER NOW >

#### Email Address: \*/email/\*

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If you are unable to attend, please use the following link to decline this invitation.

We understand your registration is tentative pending Ethics approval. More information on the program and activities at the

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conterence will be sent to you in totore mailings. If you have any questions, special concerns, or need additional information, please call (703)837-8812 or email rsvp@conginst.org. We look forward to seeing you in Williamsburg!

Mark Strand, President The Congressional Institute strand@conginst.org office: 703-837-8812 mobile: 571-366-0090 website: conginst.org

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If you are not the correct contact for this office, please <u>reply to this email</u> with the updated contact information instead of <u>unsubscribing</u>.

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Raineri     Executive Director       Ramey     Chief of Staff       Rapanos     Chief of Staff       Rapanos     Chief of Staff       Reising     Director of Member Services       Reitz     Exeuctive Director       Reitz     Chief of Staff       Reitz     Chief of Staff       Reitz     Chief of Staff       Renteria     Chief of Staff       Robertson     Chief of Staff       Rutherford     Chief of Staff       Rado     Chief of Staff       Rutherford     Chief of Staff       Rutherford     Chief of Staff       Ruth     Staff Director       Staff Director	Jared	Powell	Chief of Staff	Office of Rep. McMorris Rodgers
Ramey     Chief of Staff       Rapanos     Chief of Staff       Reising     Director of Member Services       Reitz     Eveucive Director       Reita     Eveucive Director       Reita     Chief of Staff       Reita     Chief of Staff       Reita     Chief of Staff       Reita     Chief of Staff       Robertson     Chief of Staff       Ruthen     Chief of Staff </td <td>Nick</td> <td>Raineri</td> <td>Executive Director</td> <td>Main Street Caucus</td>	Nick	Raineri	Executive Director	Main Street Caucus
Rapanos     Chief of Staff       Reising     Director of Member Services       Reitz     Exeuctive Director       Reitz     Exeuctive Director       Reitz     Chief of Staff       Rizzo     Chief of Staff       Robertson     Chief of Staff       Robertson     Chief of Staff       Robertson     Chief of Staff       Robertson     Chief of Staff       Roman     Staff Director       Roman     Chief of Staff       Rutherford     Chief of Staff       Shiefds     Chief of Staff       Rutharford     Chief of Staff <td>Chad</td> <td>Ramey</td> <td>Chief of Staff</td> <td>Office of Rep. Luetkemeyer</td>	Chad	Ramey	Chief of Staff	Office of Rep. Luetkemeyer
Reising     Director of Member Services       Reitz     Exeuctive Director       Renteria     Exeuctive Director       Ranteria     Chief of Staff       Rizzo     Chief of Staff       Robertson     Chief of Staff       Rutherford     Chief of Staff       Ryan     Chief of Staff       Ryan     Chief of Staff       Sass     Staff Director       Sass     Staff Director       Sater     Chief of Staff       Sass     Staff Director       Sater     Chief of Staff       Staff Director     Chief of Staff       Staff Director     Chief of Staff       Staff Director     Chief of	Nicole	Rapanos	Chief of Staff	Office of Rep. Gimenez
Reitz     Exercitive Director       Renteria     Exercitive Director       Renteria     Chief of Staff       Rizzo     Chief of Staff       Robertson     Chief of Staff       Ruhlen     Chief of Staff       Sass     Staff Director       Schroeder     Chief of Staff       Schroeder     Director of Operations       Shumate     Chief of Staff       Shumate     Chief of Staff	Bart	Reising	Director of Member Services	Office of the Whip
Renteria     Chief of Staff       Rizzo     Chief of Staff       Robertson     Chief of Staff       Ruhlen     Chief of Staff       Ruhlen     Chief of Staff       Ruhlen     Chief of Staff       Ruhlen     Chief of Staff       Sass     Staff Director       Sass     Staff Director       Schroeder     Chief of Staff       Schroeder     Chief of Staff       Sher     Chief of Staff       Sher     Staff Director       Sher     Director of Operations       Shelds     Staff Director       Shumate     Chief of Staff	Tim	Reitz	Exeucitve Director	House Freedom Caucus
