

2007 NOV 16 AM U.S. House of Representatives  
OFFICE OF THE CLERK  
U.S. HOUSE OF REPRESENTATIVES  
110<sup>th</sup> Congress

**EMPLOYEE  
POST-TRAVEL DISCLOSURE FORM**

This form is for disclosing the receipt of travel expenses from private sources for meetings, speaking engagements, fact-finding trips or similar events in connection with official duties. You need not disclose government-funded or political travel on this form, or travel that is unrelated to official duties. This form does not eliminate the need to report all privately-funded travel on the annual Financial Disclosure Statements of those persons required to file them. In accordance with clause 5 of House Rule 25, complete this form and file it with the Clerk of the House of Representatives, B-106 Cannon House Office Building, within 15 days after travel is completed. The Clerk is to make these forms publicly available as soon as possible after they are received. Obtain the dollar amounts from the sponsor; if exact dollar amounts are unavailable, provide a good faith estimate.

Name of Employee (print or type): Richard Hudson

Name of Accompanying Family Member (if any): N/A

Relationship to Employee:  Spouse  Child  Other (specify): \_\_\_\_\_

Date of Departure and Date of Return: Nov. 1st to Nov. 3rd, 2007

Dates at Personal Expense: N/A

Itinerary (cities of departure – destination – return): Washington, DC- Chesapeake, MD- Washington, DC

Sponsor(s) (who paid for the trip): The Congressional Institute

Describe meetings and events attended (attach additional pages if necessary): \_\_\_\_\_

Bicameral Chief of Staff Retreat

Attached to this form are EACH of the following (signify "yes" for each item by checking the corresponding box):

1.  the Private Sponsor Travel Certification Form completed by trip sponsor, including all attachments;
2.  the Privately-Sponsored Travel Approval Form completed by the employee; **and**
3.  the Committee on Standards' letter approving my participation on this trip.

I represent that I participated in each of the activities reflected in the sponsor's agenda (signify "yes" by checking box):

If not, explain: \_\_\_\_\_

*Carter*

**TRAVEL EXPENSES:**

|                                 | Total Transportation Expenses | Total Lodging Expenses | Total Meal Expenses |
|---------------------------------|-------------------------------|------------------------|---------------------|
| For employee:                   | N/A                           | \$274.50               | \$356.70            |
| For accompanying family member: | N/A                           | N/A                    | N/A                 |

|                                 | Other Expenses (dollar amount) | Specific Nature of Expenses (e.g., taxi, parking, registration fee, etc.) |
|---------------------------------|--------------------------------|---|
| For employee:                   | N/A                            | N/A   |
| For accompanying family member: | N/A                            | N/A   |

I certify that the information contained in this form is true, complete, and correct to the best of my knowledge.

SIGNATURE OF EMPLOYEE: Paul H. H. J.

DATE: 11-14-07

I authorized this travel in advance. I have determined that all of the expenses listed above 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: Congressman John Carter

SIGNATURE OF SUPERVISING MEMBER: John Carter

DATE: 11/15/07

*Version date 4/2007 by Committee on Standards of Official Conduct*

U.S. House of Representatives  
Committee on Standards of Official Conduct

**PRIVATELY-SPONSORED TRAVEL APPROVAL FORM**  
**For Members, Officers and Employees**  
**(submit directly to the Committee)**

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 XXV, 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 Private Sponsor Travel Certification Form.

*Members, officers and employees seeking approval for travel are urged to submit all forms to the Committee at least 30 days before travel is scheduled to begin. The failure to provide the Committee with adequate time to review the form and attachments may result in the invitee not receiving approval for the trip. The submission of an incomplete form will delay the review process. A copy of this form will be made available for public inspection. Please type form. Form (and any attachments) may be faxed to the Committee at (202) 226-7172.*

1. Name of Member, officer or employee (traveler): Richard Hudson
2. Sponsor(s) (who will be paying for the trip): Congressional Institute
3. a. Dates of travel: Nov 1-3, 2007  
b. Will you be extending the trip at your personal expense?  Yes  No  
If yes, dates at personal expense: N/A
4. If travel is for participation a one-day event (per trip sponsor question 10), check one of the following:  
a. Approval for one-night's lodging and meals is being requested:  or  
b. Approval for two-nights' lodging and meals is being requested:   
If "b" is checked, explain why the second night is warranted: \_\_\_\_\_
5. Travel destination(s): Cambridge, MD
6. Explain why participation in the trip is connected to your official or representational duties:  
Retreat is designed to strengthen professional relationships and encourage candid communications across different levels of responsibility.
7. Private Sponsor Travel Certification Form is attached, including agenda, invitee list, and any other attachments (signify "yes" by checking box):

8. I certify that the information contained in this form is true, complete, and correct to the best of my knowledge.

Signature: Richard A. Hudson

Name of Signatory (if other than traveler): \_\_\_\_\_

For staff, name of employing Member/Committee: \_\_\_\_\_

Office address: 408 CHOB

Phone number: 5-3864

Email address: richard.hudson@mail.house.gov

Committee staff may contact you if additional information is required.

