

# 3rd Annual PAAT ETHICS COMPLIANCE Institute

The 2007 PAAT Institute is designed for anyone interested in learning how to better navigate and comply with the ethics and lobby laws in Texas.

SEPTEMBER 26, 2007 — BARTON CREEK RESORT — 9:00 A.M. - 4:00 P.M.

<p><b>Session I</b> <b>2007 Session</b> <b>Legislative Update</b> <i>Impact of new lobby, campaign and ethics laws that passed and those that didn't; and what to expect from the Commission in light of the session</i></p>	<p><b>Session 2</b> <b>Advent of Blogs &amp; Blackberry Lobbying</b> <i>How today's e-mail and Internet communications impact the lobby and political leadership in Texas and the associated ethical and legal questions</i></p>	<p><b>Session 3</b> <b>Corporations and Their Lobbyists: Managing consequences</b> <b>Lobbyists and their Clients: Managing expectations</b></p>	<p><b>Session 4</b> <b>Luncheon Panel</b> <b>The Speaker's Race and the Law</b> <i>The dos and don'ts regarding outside participation in the Speaker's race</i></p>	<p><b>Session 5</b> <b>The Official Rules of the Process</b> <i>A Discussion from the Dais</i></p> <p><b>Session 6</b> <b>PACS, Politics and the Rules du Jour</b></p>	<p><b>Session 7</b> <b>Non-Session Lobbying</b> <i>What can you be doing now to prepare yourself and your clients for the 2008 elections and 2009 session, and practical applications of the rules of engagement</i></p>
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*Confirmed Speakers Include: House Parliamentarian Terry Keel, Journalists Paul Burka, Mike Hailey, Harvey Kronberg and Ross Ramsey, Attorney Ed Shack, Travis County Attorney David Escamilla, Director of the Public Integrity Unit of the Travis County District Attorney's Office Gregg Cox, Ethics Commission Reps and more...*

## AGENDA AND CONFIRMED SPEAKERS:

**9:00 a.m. — 9:50 a.m.**  
**2007 Session Legislative Update**  
*Impact of new lobby, campaign and ethics laws that passed and those that didn't; and what to expect from the Commission post-session*

**Panel Background:** Discussion of the legislation passed by the 80th Texas Legislature that impacts the advocacy and campaign areas of the law. Included in the discussion are the practical and literal effect of those changes on the ethical behavioral requirements on the Lobby and the process that the Commission will follow in dealing with the areas of the law recommended for change which were not addressed or failed to pass the legislature.

**Confirmed Speakers:** Natalia Luna Ashley, General Counsel and David Reisman, Executive Director, Texas Ethics Commission; Jack Gullahorn, PAAT

**10:00 a.m. — 10:50 a.m.**  
**Blog & Blackberry Lobbying**  
*How today's real-time e-mail and Internet communications impact the lobby and political leadership and the associated ethical and legal questions*

**Panel Background:** Discussion of the practical, political and ethical issues arising from real-time news and legislative communications in the process of governing. Included are issues such as journalistic integrity vs. political spin; when online news and opinion becomes leg. advertising requiring disclosure; when blogs and special interest newsletters and RSS feeds become a campaign contribution or a reportable campaign expenditure; and what are the next steps in the e-frontier.

**Confirmed Speakers:** Paul Burka, Texas Monthly; Mike Hailey, Capitol Inside; Harvey Kronberg, Quorum Report; Ross Ramsey, Texas Weekly

**11 a.m. — 11:50 a.m.**  
**Panel Discussion**  
*Corporations and Their Lobbyists: Managing consequences — Lobbyists and their Clients: Managing expectations*

**Panel Background:** What are the evolving boundaries of ethical and responsible relationships between lobbyists and clients; between corporations and their subsidiaries; and between lobbyists and their associates? A reminder of the laws on conflicts of interest, and the consequences on corporate ventures if a company's lobbyist leaves the company vulnerable to a reporting violation. What to do when your client asks or does things that can cause problems ethically. **Presenters Pending.**

**Lunch Break**  
*Box Lunches Provided by Barton Creek*

**12:10 p.m. — 1:00 p.m.**

**Luncheon Panel  
The Speaker's Race and the Law**

*The dos and don'ts regarding outside participation in the Speaker's race*

**Panel Background:** Analysis of the laws governing the process of electing a Speaker of the Texas House from the perspective of three persons charged with addressing complaints and answering questions on the legal, ethical and practical application of those statutes. Discussion of the process involved in reviewing civil, misdemeanor and felony complaints under the Speaker's race campaign statute and how to advise your client/company of the ethical boundaries of participation.

