

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: Peter J. Stein
2. a. Name of Accompanying Relative: _____ **OR** None
b. Relationship to Traveler: Spouse Child Other (specify): _____
3. a. Dates: Departure: 03/28/2025 Return: 03/30/2025
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: The Foundation for Research on Equal Opportunity
6. Describe Meetings and Events Attended: Federal policy issues panel discussions on federal budget; fiscal policy; immigration reform; AI & technology regulation; school choice & education
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:  Date: 04/04/2025

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: Rep. Diana Harshbarger Date: 04/04/2025

Signature of Supervising Member: 

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 in the trip within 10 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 or provided in-kind support for the trip: The Foundation for Research on Equal Oppor

2. Travel Destination(s): Williamsburg, VA

3. Date of Departure: 3/28/2025

Date of Return: 3/30/2025

4. Name(s) of Traveler(s): Peter Stein

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	\$30.00	\$310.88	\$253.00	\$16.00 - Colonial Williamsburg Candlelight Walk
Accompanying Family Member	NA	NA	NA	NA

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: Rebecca Atwood

Date: 3/31/2025

Name: Rebecca Atwood

Title: Vice President

Organization: The Foundation for Research on Equal Opportunity

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

Address: 201 West Fifth Street, Suite 1100, Austin, TX 78701

Telephone: 970-231-2752

Email: ratwood@freopp.org

Committee staff may contact the above-named individual if additional information is required.

If you have questions regarding your completion of this form, please contact the Committee on Ethics at 202-225-7103.

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 submitted at 1015 Longworth House Office Building or 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: Peter J. Stein

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: Peter J. Stein

Name of Signatory (if other than traveler): _____

For Staff (name of employing Member or Committee): Rep. Diana Harshbarger (TN-01)

Office Address: 167 Cannon House Office Building

Telephone Number: (202) 225-6356

Email Address of Contact Person: peter.stein@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 email: travel.requests@mail.house.gov.

COMMITTEE ON ETHICS

TRAVELER FORM

1. Name of Traveler: Peter J. Stein
2. Sponsor(s) who will be paying or providing in-kind support for the trip: Foundation for Research on Equal Opportunity / Freedom Conservatism
3. City and State **OR** Foreign Country of Travel: Williamsburg, VA
4. a. Date of Departure: March 28, 2025 Date of Return: March 30, 2025
- 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, invitation, 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 am Senior Policy Advisor to Rep. Harshbarger. In handling healthcare, tax, budget and a handful of other issues for the Congresswoman, my participation will enhance my understanding and knowledge of these important issues, and enable me to better serve as a policy expert for advising Rep. Harshbarger, and for serving constituents.

9. Yes No **Is the traveler aware of any registered federal lobbyists or foreign agents involved in 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: January 31, 2025

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's website (ethics.house.gov) provides detailed instructions for filling out the form. The Committee will notify the House invitees directly of its decision and will not notify the trip sponsors.

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. Signatures must comply with section 104(bb) of the Travel Regulations.

1. Sponsor who will be paying for the trip:

The Foundation for Research on Equal Opportunity

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, services, or in-kind assistance 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 attached

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

6. Date of Departure: 3/28/2025 Date of Return: March 30, 2025

7. a. City of departure: 3/30/2025

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 the statement is true by clicking the 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:
The sponsor is hosting this event to help provide Hill staff with learning opportunities on how to apply the timeless principles of liberty to the challenges of the 21st century. The sponsor is organizing the entirety of the event, including the agenda, transportation, and lodging.
-

13. **Answer parts a and b. Answer part c if necessary:**
- a. Mode of travel: Air Rail Bus Car Other (specify: _____)
 - b. Class of travel: Coach Business First Charter Other (specify: _____)
 - c. If travel will be first class, or by chartered or private aircraft, explain why such travel is warranted:

-

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

15. **Check only one.** I represent that either:
- a. The trip involves an event that is arranged or organized *without regard* to congressional participation and that meals provided to congressional participants are similar to those provided to or purchased by other event attendees; **OR**
 - b. The trip involves events that are arranged specifically *with regard* to congressional participation. If "b" is checked:
 - 1) Detail the cost *per day* of meals (approximate cost may be provided): Friday, March 28: \$72;
Saturday, March 29: \$131; Sunday, March 30: \$35
 - 2) Provide the reason for selecting the location of the event or trip: Reachable by bus.
Budget aligned to rules.
-

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

Hotel Name: Williamsburg Lodge City: Williamsburg, VA Cost Per Night: \$137
 Reason(s) for Selecting: Can reach by bus and budget aligned.