**FOR STAFF:  
TO BE COMPLETED BY YOUR EMPLOYING MEMBER:**

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]  
Signature of Employing Member

Date: 9-19-07

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

Committee on Standards of Official Conduct  
U.S. House of Representatives  
HT-2, The Capitol  
Washington, DC 20515  
(202) 225-7103 (phone)  
(202) 225-7392 (general fax)  
(202) 226-7172 (fax for travel approvals)

*Version date 4/2007 by Committee on Standards of Official Conduct*

U.S. House of Representatives  
Committee on Standards of Official Conduct

**PRIVATE SPONSOR TRAVEL CERTIFICATION FORM**  
(provide directly to each House invitee)

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 XXV, 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. The trip sponsor should NOT submit the form directly to the Committee.

*Private sponsors are urged to submit this form to each House invitee at least 30 days before travel is scheduled to begin. The failure to provide the Committee with adequate time to review the form and attachments may result in the invitee not receiving approval for the trip. The submission of an incomplete form will delay the review process. Before completing this form, sponsors are urged to carefully review the Committee's private travel guidelines and advisory memoranda detailing the rules and restrictions for private travel, as well as the instructions for completing this form. Sponsors should call the Committee with any questions prior to submitting the form. Please type form.*

1. Sponsor(s) (who will be paying for the trip): The Congressional Institute
  
2. I represent that the trip will not be financed (in whole or in part) by a federally-registered lobbyist or a registered foreign agent (signify "yes" by checking box):
  
3. I represent that the trip sponsor(s) has not accepted from any other source funds earmarked directly or indirectly to finance any aspect of the trip (signify "yes" by checking box):
  
4. Is travel being offered to an accompanying family member of the House invitee(s)?  Yes  No
  
5. Provide names and titles of ALL House invitees; for each invitee, provide explanation of why the individual was invited (include additional pages if necessary): See attached
  
6. Dates of travel: November 1-3, 2007
  
7. Cities of departure - destination - return: Washington DC - Cambridge, MD - Washington DC
  
8. Attached is a detailed agenda of the activities taking place during the travel (i.e., an hourly description of planned activities) (signify "yes" by checking box):
  
9. I represent that (check one of the following):
  - 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 federally registered lobbyist or registered foreign agent:  or
  - c. The trip is for attendance at a one-day event and lobbyist involvement in planning, organizing, requesting, or arranging the trip was *de minimis* under the Committee's travel regulations.
  
10. If travel is for participation in a one-day event (i.e., if you checked Question 9(c)), check one of the following:
  - a. One-night's lodging and meals are being offered:  or
  - b. Two-nights' lodging and meals are being offered:If "b" is checked, explain why the second night is warranted: \_\_\_\_\_

11. If the trip is not sponsored by an institution of higher education, I represent that a federally-registered lobbyist or foreign agent will not accompany House Members or employees on any segment of the trip (signify "yes" by checking box):
12. Private sponsors must have a direct and immediate relationship to the purpose of the trip or location being visited. Describe the role of each sponsor in organizing and conducting the trip: \_\_\_\_\_  
 The Congressional Institute President and staff organize, manage and control the event.  
 \_\_\_\_\_
13. Describe each sponsor's organizational interest in the purpose of the trip: The purpose of the  
the Congressional Institute, a 501(c)(4) organization, is to promote public education about Congress and to hold  
educational conferences including retreats for Members of Congress, staff and others.
14. Describe the type and class of the transportation being provided. Indicate whether coach, business-class or first-class transportation will be provided. In addition, for travel via aircraft, please indicate if travel is being offered on a commercial flight, chartered flight or on an aircraft operated or paid for by a carrier not licensed by the Federal Aviation Administration to operate for compensation or hire (i.e., a private aircraft). If first-class fare is being provided, or if travel is via chartered or private aircraft, please provide an explanation describing why such travel is warranted: None  
 \_\_\_\_\_
15. 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 "yes" by checking box):
16. I represent that either (check one of the following):  
 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 or organized *specifically with regard* to congressional participation:   
 If "b" is checked, detail the cost per day of meals (approximate cost may be provided): Thursday,  
11/1: \$157, Friday 11/2: \$206, Saturday 11/3 \$22.50
17. Reason for selecting the location of the event or trip: Proximity to Washington DC and convenience of the  
participants
18. Name of hotel or other lodging facility: Chesapeake Hyatt, Cambridge, MD
19. Cost per night of hotel or other lodging facility (approximate cost may be provided): \$122 room rate  
and 12.5% taxes
20. Reason(s) for selecting hotel or other lodging facility: Proximity to Washington DC and convenience of the  
participants

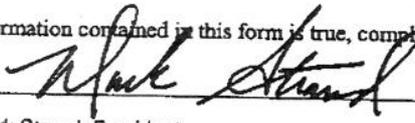
21. TOTAL EXPENSES FOR EACH PARTICIPANT:

| <input type="checkbox"/> actual amounts<br><input checked="" type="checkbox"/> good faith estimates | Total <i>Transportation</i> Expenses per Participant | Total <i>Lodging</i> Expenses per Participant | Total <i>Meal</i> Expenses per Participant |
|---|--|---|--|
| For each Member, Officer, or employee   | \$0  | \$274.50                                      | \$386                                      |
| For each accompanying family member   | \$0  | \$0   | spouse \$344 or child \$233                |

|                                       | <i>Other</i> Expenses (dollar amount) | Identify Specific Nature of "Other" Expenses (e.g., taxi, parking, registration fee, etc.) |
|---------------------------------------|---------------------------------------|--|
| For each Member, Officer, or employee | \$0                                   |  |
| For each accompanying family member   | \$0                                   |  |

