

U.S. House of Representatives
Committee on Ethics

LEGISLATIVE RESOURCE CENTER

EMPLOYEE POST-TRAVEL DISCLOSURE FORM 18 MAR -8 PM 4:45

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, 135 Cannon House Office Building, 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: Loni Peater
2. a. Name of accompanying relative: N/A or None
 b. Relationship to Traveler: Spouse Child Other (specify): _____
3. a. Dates of departure and return: Departure: 2/22/2018 Return: 2/25/2018
 b. Dates at personal expense (if any): N/A or None
4. Departure city: DCA Destination: Ft. Lauderdale Return city: DCA
5. Sponsor(s) (who paid for the trip): ITIF
6. Describe meetings and events attended: High Tech conference
panels in hotel, staff buyings, and working lunch
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 Grantmaking or Non-Grantmaking Sponsor Forms;
 - 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 that statement is true by checking 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: [Signature] DATE: 3/8/2018

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: Mike Kelly DATE: 3/8/2018

SIGNATURE OF SUPERVISING MEMBER: Mike Kelly

(22)

**U.S. House of Representatives
Committee on Ethics**

SPONSOR POST-TRAVEL DISCLOSURE FORM

This form must be completed by an officer of any organization that served as the primary trip sponsor in providing travel expenses or reimbursement for travel expenses to House Members, officers, or employees under House Rule 25, clause 5. *A completed copy of the form must be provided to each House Member, officer, or employee who participated on the trip within 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 for the trip): Information Technology and Innovation Foundation (ITIF)
2. Travel Destination(s): Fort Lauderdale, Florida
3. Date of Departure: 2/22/2018 Date of Return: 2/25/2018
4. Name(s) of Traveler(s): Lori Prater
(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 response to Question 4:

	Total Transportation Expenses	Total Lodging Expenses	Total Meal Expenses	Other Expenses (dollar amount per item and description)
Traveler	\$611.83	\$897	\$472	
Accompanying Relative				

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: Jackie Whisman

Name: Jackie Whisman Title: Vice President, Development & Outreach

Organization: Information Technology and Innovation Foundation (ITIF)

I am an officer of the above-named organization (signify statement is true by checking box):

Address: 1101 K Street, NW, Suite 610

Washington, DC 20005

Telephone number: 202-626-5748

Email Address: jwhisman@itif.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.

U.S. House of Representatives
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. *Form (and any attachments) may be faxed to the Committee at (202) 225-7392, sent or delivered to the Committee at 1015 Longworth, or e-mailed to travel.requests@mail.house.gov.*

YOUR COMPLETED REQUEST MUST BE SUBMITTED TO THE COMMITTEE NO LESS THAN 30 DAYS BEFORE YOUR PROPOSED DEPARTURE DATE. Absent exceptional circumstances, permission will not be granted for requests received less than 30 days before the trip commences. You must receive explicit approval from the Committee before you depart on this trip.

Name of Traveler: hori Prater

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: [Handwritten Signature]

Name of signatory (if other than traveler): _____

For staff, name of employing Member or committee: Congressman Mike Kelly

Office address: 1707 Longworth House Office Building

Telephone number: X 5-1051

Email address of contact person: hori.prater@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:

Committee on Ethics
1015 Longworth House Office Building
Washington, DC 20515
(202) 225-7103 (phone)
(202) 225-7392 (fax)
Travel email: travel.requests@mail.house.gov