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.*

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

<input checked="" type="checkbox"/> Actual Amounts <input type="checkbox"/> Good Faith Estimates	Total Transportation Expenses per Participant	Total Lodging Expenses per Participant	Total Meal Expenses per Participant
For each Member, Officer, or Employee	\$30	\$274	\$238
For each Accompanying Family Member	NA	NA	NA


	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	NA	NA
For each Accompanying Family Member	NA	NA

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: 3/31/2025
 Name: Rebecca Atwood Title: Vice President
 Organization: The Foundation for Research on Equal Opportunity
 Address: 201 West Fifth Street, Suite 1100, Austin, TX 78701
 Email: ratwood@freopp.org Telephone: 970-231-2752

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

Michael Guest, Mississippi
Chairman
Mark DeSaulnier, California
Ranking Member

John H. Rutherford, Florida
Andrew R. Garbarino, New York
Ashley Hinson, Iowa
Nathaniel Moran, Texas

Deborah K. Ross, North Carolina
Glenn F. Ivey, Maryland
Sylvia R. Garcia, Texas
Suhas Subramanyam, Virginia



ONE HUNDRED NINETEENTH CONGRESS

U.S. House of Representatives

COMMITTEE ON ETHICS

Thomas A. Rust
Staff Director and Chief Counsel

Keelie Broom
Counsel to the Chairman

David Arrojo
Counsel to the Ranking Member

1015 Longworth House Office Building
Washington, D.C. 20515-6328
Telephone: (202) 225-7103
<https://Ethics.House.gov>

March 25, 2025

Mr. Peter Stein
Office of the Honorable Diana Harshbarger
167 Cannon House Office Building
Washington, DC 20515

Dear Mr. Stein:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to Williamsburg, Virginia, scheduled for March 28 to 30, 2025, sponsored by Foundation for Research on Equal Opportunity.

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 \$480 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,

Michael Guest
Chairman

Mark DeSaulnier
Ranking Member

MG/MD:eme

Committee on Ethics – Primary Trip Sponsor Form

Question 4 Attachment:

FREOPP is hosting this event to help provide Hill staff with learning opportunities on how to apply the timeless principles of liberty to the challenges of the 21st century. Invitations to participate went out to all member offices who identify their approaches as part of the conservative spectrum. This event will give Hill staff the opportunity to learn about ways to apply the timeless principles of liberty to the challenges of the 21st century to improve the lives of Americans who need it most.



Freedom Conservatism
Congressional Staff Retreat
March 28-30, 2025
The Williamsburg Lodge
Williamsburg, VA

Friday, March 28, 2024

- 3:15 PM **Bus Meetup/ Loading**
750 Pennsylvania Ave. SE, Washington, DC 20003
- 3:30 PM **Bus Departs (2.5- 3 hour drive)**
Pickup Outside Trade Joe's
750 Pennsylvania Ave. SE, Washington, DC 20003
- 6:45 PM **Check-in at hotel**
- 7:15 PM **Dinner & Program**
Freedom Conservatism Introduction and Retreat Overview
In this session, speakers will talk about Freedom Conservatism and the [Statement of Principles](#).
- John Hood**, President, John William Pope Foundation
(confirmed)
- 7:30 PM **Fireside Chat**
**Expanding American Conservatism: Freedom As
An Engine of Social Mobility**
- Freedom Conservatives believe any political coalition broad enough to win elections and govern effectively will inevitably encompass leaders, thinkers, and activists with differing views. What do efforts to build that coalition entail? What tools can we employ to help forge strong coalitions into the future?