22. I represent that reimbursement for miscellaneous travel expenses for the trip, such as travel to and from airports, security costs, interpreter fees, visa application fees, and similar expenses, will be for actual costs incurred and are necessary for the purpose of the trip (signify "yes" by checking box):

23. I certify that the information contained in this form is true, complete, and correct to the best of my knowledge.

Signature: 

Name and title: Mark Strand, President

Organization: The Congressional Institute

Address: 1001 N. Fairfax Street, STE 420, Alexandria, VA 22134

Telephone number: 703-837-8812

Fax number: 703-837-8817

Email Address: strand@conginst.org

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

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

Committee on Standards of Official Conduct  
 U.S. House of Representatives  
 HT-2, The Capitol  
 Washington, DC 20515  
 (202) 225-7103 (phone)  
 (202) 225-7392 (general fax)  
 (202) 226-7172 (fax for travel approvals)

Version date 4/2007 by Committee on Standards of Official Conduct

STEPHANIE TUBBS JONES, OHIO  
CHAIRWOMAN  
GENE GREEN, TEXAS  
LUCILLE ROYBAL-ALLARD, CALIFORNIA  
MICHAEL F. DOYLE, PENNSYLVANIA  
WILLIAM D. DELAHUNT, MASSACHUSETTS  
WILLIAM V. O'REILLY,  
CHIEF COUNSEL/STAFF DIRECTOR  
DAWN KELLY MOBLEY,  
COUNSEL TO THE CHAIRWOMAN

ONE HUNDRED TENTH CONGRESS

**U.S. House of Representatives**

COMMITTEE ON STANDARDS OF  
OFFICIAL CONDUCT

Washington, DC 20515-6328

September 21, 2007

DOC HASTINGS, WASHINGTON  
RANKING REPUBLICAN MEMBER  
JO BONNER, ALABAMA  
J. GRESHAM BARRETT, SOUTH CAROLINA  
JOHN KLINE, MINNESOTA  
MICHAEL T. MCCAUL, TEXAS  
TODD UNGERECHE  
COUNSEL TO THE RANKING  
REPUBLICAN MEMBER  
SUITE HT-2, THE CAPITOL  
(202) 225-7103

Mr. Richard Hudson  
Office of the Honorable John Carter  
408 Cannon House Office Building  
Washington, DC 20515

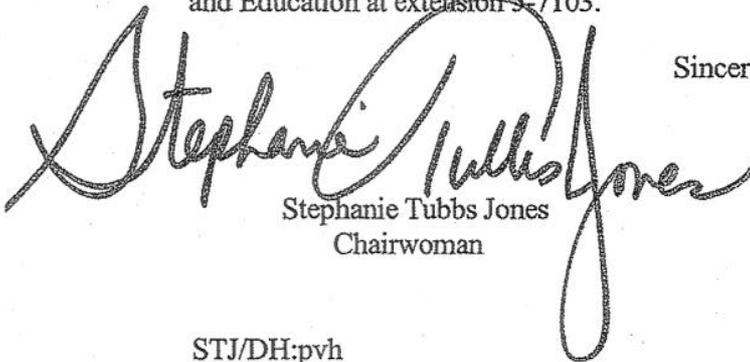
Dear Mr. Hudson:

Pursuant to House Rule XXV, clause 5(d)(2), the Committee on Standards of Official Conduct hereby approves your proposed trip to Cambridge, Maryland scheduled for November 1 to 3, 2007 sponsored by the Congressional Institute.

You must complete an Employee Travel Disclosure Form (which your employing Member must also sign) and file it with the Clerk of the House within 15 days after your return from travel. As part of that filing, you are required to attach a copy of this letter and the Private Sponsor Travel Certification Form, including all attachments. You must also include a copy of the Privately-Sponsored Travel Approval Form completed by you and signed by your employing Member. If you are required to file an annual Financial Disclosure Statement, you must also report all travel expenses totaling more than \$305 from a single source on Schedule VII of that statement.