U.S. House of Representatives
Committee on Ethics

TRAVELER FORM

1. Name of Traveler: Lori Prater
2. Sponsor(s) (who will be paying for the trip): ITIF
3. Travel destination(s): Ft Lauderdale, FL
4. a. Date of departure 2/22/2018 Date of return: 2/25/2018
b. Will you be extending the trip at your personal expense? Yes No
If yes, dates at personal expense: _____
5. a. Will you be accompanied by a relative at the sponsor's expense? Yes No
b. If yes:
(1) Name of accompanying relative: _____
(2) Relationship to traveler: Spouse Child Other (specify): _____
(3) Accompanying relative is at least 18 years of age: Yes No
6. a. Did the trip sponsor answer "yes" to Question 9(d) on the Primary Trip Sponsor Form (i.e., travel is sponsored by an entity that employs a registered federal lobbyist or foreign agent and you are requesting lodging for two nights)? Yes No
b. If yes, explain why the second night of lodging is warranted:

7. Primary Trip Sponsor Form is attached, including agenda, invitee list, and any other attachments and contributing sponsor forms: Yes No
NOTE: The agenda should show the traveler's individual schedule, including departure and arrival times and identify the specific events in which the traveler will be participating.
8. Explain why participation in the trip is connected to the traveler's individual official or representational duties. Staff should include their job title and how the activities on the itinerary relate to their duties.
As Legislative Director and Tax Counsel, I handle
tax, trade, technology, and cybersecurity related to the
high tech industry as well as related judicial issues including
IT.
9. Is the traveler aware of any registered federal lobbyists or foreign agents involved in planning, organizing, requesting, and/or arranging the trip? Yes No

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.

Date: 1/18/2018

Congressman Mike Kelly
Signature of Employing Member

**U.S. House of Representatives
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 Web site (ethics.house.gov) provides detailed instructions for filling out the form.

NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001. Failure to comply with the Committee's Travel Regulations may also lead to the denial of permission to sponsor future trips.

1. Sponsor (who will be paying for the trip): _____
The Information Technology and Innovation Foundation (ITIF)

2. I represent that the trip will not be financed (in whole or in part) by a registered federal lobbyist or foreign agent (signify that the statement is true by checking box):
3. *Check only one:* I represent that:
 - a. the primary trip sponsor has not accepted from any other source funds intended directly or indirectly to finance any aspect of the trip *or*
 - b. the trip is arranged without regard to congressional participation and the primary trip sponsor has accepted funds only from entities that will receive a tangible benefit in exchange for those funds *or*.
 - c. the primary trip sponsor has accepted funds from other source(s) intended directly or indirectly to finance all or part of this trip and has enclosed disclosure forms from each of those entities.
If "c" is checked, list the names of the additional sponsors: _____

4. Provide names and titles of ALL House Members and employees you are inviting. **For each House invitee, provide an explanation of why the individual was invited** (include additional pages if necessary):
See Attachment 1

5. Is travel being offered to an accompanying relative of the House invitee(s)? Yes No
6. Date of departure: 2/22/2018 Date of return: 2/25/2018
7. a. City of departure: Washington, DC
b. Destination(s): Fort Lauderdale, FL
c. City of return: Washington, DC
8. 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 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 one of the following:
 - a. I checked 8(a) or (b) above:
 - b. I checked 8(c) above but am not offering any lodging:
 - 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 "d" is checked, explain why the second night of lodging is warranted: _____

10. Attached is a detailed agenda of the activities the 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 one:

- a. I represent that a registered federal lobbyist or foreign agent will not accompany House Members or employees on any segment of the trip (signify that the statement is true by checking box): *or*
- b. N/A – trip sponsor is a U.S. institution of higher education.

12. For **each** sponsor required to submit a sponsor form, describe the sponsor's interest in the subject matter of the trip **and** its role in organizing and/or conducting the trip:

See Attachment 2

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. 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 specifically *with regard* to congressional participation:

If "b" is checked:

1) Detail the cost per day of meals (approximate cost may be provided): _____

2) Provide reason for selecting the location of the event or trip: _____

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

Hotel name: Westin Fort Lauderdale Beach Resort City: Fort Lauderdale, FL Cost per night: \$299

Reason(s) for selecting: Cost, Availability, Ease of Travel from East and West Coasts

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 box):