Hizzo     Chief of Staff       Robertson     Chief of Staff       Rogers     Chief of Staff       Roman     Staff Director       Roman     Staff Director       Rutherford     Chief of Staff       Sass     Staff Director       Sander     Chief of Staff       Schroeder     Chief of Staff       Shumate     Staff Director of Operations       Shumate     Chief of Staff	Andrew	Renteria	Chief of Staff	Office of Rep. Valadao
Robertson     Chief of Staff       Rogers     Chief of Staff       Roman     Staff Director       Roman     Staff Director       Ruhlen     Chief of Staff       Sass     Staff Director       Schroeder     Chief of Staff       Schroeder     Chief of Staff       Shields     Staff Director       Shields     Staff Director of Operations       Shields     Staff Director	Joe	Rizzo	Chief of Staff	Office of Rep. Reed
Rogers     Chief of Staff       Roman     Staff Director       Roman     Staff Director       Ruhlen     Chief of Staff       Rutherford     Chief of Staff       Ryan     Chief of Staff       Sass     Staff Director       Sawyer     Chief of Staff       Sawyer     Chief of Staff       Sawyer     Chief of Staff       Sawyer     Chief of Staff       Sawyer     Staff Director       Sawyer     Chief of Staff       Sawyer     Staff Director       Sawyer     Chief of Staff       Sawyer     Staff Director       Sawyer     Chief of Staff	Kyle	Robertson	Chief of Staff	Office of Rep. Pence
Roman     Staff Director       Rosado     Chief of Staff       Ruhlen     Chief of Staff       Rutherford     Chief of Staff       Ryan     Chief of Staff       Ryan     Chief of Staff       Sass     Staff Director       Sawer     Chief of Staff       Sass     Chief of Staff       Sass     Staff Director       Sass     Staff Director       Sher     Chief of Staff       Sher     Chief of Staff       Sher     Director of Operations       Shumate     Chief of Staff	Jason	Rogers	Chief of Staff	Office of Rep. Roy
Roado     Chief of Staff       Ruhlen     Chief of Staff       Ruhlen     Chief of Staff       Ryan     Chief of Staff       Sass     Staff Director       Sawer     Chief of Staff       Schroeder     Chief of Staff       Schroeder     Chief of Staff       Shumate     Staff Director       Shumate     Chief of Staff	Mark	Roman	Staff Director	House Committee on Budget
Ruhlen     Chief of Staff       Rutherford     Rutherford       Rutherford     Chief of Staff       Ryan     Chief of Staff       Sass     Staff Director       Sass     Staff Director       Savyer     Chief of Staff       Schroeder     Chief of Staff       Staff Director of Operations     Staff Director       Shumate     Chief of Staff	Mary	Rosado	Chief of Staff	Office of Rep. Barr
Rutherford     Chief of Staff       Ryan     Chief of Staff       Ryan     Chief of Staff       Sass     Staff Director       Sawyer     Chief of Staff       Sawyer     Chief of Staff       Schroeder     Chief of Staff       Schroeder     Chief of Staff       Schroeder     Chief of Staff       Scher     Chief of Staff	Steve	Ruhlen	Chief of Staff	Office of Rep. Granger
Ryan     Chief of Staff       Sass     Staff Director       Sass     Staff Director       Savyer     Chief of Staff       Schroeder     Chief of Staff       Scher     Director of Operations       Shumate     Staff Director       Shumate     Chief of Staff	Zac	Rutherford	Chief of Staff	Office of Rep. Harshbarger
Sass     Staff Director       Sawyer     Chief of Staff       Schroeder     Chief of Staff       Schroeder     Chief of Staff       Scher     Director of Operations       In     Shields       Shumate     Chief of Staff	Lindsay	Ryan	Chief of Staff	Office of Rep. Moolenaar
Sawyer     Chief of Staff       Schroeder     Chief of Staff       Schroeder     Chief of Staff       Seher     Director of Operations       In     Shields       Shumate     Chief of Staff	Paul	Sass	Staff Director	House Committee on Transportation a Infrastructure
Schroeder     Chief of Staff       Schroeder     Chief of Staff       In     Staff Director of Operations       Shields     Staff Director       Shumate     Chief of Staff	Paul	Sawyer	Chief of Staff	Office of Rep. Graves (LA)
In Seher Director of Operations Staff Director Staff Director Shumate Chief of Staff	Robert	Schroeder	Chief of Staff	Office of Rep. Nehls
In Staff Director Staff Director Chief of Staff	Ellen	Seher	Director of Operations	Office of the Whip
Shumate Chief of Staff	Brendan	Shields	Staff Director	House Committee on Foreign Affairs
	Jonah	Shumate	Chief of Staff	Office of Rep. Crawford

