

#### 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: Kevin O'Keete	
2.	a. Name of Accompanying Relative:	OR None 🛛
	b. Relationship to Traveler: 🗆 Spouse 🛛 Child 🗂 Other (specify):	
3.	a. Dates: Departure: June 1, 2022 Return: June 3, 2022	
	b. Dates at Personal Expense, if any:	OR None 🖾
4.	Departure City: <u>Arlington, VA</u> Destination: <u>Williamsburg, VA</u> Return City: <u>Arlin</u>	yton, VA
5.	Sponsor(s), Who Paid for the Trip: Congress Sanaf Institute	J
	Describe Meetings and Events Attended: Lesislative & management Summars & World	1 Souls
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- 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. If the Primary Trip Sponsor Form completed by the trip sponsor prior to the trip, including all attachments and the Additional Sponsor Form(s);
  - c. D page 2 of the completed *Traveler Form* submitted by the employee; and
  - d.  $\Box$  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:

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. \_\_\_\_\_ Date: <u>6/14/2022</u>

Date: June 13, 2022

Name of Supervising Member: \_\_\_\_\_\_\_ Signature of Supervising Member: \_\_\_\_\_\_\_ Hed Kelle Signature of Supervising Member: \_\_\_

Version date 3/2021 by Committee on Ethics



# U.S. House of Representatives ETHCS

## 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	\$0	\$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:

Name: Mark Strand

Date:	June	9,	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.

Version date 3/2021 by Committee on Ethics



# U.S. House of Representatives ETHICS

## **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: Kevin O'Keefe

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): Fred Keller

Office Address: 1717 Longworth House Office Building, Washington, DC 20515

Telephone Number: 202-225-3731

Email Address of Contact Person: kevin.okeefe@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*.

Head Teller



# U.S. House of Representatives ETHICS

## TRAVELER FORM

1.	Name	of Traveler:	Kevin	O'Keefe
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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 : <u>Williamsburg, VA</u>
- 4. a. Date of Departure: <u>6/1/2022</u> Date of Return: <u>6/3/2022</u>
  - 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 O 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. As Rep. Keller's Legislative Director, interacting with other congressional staff and building relationships is connected to my role and will help advance our office's legislative priorities.
- 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 4/29/2022



## 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:
    - 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:



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 🗌 1	Bus 🔳 Car 🗌	Other	(specify:	)
b. Class of travel:	Coach 🔳 Busines	s 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
- 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	<sub>City:</sub> <u>Williamsburg</u> , VA	Cost Per Night: <u>\$118 +taxes</u>
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. Irepresent 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	\$269	\$160
For each Accompanying Family Member	\$106	n/a	\$160

5	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:
Signature: Mark Strand	Title: President
Organization: Congressional Institute	an a
Address: 1700 Diagonal Road #300, Alexandria, VA 22314	"";
Email: strand@conginst.org	Telephone: 203-837-8812

## **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: 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 ETHCS

- 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. 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
    - 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: <u>\$118 +taxes</u>
Reason(s) for Selecting: proximity to DC, a	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. 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	\$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	April 12, 2022
Signature: Mark Strand	Title: President
Organization: Congressional Institute	
Address: 1700 Diagonal Road #300, Alexandria, VA 22314	

Email: \_\_\_\_\_\_

\_Telephone: <u>703-837-8812</u>

## 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	

<u>ethicscommittee@mail.house.gov</u> | 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

May 25, 2022

Mr. Kevin O'Keefe Office of the Honorable Fred Keller 1717 Longworth House Office Building Washington, DC 20515

Dear Mr. O'Keefe:

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.

Theodore E. Deutch Chairman

Sincerely,

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 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 \$451.

From: Congressional Institute rsvp@conginst.org

Subject: Test - Register Now for the Legislative and Communication Directors Conference

Date: April 12, 2022 at 2:52 PM

To: amym@conginst.org



#### PLEASE NOTE: TRAVELER FORMS ARE DUE TO ETHICS ON MONDAY, MAY 2, 2022!!!

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

The Congressional Institute is once again honored to host the annual 2022 Legislative and Communication Directors Conference, from Wednesday, June 1, 2022, through Friday, June 3, 2022, 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.