John Hood, President, John William Pope Foundation
(confirmed)

Jonah Goldberg, Columnist, The Dispatch (confirmed)

8:20 PM **Retreat Goals & Logistics Overview**
Coordinators will go over the agenda and logistics for the retreat.
Laura Maristany, Sr. Advisor, Freedom Conservatism (confirmed)

8:30 pm **Adjourn**

Saturday, March 29, 2025

8:30 AM **Breakfast Buffet**

8:50 AM **Welcome Remarks & Introduction to 9:00 am session**

Akash Chougule, President, FREOPP (confirmed)

9:00 AM **The Future of School Choice: Federal and State Perspectives**

This session will explore the evolving landscape of school choice, highlighting key legislative and policy efforts at both the federal and state levels. Aligned with the principles of the Freedom Conservatism movement, the discussion will emphasize parental empowerment, educational freedom, and policies that expand access to high-quality learning options. Attendees will gain insights into recent advancements, challenges, and opportunities in shaping a more competitive and accountable education system that prioritizes student success over bureaucratic control.

Moderator: Rachel Barkley, Executive Director, Alliance for Opportunity (confirmed)

Speakers:

Andrew Clark, President, yes. every kid. (confirmed)

Dan Lipps, Head of Policy, Foundation for American Innovation & Visiting Fellow, FREOPP (confirmed)

10:30 am **Americans By Choice: Immigration as a Principal Driver of American Prosperity and Achievement**

Legal immigration enriches America's cultural fabric and plays a vital role in sustaining a strong, dynamic economy, but our current system for managing it is broken. This panel will explore ways to fix some of its most pressing issues, including strengthening legal immigration pathways to address workforce shortages, drive economic growth, and enhance national competitiveness. Panelists will discuss the biggest challenges facing the current system and propose solutions to ensure that legal immigration continues to support a vibrant society.

Moderator: Isabel Soto, Director of Policy, The Libre Initiative (confirmed)

Speakers:

Mario H. Lopez, President, Hispanic Leadership Fund (confirmed)

David Bier, Director of Immigration Studies, CATO Institute (confirmed)

Daniel Di Martino, Graduate Fellow, Manhattan Institute (confirmed)

12:00 PM **Buffet Lunch + Networking**

12:30 PM **Guided Table Conversations**

Each table will have at least one Freedom Conservatism thought leader to help guide conversations on the chosen topic for that table.

Table conversations will include FreeCon signatories in every table.

Invited Signatories:

Akash Chougule, FREOPP

Taylor Barkley, Abundance Institute (AI-Technology)

Mario H. Lopez

1:15 PM **How Pro-Growth Tax Policies and Common Sense Deregulation Help America's Families: Examination of Legislative Approaches to Fiscal Sustainability**

In this session, we will discuss how the federal debt is overshadowing policy priorities across issues and the pending debt crisis the US may face. Experts will take a close look at the leading legislative approaches to addressing our current unsustainable fiscal situation and discuss the three major entitlements (Social Security, Medicare, and Medicaid), the \$1.1 trillion/year welfare state, and the impact rising and sustained inflation and the ensuing higher interest rates will have on all of this.

Moderated by: Kathleen O'Hearn, Director of Economic Progress, Stand Together (confirmed)

Speakers:

Paul Winfree, President & CEO, EPIC for America (confirmed)

Adam Michel, Director of Tax Policy Studies, Cato Institute (confirmed)

Joseph Bishop-Henchman, Executive Vice President, National Taxpayer Union Foundation (confirmed)

2:15 PM

AI & Tech Policy

This session will delve into strategies for fostering technological growth while safeguarding individual freedoms and advancing conservative principles in the digital age.

Moderator: Laura Maristany, Founder & CEO, Katch Skills & Sr. Advisor, Freedom Conservatism (confirmed)

Taylor Barkley, Director of Policy, The Abundance Institute (confirmed)

Neil Chilson, Head of AI, The Abundance Institute (confirmed)

3:15 PM

Challenges & Opportunities: Group Conversations on Managing the Legislative Process to Advance Policies that Work

Attendees share out their experience developing and advancing policy agendas. In this session, speakers will share perspectives on what could be more helpful to help bring together diverse coalitions and to help support their work on Capitol Hill.