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Stephen Alison	ä		
Alison	SIAO	Chief of Staff	Office of Rep. Green
	Slagell	Deputy Chief of Staff	Office of Rep. Lucas
Lindsay	Slater	Chief of Staff	Office of Rep. Simpson
Jeff	Small	Chief of Staff	Office of Rep. Boebert
William	Smith	Chief of Staff	Office of Rep. Palmer
Caleb	Smith	Digital Communications Director	Office of the Leader
Amy	Smith	Learning and Development Director	Office of the House CAO
Mike	Smullen	Chief of Staff	Office of Rep. Johnson (OH)
Shannan	Sorrell	Chief of Staff	Office of Rep. Fallon
David	Sours	Chief of Staff	Office of Rep. Ferguson
Mark	Spannagel	Chief of Staff	Office of Rep. LaMalfa
Matt	Sparks	Head of Communications	Office of the Leader
Brittan	Specht	Senior Policy Advisor	Office of the Leader
Nick	Stewart	Chief of Staff	Office of Rep. Tenney
Nick	Strader	Chief of Staff	Office of Rep. Bentz
Kelle	Strickland	Staff Director	House Committee on Ethics
Deena	Tauster	Chief of Staff	Office of Rep. Garbarino
Shana	Teehan	Chief of Staff	Office of Rep. Moore (AL)
Alan	Tennille	Chief of Staff	Office of Rep. Garcia
Sophie	Trainor	Chief of Staff	Office of Rep. Guthrie
Catherine	Treadwell	Deputy Chief of Staff and Counsel	Office of Rep. Cawthorn
Maria	Tripplaar	Staff Director	House Committee on Veterans Affairs
Chris	Tudor	DC Chief of Staff	Office of Rep. McClintock
Tom	Van Flein	Chief of Staff	Office of Rep. Gosar
Richard	Vaughn	Chief of Staff	Office of Rep. DesJarlais
Luis	Vega	Chief of Staff	Office of Rep. Sessions
Ted	Verrill	Chief of staff	Office of Rep. Letlow
Chris	Vieson	Staff Director	House Committee on Armed Services

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Jano	hindaan	Folicy Director	House Hepublican Conterence
Rachel	Wagley	Chief of Staff	Office of Rep. Moore (UT)
Jennifer	Watson	Chief of Staff	Office of Rep. Rice
Austin	Weatherford	Chief of Staff	Office of Rep. Kinzinger
Trevor	Whetstone	Chief of Staff	Office of Rep. Rosendale
Clay	White	Chief of Staff	Office of Rep. Stewart
Jeanette	Whitener	Chief of Staff	Office of Rep. Weber
Jenn	Wickre	Deputy Staff Director	House Committee on Science, Space Technology
Veronica	Wong	Chief of Staff	Office of Rep. Issa
Leafaina	Yahn	Chief of Staff	Office of Rep. Radewagen
Chad	Yelinski	Chief of Staff	Office of Rep. Budd
Dan	Ziegler	Executive Director	Republican Study Committee

#### House Staff Attendance List Chiefs of Staff Conference 2022

	Last Name	Institution	Registration Status
Anna	Alburger Romeo	Office of Rep. Joyce (OH)	Confirmed
Cyrus	Artz	House Committee on Education and Labor	Confirmed
Megan	Bel Miller	Office of Rep. Scalise	Confirmed
Joshua	Bell	Office of Rep. Estes	Confirmed
Brooke	Bennett	Office of Rep. Hill	Confirmed
Chris	Bien	Office of the Leader	Confirmed
Ali	Black	House Republican Conference	Confirmed
Gabriella	Boffelli	Office of Rep. González-Colón	Confirmed
Alex	Bolton	Office of Rep. Malliotakis	Confirmed
Kate	Bonner	Office of Rep. Smucker	Confirmed
Lorissa	Bounds	Office of Rep. Obernolte	Confirmed
Jenifer	Bradley	Office of Rep. Rutherford	Confirmed
Sean	Brady	Office of Rep. Buchanan	Confirmed
Francis	Brennan	House Republican Conference	Confirmed
Francis	Brooke	Office of the Whip	Confirmed
Greg	Brooks	Office of Rep. Wenstrup	Confirmed
Keelie	Broom	Office of Rep. Owens	Confirmed
Stuart	Burns	Office of Rep. Posey	Confirmed
Courtney	Butcher	House Republican Conference	Confirmed
John	Byers	Office of Rep. Pfluger	Confirmed
Chadwick	Carlough	Office of Rep. Carl	Confirmed
Ryan	Carney	Office of Rep. Steil	Confirmed
Machalagh	Carr	Office of the Leader	Confirmed
lessica	Carter	Office of Rep. Newhouse	Confirmed
Michael	Comer	Office of the Whip	Confirmed
Billy	Constangy	Office of Rep. Hudson	Confirmed
Chris	Crawford	Office of Rep. Carter (GA)	Confirmed
Brian	Cress	House Republican Conference	Confirmed
Tim	Cummings	Office of Rep. Walorski	Confirmed
Dante	Cutrona	Office of Rep. Joyce (PA)	Confirmed
Molly	Cutrona (Lowe)	Office of Rep. Amodei	Confirmed
Arie	Dana	Office of Rep. Steel	Confirmed
Dave	Davis	Office of Rep. Brady	Confirmed
onathan	Day	Office of Rep. Wilson	Confirmed
Ben	DeMarzo	Office of Rep. Miller (IL)	Confirmed
on	DeWitte	Office of Rep. Huizenga	Confirmed
Monica	Didiuk	Office of Rep. Smith (NE)	Confirmed
ordan	Downs	Office of Rep. Guest	Confirmed
Braden	Dreiling	Office of Rep. LaTurner	Confirmed
Mark	Dreiling		
Will	Dunham	Office of Rep. Bacon Office of the Leader	Confirmed Confirmed
aryn	Emhof	Office of Rep. Webster	Confirmed
Лах	Engling	Office of the Leader	Confirmed
Jaura	Engquist	Office of Rep. Balderson	Confirmed
Aichele	Exner	Office of the Leader	Confirmed
lugh	Fike	Office of Rep. Cloud	Confirmed
Lauren	Fine	Office of the Whip	Confirmed
Cameron	Foster	Office of Rep. Hern	Confirmed