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

Sincerely,

  
Stephanie Tubbs Jones  
Chairwoman

  
Doc Hastings  
Ranking Republican Member

STJ/DH:pvh

**Bicameral Chiefs of Staff Retreat**

|    | Name    |             | Institution                           | Reason Invited:  |
|----|---------|-------------|---------------------------------------|------------------|
| 1  | Will    | Plaster     | House Administration Cmte.            | Staff Director   |
| 2  | William | O'Conner    | House Agriculture Cmte.               | Staff Director   |
| 3  | Frank   | Cushing     | House Appropriations Cmte.            | Staff Director   |
| 4  | Bob     | Simmons     | House Armed Services Cmte.            | Staff Director   |
| 5  | James   | Bates       | House Budget Cmte.                    | Staff Director   |
| 6  | Victor  | Klatt       | House Education & Labor Cmte.         | Staff Director   |
| 7  | Bud     | Albright    | House Energy & Commerce Cmte.         | Staff Director   |
| 8  | Thomas  | Weimer      | House Energy Independence & Global    | Staff Director   |
| 9  | Todd    | Ungerecht   | House Ethics Cmte.                    | Staff Director   |
| 10 | Larry   | Lavendar    | House Financial Services Cmte.        | Staff Director   |
| 11 | Yleem   | Poblete     | House Foreign Affairs Cmte.           | Staff Director   |
| 12 | Rob     | O'Connor    | House Homeland Security Cmte.         | Staff Director   |
| 13 | Michael | Meermans    | House Intelligence Cmte.              | Staff Director   |
| 14 | Joseph  | Gibson      | House Judiciary Cmte.                 | Staff Director   |
| 15 | Llyod   | Jones       | House Natural Resources Cmte.         | Staff Director   |
| 16 | David   | Martin      | House Oversight & Government Reform   | Staff Director   |
| 17 | Seth    | Webb        | House Republican Conference           | Leadership Staff |
| 18 | Karen   | Haas        | House Republican Conference           | Leadership Staff |
| 19 | Rachel  | Hodges      | House Republican Conference           | Leadership Staff |
| 20 | Ed      | Patru       | House Republican Conference           | Leadership Staff |
| 21 | Charles | Cooper      | House Republican Conference           | Leadership Staff |
| 22 | Nathan  | Imperiale   | House Republican Conference           | Leadership Staff |
| 23 | Patrick | Rothwell    | House Republican Policy Committee     | Leadership Staff |
| 24 | Hugh    | Halpern     | House Rules Committee                 | Staff Director   |
| 25 | Janet   | Poppleton   | House Science & Technology Cmte.      | Staff Director   |
| 26 | Kevin   | Fitzpatrick | House Small Business Cmte.            | Staff Director   |
| 27 | James   | Coon        | House Transportation & Infrastructure | Staff Director   |
| 28 | James   | Lariviere   | House Veterans' Affairs Cmte.         | Staff Director   |
| 29 | Brett   | Loper       | House Ways & Means Cmte.              | Staff Director   |
| 30 | Hood    | Harris      | Office of Cong. Aderholt              | Chief of Staff   |
| 31 | Paul    | Protic      | Office of Cong. Akin                  | Chief of Staff   |
| 32 | Adam    | Terry       | Office of Cong. Alexander             | Chief of Staff   |

**Bicameral Chiefs of Staff Retreat**

| Name |                   | Institution                 | Reason Invited: |
|------|-------------------|-----------------------------|-----------------|
| 33   | Rich Dunn         | Office of Cong. Bachmann    | Chief of Staff  |
| 34   | Warren Tryon      | Office of Cong. Bachus      | Chief of Staff  |
| 35   | Christina Casteel | Office of Cong. Baker       | Chief of Staff  |
| 36   | Lance Williams    | Office of Cong. Barrett     | Chief of Staff  |
| 37   | Bud Otis          | Office of Cong. Bartlett    | Chief of Staff  |
| 38   | Heather Couri     | Office of Cong. Barton      | Chief of Staff  |
| 39   | Kathy Lydon       | Office of Cong. Biggert     | Chief of Staff  |
| 40   | Steve Danon       | Office of Cong. Bilbray     | Chief of Staff  |
| 41   | Rebecca Hyder     | Office of Cong. Bilirakis   | Chief of Staff  |
| 42   | Scott Parker      | Office of Cong. Bishop      | Chief of Staff  |
| 43   | Steve Brophy      | Office of Cong. Blackburn   | Chief of Staff  |
| 44   | Amy Poe           | Office of Cong. Blunt       | Chief of Staff  |
| 45   | Mick Krieger      | Office of Cong. Boehner     | Chief of Staff  |
| 46   | Alan Spencer      | Office of Cong. Bonner      | Chief of Staff  |
| 47   | Frank Cullen      | Office of Cong. Bono        | Chief of Staff  |
| 48   | Matt Sagely       | Office of Cong. Boozman     | Chief of Staff  |
| 49   | Jeff Dobrozsi     | Office of Cong. Boustany    | Chief of Staff  |
| 50   | Doug Centilli     | Office of Cong. Brady       | Chief of Staff  |
| 51   | Aloysius Hogan    | Office of Cong. Broun       | Chief of Staff  |
| 52   | Delores DaCosta   | Office of Cong. Brown       | Chief of Staff  |
| 53   | Pete Meachum      | Office of Cong. Brown-Waite | Chief of Staff  |
| 54   | Dave Karvelas     | Office of Cong. Buchanan    | Chief of Staff  |
| 55   | Barry Brown       | Office of Cong. Burgess     | Chief of Staff  |
| 56   | Mark Walker       | Office of Cong. Burton      | Chief of Staff  |
| 57   | Mike Copher       | Office of Cong. Buyer       | Chief of Staff  |
| 58   | Dave Ramey        | Office of Cong. Calvert     | Chief of Staff  |
| 59   | Jim Brandell      | Office of Cong. Camp        | Chief of Staff  |
| 60   | David Bowser      | Office of Cong. Campbell    | Chief of Staff  |
| 61   | Joe Hunter        | Office of Cong. Cannon      | Chief of Staff  |
| 62   | Rob Collins       | Office of Cong. Cantor      | Chief of Staff  |
| 63   | Joel Brubaker     | Office of Cong. Capito      | Chief of Staff  |
| 64   | Richard Hudson    | Office of Cong. Carter      | Chief of Staff  |

