

<u>Organization</u>	<u>Dates</u>
Tau Kappa Epsilon Fraternity, President	1978-79
American Chemical Society (affiliate)	1982-84
Society for Applied Spectroscopy	1982-84
Houston Young Professional Republicans	1984-89
Public Relations Society of America	1996-99
National Association of Government Communicators (Chapter VP)	1996-99

Employment record: List below all positions held since college, including the title or description of job, name of employment, location of work, and inclusive dates of employment.

(See Attachment #1)

**Government
experience:**

List any experience in or direct association with Federal, State, or local governments, including any advisory, consultative, honorary or other part time service or positions.

7/90 – 7/92	The White House, Office of Presidential Advance
7/92 – 1/93	The White House, Office of Vice Presidential Advance, Deputy Director
1/95 – 2/96	Texas Department of Commerce, Communications Director
2/96 – 6/99	Texas Department of Housing & Community Affairs, Communications Director
1/01 – 1/03	The White House, Deputy Assistant to the President & Director of Presidential Advance
1/03 – 4/05	The White House, Deputy Assistant to the President & Cabinet Secretary

**Published
Writings:**

List the titles, publishers and dates of books, articles, reports or other published materials you have written.

As a spokesperson for two State of Texas agencies (Texas Department of Commerce; Texas Department of Housing & Community Affairs), I was routinely quoted in Texas newspapers as well as creating op-eds related to economic and community development. I also assisted in the development of strategic plans, consolidated plans, and other written reports at both agencies.

Also developed an op-ed that was published by the Houston Chronicle and other Hearst newspapers in January 1993.

**Political
Affiliations
and activities:**

List memberships and offices held in and services rendered to all political parties or election committees during the last 10 years.

1994	George W. Bush for Governor Campaign, Director of Advance
1995	Director of Events, Texas Inaugural Committee
1996	Volunteer Advance, Dole-Kemp
1999	Director of Events, Texas Inaugural Committee
1999-2000	Director of Advance, George W. Bush for President; Bush-Cheney 2000
2000-2001	Chief Deputy & Director of Events/Operations, Presidential Inaugural Committee

Political

Contributions: Itemize all political contributions of \$500 or more to any individual, campaign organization, political party, political action committee or similar entity during the last eight years and identify specific amounts, dates, and names of recipients.

Bush-Cheney 2004: \$500. While other contributions to political campaigns and committees are cumulatively in excess of \$500, this is the only single contribution of \$500 or more during the last eight years.

Qualifications: State fully your qualifications to serve in the position to which you have been named.

I spent close to five years in Texas state government, with more than 3 ½ years of that service at the Texas Department of Housing & Community Affairs (TDHCA). TDHCA is one of the largest and most programmatically diverse state housing agencies in the country and administers the following programs and activities: First Time Homebuyers Program (mortgage revenue bonds), Low Income Housing Tax Credits (LIHTC), Community Development Block Grants (CDBG)*, Community Service Block Grants (CSBG), Low Income Home Energy Assistance Program (LIHEAP), Home Investment Partnership Program (HOME), Colonia Initiatives, and regulation of the States' Manufactured Housing industry, to name a few. I have attached a list of some of the legislative and programmatic successes that I played a part in during my tenure. (See Attachment #2).

I also served at the Texas Department of Commerce (now the Texas Department of Economic Development) for more than a year. In my capacity as Communications Director I dealt with policy and legislative issues related to economic development, workforce training, and the travel and tourism industry.

Additionally, from January 2003 until early 2005, I served as Deputy Assistant to the President and Cabinet Secretary and routinely participated in meetings with the President, Vice President, and White House senior staff on a variety of HUD policy issues. These issues included the Administration's efforts to boost homeownership, increase access to affordable housing, and reform both RESPA and the GSEs.

*Was made a separate state agency in 2001

Future employment

relationships: 1. Indicate whether you will sever all connections with your present employer, business firm, association or organization if you are confirmed by the Senate.

If confirmed by the Senate, I would continue to be employed by HUD.

2. As far as can be foreseen, state whether you have any plans after completing government service to resume employment, affiliation or practice with your previous employer, business firm, association or organization.

I have not received any commitments for employment after I leave government service.

3. Has anybody made you a commitment to a job after you leave government?

I have not received any commitments for employment after I leave government service.

4. Do you expect to serve the full term for which you have been appointed?

If confirmed by the Senate, I would serve at the pleasure of the President.