Larissa Martinez, President, The Women's Public Leadership Network (confirmed)

Rachel Barkley, Executive Director, Alliance for Opportunity (confirmed)

Elizabeth McGuigan, Senior Vice President, Philanthropy Roundtable (confirmed)

4:30 PM

BREAK

5:30 PM **Buffet Dinner**

6:30 PM **Walk to Colonial Williamsburg**

7:00 PM **Colonial Williamsburg Candlelight Walk (Optional)**

This immersive walking tour of Colonial Williamsburg will explore the foundations of American freedom through the lens of early democratic ideals, individual liberty, and limited government. Congressional staff will engage with historians and interpreters to examine the debates and compromises that shaped the U.S. Constitution, connecting them to the principles of freedom conservatism. Through discussions at key historical sites, participants will reflect on the balance between personal responsibility and government authority, drawing lessons applicable to modern policymaking.

8:00 PM **Walk back to Hotel (Adjourn)**

Sunday, March 30, 2025

8:30 AM **Breakfast with Closing Thoughts and Feedback**

Akash Chougule, President, FREOPP (confirmed)

Laura Maristany, Sr. Advisor, Freedom Conservatism (confirmed)




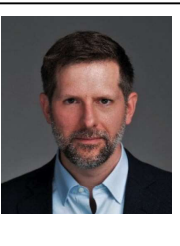

9:00 AM **Bus Back to DC**

11:30 am **Arrive in DC- Same location as pickup**






750 Pennsylvania Ave. SE, Washington, DC 20003



Speaker & Participant List
Freedom Conservatism Congressional Retreat
March 28-30, 2025

	Taylor Barkley	Director of Policy, The Abundance Institute	Taylor Barkley is the Director of Public Policy for the Abundance Institute. Previous to this position he was the Director of Technology and Innovation at the Center for Growth and Opportunity. He managed the research agenda, strategy, and represented the technology and innovation portfolio. His primary research and expertise are at the intersection of culture, technology, and innovation. He has extensive experience working with state-based technology policy projects and partners and most major federal technology policy topics.
	Rachel Barkley	Executive Director, Alliance for Opportunity	Rachel Barkley is an experienced coalition and community builder at the state and national level. She runs her consulting business, RK Barkley Consulting, Inc., to help organizations move forward policies that advance freedom and promote human dignity through coalition building and policy strategy. She is the director of a disability policy reform project, Able Americans, and the executive director of the Alliance for Opportunity, a multi-state project to move 1 million people out of poverty into lives of flourishing.
	David Bier	Director of Immigration Studies, Cato Institute	David J. Bier is the research fellow for immigration studies at the Cato Institute. He is an expert on border security, interior enforcement, and legal immigration. Bier's popular writing has appeared in the New York Times, the Washington Post, and numerous other print and online publications.
	Neil Chilson	Head of AI Policy, Abundance Institute	Neil Chilson is the Head of AI Policy at the Abundance Institute. The Institute is a mission-driven nonprofit dedicated to creating an environment for emerging technologies to germinate, develop, and thrive in order to perpetually expand widespread human prosperity. Chilson is a lawyer, computer scientist, and author of the book "Getting Out of Control: Emergent Leadership in a Complex World." He studies and promotes the conditions that best enable technology to create widespread human prosperity and abundance. His areas of expertise include artificial intelligence, online privacy and digital free speech, and Federal Trade Commission matters, including antitrust and consumer protection.
	Akash Chougule	President, FREOPP	Akash Chougule is the President of The Foundation for Research on Equal Opportunity. Previously he was the Vice President of Americans for Prosperity, the largest free-market grassroots advocacy organization in the country. Prior to AFP, Akash was Vice President of the Economic Opportunity Initiative at the Stand Together Chamber of Commerce. Prior to Stand Together, Akash was a policy staffer on the US House of Representatives Education and Labor Committee.