#### House Staff Attendance List Chiefs of Staff Conference 2022

Jason	Galanes	Office of Rep. Turner	Confirmed
Cesar	Gonzalez	Office of Rep. Diaz-Balart	Confirmed
Andrea	Grace	Office of Rep. Zeldin	Confirmed
Drew	Griffin	Office of Rep. Latta	Confirmed
Hillary	Gross	Office of Rep. Gibbs	Confirmed
Rachel	Harris	Office of Rep. Lesko	Confirmed
Nick	Hawatmeh	Office of Rep. McClain	Confirmed
Jessica	Hayes	Office of Rep. Hice	Confirmed
Patrick	Hester	Office of Rep. Stefanik	Confirmed
Brett	Horton	Office of the Whip	Confirmed
Adam	Howard	House Committee on Intelligence	Confirmed
Kyle	Jackson	Office of Rep. Bucshon	Confirmed
Stephen	Janushkowsky	Office of Rep. Babin	Confirmed
Sarah	Jorgenson	House Select Climate Committee	Confirmed
Natalie	Joyce	Office of the Leader	Confirmed
Rebecca	Keightley	Office of Rep. Calvert	Confirmed
Charlie	Keller	Office of Rep. Wagner	Confirmed
Mark	Kelly	Office of Rep. Good	Confirmed
Melissa	Kelly	Office of Rep. Franklin	Confirmed
Micah	Ketchel	Office of Rep. Waltz	Confirmed
Carolyn	King	Office of Rep. Wittman	Confirmed
Allen	Klump	Office of Rep. Duncan	Confirmed
Scott	Knittle	Office of Rep. Hice	Confirmed
Joe	Knowles	Office of Rep. Fitzpatrick	Confirmed
Desiree	Koetzle	Office of Rep. Stauber	Confirmed
Allie	Kotsovos	Office of the Leader	Confirmed
Kate	LaBorde	Office of Rep. Biggs	Confirmed
Zack	Laven	Office of Rep. Schweikert	Confirmed
Chrissi	Lee	Office of Rep. Hartzler	Confirmed
Tony	Lis	Office of Rep. Bergman	Confirmed
Tim	Lolli	Office of Rep. Gonzalez (OH)	Confirmed
Jonathan	Lowe	Office of Rep. Chabot	Confirmed
Michael	Lowry	Office of Rep. Dunn	Confirmed
Kelly	Lungren McCollum	Office of Rep. Griffith	Confirmed
Chris	Marklund	House Committee on Natural Resources	Confirmed
Anna	McCormack	Office of Rep. Rouzer	Confirmed
Ryan	McCormack	Office of Rep. Fitzgerald	Confirmed
Moutray	McLaren	Office of Rep. Timmons	Confirmed
Dan	Meyer	Office of the Leader	Confirmed
Matt	Meyer	Office of Rep. Smith (MO)	Confirmed
Carson	Middleton	Office of Rep. Foxx	Confirmed
James	Min	Office of Rep. McCarthy	Confirmed
Annie	Minkler	Office of the Whip	Confirmed
Tim	Monahan	House Committee on Administration	Confirmed
Tom	Moran	Office of Rep. Salazar	Confirmed
Lauren	Muglia	Office of Rep. Perry	Confirmed
Ben	Napier	Office of the Whip	Confirmed
Madison	Nash	Office of Rep. Womack	Confirmed
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#### House Staff Attendance List Chiefs of Staff Conference 2022