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, May 2, 2022

To comply with House rules, you need pre-authorization from the Committee on Ethics. Download the Institute's <u>Private</u> <u>Sponsor Travel Certification Form</u>, complete the traveler form and submit the whole package with your completed Traveler Form by Monday, May 2, 2022, to the Committee on Ethics. This entire package may be emailed to the Committee at travel.requests@mail.house.gov or delivered to the Committee at 1015 Longworth.

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.

Register for 2022 Legislative and Communication Directors Conference 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 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!

## Mark Strand, President

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



RC



## 2022 House Republican Legislative and Communication Directors Conference Williamsburg, VA

## Wednesday, June 1

- 11:30 AM Bus Departs from Hill
- 2:00 PM Nametag Pickup
- 3:00 PM Welcome
- 3:15 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
- 4:15 PM Ethics: Official, Campaigns, and Redistricting Elliot Berke, Berke Farah LLC Erin Clark, NRCC Tim Monahan, Committee on House Administration

## 6:00 PM Reception & Dinner Katie Pavlich, *Townhall*

Thursday, June 2

8:00 AM	Breakfast
0.00 414	Loodenship Deline and Communication Directors
9:00 AM	Leadership Policy and Communication Directors
	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
12:00 PM	Lunch
	Os Guinness, Author & Social Critic

## **Policy Breakouts**

1:30 PM	<b>A Governing Agenda for the 118<sup>th</sup> Congress: House GOP Task Forces</b> Moderator: Mark Strand, Congressional Institute House GOP Task Force Staffers
2:30 PM	<b>Drafting and Passing Legislation</b> Hugh Halpern, Former House Rules Committee Staff Director TBD, House Office of the Legislative Counsel
3:45 PM	How to Think Like an Economist Steven Rhoads, University of Virginia Ryan Bourne, Cato Institute
	Communications Breakouts
1:30 PM	<b>Communicating the Republican Agenda: House GOP Task Forces</b> Moderator: Jessica Towhey, Congressional Institute/2e Communications
2:30 PM	Crisis Communications Craig Stephens, DCI Group
3:45 PM	Speechwriting 101 TBD, TBD
6:00 PM	Reception & Dinner Walter Russell Mead, The Wall Street Journal
	Friday, June 3
8:00 AM	Breakfast
9:00 AM	How to Conduct Effective Oversight The Honorable Kelly Armstrong, U.S. House of Representatives Machalagh Carr, Office of the Republican Leader Steve Castor, House Judiciary Committee William Burck, Quinn Emanuel Urguhart & Sullivan, LLP

- 10:30 AM Budget, Appropriations, & Taxes: Understanding & Explaining A Mystery Matt Glassman, Georgetown University Anne Marie Chotvaks, Committee on Appropriations J.P. Freire, Committee on Ways and Means
- 12:00 PMConference ConcludesBus departs from Kingsmill

First Name	Last Name	Job Title	Institution
Steve	Ackerman	Legislative Director	Office of Rep. Fulcher
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Speechwriter
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Office of Rep. Comer	Communications Director	Smith	Matt
Office of Rep. Timmons	Communications Director	Smith	Heather
Office of Rep. Joyce (OH)	Legislative Director	smith	Burke
Office of Rep. Donalds	Legislative Director	Smith	Alex