	Andrew Clark	President, yes every kid.	<p>Andrew Clark is an unapologetic advocate for freeing each individual from bureaucratic barriers, empowering people to take charge, and igniting the entrepreneurial spirit that fuels genuine innovation and human progress.</p> <p>As President at yes. every kid., I am committed to creating a radically different future in education—one where every child can discover and pursue their own path, not the one dictated by outdated systems and top-down controls.</p> <p>For nearly two decades, I've fought at the forefront of policy battles, from my tenure directing strategies at Americans for Prosperity to mobilizing young Americans as Executive Director of Generation Opportunity. I thrive at the intersection of futurism, policy, and market-driven reform, wielding data-driven tactics to shatter barriers and drive real impact.</p>
	Daniel Di Martino	Graduate Fellow, Manhattan Institute	Daniel Di Martino is a PhD candidate in Economics at Columbia University and a Fellow at the Manhattan Institute—where he focuses on high-skill immigration policy. Born and raised in Venezuela, Di Martino experienced the terrible consequences of socialism firsthand. After leaving Venezuela for the U.S. in 2016, he dedicated himself to explaining how socialism destroyed his homeland, advocating for its freedom, and stopping this ideology from ever being implemented in America and elsewhere.
	Jonah Goldberg	Senior Fellow, American Enterprise Institute; Editor-in Chief, The Dispatch	Jonah Jacob Goldberg is an American conservative syndicated columnist, author, political analyst, and commentator. The founding editor of National Review Online, from 1998 until 2019, he was an editor at National Review. Goldberg writes a weekly column about politics and culture for the Los Angeles Times.
	John Hood	President, John William Pope Foundation	John Hood is president of the John William Pope Foundation, a North Carolina-based grantmaker, and a syndicated columnist. The author of 10 books, Hood teaches public policy at Duke University and serves on the boards of State Policy Network, the College Fix, the John Locke Foundation, and North Carolina Public Radio, among other organizations.
	Dan Lips	Head of Policy, Visiting Fellow, Foundation for American Innovation, FREOPP	Dan Lips is senior fellow with the Foundation for Research on Equal Opportunity. He is head of policy at the Foundation for American Innovation. He previously was policy director with the Senate Homeland Security and Governmental Affairs Committee.
	Mario H. Lopez	President, Hispanic Leadership Fund	Mario H. Lopez is the President of the Hispanic Leadership Fund, an advocacy organization that promotes liberty, opportunity, and prosperity for all in public policy. HLF advocates on Capitol Hill and state legislatures, before regulatory agencies, and in the courts, to further its core principles and work with policymakers to defend and strengthen the American Dream.
	Laura Maristany	Founder & CEO, Prospera Insights LLC	With leadership experience across the government, corporate, philanthropic and nonprofit sectors, Laura brings unique insight on how to build successful strategies that holistically align to market dynamics.

	Larissa Martinez	President, Women's Public Leadership Network	Political and policy professional with a proven track record of achieving results under challenging circumstances. Excels at and enjoys engaging stakeholders and building coalitions to advance a given agenda. Adept at navigating the political landscape and combining in-depth policy analysis to develop winning multifaceted strategies.
	Elizabeth McGuigan	Senior Vice President, Philanthropy Roundtable	Elizabeth McGuigan is a senior vice president at Philanthropy Roundtable and has been with the organization since January 2021. In Elizabeth's current role, she oversees the organization's public policy and government affairs team as well as the philanthropic programs and services team. She also serves on the Roundtable's executive team. Previously, Elizabeth led the policy and government affairs team, working to protect and promote philanthropic freedom by publishing timely research and advancing legislation at the state and federal levels. Her work has helped solidify Philanthropy Roundtable as a stalwart for donor freedom and every American's right to support the charitable causes and communities they care about without fear of intimidation or harassment.
	Kathleen O'Hearn	Director of Economic Progress, Stand Together	Kathleen O'Hearn is a strategic leader with extensive experience in public policy, government affairs, and nonprofit management. She specializes in building high-impact partnerships, advancing policy initiatives, and driving organizational growth. Kathleen has a proven track record of leading national policy campaigns, cultivating relationships across sectors, and leveraging data-driven insights to inform policy decisions. Her expertise spans policy analysis, stakeholder engagement, and fostering collaboration to create sustainable impact.
	Isabel Soto	Director of Policy, The Libre Initiative	Isabel Soto is the Director of Policy for The LIBRE Initiative. Previously, she was a Senior Policy Advisor at the United States Congress Joint Economic Committee, where she wrote and contributed to multiple original research projects. Before that role, Isabel was Director of Labor Market Policy at the American Action Forum. She and her work have been featured by several media outlets, including CNBC's Squawk Box, The Wall Street Journal, CSPAN, and The Washington Post. Isabel's research and expertise have been used to inform legislation both on the federal and local level around workforce development, hazard pay, unemployment benefits, and independent contracting.
	Paul Winfree	President & CEO, Economic Policy Innovation Center	Paul Winfree, Ph.D., is the President and CEO of the Economic Policy Innovation Center (EPIC). He has served in top management and policy roles in the White House, the U.S. Senate, and think tanks. Prior to founding EPIC, Winfree served in multiple positions during three different tours at The Heritage Foundation. These included Distinguished Fellow in Economic Policy and Public Leadership, Director of Economic Policy Studies the Richard F. Aster Fellow, and acting Director of the Center for Data Analysis.