Jimmy	Peacock	Office of Rep. Hinson	Confirmed
Mehgan	Perez-Acosta	Office of Rep. Gooden	Confirmed
Mark	Pettitt	Office of Rep. Brooks	Confirmed
Steve	Pfrang	Office of Rep. LaHood	Confirmed
Nicholas	Raineri	Main Street Caucus	Confirmed
Bart	Reising	Office of the Whip	Confirmed
Andrew	Renteria	Office of Rep. Valadao	Confirmed
Kyle	Robertson	Office of Rep. Pence	Confirmed
Jason	Rogers	Office of Rep. Roy	Confirmed
Mary	Rosado	Office of Rep. Barr	Confirmed
Steve	Ruhlen	Office of Rep. Granger	Confirmed
Zac	Rutherford	Office of Rep. Harshbarger	Confirmed
Paul	Sass	House Committee on Transportation and Infrastructure	Confirmed
Robert	Schroeder	Office of Rep. Nehls	Confirmed
Jonah	Shumate	Office of Rep. Crawford	Confirmed
Bryan	Shuy	Office of Rep. Harris	Confirmed
Alison	Slagell	Office of Rep. Lucas	Confirmed
Caleb	Smith	Office of the Leader	Confirmed
Mike	Smullen	Office of Rep. Johnson (OH)	Confirmed
Shannan	Sorrell	Office of Rep. Fallon	Confirmed
Brittan	Specht	Office of the Leader	Confirmed
Kelle	Strickland	House Committee on Ethics	Confirmed
Shana	Teehan	Office of Rep. Moore (AL)	Confirmed
Catherine	Treadwell	Office of Rep. Cawthorn	Confirmed
Maria	Tripplaar	House Committee on Veterans Affairs	Confirmed
Chris	Tudor	Office of Rep. McClintock	Confirmed
Tom	Van Flein	Office of Rep. Gosar	Confirmed
Ted	Verrill	Office of Rep. Letlow	Confirmed
Jake	Vreeburg	House Republican Conference	Confirmed
Rachel	Wagley	Office of Rep. Moore (UT)	Confirmed
Austin	Weatherford	Office of Rep. Kinzinger	Confirmed
Jeanette	Whitener	Office of Rep. Weber	Confirmed

## 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 Minority and Senate Majority personal offices, the Staff Director in House Minority 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 \$406 as disclosed on the sponsor form.

**COVID Safety Precautions:** We will have over the counter testing available to participants as needed.

# 2022 House Republican Chiefs of Staff Conference Williamsburg, VA

#### Wednesday, May 4

- 11:30 AM Bus Departs from Hill
- 2:00 PM Nametag Pickup
- 4:15 PM Welcome

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- 4:30 PM New Findings on Public Opinion David Winston, The Winston Group Myra Miller, The Winston Group Dave Sackett, The Tarrance Group BJ Martino, The Tarrance Group
- 6:00 PM Reception
   7:00 PM Dinner
   Marcus Buckingham, The Marcus Buckingham Company

#### Thursday, May 6

8:00 AM	breaklast
9:00 AM	Leadership Chiefs of Staff Moderated by: Mark Strand, Congressional Institute Dan Meyer, Office of the Republican Leader Brett Horton, Office of the Republican Whip Patrick Hester, House Republican Conference
10:00 AM	Preparing to Manage In the 118 <sup>th</sup> Congress Mark Horstman, Manager Tools, LLC (confirmed)
12:00 PM	Lunch The Honorable Winsome Sears, Lieutenant Governor of Virginia (invited)
L:15 PM	Ethics: Official, Campaigns, and Redistricting Moderator: Kelle Strickland

	Elliot Berke, Berke Farah LLC Erin Clark, NRCC Tim Monahan, Committee on House Administration
2:30 PM	Maximizing the MRA Brad Fitch, Congressional Management Foundation
3:30 PM	A Policy Agenda for the 118 <sup>th</sup> Congress: Task Force Breakouts Moderator: Mark Strand
4:30 PM	Break
6:00 PM	Reception & Dinner Katie Pavlich, <i>Townhall</i>
	Saturday, May 6
8:00 AM	Breakfast
9:00 AM	Schoolhouse Rocks Revisited: Getting Your Member's Bill Passed Anne Bradbury, former leadership staffer Gary Andres, Committee on Ways and Means Craig Stephens, DCI Group
10:00 AM	Growing Your Staff's Talent Ardine Williams, Amazon
11:15 AM	Open Mic Discussion Moderator: Mark Strand, Congressional Institute
12:30 PM	Conference Concludes Bus departs from the Williamsburg Lodge