**Confirmed Speakers:** David Escamilla, Travis County Attorney; Gregg Cox, Director of the Public Integrity Unit of the Travis County District Attorney's Office; Natalia Luna Ashley, General Counsel of the Texas Ethics Commission

**1:10 p.m. — 2:00 p.m.**

**The Official Rules of the Process**

*A discussion from the dais*

**Panel Background:** The current status of the debate over the scope of the Rules and Procedures of the Texas House and how that debate may impact this interim, if at all. How does a lobbyist ethically and intelligently advise a client on what to expect? What will the process be when the House convenes in January of 2009?

**Confirmed Speaker:** Terry Keel, Parliamentarian of the Texas House

**2:10 p.m. — 3:00 p.m.**

**PACS, Politics and the Rules du Jour**

**Panel Background:** Discussion to include the current thinking on the impact in Texas of the recent Supreme Court decision in Federal Election Commission v. Wisconsin Right to Life, Inc. on corporate indirect involvement in elections. The legal and ethical parameters of what can be done in Texas by corporations to support a PAC's administrative expenditures. The limitations on and ethical boundaries that apply when lobby and political activities are mixed.

**Confirmed Speaker:** Ed Shack, Attorney At Law

**3:10 p.m. — 4:00 p.m.**

**Non-Session Lobbying**

*What can you be doing now to prepare yourself and your clients for the 2008 elections and 2009 session, and practical applications of the rules of engagement*

**Panel Background:** How to avoid the ethical pitfalls of inadvertently making impermissible expenditures with corporate dollars, or failing to report activities correctly. Including discussions of hypothetical situations involving expenditures for Fundraisers, Corporate walk-throughs; PACs; "conferences and fact finding trips"; entertainment; corporate suites and the presence requirement. The scope of allowable lobby activities involving members and staff and meeting their expectations, ethically and effectively.

**Confirmed Speakers:** Natalia Luna Ashley, Jack Gullahorn

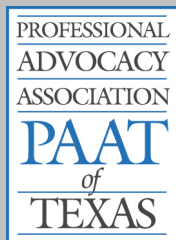
**4:00 p.m.**

**Closing Remarks**

Jack Gullahorn

*QUESTIONS?*

*For more information about the 2007 Institute contact Allison Small at 512.922.5458 or via e-mail at [asmall@texasadvocacy.com](mailto:asmall@texasadvocacy.com).*



*The Professional Advocacy Association of Texas is the state's only recognized statewide group for the lobby community. PAAT Members are well-respected lobbyists and company/association government affairs representatives who are serious about what they do and are committed to integrity and high ethical standards.*

**REGISTER TODAY!**

PAAT Ethics Compliance Institute

September 26, 2007 • Barton Creek Resort

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**Yes, I want to become a PAAT member and receive all the membership benefits, including a discount on my registration fee.**

*Upon receipt of this form, PAAT will contact you about membership details and issue an invoice for your annual membership fee.*

**I'll be attending the event as:**

early bird member (before August 24th) — \$185

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*For PAAT corporate and association members with multiple registrants, only one person may register using the PAAT member discount rate. If multiple registrants use the discount we will let you know and invoice you for the remaining fees.*

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*Please return this form, along with payment or payment information, either by mail or by fax at 512.708.8397.*

**Professional Advocacy Association of Texas**  
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Austin, TX 78763

Registration is also available online at [www.texasadvocacy.com](http://www.texasadvocacy.com).