



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 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: Jeffrey P. Kratz
2. a. Name of Accompanying Relative: _____ **OR** None ☐
b. Relationship to Traveler: ☐ Spouse ☐ Child ☐ Other (specify): _____
3. a. Dates: Departure: 6/1/2022 Return: 6/3/2022
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: Congressional Institute
6. Describe Meetings and Events Attended:
Meetings were focused on professional development and how to better navigate the legislative process.
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: 6/10/22

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: Don Bacon Date: 6/10/22

Signature of Supervising Member: [Signature]



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: June 1, 2022 Date of Return: June 3, 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 Meal Expenses	Total Other Expenses (dollar amount per item and description)
Traveler	\$91	\$269	\$154	\$398 - 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: Mark Strand Date: June 9, 2022

Name: Mark Strand Title: President

Organization: Congressional Institute

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

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

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.



U.S. House of Representatives

COMMITTEE ON ETHICS

TRAVELER FORM

1. Name of Traveler: Jeff Kratz
2. Sponsor(s) who will be paying or providing in-kind support for the trip:
Congressional Institute
3. City and State **OR** Foreign Country of Travel: Williamsburg, Virginia
4. a. Date of Departure: June 1 2022 Date of Return: June 3, 2022
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 *Primary Trip Sponsor Form* (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.
I serve as Congressman Bacon's Legislative Director. This conference will give me tips and pointers on how to better manage our legislative staff as well as to better understand how the House of Representatives operates.
9. Yes ☐ No ☒ **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

Date

4/22/22



U.S. House of Representatives

COMMITTEE ON ETHICS

TRAVELER FORM

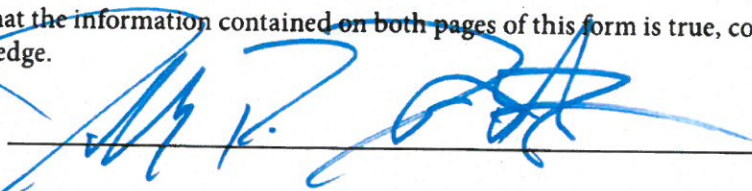
This form should be completed by House Members, officers, or employees seeking Committee approval of privately-sponsored travel or reimbursement for travel under House Rule 25, clause 5. The completed form should be submitted directly to the Committee by each invited House Member, officer, or employee, together with the completed and signed trip sponsor form(s) and any attachments. A copy of this form, minus this initial page, will be made available for public inspection. This form and any attachments may be 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: Jeff Kratz

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): Rep. Don Bacon (NE-02)

Office Address: 1024 Longworth House Office Building

Telephone Number: 202-225-4155

Email Address of Contact Person: jeff.kratz@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.



U.S. House of Representatives

COMMITTEE ON ETHICS

PRIMARY TRIP SPONSOR FORM

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

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

1. Sponsor who will be paying for the trip:
Congressional Institute
2. ☒ I represent that the trip will not be financed, in whole or in part, by a registered federal lobbyist or foreign agent.
Signify that the statement is true by checking box.
3. **Check only one.** I represent that:
 - a. ☐ The primary trip sponsor has not accepted from any other source, funds intended directly or indirectly to finance any aspect of the trip: **OR**
 - b. ☐ The trip is arranged without regard to congressional participation and the primary trip sponsor has accepted funds only from entities that will receive a tangible benefit in exchange for those funds: **OR**
 - c. ☐ The primary trip sponsor has accepted funds from other source(s) intended directly or indirectly to finance all or part of this trip and has enclosed disclosure forms from each of those entities.
If "c" is checked, list the names of the additional sponsors:
4. Provide names and titles of **ALL** House Members *and* employees you are inviting. **For each House invitee, provide an explanation of why the individual was invited** (include additional pages if necessary):
See addendum & attached invitation list
5. Yes ☐ No ☐ Is travel being offered to an accompanying family member of the House invitee(s)?
6. Date of departure: June 1, 2022 Date of return: June 3, 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:



U.S. House of Representatives

COMMITTEE ON ETHICS

10. ☐ Attached is a detailed agenda of the activities House invitees will be participating in during the travel (i.e., an hourly description of planned activities for trip invitees). *Indicate agenda is attached by checking box.*
11. **Check only one of the following:**
- a. ☐ I represent that a registered federal lobbyist or foreign agent will not accompany House Members or employees on any segment of the trip. *Signify that the statement is true by checking box; OR*
- b. ☐ *Not Applicable.* Trip sponsor is a U.S. institution of higher education.
12. For **each** sponsor required to submit a sponsor form, describe the sponsor's interest in the subject matter of the trip **and** its role in organizing and/or conducting the trip:
- See addendum
13. **Answer parts a and b. Answer part c if necessary:**
- a. Mode of travel: Air ☐ Rail ☐ Bus ☒ Car ☐ Other ☐ (specify: _____)
- b. Class of travel: Coach ☒ Business ☐ First ☐ Charter ☐ Other ☐ (specify: _____)
- c. If travel will be first class, or by chartered or private aircraft, explain why such travel is warranted:
14. ☒ I represent that the expenditures related to local area travel during the trip will be unrelated to personal or recreational activities of the invitee(s). *Signify that the statement is true by checking 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):
Day 1 - \$51, Day 2 - \$88, Day 3 - \$21
- 2) 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: Kingsmill City: Williamsburg, VA Cost Per Night: \$118 +taxes
- Reason(s) for Selecting: proximity to DC, availability, security & facility size
- Hotel Name: _____ City: _____ Cost Per Night: _____
- Reason(s) for Selecting: _____
- Hotel Name: _____ City: _____ Cost Per Night: _____
- Reason(s) for Selecting: _____
17. ☐ I represent that all expenses connected to the trip will be for actual costs incurred and not a per diem or lump sum payment. *Signify that the statement is true by checking the box.*



U.S. House of Representatives

COMMITTEE ON ETHICS

18. Total Expenses for each Participant:

☐ Actual Amounts ☒ Good Faith Estimates	Total Transportation Expenses per Participant	Total Lodging Expenses per Participant	Total Meal Expenses per Participant
For each Member, Officer, or Employee	\$106	\$269	\$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	\$451	Room Rental
For each Accompanying Family Member	\$451	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:

Date: April 12, 2022

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



U.S. House of Representatives

COMMITTEE ON ETHICS

PRIMARY TRIP SPONSOR FORM

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

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

1. Sponsor who will be paying for the trip:

Congressional Institute

2. ☒ I represent that the trip will not be financed, in whole or in part, by a registered federal lobbyist or foreign agent. Signify that the statement is true by checking box.

3. **Check only one.** I represent that:

- a. ☐ The primary trip sponsor has not accepted from any other source, funds intended directly or indirectly to finance any aspect of the trip: **OR**
- b. ☐ The trip is arranged without regard to congressional participation and the primary trip sponsor has accepted funds only from entities that will receive a tangible benefit in exchange for those funds: **OR**
- c. ☐ The primary trip sponsor has accepted funds from other source(s) intended directly or indirectly to finance all or part of this trip and has enclosed disclosure forms from each of those entities.

If "c" is checked, list the names of the additional sponsors:

4. Provide names and titles of **ALL** House Members *and* employees you are inviting. **For each House invitee, provide an explanation of why the individual was invited** (include additional pages if necessary):

See addendum & attached invitation list

5. Yes ☐ No ☐ Is travel being offered to an accompanying family member of the House invitee(s)?

6. Date of departure: June 1, 2022 Date of return: June 3, 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:



U.S. House of Representatives

COMMITTEE ON ETHICS

10. ☐ Attached is a detailed agenda of the activities House invitees will be participating in during the travel (i.e., an hourly description of planned activities for trip invitees). *Indicate agenda is attached by checking box.*
11. **Check only one of the following:**
- a. ☐ I represent that a registered federal lobbyist or foreign agent will not accompany House Members or employees on any segment of the trip. *Signify that the statement is true by checking box; OR*
- b. ☐ *Not Applicable.* Trip sponsor is a U.S. institution of higher education.
12. For **each** sponsor required to submit a sponsor form, describe the sponsor's interest in the subject matter of the trip **and** its role in organizing and/or conducting the trip:
- See addendum