From: Congressional Institute rsvp@conginst.org Subject: Test - Register Now for the GOP Chiefs of Staff Conference Date: March 27, 2022 at 8:08 PM To: amym@conginst.org



#### PLEASE NOTE: TRAVELER FORMS ARE DUE TO ETHICS ON MONDAY, APRIL 4, 2022111

#### Dear \*/fname/\*,

On behalf of the Congressional Institute, I'm happy to invite you to the annual 2022 Chiefs of Staff Issues Conference, which will be from Wednesday, May 4, 2022, through Friday, May 6, 2022, at Colonial Williamsburg Lodge in Williamsburg, VA. We hope you and your family will join us.

You have many challenges as a Chief of Staff, including the daily management of your office. We're developing an engaging program to help you do your job more effectively. We are inviting House and Senate Republican personal chiefs of staff, committee staff directors and leadership staff so you can get to know colleagues you might not normally meet during a normal workday.

We are working with the Committee on Ethics so that the Congressional Institute is able to cover ceratin costs for you. We ask that you submit your paperwork to the Ethics Committee as soon as possible.

We look forward to seeing you at this issues conference so you can hear about the future of the country and Congress, learn new management ideas, discuss best practices, and strengthen professional relationships

#### To Register:

#### Step 1: Submit Ethics Packet by Monday, April 4, 2022

IF YOU THINK THAT THERE IS EVEN A POSSIBILITY YOU WILL ATTEND, you need pre-authorization from the Committee on Ethics; you may always withdrawl your paperwork.

Download the Institute's <u>Primary Trip Sponsor Form</u> and submit the whole package with your completed Traveler Form by Monday, April 4, 2022, to the Committee on Ethics. This entire package 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.

Failure to submit your completed materials on time means we will be unable to cover the cost of your attendance and your Member's principal campaign fund would need to pay for you.



#### Step 2: Register on the Congressional Institute's website

The Congressional Institute will coordinate all logistical arrangements, including room reservations. The Institute will cover the cost of participation for each staff member and spouse. You are welcome to bring your children, though you will be responsible for the costs of their participation. All reservations must be made through the Institute.



#### Email Address: \*/email/\*

Access Code: \*/other\_id/\*

If you are unable to attend, please use the following link to decline this invitation.

We understand your registration is tentative pending Ethics approval. More information on the program and activities at the

conterence will be sent to you in torore mailings. If you have any questions, special concerns, or need additional information, please call (703)837-8812 or email rsvp@conginst.org. We look forward to seeing you in Williamsburg!

Mark Strand, President The Congressional Institute strand@conginst.org office: 703-837-8812 mobile: 571-366-0090 website: conginst.org

Congressional Institute

If you are not the correct contact for this office, please <u>reply to this email</u> with the updated contact information instead of <u>unsubscribing</u>.

# **COS: Invited Hill Staff**

Matt	Sean	Jen	Parish	Casey	Lorissa	Kate	Aaron	Alex	Gabriella	Alex	Jeff	Brooke	Josh	Megan	Cliff	Jason	Cyrus	Jon	Gary	Taylor	Dale	Anna	Amy	Kara	Rob	First Name
Brennan	Brady	Bradley	Braden	Bowman	Bounds	Bonner	Bonnaure	Bolton	Boffelli	Blair	Billman	Bennett	Bell	Bel Miller	Bayer	Bauknecht	Artz	Anzur	Andres	Andreae	Anderson	Alburger	Albro	Ahern	Adkerson	Last Name
Chief of Staff	Chief of Staff	Chief of Staff	Staff Director	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff.	Staff Director	Chief of Staff	Staff Director	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Job Title
Office of Rep. Thompson	Office of Rep. Buchanan	Office of Rep. Rutherford	House Committee on Agriculture	Office of Rep. Herrera Beutler	Office of Rep. Obernalte	Office of Rep. Smucker	Office of Rep. Reschenthaler	Office of Rep. Malliotakis	Office of Rep. González-Colón	Office of Rep. Steube	Office of Rep. Jackson	Office of Rep. Hill	Office of Rep. Estes	Office of Rep. Scalise	Office of Rep. Fulcher	Office of Rep. Tiffany	House Committee on Education and I	Office of Rep. Keller	House Committee on Ways and Mean	Office of Rep. Gallagher	Office of Rep. Lamborn	Office of Rep. Joyce (OH)	Office of Rep. Bice	Office of Rep. Cheney	Office of Rep. Loudermilk	Institution