18. TOTAL EXPENSES FOR EACH PARTICIPANT:

<input type="checkbox"/> actual amounts <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	\$650	\$900	\$450
For each accompanying relative			

	<i>Other</i> Expenses (dollar amount per item)	Identify Specific Nature of "Other" Expenses (e.g., taxi, parking, registration fee, etc.)
For each Member, Officer, or employee		
For each accompanying relative		

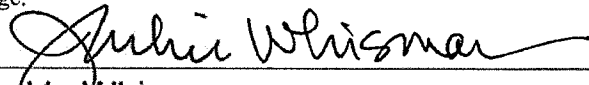
NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001.

19. Check one:

- a. I certify that I am an officer of the organization listed below. *or*
 b. N/A – sponsor is an individual or a U.S. institution of higher education.

20. I certify that I am not a registered federal lobbyist or foreign agent for any sponsor of this trip.

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

Signature: 
 Name: Jackie Whisman
 Title: Vice President
 Organization: Information Technology and Innovation Foundation
 Address: 1101 K Street, NW, Suite 610, Washington, DC 20005
 Telephone number: (202) 626-5748
 Email address: jwhisman@itif.org

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

Committee on Ethics
 U.S. House of Representatives
 1015 Longworth House Office Building
 Washington, DC 20515
 (202) 225-7103 (phone)
 (202) 225-7392 (general fax)

U.S. House of Representatives
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 Web site (ethics.house.gov) provides detailed instructions for filling out the form.

NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 USC. § 1001. Failure to comply with the Committee's Travel Regulations may also lead to the denial of permission to sponsor future trips.

1. Sponsor (who will be paying for the trip): _____
The Information Technology and Innovation Foundation (ITIF)

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): a
3. Check only one: I represent that:
 - a. the primary trip sponsor has not accepted from any other source funds intended directly or indirectly to finance any aspect of the trip or
 - b. the trip is arranged without regard to congressional participation and the primary trip sponsor has accepted funds only from entities that will receive a tangible benefit in exchange for those funds or.
 - c. the primary trip sponsor has accepted funds from other source(s) intended directly or indirectly to finance all or part of this trip and has enclosed disclosure forms from each of those entities. If "c" is checked, list the names of the additional sponsors:

4. Provide names and titles of ALL House Members and employees you are inviting. For each House invitee, provide an explanation of why the individual was invited (include additional pages if necessary):
See Attachment I

5. Is travel being offered to an accompanying relative of the House invitee(s)? Yes No
6. Date of departure: 2/22/2018 Date of return: 2/25/2018

7. a. City of departure: Washington, DC

- b. Destination(s): Fort Lauderdale, FL

- c. City of return: Washington, DC

8. 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 registered federal lobbyist or foreign agent: or
 - c. 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 one of the following:

- a. I checked 8(a) or (b) above:
- b. I checked 8(c) above but am not offering any lodging:
checked 8(e) 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 "d" is checked, explain why the second night of lodging is warranted:

10. Attached is a detailed agenda of the activities the 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 one:

- a. I represent that a registered federal lobbyist or foreign agent will not accompany House Members or employees on any segment of the trip (signify that the statement is true by checking box): a **or**
- b. N/A — trip sponsor is a U.S. institution of higher education.

12. For each sponsor required to submit a sponsor form, describe the sponsor's interest in the subject matter of the trip and its role in organizing and/or conducting the trip:

See Attachment 2

13. Answer parts a and b. Answer part c if necessary.

- a. Mode of travel: Air/Rail Bus a Car a Other (Specify: _____)
- b. Class of travel: Coach Business a First a 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): a

15. 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 specifically with regard to congressional participation:

If "b" is checked:

1) Detail the cost per day of meals (approximate cost may be provided):

2) Provide reason for selecting the location of the event or trip:

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

Hotel name: Westin Fort Lauderdale Beach Resort City: Fort Lauderdale, FL Cost per night: \$299