2025 Freedom Conservatism Congressional Retreat Attendees

[James Barbaccia](#)

Legislative Assistant
U.S. Representative Scott
Perry (PA-10)

[Justin Camp](#)

Legislative Assistant
Rep. Bob Onder (MO- 3)

[Josselin Castillo](#)

Principal
National Federation of
Independent Business (NFIB)

[Marjorie Daily](#)

Director of Operations
Rep. Harriet Hageman (WY- at
large)

[Noelle Dana](#)

Legislative Correspondent
Rep. Rob Bresnahan (PA-08)

[Kevin Garcia Galindo](#)

Policy Associate
The Libre Initiative

[Jackie Gregory](#)

Community Liaison
Congressman Andy Harris,
M.D. (MD- 01)

[Danielle Hornberger](#)

Community Liaison
Congressman Andy Harris,
M.D. (MD- 01)

[Wade Jones](#)

Deputy Research Director
Republican State Leadership
Committee (RSLC)

[Athina Lawson](#)

Press Secretary
Speaker Mike Johnson

[Sebastian Lopez](#)

Intern
Congressional Hispanic
Leadership Institute (CHLI)

[Valerio Martinelli](#)

Senior Vice President
Prospera Insights

[Melody Moreno](#)

Intern
Congressional Hispanic
Leadership Institute (CHLI)

[Brianna Saenz](#)

Programs & Admin Assistant
Manager
Congressional Hispanic
Leadership Institute (CHLI)

[Jorge Sanabria](#)

Intern
Congressional Hispanic
Leadership Institute (CHLI)

[Brandon Smith](#)

Director of Operations
Rep. Ron Estes (KS-04)

[Peter Stein](#)

Senior Policy Advisor
Rep. Diana Harshbarger
(TN-01)

[Mike Thom](#)

President
515 Group

[Stami Turk](#)

Adjunct Professor
George Washington
University (GWU)

[Jesse Von Stein](#)

Legislative Director
Rep. Cory Mills (FL-07)

[Josh Walton](#)

Legislative Assistant
Rep. Nick Begich (AK-01)

Name	Last Name	Title	Organization
James Taylor	Barbaccia	Legislative Assistant	U.S. Representative Scott Perry (PA-10)
Rachel	Barkley	Director of Public Policy	Abundance Institute
David	Barkley	Executive Director	Alliance for Opportunity
Joe	Bier	Director of Immigration Studies	Cato Institute
Kate	Bishop- Henchman	Executive Vice President	National Taxpayers Union Foundation
Josselin	Carney	Deputy Director	More in Common
Neil	Castillo	Principal	NFIB
Akash	Chilson	Head of AI Policy	Abundance Institute
Daniel	Chougule	President	FREOPP
Kevin	Di Martino	Graduate Fellow	Manhattan Institute
Jonah	Garcia Galindo	Policy Associate	The Libre Initiative
Jackie	Goldberg	Editor-in-Chief	TheDispatch.com
John	Gregory	Community Liaison	Congressman Andy Harris, M.D. (R-MD)
Danielle	Hood	President	John William Pope Foundation
Athina	Hornberger	Community Liaison	Congressman Andy Harris, M.D. (R-MD)
	Lawson	Press Secretary	Speaker Mike Johnson
Dan	Lips	Head of Policy, Foundation for American Innovation & Visiting Fellow, FREOPP	
Mario H.	Lopez	President	Hispanic Leadership Fund
Laura	Maristany	Sr. Advisor	Freedom Conservatism
Larissa	Martinez	Founder & President	Women's Public Leadership Network
Elizabeth	McGuigan	Senior Vice President	The Philanthropy Roundtable
Adam	Michel	Director of Tax Policy Studies	Cato Institute
Kathleen	O'Hearn	Director of Economic Progress	Stand Together
Isabel	Soto	Policy Director	The Libre Initiative
Peter	Stein	Senior Policy Advisor	Congresswoman Diana Harshbarger (TN-01)
Paul	Winfree	President/CEO	Economic Policy Innovation Center
Mike	Thom	President	515 Group
Justin	Camp	Legislative Assistant	Rep. Bob Onder (R-MO)
Andrew	Clark	President	yes. every kid.
Marjorie	Daily	Director of Operations for Wyoming's Congresswoman Harriet Hageman	Rep. Harriet Hageman (R-WY)