Casey	Billy	Chris	Michael	Victoria				Caroline	Cooling		нуал	Chad	Ben	Heather	Larry	John		Jett	Courtney	Stuart	E	Nick	Keelie	Greg	Francis	Chris	Francis	
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Chief of Staff	Chief of Staff	Chief of Staff	Deputy Communications Director	Chief of Staff	Chief of Staff	Chief of Staff	Staff Director	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff (Steil)	Chief of Staff	Chief of Staff	Deputy Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Member Services Director	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Policy Director	Chief of Staff	Rapid Response Director	
Office of Rep. Gonzales (TX)	Office of Rep. Hudson	Office of Rep. Hartzler	Office of the Whip	Office of Rep. Westerman	Office of Rep. Arrington	Office of Rep. Johnson (SD)	House Committee on Appropriations	Office of Rep. Comer	Office of Rep. Newhouse	Office of Rep. Ellzey	Select Committee on Economic Dispa and Fairness in Growth	Office of Rep. Carl	Office of Rep. Mullin	Office of Rep. Granger	Office of Rep. Cammack	Office of Rep. Pfluger	Office of Rep. Kelly (PA)	Office of Rep. McHenry	House Republican Conference	Office of Rep. Posey	Office of Rep. Greene	Office of Rep. Clyde	Office of Rep. Owens	Office of Rep. Wenstrup	Office of the Whip	Office of Rep. Rogers (AL)	House Republican Conference	

Page 2,

Kathee	John	Laura	Max	Jaryn	Erin	Kevin	Mark	Braden	Jordan	Matt	Kelly	David	Justin	Lonnie	Monica	Jon	Ben	Chris	James	Jonathan	Dave	Arie	Dante	Quincy	Tim	Nick	Brian	Chris
Facchiano	Etue	Engquist	Engling	Emhof	Elliot	Eichinger	Dreiling	Dreiling	Downs	Donnellan	Dixon	DiStefano	Discigil	Dietz	Didiuk	DeWitte	DeMarzo	Del Beccaro	Decker	Day	Davis	Dana	Cutrona	Cunningham	Cummings	Crocker	Cress	Crawford
Chief of Staff	Chief of Staff	Chief of Staff	Deputy Member Services Director	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Staff Director	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Professional Staff Member	Member Services and Operations Assistant House Republican Conference	Chief of Staff
Office of Rep. Higgins	Office of Rep. Williams	Office of Rep. Balderson	Office of the Leader	Office of Rep. Webster	Office of Rep. Katko	Office of Rep. Jordan	Office of Rep. Bacon	Office of Rep. LaTurner	Office of Rep. Guest	Office of Rep. Miller (WV)	House Committee on Rules	Office of Rep. Carey	Office of Rep. Crenshaw	Office of Rep. Taylor	Office of Rep. Smith (NE)	Office of Rep. Huizenga	Office of Rep. Miller (IL)	Office of Rep. McCaul	Office of Rep. Burgess	Office of Rep. Wilson	Office of Rep. Brady	Office of Rep. Steel	Office of Rep. Joyce (PA)	Office of Rep. Baird	Office of Rep. Walorski	House Committee on Administration	nt House Republican Conference	Office of Rep. Carter (GA)

Adam	Patrick	Caleb	Hayden	Tyler	Jessica	Nick	Hachel	Derek	Brandon	Dan	James	Mike	Connie	Matt	Hillary	Josh	Drew	Michael	Andrea	Cesar	Tracie	Jason	Cameron	David	Lauren	Hugh	Alex
Hewitt	* Hester	Hays	Haynes	Haymore	Hayes	Hawatmeh	Harris	Harley	Harder	Hanlon	Hampson	Hamilton	Hair	Gurtler	Gross	Grogis	Griffin	Grider	Grace	Gonzalez	Gibler	Galanes	Foster	FitzSimmons	Fine	Fike	Ferro
Chief of Staff	Chief of Staff	General Counsel/Deputy Staff Director	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Staff Director	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Communications Director	Chief of Staff	Chief of Staff
Office of Rep. Davidson	Office of Rep. Stefanik	House Committee on Administration	Office of Rep. Johnson (LA)	Office of Rep. Donalds	Office of Rep. Hice	Office of Rep. McClain	Office of Rep. Lesko	House Committee on Modernization c Congress	Office of Rep. Mann	Office of Rep. Mace	Office of Rep. Bishop	Office of Rep. McKinley	Office of Rep. Gohmert	Office of Rep. Massie	Office of Rep. Gibbs	Office of Rep. Cole	Office of Rep. Latta	Office of Rep. Burchett	Office of Rep. Zeldin	Office of Rep. Diaz-Balart	Office of Rep. Miller-Meeks	Office of Rep. Turner	Office of Rep. Hern	Office of Rep. Fischbach	Office of the Whip	Office of Rep. Cloud	Office of Rep. Gimenez