Reason(s) for selecting: Cost, Availability, Ease of Travel from East and West Coasts

Hotel name: _____ City: _____ Cost per night: _____

Reason(s) for selecting: _____

Hotel name: _____ City: _____ Cost per night: _____

Reason(s) for selecting: _____

- 2 -

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 box):

18. TOTAL EXPENSES FOR EACH PARTICIPANT:

actual amounts used or faith estimates	Total Transportation Expenses per Participant	Total Lodging Expenses per Participant	Total Meal Expenses per Participant
For each Member, Officer, or employee	\$650	\$900	\$450
For each accompanying relative			
	Other Expenses dollar amount or item	Identify Specific Nature of "Other" Expenses (e.g., taxi, parking, registration fee, etc.	
For each Member, Officer, or employee			
For each accompanying relative			

NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001.

19. Check one:

a. I certify that I am an officer of the organization listed below. or

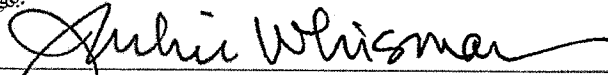
b. N/A — sponsor is an individual or a U.S. institution of higher education.

20. I certify that I am not a registered federal lobbyist or foreign agent for any sponsor of this trip.

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

my knowledge.

Signature:



Name:

Jackie Whisman

Ja

Vice President

Title:

Information Technology and Innovation Foundation
Organization:

Address: 1 101 K Street, NW, Suite 610, Washington, DC 20005

Telephone number: (202) 626-5748

Email address: jwhisman@itif.org

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

Committee on Ethics
U.S. House of Representatives
1015 Longworth House Office Building
Washington, DC 20515
(202) 225-7103 (phone)

(202)

225-7392

(general

fax

Version date 4/2013 by Committee on Ethics

Susan W. Brooks, Indiana
Chairwoman
Theodore E. Deutch, Florida
Ranking Member

Kenny Marchant, Texas
Leonard Lance, New Jersey
Mimi Walters, California
John Ratcliffe, Texas

Yvette D. Clarke, New York
Jared Polis, Colorado
Anthony Brown, Maryland
Steve Cohen, Tennessee



ONE HUNDRED FIFTEENTH CONGRESS

U.S. House of Representatives

COMMITTEE ON ETHICS

February 14, 2018

Thomas A. Rust
Staff Director and Chief Counsel

Donna Herbert
Director of Administration

Megan Savage
*Chief of Staff and Counsel to
the Chairwoman*

Daniel J. Taylor
Counsel to the Ranking Member

1015 Longworth House Office Building
Washington, D.C. 20515-6328
Telephone: (202) 225-7103
Facsimile: (202) 225-7392

Ms. Lori Prater
Office of the Honorable Mike Kelly
1707 Longworth House Office Building
Washington, DC 20515

Dear Ms. Prater:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to Fort Lauderdale, Florida, scheduled for February 22 to 25, 2018, sponsored by the Information Technology and Innovation Foundation (ITIF).

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 \$390 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,

Susan W. Brooks
Chairwoman

Theodore E. Deutch
Ranking Member

SWB/TED:adw

January 16, 2018

Lori Prater
Office of Congressman Mike Kelly
Washington, DC

Dear Lori:

I would like to invite you to participate in the Information Technology and Innovation Foundation's (ITIF's) annual invitation-only Innovation Policy Retreat in Fort Lauderdale, Florida from the evening of Thursday, February 22 through Saturday, February 24, 2018, and participate in a panel discussion on Tech Policy prospects with Hill and Administration staff on Saturday evening, February 24.

As we have in past years, our fourth policy retreat will bring together leaders from business, government, and academia to facilitate serious discussions to explore creative solutions to difficult economic and innovation challenges facing our nation. We would be most grateful for the benefit of your thoughts during this critical time for innovation. All discussions are off-the-record and the event is closed to the press.