Tim	Svoboda	Deputy Chief of Staff/Communications Director	Office of Rep. Grothman
Phillip	Swagel	Director	Congressional Budget Office
Conner	Swanson	Communications Director	Office of Rep. Armstrong
Chris	Sweet	Legislative Director	Office of Rep. Diaz-Balart
Angela	Swinson	Director of Communications	Office of Rep. Gohmert
Michael	Taggart	Policy Director	House Committee on Energy and Commerce
Sarah	Talmage	Legislative Director	Office of Rep. Zeldin
Shaun	Taylor	Legislative Director	Office of Rep. Fallon
Charlotte	Taylor	Communications Director	Office of Rep. Bucshon
Emily	Taylor	Communications Director	Office of Rep. Meijer
Trevor	TenBrink	Legislative Director	Office of Rep. Huizenga
Elissa	Tew	Communications Director	Office of Rep. Buck
Taylor	Theodossiou	Press Secretary	Office of Rep. McHenry
James	Thomas	Legislative Director	Office of Rep. Lamborn
Jett	Thompson	Legislative Director	Office of Rep. Bice
Emma	Thomson	Communications Director	Office of Rep. Walorski
Sadie	Thorman	Communications Director	Office of Rep. Steube
Daniel	Tidwell	Legislative Director	Office of Rep. Fleischmann
Michaela	Todd	Press Secretary	Office of Rep. Mann
Nicholas	Tortorici	Legislative Director/Deputy Chief of Staff	Office of Rep. Armstrong
Matthew	Tragesser	Communications Director	Office of Rep. Biggs
Catherine	Treadwell	Legislative Director	Office of Rep. Cawthorn
Claire	Trokey	Legislative Director	Office of Rep. Scalise
Charlie	Truxal	Legislative Director	Office of Rep. Franklin
Matt	Tucker	Deputy Chief of Staff/ Legislative Director	Office of Rep. Joyce (PA)
Caroline	Tucker	Communications Director	Office of Rep. Moore (UT)
Will	Turner	Legislative Director	Office of Rep. Garcia
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Office of Rep. Higgins	Deputy Chief of Staff	Westmoreland	Grayson
Office of Rep. Taylor	Legislative Director	Weldon	Laura
Office of Rep. Carl	Communications Director	Weidlich	Zachary
Office of Rep. Carter (GA)	Deputy Chief of Staff	Wehagen	Robby
Office of Rep. Fischbach	Press Secretary	Weber	Lauren
Office of Rep. Turner	Legislative Director	Ward	Maggie
Office of Rep. Murphy	Legislative Director	Wallwork	Luke
Office of Rep. Simpson	Communications Director/District Director	Wallace	Nikki
Office of Rep. Miller (WV)	Communications Director	Wallace	Tatum
House Committee on Intelligence	Communications Director	Walker	Rachel
House Committee on Intelligence	Communications Director	Walker	Rachel
Office of Rep. Fitzgerald	Legislative Director	Wagener	Rob
House Republican Conference	Policy Director	Vreeburg	Jake
Office of Rep. Burgess	Communications Director	Voyles	Sarah Anne
Office of Rep. McMorris Rodgers	Communications Director	VonEnde	Kyle
Office of Rep. Smith (NJ)	Legislative Director/Senior Policy Advisor	Vigil	Mary
Office of Rep. Smucker	Legislative Director	Verhelst	Noelle
Office of Rep. Bilirakis	Legislative Director/Deputy Chief of Staff	Vecchi	Jonathan
Office of Rep. LaMalfa	Legislative Director	Veale	John
House Committee on Science, Space and Technology	Communications Director	Vaughan	Heather
House Committee on Small Business	Communications Director	VanHyfte	Matt
Office of Rep. Barr	Legislative Director	VanderToll	Hunt
Office of Rep. DesJarlais	Communications Director	Vanderford	Alex
Office of Rep. Reschenthaler	Communications Director	Vance	Alexa
Office of Rep. Mace	Deputy Chief of Staff/Legislative Director	Van Every	Madison
Office of Rep. Gimenez	Legislative Director	Valentine	Ē
Office of Rep. Posey	Legislative Director	Valenta	Valentina
Office of Rep. Gaetz	Communications Director	Valdez	Joel

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Johnny	Nate	Mac	Lauren	Ryan	Alex	Dominique	Rob	Dan	Joshua	Maggie	Emily	Jordan	Kelsey	David	Laura	Haley	Jonathan	Jett	Jelli	Calla	lan	Grace	Allie	Connor	
Zwaanstra	Zimpher	Zimmerman	Ziegler	Young	Yost	Yelinski	Yavor	Wunderlich	Woodward	Woodin	Wood	Wood	Wolfgram	Winfrey	Wilson	Wilson	Wilcox	Wieand	Wickre	Wickenhauser	Whitson	White	White	White	Wheeler
Legislative Director	Legislative Director	Legislative Director	Legislative Director	Legislative Director	Legislative Director	Legislative Director	Policy Director	Communications Director	Legislative Director	Legislative Director	Press Secretary	Legislative Director	Senior Legislative Assistant	Legislative Director	Legislative Director	Legislative Director	Communications Director	Counsel	Policy Director	Communications Assistant (DC)	Legislative Director	Communications Director	Legislative Director	Legislative Director	Communications Director
Office of Rep. Lesko	Office of Rep. Balderson	Office of Rep. Tiffany	Office of Rep. Babin	Office of Rep. Sessions	Office of Rep. Owens	Office of Rep. Hern	House Committee on Small Business	Office of Rep. Schweikert	Office of Rep. Cammack	Office of Rep. Meijer	Office of Rep. Duncan	Office of Rep. Gooden	Office of Rep. Burchett	Office of Rep. Granger	Office of Rep. Johnson (OH)	Office of Rep. Rogers (AL)	Office of Rep. Issa	Office of the Whip	House Committee on Science, Space and Technology	Office of Rep. Davis	Office of Rep. Rouzer	Office of Rep. Steil	Office of Rep. Ferguson	Office of Rep. Davidson	Office of Rep. Herrera Beutler