Potential conflicts of interest:

1. Describe any financial arrangements or deferred compensation agreements or other continuing dealings with business associates, clients or customers who will be affected by policies which you will influence in the position to which you have been nominated.

None that I am aware of.

2. List any investments, obligations, liabilities, or other relationships which might involve potential conflicts of interest with the position to which you have been nominated.

As a former employee of the State of Texas, I continue to participate in (but no longer contribute to) the Employees Retirement System of Texas defined benefits plan.

3. Describe any business relationship, dealing or financial transaction (other than tax paying) which you have had during the last 10 years with the Federal Government, whether for yourself, on behalf of a client, or acting as an agent, that might in any way constitute or result in a possible conflict of interest with the position to which you have been nominated.

None that I am aware of.

4. List any lobbying activity during the past ten years in which you have engaged in for the purpose of directly or indirectly influencing the passage, defeat or modification of any legislation at the national level of government or affecting the administration and execution of national law or public policy.

While at the Texas Department of Housing & Community Affairs, I traveled to Washington, DC several times between 1996 and 1999 to meet with Members of the Texas Congressional Delegation (and their staff) to seek support on issues and programs related to our agency. Among the issues we sought support were increasing the allocation by which States receive low-income housing tax credits. We also asked for support to increase the size of the private activity bond cap which would allow us to issue additional mortgage revenue bonds aimed at assisting low to moderate income first-time homebuyers.

5. Explain how you will resolve any conflict of interest that may be disclosed by your responses to the items above.

Pursuant to an ethics agreement with the Office of General Counsel at HUD, I have agreed to recuse myself from participating personally and substantially in any particular matter that will have a direct and predictable effect on the ability and willingness of the State of Texas pension plan (Employees Retirement System of Texas) to provide me any pension benefit through its defined benefit pension plan.

**Civil, criminal and
investigatory
actions:**

1. Give the full details of any civil or criminal proceeding in which you were a defendant or any inquiry or investigation by a Federal, State, or local agency in which you were the subject of the inquiry or investigation.

No criminal proceedings.

In 1978, I was the defendant in a civil lawsuit resulting from a traffic accident with a fatality (occurred in 1974). The jury ruled in my favor.

2. Give the full details of any proceeding, inquiry or investigation by any professional association including any bar association in which you were the subject of the proceeding, inquiry or investigation.

None that I am aware of.

ATTACHMENT #1 – EMPLOYMENT RECORD

RE: Brian D. Montgomery

Deputy Assistant to the President and Cabinet Secretary, January 2003 – April 2005, Washington, DC

- Served as a member of the President's senior staff and supervised the division that helped manage the President's relationship with his Cabinet and all Federal agencies in the Executive Branch. Advocated within the White House on behalf of the Cabinet agencies and served as an early warning system in relation to agency initiatives and late-breaking issues for the President and senior White House leadership. Interacted with other White House Offices such as the Chief of Staff, Strategic Initiatives, Communications, and the four policy councils (Domestic Policy Council, National Economic Council, Homeland Security Council, and the National Security Council) on a variety of initiatives to help ensure that agency programs were aligned with the President's agenda. Regularly participated in policy meetings with senior Cabinet officials, the Vice President, and the President. Led the internal Space Shuttle *Columbia* Working Group that was formed immediately following the shuttle disaster. The Group formulated the White House response to all accident-related activities and initiated the review process that ultimately led to the President's 2004 Space Policy that charts a new course for America's space program. Coordinated and helped lead two inter-agency working groups that dealt with relief and reconstruction efforts following the devastating 2004 hurricanes that hit Florida and other states; and a similar collaborative effort following the wildfires that struck California and Arizona in 2003. Served as a member of the President's Management Council, which helps oversee implementation of the President's Management Agenda – an inter-agency strategy for improving the management and performance of the Federal Government. Served as the White House liaison and directed the participation of White House staff in the events around the state funeral of former President Ronald Reagan in June 2004.

Deputy Assistant to the President and Director of Advance, January 2001 – January 2003, Washington, DC

- Managed the division responsible for the development, organization, and implementation of Presidential events both in the United States and overseas. Participated in message development and directed the process that visually communicated the message at Presidential events. Co-directed all international and domestic site surveys in advance of Presidential visits. Traveled extensively with the President throughout the world serving as trip director. Of note, directed the planning and execution of all Presidential events following the attacks on September 11, 2001, as well as the one-year remembrance.