13. **Answer parts a and b. Answer part c if necessary:**

- a. Mode of travel: Air ☐ Rail ☐ Bus ☒ Car ☐ Other ☐ (specify: _____)
- b. Class of travel: Coach ☒ Business ☐ First ☐ Charter ☐ Other ☐ (specify: _____)
- c. If travel will be first class, or by chartered or private aircraft, explain why such travel is warranted:

14. ☒ I represent that the expenditures related to local area travel during the trip will be unrelated to personal or recreational activities of the invitee(s). *Signify that the statement is true by checking 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):

Day 1 - \$51, Day 2 - \$88, Day 3 - \$21

- 2) 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: Kingsmill City: Williamsburg, VA Cost Per Night: \$118 +taxes

Reason(s) for Selecting: proximity to DC, availability, security & facility size

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

Reason(s) for Selecting: _____

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

Reason(s) for Selecting: _____

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



U.S. House of Representatives

COMMITTEE ON ETHICS

18. Total Expenses for each Participant:

☐ Actual Amounts ☒ Good Faith Estimates	Total Transportation Expenses per Participant	Total Lodging Expenses per Participant	Total Meal Expenses per Participant
For each Member, Officer, or Employee	\$106	\$269	\$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	\$451	Room Rental
For each Accompanying Family Member	\$451	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: April 12, 2022
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

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

May 25, 2022

Mr. Jeffrey Kratz
Office of the Honorable Don Bacon
1024 Longworth House Office Building
Washington, DC 20515

Dear Mr. Kratz:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to Williamsburg, Virginia, scheduled for June 1 to 3, 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

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 roles of Legislative Directors and Communications staff in congressional offices. Therefore, the invitation to this retreat is being extended to legislative directors and the most senior communications staffer in House Republican personal offices and committee offices as well as policy and communication staff in leadership offices.

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. The Congressional Institute is dedicated to helping Congressional offices better serve their constituents and to otherwise support and further the Member's legislative and representational roles. Legislative Directors and Communications Directors play essential parts in these, and other important aspects and functions, of personal, committee, and leadership offices. This retreat is designed to strengthen professional relationships among Legislative Directors and senior Communications 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 audio/visual capabilities necessary to conduct our program. Dividing these conference and banquet room rental costs by the number of participants estimated to attend this event, the estimated figure would be \$323.



Legislative and Communication Directors Conference

October 13-15, 2021
The Kingsmill, Williamsburg, Virginia

Wednesday, October 13, 2021

11:30 AM	Buses Depart	Rayburn Horseshoe
3:00 PM	Check-In	
4:00 PM	Welcome Mark Strand, Congressional Institute	
4:10 - 5:15 PM	Americans' Views on Today's Topics Rob Autry, Meeting Street Dave Sackett, Tarrance Group	
5:15 - 6:25 PM	GOP Outreach to Hispanic Communities David Winston, The Winston Group Myra Miller, The Winston Group Daniel Garza, The Libre Initiative	
6:30 - 9:00 PM	Reception & Dinner Kim Strassel, Wall Street Journal	

Thursday, October 14, 2021

8:00 - 8:45 AM	Breakfast	
9:00 - 10:00 AM	House Leadership Presentation Moderator: Mark Strand, Congressional Institute Will Dunham, Office of GOP Leader Kevin McCarthy Matt Sparks, Office of GOP Leader Kevin McCarthy	

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

Marty Reiser, Office of GOP Whip Steve Scalise
Lauren Fine, Office of GOP Whip Steve Scalise

10:00 - 11:00 AM **Congressional Ethics: A Primer**
Elliot Berke, Berke Farah LLP
Erin Clark, NRCC