## **Post-Travel Disclosure Instructions:**

- Complete the Employee Post-Travel Disclosure Form (Page 2 of this packet)
- Attach page 2 of the completed Traveler Form submitted pre-travel by the employee; **and** the letter from the Committee on Ethics approving participation on this trip.
- file the entire packet with the Clerk of the House, by email at gifttravelreports@mail.house.gov, within 15 days after travel

## 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 \$451.

From: Congressional Institute rsvp@conginst.org

Subject: Test - Register Now for the Legislative and Communication Directors Conference

Date: April 12, 2022 at 2:52 PM

To: amym@conginst.org



#### PLEASE NOTE: TRAVELER FORMS ARE DUE TO ETHICS ON MONDAY, MAY 2, 2022!!!

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

The Congressional Institute is once again honored to host the annual 2022 Legislative and Communication Directors Conference, from Wednesday, June 1, 2022, through Friday, June 3, 2022, 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.

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, May 2, 2022

To comply with House rules, you need pre-authorization from the Committee on Ethics. Download the Institute's <u>Private</u> <u>Sponsor Travel Certification Form</u>, complete the traveler form and submit the whole package with your completed Traveler Form by Monday, May 2, 2022, to the Committee on Ethics. This entire package may be emailed to the Committee at travel.requests@mail.house.gov or delivered to the Committee at 1015 Longworth.

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.

<u>Register for 2022 Legislative and Communication Directors Conference</u> 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 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!

## Mark Strand, President

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





2022 House Republican Legislative and Communication Directors Conference Williamsburg, VA

### Wednesday, June 1

- 11:30 AM Bus Departs from Hill
- 2:00 PM Nametag Pickup
- 3:00 PM Welcome
- 3:15 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
- 4:15 PM Ethics: Official, Campaigns, and Redistricting Elliot Berke, Berke Farah LLC Erin Clark, NRCC Tim Monahan, Committee on House Administration
- 6:00 PM Reception & Dinner Katie Pavlich, *Townhall*

Breakfast

8:00 AM

Thursday, June 2

9:00 AM Leadership Policy and Communication Directors Dan Meyer, Office of the Republican Leader Brett Horton, Office of the Republican Whip Patrick Hester, House Republican Conference

10:00 AMPreparing to Manage In the 118th CongressMark Horstman, Manager Tools, LLC

## **12:00 PM Lunch** Os Guinness, Author & Social Critic

## **Policy Breakouts**

- **1:30 PM**A Governing Agenda for the 118th Congress: House GOP Task ForcesModerator: Mark Strand, Congressional InstituteHouse GOP Task Force Staffers
- 2:30 PM Drafting and Passing Legislation Hugh Halpern, Former House Rules Committee Staff Director TBD, House Office of the Legislative Counsel
- **3:45 PM** How to Think Like an Economist Steven Rhoads, University of Virginia Ryan Bourne, Cato Institute

## **Communications Breakouts**

- 1:30 PMCommunicating the Republican Agenda: House GOP Task ForcesModerator: Jessica Towhey, Congressional Institute/2e Communications
- 2:30 PM Crisis Communications Craig Stephens, DCI Group
- 3:45 PM Speechwriting 101 TBD, TBD
- 6:00 PM Reception & Dinner Walter Russell Mead, *The Wall Street Journal*

Friday, June 3

8:00 AM Breakfast

9:00 AM How to Conduct Effective Oversight The Honorable Kelly Armstrong, U.S. House of Representatives Machalagh Carr, Office of the Republican Leader Steve Castor, House Judiciary Committee William Burck, Quinn Emanuel Urquhart & Sullivan, LLP