Name	Last Name	Title	Organization
Noelle	Dana	Legislative Correspondent	U.S House of Representatives Rep. Rob Bresnahan (PA-08)
Wade	Jones	Deputy Research Director	RSLC
Sebastian	Lopez	Intern	Congressional Hispanic Leadership Institute (CHLI)
Valerio	Martinelli	SVP	Prospera Insights
Melody	Moreno	Intern	Congressional Hispanic Leadership Institute (CHLI)
Brianna	Saenz	Programs and Administrative Assistant Manager	Congressional Hispanic Leadership Institute (CHLI)
Jorge	Sanabria	Intern	Congressional Hispanic Leadership Institute (CHLI)
Brandon	Smith	Director of Operations	Office of Congressman Ron Estes (KS-04)
Stami	Turk	Adjunct Professor	GWU
Jesse	Von Stein	Legislative Director	Rep. Cory Mills (FL-07)
Josh	Walton	Legislative Assistant	Rep. Begich (AK-01)



Freedom Conservatism
Congressional Staff Retreat
March 28-30, 2025
The Williamsburg Lodge
Williamsburg, VA

Friday, March 28, 2024

- 3:15 PM **Bus Meetup/ Loading**
750 Pennsylvania Ave. SE, Washington, DC 20003
- 3:30 PM **Bus Departs (2.5- 3 hour drive)**
Pickup Outside Trade Joe's
750 Pennsylvania Ave. SE, Washington, DC 20003
- 6:45 PM **Check-in at hotel**
- 7:15 PM **Dinner & Program**
Freedom Conservatism Introduction and Retreat Overview
In this session, speakers will talk about Freedom Conservatism and the [Statement of Principles](#).
- John Hood**, President, John William Pope Foundation
(confirmed)
- 7:30 PM **Fireside Chat**
**Expanding American Conservatism: Freedom As
An Engine of Social Mobility**
- Freedom Conservatives believe any political coalition broad enough to win elections and govern effectively will inevitably encompass leaders, thinkers, and activists with differing views. What do efforts to build that coalition entail? What tools can we employ to help forge strong coalitions into the future?

John Hood, President, John William Pope Foundation
(confirmed)

Jonah Goldberg, Columnist, The Dispatch (confirmed)

8:20 PM **Retreat Goals & Logistics Overview**
Coordinators will go over the agenda and logistics for the retreat.
Laura Maristany, Sr. Advisor, Freedom Conservatism (confirmed)

8:30 pm **Adjourn**

Saturday, March 29, 2025

8:30 AM **Breakfast Buffet**

8:50 AM **Welcome Remarks & Introduction to 9:00 am session**

Akash Chougule, President, FREOPP (confirmed)

9:00 AM **The Future of School Choice: Federal and State Perspectives**

This session will explore the evolving landscape of school choice, highlighting key legislative and policy efforts at both the federal and state levels. Aligned with the principles of the Freedom Conservatism movement, the discussion will emphasize parental empowerment, educational freedom, and policies that expand access to high-quality learning options. Attendees will gain insights into recent advancements, challenges, and opportunities in shaping a more competitive and accountable education system that prioritizes student success over bureaucratic control.