Kyle	Kyle	Carolyn	Micah	Melissa	Mark	David	Charlie	Rebecca	Natalie	Sarah	Jake	Stephen	Kyle	Renee	Paul	Adam	Michael	Brett	Michael	Matt	Nale	Lauren	Chris	Liz	Jim	Joan	Van
Klein	Kizzier	King	Ketchel	Kelly	Kelly	Keller	Keller	Keightley	Joyce	Jorgenson	Johnsen	Janushkowsky	Jackson	Hudson	Howell	Howard	Hough	Horton	Horanburg	Hoffmann	Hodson	Hodge	Hixon	Hittos	Hippe	Hillebrands	Hilleary
Staff Director	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Deputy Chief of Staff for Member Services	Staff Director	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Staff Director	Chief of Staff	Chief of Staff	Chief of Staff	Staff Director	Statt Director	Chief of Staff	Staff Director	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff
House Committee on Homeland Sect	Office of Rep. Jacobs	Office of Rep. Wittman	Office of Rep. Waltz	Office of Rep. Franklin	Office of Rep. Good	Office of Rep. Banks	Office of Rep. Wagner	Office of Rep. Calvert	vices Office of the Leader	House Committee on Climate Crisis	Office of Rep. Rogers (KY)	Office of Rep. Babin	Office of Rep. Bucshon	Office of Rep. Spartz	Office of Rep. Kelly (MS)	House Committee on Intelligence	Office of Rep. Mooney	Office of the Whip	Office of Rep. Herrell	House Committee on Financial Servic	House Committee on Energy and Commerce	Office of Rep. Allen	House Committee on Judiciary	Office of Rep. Bilirakis	Office of Rep. Fleischmann	Office of Rep. Upton	Office of Rep. Rose

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Klump Chief of Staff	Office of Rep. Aderholt			Chief of Staff	Knott		Kerry
	Office of Rep. Duncan			Chief of Staff	Klump		Allen

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Office of Rep. Foxx	Chief of Staff	Middleton	1	Carson
Office of the Leader	Chief of Staff	Meyer		Dan
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Office of Rep. Johnson (OH)	Chief of Staff	Smullen	Mike
Office of Rep. Palmer	Chief of Staff	Smith	William
Office of Rep. Boebert	Chief of Staff	Small	Jeff
Office of Rep. Simpson	Chief of Staff	Slater	Lindsay
Office of Rep. Lucas	Deputy Chief of Staff	Slagell	Alison
Office of Rep. Green	Chief of Staff	Siao	Stephen
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House Committee on Foreign Affairs	Staff Director	Shields	Brendan
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House Committee on Small Business	Staff Director	Planning	David

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Yahn	Wong		Wickre	Whitener	White	Whetstone	Weatherford	Watson	Walker	Wagley	Vreeburg	Vieson	Verrill	Vega	Vaughn	Van Flein	Tudor	Tripplaar	Treadwell	Trainor	Tennille	Teehan	Tauster	Strickland	Strader	Stewart	Spannagel	Sours
Chief of Staff	Chief of Staff		Denuty Staff Director	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Policy Director	Staff Director	Chief of staff	Chief of Staff	Chief of Staff	Chief of Staff	DC Chief of Staff	Staff Director	Deputy Chief of Staff and Counsel	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff	Staff Director	Chief of Staff	Chief of Staff	Chief of Staff	Chief of Staff
Office of Rep. Radewagen	Office of Rep. Issa	Technology	House Committee on Colored Court	Office of Rep. Weber	Office of Rep. Stewart	Office of Rep. Rosendale	Office of Rep. Kinzinger	Office of Rep. Rice	Office of Rep. Womack	Office of Rep. Moore (UT)	House Republican Conference	House Committee on Armed Services	Office of Rep. Letlow	Office of Rep. Sessions	Office of Rep. DesJarlais	Office of Rep. Gosar	Office of Rep. McClintock	House Committee on Veterans Affairs	Office of Rep. Cawthorn	Office of Rep. Guthrie	Office of Rep. Garcia	Office of Rep. Moore (AL)	Office of Rep. Garbarino	House Committee on Ethics	Office of Rep. Bentz	Office of Rep. Tenney	Office of Rep. LaMalfa	Office of Rep. Ferguson

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Chief of Staff Executive Director

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