- 10:30 AM Budget, Appropriations, & Taxes: Understanding & Explaining A Mystery Matt Glassman, Georgetown University Anne Marie Chotvacs, Committee on Appropriations J.P. Freire, Committee on Ways and Means
- 12:00 PM Conference Concludes Bus departs from Kingsmill



## 2022 Legislative and Communication Directors Conference

	Wednesday, June 1, 2022	
1:00 PM	Nametag Pickup	Conference Desk
2:00 PM	Welcome Mark Strand, Congressional Institute	Burwell Ballroom
2:15 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	Burwell Ballroom
3:15 PM	<b>Ethics: Official, Campaigns, and Redistricting</b> Bill Farah, Berke Farah LLP Blake Murphy, NRCC	Burwell Ballroom
4:15 PM	<b>The Republican Coalition: Working As One</b> Moderator: David Winston, The Winston Group Ryan Streeter, American Enterprise Institute Chad Wolf, America First Policy Institute	Burwell Ballroom
6:00 PM	<b>Reception</b> <b>Dinner</b> <i>Creating an American Majority</i> The Honorable Newt Gingrich, 50 <sup>th</sup> Speaker of the House of Re	James River Grand Foyer James River Grand Ballroom presentatives
	Thursday, June 2, 2022	
8:00 AM	Breakfast	James River Grand Ballroom
9:00 AM	Leadership Policy and Communication Directors Moderator: Mark Strand, Congressional Institute Emily Domenech, Office of Leader Kevin McCarthy Preston Hill, Office of Leader Kevin McCarthy Steve Giaier, Office of Leader Kevin McCarthy Lauren Fine, Office of Whip Steve Scalise Ben Napier, Office of Whip Steve Scalise Ali Pardo, House Republican Conference Jake Vreeburg, House Republican Conference	Burwell Ballroom
10:00 AM	<b>Preparing to Lead In the 118<sup>th</sup> Congress</b> Mark Horstman, Manager Tools, LLC	Burwell Ballroom
12:00 PM	<b>Lunch</b> Os Guinness, Author & Social Critic	James River Grand Ballroom

## Policy Breakouts Burwell Ballroom

## 1:30 PM How to Draft Legislation Effectively Moderator: Mark Strand, Congressional Institute Wade Ballou, House Legislative Counsel Phillip Swagel, Director, Congressional Budget Office 2:30 PM Schoolhouse Pocks Revisited: Passing

## 2:30 PM Schoolhouse Rocks Revisited: Passing Your Member's Bill

Arne Christenson, Former Chief of Staff to the Speaker of the House Hugh Halpern, Former House Rules Committee Staff Director & Floor Ralph Hellman, Former Policy Director to the Speaker of the House

## Communications Breakouts Tazewell Room

## 1:30 PM Taking Control of Your Message on Digital Channels Daria Grastara, NRSC Matt Lira, Hangar Capital

**2:15 PM** Crisis Communications Ed Patru, Direct Communications Co.

#### **James River Grand Fover** 6:00 PM Reception Dinner James River Grand Ballroom Can NATO Promote International Security and Prosperity? A Fireside Chat with Members of the Diplomatic Community Moderator: Mark Strand, Congressional Institute Theodoros Bizakis, Minister Counselor-Deputy Chief of Mission Embassy of Greece Adam Krzywosądzki, Deputy Chief of Mission, Embassy of Poland Friday, June 3, 2022 James River Grand Ballroom 8:00 AM Breakfast Burwell Ballroom **How to Conduct Effective Oversight** 9:00 AM The Honorable Kelly Armstrong, U.S. House of Representatives William Burck, Quinn Emanuel Urguhart & Sullivan, LLP Machalagh Carr, Office of the Republican Leader Steve Castor, House Judiciary Committee Burwell Ballroom 10:00 AM The Appropriations Process: Understanding & Explaining A Mystery Anne Marie Chotvacs, Committee on Appropriations Jennifer Hing, Former Appropriations Committee Communications Director **Burwell Ballroom** Dobbs v. Jackson and the Future of the Pro-Life Movement 11:00 AM Autumn Christensen, Susan B. Anthony List Katie Glenn, Americans United For Life Tim Saccoccia, Knights of Columbus 12:00 PM **Conference Concludes**

Bus departs from Lobby