Moderator: Rachel Barkley, Executive Director, Alliance for Opportunity
(confirmed)

Speakers:

Andrew Clark, President, yes. every kid. (confirmed)

Dan Lipps, Head of Policy, Foundation for American Innovation &
Visiting Fellow, FREOPP (confirmed)

10:30 am

Americans By Choice: Immigration as a Principal Driver of American Prosperity and Achievement

Legal immigration enriches America's cultural fabric and plays a vital role in sustaining a strong, dynamic economy, but our current system for managing it is broken. This panel will explore ways to fix some of its most pressing issues, including strengthening legal immigration pathways to address workforce shortages, drive economic growth, and enhance national competitiveness. Panelists will discuss the biggest challenges facing the current system and propose solutions to ensure that legal immigration continues to support a vibrant society.

Moderator: Isabel Soto, Director of Policy, The Libre Initiative (confirmed)

Speakers:

Mario H. Lopez, President, Hispanic Leadership Fund (confirmed)

Daniel Di Martino, Graduate Fellow, Manhattan Institute (confirmed)

12:00 PM

Buffet Lunch + Networking

12:30 PM

Guided Table Conversations

Each table will have at least one Freedom Conservatism thought leader to help guide conversations on the chosen topic for that table. Table conversations will include FreeCon signatories in every table.

Invited Signatories:

Akash Chougule, FREOPP

Taylor Barkley, Abundance Institute (AI-Technology)

Mario H. Lopez

1:15 PM

How Pro-Growth Tax Policies and Common Sense Deregulation Help America's Families: Examination of Legislative Approaches to Fiscal Sustainability

In this session, we will discuss how the federal debt is overshadowing policy priorities across issues and the pending debt crisis the US may face. Experts will take a close look at the leading legislative approaches to addressing our current unsustainable fiscal situation and discuss the three major entitlements (Social Security, Medicare, and Medicaid), the \$1.1 trillion/year welfare state, and the impact rising and sustained inflation and the ensuing higher interest rates will have on all of this.

Moderated by: Kathleen O'Hearn, Director of Economic Progress, Stand Together (confirmed)

Speakers:

Paul Winfree, President & CEO, EPIC for America (confirmed)

Adam Michel, Director of Tax Policy Studies, Cato Institute (confirmed)

Joseph Bishop-Henchman, Executive Vice President, National Taxpayer Union Foundation (confirmed)

2:15 PM

AI & Tech Policy

This session will delve into strategies for fostering technological growth while safeguarding individual freedoms and advancing conservative principles in the digital age.

Moderator: Laura Maristany, Founder & CEO, Katch Skills & Sr. Advisor, Freedom Conservatism (confirmed)

Taylor Barkley, Director of Policy, The Abundance Institute (confirmed)

Neil Chilson, Head of AI, The Abundance Institute (confirmed)

3:15 PM

Challenges & Opportunities: Group Conversations on Managing the Legislative Process to Advance Policies that Work

Attendees share out their experience developing and advancing policy agendas. In this session, speakers will share perspectives on what could be more helpful to help bring together diverse coalitions and to help support their work on Capitol Hill.

Larissa Martinez, President, The Women's Public Leadership Network (confirmed)

Rachel Barkley, Executive Director, Alliance for Opportunity (confirmed)

Elizabeth McGuigan, Senior Vice President, Philanthropy Roundtable (confirmed)

- 4:30 PM **BREAK**
- 5:30 PM **Buffet Dinner**
- 6:30 PM **Walk to Colonial Williamsburg**
- 7:00 PM **Colonial Williamsburg Candlelight Walk (Optional)**
This immersive walking tour of Colonial Williamsburg will explore the foundations of American freedom through the lens of early democratic ideals, individual liberty, and limited government. Congressional staff will engage with historians and interpreters to examine the debates and compromises that shaped the U.S. Constitution, connecting them to the principles of freedom conservatism. Through discussions at key historical sites, participants will reflect on the balance between personal responsibility and government authority, drawing lessons applicable to modern policymaking.
- 8:00 PM **Walk back to Hotel (Adjourn)**

Sunday, March 30, 2025

- 8:30 AM **Breakfast with Closing Thoughts and Feedback**

Laura Maristany, Sr. Advisor, Freedom Conservatism (confirmed)
- 9:30 AM **Bus Back to DC**
- 11:30 am **Arrive in DC- Same location as pickup**
750 Pennsylvania Ave. SE, Washington, DC 20003