Other retreat participants through the years have included FCC Chairman Ajit Pai; Acting Chairman of the FTC Maureen Ohlhausen and Commissioner Julie Brill; Acting USTR Demetrios Marantis and Deputy USTR Robert Holleyman; ITC Commissioner Meredith Broadbent; Undersecretary of State Robert Hormats; NSA General Counsel Rajesh De; U.S. Senator Chris Coons; and U.S. Representatives Chaffetz, Deutch, Farenthold, Hultgren, Kilmer, Latta, Moran, Neal, Richmond and Roskam.

ITIF is an independent, nonpartisan research and educational institute focusing on the intersection of technological innovation and public policy. Recognized as one of the world's leading science and technology think tanks, ITIF's mission is to formulate and promote policy solutions that accelerate innovation and boost productivity to spur growth, opportunity, and progress.

I have taken the liberty of including a draft agenda to give you a sense of the topics we plan to cover and have highlighted your proposed panel for reference. ITIF is happy to cover the costs of your travel and lodging, and will work with all relevant ethics committees and agencies to ensure the trip complies with all rules governing privately sponsored travel. Please feel free to contact Jackie Whisman, jwhisman@itif.org, with any questions.

We very much appreciate your consideration and hope you can join us in February.

My best regards,

A handwritten signature in black ink that reads "Robert D. Atkinson". The signature is written in a cursive, flowing style.

Robert D. Atkinson
President and Founder
Information Technology and Innovation
Foundation

**Draft Agenda: 2018 ITIF Winter Policy Retreat
February 22 – 24, 2018**

The Westin Fort Lauderdale Beach Resort - 321 North Fort Lauderdale Beach Boulevard

Thursday, February 22, 2018

Afternoon arrivals into Fort Lauderdale (FLL)

- 2:00 – 6:00 PM **Registration in Hotel Lobby**
- 6:00 – 7:00 PM **Welcome Reception**
- 7:15 – 9:00 PM **Dinner Discussion: The Future of Health Care Innovation: Biologics, Big Data and Nano**

Friday, February 23, 2018

- 8:00 AM **Breakfast Buffet**
- 8:30 – 9:00 AM **Introductory Remarks**

9:15 – 10:30 AM **Panel: “Overcoming Europe’s Economic Risk Aversion”**
U.S. economic policy embraces entrepreneurial dynamism, risk-taking, and breakthrough innovations. Europe’s framework is fundamentally different. It is grounded in the precautionary principle—that is, avoiding risks—which in practice means limiting the use of data; over-regulating new technologies (like robots, over-the-top applications, etc.); challenging large firms for the sin of being large (and American); and generally resisting the kind of Schumpeterian creative destruction that is so vital to growth and progress. It would be one thing if this affected only Europe. But other regions, particularly Latin America, are increasingly looking to copy the European model. This panel will discuss the challenges posed by Europe’s overabundance of caution and explore how innovation supporters and the U.S. government can better make their case, both in Europe and to others looking for guidance.

- Moderator: **Rob Atkinson**, President, ITIF
- Confirmed: **Paul Hofheinz**, President/Co-Founder, Lisbon Council
 Damien Levie, Head of Trade, Embassy of the European Union
- Invited: **Guy Verhofstadt**, President, Alliance of Liberals and Democrats for Europe, European Parliament
 Ambassador Mariam Sapiro
 David Weiner, Deputy Assistant USTR for Europe

Friday, February 23, 2018 (continued)

10:45 – 12:00 PM

Panel: “China Trade: Constructive Confrontation or All-Out Trade War?”

President Trump campaigned on getting tougher on China’s unfair trade practices, and his administration has rightly started to follow through by launching a Section 301 Investigation of China’s policies and practices related to tech transfer, intellectual property, and innovation. But what are the pros and cons of the policy options available to crack down on Chinese “innovation mercantilism?” And what should Congress do to complement or restrain the administration’s China trade policy? This panel will explore these and other questions surrounding America’s most fraught economic relationship and the integrity of the global trading system.