11:00 - 12:00 PM **Constituent Communications: Strategies and Standards**
Moderator: Mark Strand
Elisabeth Conklin, House Communications Standards Commission
Max Engling, Office of GOP Leader Kevin McCarthy

12:00 - 1:15 PM **Lunch: How Adam Smith Can Change Your Life**
Russ Roberts, Hoover Institution

Legislative Directors

1:15-2:30 The Economy, Inflation and the Debt
Michael Strain, AEI
Scott Hodge, Tax Foundation
Maya MacGuineas, Committee for a
Responsible Federal Budget

2:45-4:15 American Security
Moderator: Mark Strand
Senator Jim Talent, AEI
Rob Greenway, Hudson Institute
Mackenzie Eaglen, AEI

4:30-6:00 Healthcare
Marie Fishpaw, Heritage Foundation
Brian Blase, Galen Institute
Chris Pope, Manhattan Institute

Communication Directors

**1:15-2:45 Communicating with a Hostile
Press/Communicating in the Minority**
Michael Steel, Hamilton Place
Strategies

3:00-4:30 How to Pitch to the Media
Jessica Towhey, 2e Communications
Charyssa Parent, House Republican
Conference

**4:45-6:15 The Latest on Digital Media Best
Practices**
Matt Lira, Hangar Capital
Katlyn Karnes, Former White House

Digital Director
Steve Johnston, FlexPoint Media

7:00 - 9:00 PM **Reception and Dinner**
Josh Holmes, *Ruthless* podcast

Friday, October 15, 2021

8:00 AM **Breakfast**

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

9:00-10:00 AM

The Budget Process 101

Bill Hoagland, Bipartisan Policy Center

Douglas Holtz-Eakin, American Action Forum

James C. Capretta, American Enterprise Institute

10:00-11:00 AM

How to Negotiate

Moderator: Mark Strand

Alex Kouts, Indigov

11:00-12:00 PM

A Guide to Redistricting

Adam Kincaid, National Republican Redistricting Trust

12:00 PM

End of Retreat

Buses Depart

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

From: Congressional Institute rsvp@conginst.org
Subject: Test - Legislative and Communication Directors Conference: Registration
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**2021 Legislative and
Communication Directors
Conference**

Wednesday, October 13, 2021 -
Friday, October 15, 2021
Kingsmill



**PLEASE NOTE: TRAVELER FORMS ARE DUE TO ETHICS ON
MONDAY, SEPTEMBER 13, 2021!!!**

Dear */fname/*,

The Congressional Institute is once again honored to host the annual 2021 Legislative and Communication Directors Conference, from Wednesday, October 13, 2021, through Friday, October 15, 2021, at the Kingsmill in Williamsburg, VA. We hope you will join us.

This invitation is being extended to legislative directors and the most senior communications staffer in Republican House personal offices, committee offices, and leadership staff. The conference is designed to strengthen professional relationships, educate you on policy issues and best practices, and encourage productive conversations with your colleagues.

Please note that this conference is limited to two staff members from each personal and committee office: one person from the legislative shop and one person from the communications/press shop.

To Register:

Step 1: Submit Ethics Packet by Monday, September 13, 2021

To comply with House rules, you need pre-authorization from the Committee on Ethics. Download the Institute's [Private Sponsor Travel Certification Form](#) and submit the whole package with your completed Traveler Form by Monday, September 13, 2021, 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 the cost would need to be covered by your Member's principal campaign committee funds.

Additionally, you must file a travel disclosure statement with the Clerk of the House within 15 days of your return.

Step 2: Register with the Congressional Institute's website

The Congressional Institute will coordinate all logistical arrangements, including room reservations, meals, group transportation and meetings during the conference. 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.

To Register:

[Register for 2021 Legislative and
Communication Directors Conference](#)

Email Address:

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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 conference will be sent to you in future 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!

Best wishes,

Mark Strand, President
The Congressional Institute
(703) 837-8812 - Office
strand@conginst.org

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If you are not the correct contact for this office, please [reply to this email](#) with the updated contact information instead of [unsubscribing](#).

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