2001 Presidential Inaugural Committee, December 2000 – January 2001**Principal Deputy and Director of Special Events and Operations, Washington, DC**

- Managed the largest division responsible for the organization of all inaugural events and activities, which was accomplished in only 31 days. Directed a staff of close to 200 and oversaw all event-related expenditures.

Bush-Cheney 2000, May 1999 – December 2000, Director of Advance, Austin, Texas

- Managed the division responsible for all public events and advance operations. As a member of the campaign senior staff also participated in message development and directed the implementation of the message through campaign events and appearances. Managed close to 150 employees and volunteer advance staff. Traveled extensively with the candidate throughout targeted states.

**Texas Department of Housing and Community Affairs, February 1996 – May 1999
Communications Director, Austin, Texas**

- Served as the agency's chief spokesperson and director of the division responsible for all external communications to the news media, state legislature, state and federal agencies, housing and community assistance organizations, and other public constituencies. Marketed agency programs and services including the First-Time Homebuyer Program, Community Development Block Grants, HOME Program, Low Income Housing Tax Credits, and Community Service Block Grants. Coordinated and directed the production of printed and displayed communications media including feature stories, newsletters, brochures, billboards, news articles and editorials, public service announcements, and the agency website. Directed the senior management decision-making process regarding all external communications and served as chief agency liaison to the Governor's Office.

**Texas Department of Economic Development, February 1995 – February 1996
Communications Director, Austin, Texas**

- Served as the agency's chief spokesperson and director of the division responsible for conveying agency information to the business community, media, state and federal agencies, members of the state legislature, and other public sources. Directed all division functions including marketing, media relations, and communications, including speech and editorial development. Consulted other division directors on political and policy issues related to economic development, workforce training, and the travel and tourism industry including participation in the review process for the highly-successful Texas tourism advertising campaign.

**George Bush for Governor/Gubernatorial Inaugural Committee, June 1994 –
January 1995, Director of Advance/Director of Events, Austin, Texas**

- Managed the division responsible for all public events and advance operations. As a member of the campaign senior staff also participated in message development and directed the implementation of the message through campaign

events and appearances. Also directed all inaugural events and activities on behalf of the Governor-elect.

Taylor-Neumann Public Relations, April 1993 – May 1994, Account Supervisor, Houston, Texas

- Developed, planned, and implemented public and media related initiatives on behalf of corporate clients and governmental organizations. Responsibilities included the development and distribution of news releases and opinion-editorials, media training, and public information campaign management.

Office of the Vice President, The White House, July 1992 – January 1993, Deputy Director of Advance, Washington, DC

- Co-managed a team of more than 60 paid and volunteer advance staff. Reviewed and approved news releases regarding Vice Presidential events and interacted with other senior staff and campaign operatives on issues related to the Vice President's public events. Responsible for the planning and execution of public appearances by Vice President Quayle. Directed and planned media coverage, event structure, and flow. Participated in the decision-making process regarding the Vice President's political agenda and travel schedule.

Office of Presidential Advance, The White House, June 1990 – July 1992, Lead Press Advance Representative, Washington, DC

- Planned and directed media coverage for President George H.W. Bush in public appearances both domestic and abroad. Wrote news releases regarding these events and organized press conferences and other large media events. Conceptualized events and logistics during domestic and international pre-planning site surveys. Interacted on a daily basis with personnel from the U.S. Secret Service, White House Military Office, and White House Communications Agency. Also interacted with State Department staff and foreign security agencies during international visits.

Whittle Communications, LLC, November 1987 – May 1990, Regional Manager, Houston, Texas

- Planned and implemented a regional strategic marketing plan for Channel One, a nationally targeted satellite transmitted news broadcast for secondary school students. Marketing efforts positioned Texas as the number one market for Channel One. Developed and delivered presentations to state and local boards of education, teachers groups, and parent/teacher associations. Also served as regional spokesperson.

Petrochemical and Chemical Processing Industry, 1980 – 1986, Houston, Texas, International Inventory Specialists, Alloy Spectrotest, and Corr Tech, Inc.

- Held managerial and marketing positions in the petrochemical and chemical processing industries, including managing a materials testing laboratory and representing manufacturers of fluid handling equipment.