**Bicameral Chiefs of Staff Retreat**

| Name |                    | Institution                 | Reason Invited: |
|------|--------------------|-----------------------------|-----------------|
| 65   | Mike Quaranta      | Office of Cong. Castle      | Chief of Staff  |
| 66   | Gary Lindgren      | Office of Cong. Chabot      | Chief of Staff  |
| 67   | Ed McDonald        | Office of Cong. Coble       | Chief of Staff  |
| 68   | Sean Murphy        | Office of Cong. Cole        | Chief of Staff  |
| 69   | Jeff Burton        | Office of Cong. Conaway     | Chief of Staff  |
| 70   | John Ariale        | Office of Cong. Crenshaw    | Chief of Staff  |
| 71   | Tom Wiblemo        | Office of Cong. Cubin       | Chief of Staff  |
| 72   | Tony Essalih       | Office of Cong. Culberson   | Chief of Staff  |
| 73   | Brenda Otterson    | Office of Cong. Davis       | Chief of Staff  |
| 74   | Chris Connelly     | Office of Cong. Davis       | Chief of Staff  |
| 75   | David Thomas       | Office of Cong. Davis       | Chief of Staff  |
| 76   | Justin Brasell     | Office of Cong. Davis       | Chief of Staff  |
| 77   | Chris Riley        | Office of Cong. Deal        | Chief of Staff  |
| 78   | George McElwee     | Office of Cong. Dent        | Chief of Staff  |
| 79   | Thomas Bean        | Office of Cong. Diaz-Balart | Chief of Staff  |
| 80   | Ana Carbonell      | Office of Cong. Diaz-Balart | Chief of Staff  |
| 81   | Richard Robinson   | Office of Cong. Doolittle   | Chief of Staff  |
| 82   | Carrie Melvin      | Office of Cong. Drake       | Chief of Staff  |
| 83   | Brad Smith         | Office of Cong. Dreier      | Chief of Staff  |
| 84   | Bob Griffiths      | Office of Cong. Duncan      | Chief of Staff  |
| 85   | Bill McBride       | Office of Cong. Ehlers      | Chief of Staff  |
| 86   | Lloyd Smith        | Office of Cong. Emerson     | Chief of Staff  |
| 87   | Annette Carr       | Office of Cong. English     | Chief of Staff  |
| 88   | Wade Heck          | Office of Cong. Everett     | Chief of Staff  |
| 89   | Nate Webb          | Office of Cong. Fallin      | Chief of Staff  |
| 90   | Tonnie Wybensinger | Office of Cong. Feeney      | Chief of Staff  |
| 91   | Chris Jones        | Office of Cong. Ferguson    | Chief of Staff  |
| 92   | Margaret Klessig   | Office of Cong. Flake       | Chief of Staff  |
| 93   | Dee Gilmore        | Office of Cong. Forbes      | Chief of Staff  |
| 94   | Kelly Lungren-     | Office of Cong. Fortenberry | Chief of Staff  |
| 95   | Luis Baco-Sanchez  | Office of Cong. Fortuno     | Chief of Staff  |
| 96   | Tom Quaadman       | Office of Cong. Fossella    | Chief of Staff  |

**Bicameral Chiefs of Staff Retreat**

| Name |          |                 | Institution                   | Reason Invited: |
|------|----------|-----------------|-------------------------------|-----------------|
| 97   | Todd     | Poole           | Office of Cong. Foxx          | Chief of Staff  |
| 98   | Tom      | Stallings       | Office of Cong. Franks        | Chief of Staff  |
| 99   | Nancy    | Fox             | Office of Cong. Frelinghuysen | Chief of Staff  |
| 100  | Joel     | Kassiday        | Office of Cong. Gallegly      | Chief of Staff  |
| 101  | Michelle | Presson         | Office of Cong. Garrett       | Chief of Staff  |
| 102  | Guy      | Ciarrocchi      | Office of Cong. Gerlach       | Chief of Staff  |
| 103  | Anthony  | Caligiuri       | Office of Cong. Gilchrest     | Chief of Staff  |
| 104  | Mark     | Wellman         | Office of Cong. Gillmor       | Chief of Staff  |
| 105  | Sean     | Dalton          | Office of Cong. Gingrey       | Chief of Staff  |
| 106  | Michael  | Tomberlin       | Office of Cong. Gohmert       | Chief of Staff  |
| 107  | Jerr     | Rosenbaum       | Office of Cong. Goode         | Chief of Staff  |
| 108  | Shelley  | Husband         | Office of Cong. Goodlatte     | Chief of Staff  |
| 109  | Robert   | Head            | Office of Cong. Granger       | Chief of Staff  |
| 110  | Tom      | Brown           | Office of Cong. Graves        | Chief of Staff  |
| 111  | Janet    | Perry-Poppleton | Office of Cong. Hall          | Chief of Staff  |
| 112  | Mike     | Stokke          | Office of Cong. Hastert       | Chief of Staff  |
| 113  | Todd     | Young           | Office of Cong. Hastings      | Chief of Staff  |
| 114  | Andrew   | Duke            | Office of Cong. Hayes         | Chief of Staff  |
| 115  | Mac      | Abrams          | Office of Cong. Heller        | Chief of Staff  |
| 116  | Dee      | Buchanan        | Office of Cong. Hensarling    | Chief of Staff  |
| 117  | Derek    | Harley          | Office of Cong. Herger        | Chief of Staff  |
| 118  | Wayne    | Struble         | Office of Cong. Hobson        | Chief of Staff  |
| 119  | Amy      | Plaster         | Office of Cong. Hoekstra      | Chief of Staff  |
| 120  | Erik     | Rasmussen       | Office of Cong. Hulshof       | Chief of Staff  |
| 121  | Victoria | Middleton       | Office of Cong. Hunter        | Chief of Staff  |
| 122  | Wayne    | Roper           | Office of Cong. Inglis        | Chief of Staff  |
| 123  | Dale     | Neugebauer      | Office of Cong. Issa          | Chief of Staff  |
| 124  | Sapna    | Delacourt       | Office of Cong. Jindal        | Chief of Staff  |
| 125  | Jerome   | Clarke          | Office of Cong. Johnson       | Chief of Staff  |
| 126  | David    | Heil            | Office of Cong. Johnson       | Chief of Staff  |
| 127  | Glen     | Downs           | Office of Cong. Jones         | Chief of Staff  |
| 128  | Ray      | Yonkura         | Office of Cong. Jordan        | Chief of Staff  |

**Bicameral Chiefs of Staff Retreat**

| Name |                       | Institution                      | Reason Invited: |
|------|-----------------------|----------------------------------|-----------------|
| 129  | Bryan Malenius        | Office of Cong. Keller           | Chief of Staff  |
| 130  | Brenna Findley        | Office of Cong. King             | Chief of Staff  |
| 131  | Kevin Fogarty         | Office of Cong. King             | Chief of Staff  |
| 132  | Heather McNatt        | Office of Cong. Kingston         | Chief of Staff  |
| 133  | Lester Munson         | Office of Cong. Kirk             | Chief of Staff  |
| 134  | Steve Sutton          | Office of Cong. Kline            | Chief of Staff  |
| 135  | Trent Wisecup         | Office of Cong. Knollenberg      | Chief of Staff  |
| 136  | Brian Fitzpatrick     | Office of Cong. Kuhl             | Chief of Staff  |
| 137  | Diane Liesman         | Office of Cong. LaHood           | Chief of Staff  |
| 138  | Robert McCreary       | Office of Cong. Lamborn          | Chief of Staff  |
| 139  | Mike Gruber           | Office of Cong. Latham           | Chief of Staff  |
| 140  | Matthew Wallen        | Office of Cong. LaTourette       | Chief of Staff  |
| 141  | Arlene Willis         | Office of Cong. Lewis            | Chief of Staff  |
| 142  | Daniel London         | Office of Cong. Lewis            | Chief of Staff  |
| 143  | Rob Woodall           | Office of Cong. Linder           | Chief of Staff  |
| 144  | Mary Annie Harper     | Office of Cong. LoBiondo         | Chief of Staff  |
| 145  | Stacey Glasscock      | Office of Cong. Lucas            | Chief of Staff  |
| 146  | Victor Arnold-Bik     | Office of Cong. Lungren          | Chief of Staff  |
| 147  | Jeff Cohen            | Office of Cong. Mack             | Chief of Staff  |
| 148  | Adam Magary           | Office of Cong. Manzullo         | Chief of Staff  |
| 149  | Brian Thomas          | Office of Cong. Marchant         | Chief of Staff  |
| 150  | James Min             | Office of Cong. McCarthy         | Chief of Staff  |
| 151  | Greg Hill             | Office of Cong. McCaul           | Chief of Staff  |
| 152  | Martin Van Valkenburg | Office of Cong. McCotter         | Chief of Staff  |
| 153  | Clayton Hall          | Office of Cong. McCrery          | Chief of Staff  |
| 154  | Jon Causey            | Office of Cong. McHenry          | Chief of Staff  |
| 155  | Robert Taub           | Office of Cong. McHugh           | Chief of Staff  |
| 156  | Bob Cochran           | Office of Cong. McKeon           | Chief of Staff  |
| 157  | Connie Partoyan       | Office of Cong. McMorris Rodgers | Chief of Staff  |
| 158  | Rusty Roberts         | Office of Cong. Mica             | Chief of Staff  |
| 159  | Jamie Roe             | Office of Cong. Miller           | Chief of Staff  |
| 160  | Dan McFaul            | Office of Cong. Miller           | Chief of Staff  |

**Bicameral Chiefs of Staff Retreat**

| <b>Name</b>           | <b>Institution</b>           | <b>Reason Invited:</b> |
|-----------------------|------------------------------|------------------------|
| 161 John Rothrock     | Office of Cong. Miller       | Chief of Staff         |
| 162 Todd Novascone    | Office of Cong. Moran        | Chief of Staff         |
| 163 Susan Mosychuk    | Office of Cong. Murphy       | Chief of Staff         |
| 164 Guy Short         | Office of Cong. Musgrave     | Chief of Staff         |
| 165 Andy Polk         | Office of Cong. Myrick       | Chief of Staff         |
| 166 Gayland Barks     | Office of Cong. Neugebauer   | Chief of Staff         |
| 167 Johnny Amaral     | Office of Cong. Nunes        | Chief of Staff         |
| 168 Tom Lizardo       | Office of Cong. Paul         | Chief of Staff         |
| 169 Bob Carter        | Office of Cong. Pearce       | Chief of Staff         |
| 170 Bill Smith        | Office of Cong. Pence        | Chief of Staff         |
| 171 Jordan Clark      | Office of Cong. Peterson     | Chief of Staff         |
| 172 Debra Gebhardt    | Office of Cong. Petri        | Chief of Staff         |
| 173 Susan Butler      | Office of Cong. Pickering    | Chief of Staff         |
| 174 Gabe Neville      | Office of Cong. Pitts        | Chief of Staff         |
| 175 Scott Miller      | Office of Cong. Platts       | Chief of Staff         |
| 176 Heather Ramsey    | Office of Cong. Poe          | Chief of Staff         |
| 177 Michael Hesse     | Office of Cong. Porter       | Chief of Staff         |
| 178 Matt McGinley     | Office of Cong. Price        | Chief of Staff         |
| 179 Lori Salley       | Office of Cong. Pryce        | Chief of Staff         |
| 180 Mathew Joyner     | Office of Cong. Putnam       | Chief of Staff         |
| 181 Ted Maness        | Office of Cong. Radanovich   | Chief of Staff         |
| 182 Dean Peterson     | Office of Cong. Ramstad      | Chief of Staff         |
| 183 Lori Rowley       | Office of Cong. Regula       | Chief of Staff         |
| 184 Jay Martin        | Office of Cong. Rehberg      | Chief of Staff         |
| 185 Michael Shields   | Office of Cong. Reichert     | Chief of Staff         |
| 186 Brian Murray      | Office of Cong. Renzi        | Chief of Staff         |
| 187 Sally Vastola     | Office of Cong. Reynolds     | Chief of Staff         |
| 188 Marshall Macomber | Office of Cong. Rogers       | Chief of Staff         |
| 189 Will Smith        | Office of Cong. Rogers       | Chief of Staff         |
| 190 Andy Keiser       | Office of Cong. Rogers       | Chief of Staff         |
| 191 Rick Dykema       | Office of Cong. Rohrabacher  | Chief of Staff         |
| 192 Art Estopinan     | Office of Cong. Ros-Lehtinen | Chief of Staff         |