ATTACHMENT #2 – QUALIFICATIONS (continued from Page 3)

RE: Brian D. Montgomery

Some of the legislative and programmatic successes I contributed to while employed at the Texas Department of Housing & Community Affairs:

- Texas Statewide Homebuyer Education Program (TSHEP) – This homebuyer counseling and education program won a HUD best-practices award in 1999.
- Home of Your Own (HOYO) – Since this home buying initiative was created in 1996, 243 Texans with disabilities have become homeowners through the program. The component of strong homebuyer education has resulted in only one foreclosure – and a success rate greater than 99.5 percent.
- Senate Bill 623 – passed during the 76th Texas Legislature, it requires recipients of state or federal funds from TDHCA for the construction of single family affordable housing for individuals and families of low, very low, and extremely low income to construct the housing in accordance with basic accessibility requirements.
- The Statewide Architectural Barrier Removal Program (SABR) – Established in 1996 as a pilot project, SABR provides funds for the modification of homes occupied by persons with disabilities.
- LIHEAP – Distributed more than \$65 million in LIHEAP funds during 1998 Texas heat wave.
- Texas YouthWorks – Launched in 1998, Texas YouthWorks offers at-risk individuals opportunities for education, learning entry-level construction skills as well as valuable life skills as they construct energy-efficient affordable housing in their communities.
- The Small Towns Environment Program (STEP) – administers grants to eligible cities and counties for solving water and sewer problems with a self-help approach that requires local participation through volunteerism.
- Office of Colonia Initiatives – established in 1997, the Office focuses on programs designed to help improve the quality of life within the States' colonias. Among these is the Contract-for-Deed Conversion program that was implemented in 1998 to help colonia residents convert contracts-for-deed into traditional mortgages. This allowed the residents to build equity in their homes.

BRIAN D. MONTGOMERY

Brian D. Montgomery comes to the U.S. Department of Housing and Urban Development (HUD) from the White House, where he served as Deputy Assistant to the President and Cabinet Secretary from 2003 - 2005. In that role, Montgomery managed the Office of Cabinet Affairs, which serves as the liaison to all the Cabinet members and executive agency heads. As Cabinet Secretary, Montgomery worked to ensure that agency initiatives and programs were effectively communicated to the White House staff, and acted as one of the primary information sources of White House policy and directives for the Cabinet. While serving in the White House, Montgomery routinely participated in meetings with the President, Vice President, and White House senior staff on a variety of HUD policy issues. These issues included the Administration's efforts to boost homeownership, increase access to affordable housing, and reform both RESPA and the GSEs.

Prior to his appointment as Cabinet Secretary, Montgomery served as Deputy Assistant to the President and Director of Presidential Advance from 2001 - 2003. In this capacity, he planned and directed dozens of domestic and international events. Of note, he helped direct the planning and execution of all Presidential events following the attacks on September 11, 2001, as well as the one-year remembrance.

From 1996 until 1999, Montgomery served as the Communications Director at the Texas Department of Housing and Community Affairs (TDHCA). Recognized as one of the largest and most programmatically diverse state housing agencies in the country, TDHCA developed a number of initiatives to improve lives and communities during Montgomery's tenure.

One of these initiatives was the *Home of Your Own Program (HOYO)*, which was created in 1996 to expand homeownership opportunities for Texans with disabilities. Designed to include homeownership education, down payment assistance, affordable financing, disability-specific construction modifications, and other supportive services, HOYO helped many Texans overcome the barriers to homeownership. Since the inception of the program, hundreds of Texans with disabilities have become homeowners.

In 1997, TDHCA implemented the Texas Statewide Homebuyer Education Program, which was designed to provide information and counseling to prospective homebuyers, without duplicating the efforts of existing counseling programs. The program achieved immediate success, and in 1999, it won a HUD best-practices award.

During Montgomery's tenure, TDHCA also implemented a number of programs to increase the availability of affordable housing for low-income individuals, and worked to ensure that persons with disabilities had healthy, accessible housing opportunities. Also while serving, TDHCA undertook several initiatives designed to improve their fair housing efforts. These initiatives included the establishment of the Office of Colonia Initiatives, and increased marketing of the First Time Homebuyer Program to minority populations.

Immediately following the Shuttle *Columbia* accident in February 2003, Montgomery was asked to lead a White House working group to monitor all facets of the accident investigation. This ultimately led to the process that developed the President's vision for space exploration announced in January 2004. For this effort, Montgomery was awarded the NASA Exceptional Service Medal in June 2004. And following the death of President Ronald Reagan in June 2004, Montgomery served as the primary White House contact for all activities and events surrounding the State Funeral.

A graduate of the University of Houston, Montgomery and his wife Katy reside in Virginia. Katy is employed with the U.S. Department of Homeland Security.

May 2005