**Bicameral Chiefs of Staff Retreat**

| Name |                     | Institution                   | Reason Invited: |
|------|---------------------|-------------------------------|-----------------|
| 193  | Steven Moore        | Office of Cong. Roskam        | Chief of Staff  |
| 194  | Amy Porter          | Office of Cong. Royce         | Chief of Staff  |
| 195  | Andrew Speth        | Office of Cong. Ryan          | Chief of Staff  |
| 196  | Robert Schwarzwald  | Office of Cong. Sali          | Chief of Staff  |
| 197  | Elise Aronson       | Office of Cong. Saxton        | Chief of Staff  |
| 198  | Barry Bennett       | Office of Cong. Schmidt       | Chief of Staff  |
| 199  | Tom Schreibel       | Office of Cong. Sensenbrenner | Chief of Staff  |
| 200  | Guy Harrison        | Office of Cong. Sessions      | Chief of Staff  |
| 201  | Sean Noble          | Office of Cong. Shadegg       | Chief of Staff  |
| 202  | Betsy Hawkings      | Office of Cong. Shays         | Chief of Staff  |
| 203  | Craig Roberts       | Office of Cong. Shimkus       | Chief of Staff  |
| 204  | Jeffrey Loveng      | Office of Cong. Shuster       | Chief of Staff  |
| 205  | Lindsay Slater      | Office of Cong. Simpson       | Chief of Staff  |
| 206  | Jeff Shapiro        | Office of Cong. Smith         | Chief of Staff  |
| 207  | Mary Noonan         | Office of Cong. Smith         | Chief of Staff  |
| 208  | Jennifer Brown      | Office of Cong. Smith         | Chief of Staff  |
| 209  | Renee Howell        | Office of Cong. Souder        | Chief of Staff  |
| 210  | Jack Seum           | Office of Cong. Stearns       | Chief of Staff  |
| 211  | Elizabeth Bartheld  | Office of Cong. Sullivan      | Chief of Staff  |
| 212  | MacArthur Zimmerman | Office of Cong. Tancredo      | Chief of Staff  |
| 213  | Eric Hultman        | Office of Cong. Terry         | Chief of Staff  |
| 214  | Bill Harris         | Office of Cong. Thornberry    | Chief of Staff  |
| 215  | Jeff Kahrs          | Office of Cong. Tiahrt        | Chief of Staff  |
| 216  | Chris Zeigler       | Office of Cong. Tiberi        | Chief of Staff  |
| 217  | Stacy Barton        | Office of Cong. Turner        | Chief of Staff  |
| 218  | Joan Hillebrands    | Office of Cong. Upton         | Chief of Staff  |
| 219  | Joe Wicks           | Office of Cong. Walberg       | Chief of Staff  |
| 220  | Brian MacDonald     | Office of Cong. Walden        | Chief of Staff  |
| 221  | Daniel Gage         | Office of Cong. Walsh         | Chief of Staff  |
| 222  | Helen Hardin        | Office of Cong. Wamp          | Chief of Staff  |
| 223  | Dana Gartzke        | Office of Cong. Weldon        | Chief of Staff  |
| 224  | Jeanette Whitener   | Office of Cong. Weller        | Chief of Staff  |

**Bicameral Chiefs of Staff Retreat**

| Name |                     | Institution                  | Reason Invited:  |
|------|---------------------|------------------------------|------------------|
| 225  | Chip Lake           | Office of Cong. Westmoreland | Chief of Staff   |
| 226  | John Sparkman       | Office of Cong. Whitfield    | Chief of Staff   |
| 227  | Michelle Barlow     | Office of Cong. Wicker       | Chief of Staff   |
| 228  | Bryce Dustman       | Office of Cong. Wilson       | Chief of Staff   |
| 229  | Dino Teppara        | Office of Cong. Wilson       | Chief of Staff   |
| 230  | Daniel Scandling    | Office of Cong. Wolf         | Chief of Staff   |
| 231  | Michael Anderson    | Office of Cong. Young        | Chief of Staff   |
| 232  | Harry Glenn         | Office of Cong. Young        | Chief of Staff   |
| 233  | Steve Stombres      | Office of the Deputy Whip    | Leadership Staff |
| 234  | George Canty        | Office of the Leader         | Leadership Staff |
| 235  | Dave Schnittger     | Office of the Leader         | Leadership Staff |
| 236  | Jo-Marie St. Martin | Office of the Leader         | Leadership Staff |
| 237  | Mike Sommers        | Office of the Leader         | Leadership Staff |
| 238  | Trevor Kolego       | Office of the Leader         | Leadership Staff |
| 239  | Paula Nowakowski    | Office of the Leader         | Leadership Staff |
| 240  | Ed Cassidy          | Office of the Leader         | Leadership Staff |
| 241  | Greg Maurer         | Office of the Leader         | Leadership Staff |
| 242  | Brian Gaston        | Office of the Whip           | Leadership Staff |
| 243  | Neil Bradley        | Office of the Whip           | Leadership Staff |
| 244  | Kyle Nevins         | Office of the Whip           | Leadership Staff |
| 245  | Antonia Ferrier     | Office of the Whip           | Leadership Staff |
| 246  | Ashley Hoy          | Office of the Whip           | Leadership Staff |
| 247  | Melanie Looney      | Office of the Whip           | Leadership Staff |



**Bicameral Chiefs of Staff Retreat**  
**Thursday, November 1<sup>st</sup> – Saturday, November 3<sup>rd</sup>**  
**The Hyatt Regency Chesapeake Bay, Cambridge, Maryland**

**TENTATIVE AGENDA**

**Thursday, November 1, 2007**

**12:00 - 1:45 Luncheon Meeting**

*Mark Strand, Congressional Institute President*  
*Republican Leader John Boehner*

- Discussion of Retreat format and goals
- Opening address

**2:00 - 3:00 New Ethics Rules: Managing your Member, Staff and External Relationships to Ensure Compliance**

*Jan Baran, Partner, Wiley Rein LLP*  
*Ed Cassidy, Counsel, House Minority Leader*

Legal and Congressional experts will provide an overview of the new rules and answer participants' questions. Attendees will then split into smaller groups where they will be asked to resolve hypothetical situations where new ethics rules apply.

**3:00 - 4:30 Tele-Townhalls**

*Richard Thau, Presentation Testing*

Presentation of survey data on tele-townhall meetings. Followed by a "best practices" panel discussion by chiefs of staff whose offices have done numerous tele-townhall meetings. The presentation will be followed by a soup-to-nuts demonstration of a tele-townhall meeting.

**4:30 - 4:45 Break**

**4:45 - 5:45 General Petreus' Report: What Next for Iraq?**

*Guest speaker from the Administration*

Speaker followed by panel discussion by outside experts on possible scenarios in the year ahead.

**6:30 - 7:15 Reception**

**7:15 Dinner**

*Former Speaker Newt Gingrich*

Working for a new and better future through freedom and security

**Friday, November 2, 2007**

**8:00 - 9:00 Breakfast**

**9:00 - 10:00 Current Landscape**

*Dave Winston, The Winston Group*

*Richard Thau, Presentation Testing*

*Linda DiVall, American Viewpoint*

Panel discussion by panel of public opinion experts of what the current mood of the country is, what their expectations are, how do they see the current Congress.

**10:00 - 10:15 Break**

**10:15 - 11:15 Branding: Every Organization Has One, Deliberately or Not**

*Richard Costello, Former Director of Marketing for GE*

Every organization has a brand – or an essence. Its success depends on how well the public believes in that brand and its promise. Mr. Costello will review the branding process and what its implications are for Congressional action. Dave Winston will participate.

**11:15 - 12:00 Breakout Discussion Groups**

- Immigration
- Defense Policy
- Economic Security
- Tax Policy
- Health Care

**12:00 - 12:45 Lunch**

**12:45 - 1:30 General Session**

*Speaker to be announced.*

**1:45 - 2:45 Communicating with the White House**

*Candi Wolff, Assistant to the President for Legislative Affairs*

*Dan Meyer, Deputy Assistant to the President for Legislative Affairs*

How the White House is functioning with the Democrat Majority and what will the remaining year of the Bush presidency will look like.

**2:45 - 4:00 House and Senate Breakout Groups**

**4:00 - 4:15 Break**

**4:15 - 5:15 Congressional Websites**

*Richard Thau, Presentation Testing*

Most Congressional website and e-newsletter programs fall short in the eyes of constituents. The problem with HIR templates are that they don't provide what constituents really want from a website. Find out what survey show constituents want that they are not getting, how to design and implement an effective e-newsletter program, and whether or not paper mail such as postal patrons are still worth sending.

**5:15 - 5:30**    **Best Practice for E-Newsletter Program**  
Chiefs of Staff panel discussion.

**5:30 - 6:30**    **The Congressional Website of the Future**  
DJ Smith, Capital Idea Ventures & Former  
Live demonstration of the Congressional website of the future with an interactive component that will show chiefs how easy it is to add constituent favorites such as blogs, video – and how a search function that makes it easy to find positions and votes on issues would work. Presented by former IT Hill staffer D.J. Smith.

**6:30 - 7:00**    **Reception**

**7:00**            **Dinner**  
*Guest speaker to be announced.*

**Saturday, November 3, 2007**

**8:00-9:30**    **Breakfast**