Moderator: **Stephen Ezell**, Vice President, Global Innovation Policy, ITIF

Confirmed: **Hon. Byron Dorgan**, Senior Policy Advisor, Arent Fox
Claire Reade, Senior Counsel, Arnold and Porter
Dennis Shea, Vice Chairman, U.S.-China Economic and Security Review

Invited: **Tim Wineland**, Deputy Assistant USTR for China Affairs
Gil Kaplan, Under Secretary for International Trade Designate
Clete Willems, Special Assistant to the President for Trade
Orville Schell, Director, Center on U.S.-China Relations, Asia Society

12:00 PM

Lunch

1:00 – 2:15 PM

Panel: “Innovation Companies in the Crosshairs: How Should They Respond?”

More and more, innovation industries are under attack, not just in the United States, but around the world. They stand accused of being monopolists that make excess profits by controlling and abusing of vital chokepoints in the network economy; violating privacy and enabling all sorts of anti-social activities; and destroying jobs. This snowballing narrative poses a major threat to pro-innovation, pro-growth policies around the world. This panel will explore these issues and discuss how advocates for innovation should respond.

Moderator: **Rob Atkinson**, President, ITIF

Confirmed: **Congresswoman Suzan DelBene (WA-01)**
Congressman Darrell Issa (CA-49)

Friday, February 23, 2018 (continued)

- 2:30 – 3:30 PM **Fireside Chat with Everett Eissenstat**, Deputy Assistant to the President for International Economic Affairs and Deputy Director of the NEC (invited)
- 3:30 – 4:30 PM **Discussion with FCC Commissioners Jessica Rosenworcel and Mike O’Reilly** (invited)
- 5:00 – 7:00 PM **Dinner Discussion: “Big Is Under Attack: How to Restore the Reputation of Large Corporations as Forces for Progress and Opportunity”** with ITIF President Rob Atkinson

Saturday, February 24, 2018

- 8:30 AM **Breakfast Buffet**
- 9:00 – 9:30 AM **Fireside Chat with Vishal Amin**, U.S. Intellectual Property Enforcement Coordinator (invited)
- 9:30 – 10:45 AM **Panel: “Cybersecurity Analysis”**
High-profile cyberattacks on U.S. companies, government agencies, and even presidential campaigns now seem to be regular occurrences. Some of the perpetrators are state-supported, some are criminal enterprises, and still others are rogue actors. Regardless of the source, these threats undermine support for IT-driven innovation, and there is a growing urgency in Washington to do more to secure the nation’s IT systems. What should Congress and the administration do? Among the options are shifting from an offensive posture to a more defensive one, supporting strong end-to-end encryption, and developing a national system of secure identities. This panel will assess the most pressing threats the country faces and explore the path forward.
- Moderator: **Daniel Castro**, Vice President, ITIF
- Confirmed: **Barbara Hoffman**, Vice President, Business Development, B2G, Samsung Electronics
 Joan O’Hara, Deputy National Security Advisor to the Vice President of the United States
- Invited: **Jeanette Manfra**, National Protection and Programs Director and Assistant Secretary for the Office of Cybersecurity and Communications, Department of Homeland Security
 Chairman Michael McCaul, U.S. House of Representatives

Saturday, February 24, 2018 (continued)

11:00 AM – 12:15 PM **Panel: “Technology and the Future of Work”**

It seems impossible to go a day without reading how the so-called “fourth industrial revolution,” propelled by technological innovation and relentless automation, will lay waste to jobs and leave people out in the cold. But instead of succumbing to this kind of techno-panic, it’s worth stepping back and questioning the premise. What kind of labor market impacts can we really expect from emerging technologies like artificial intelligence, automation, and robotics? More importantly, what kinds of policies do we need to ensure American workers are better equipped to successfully navigate inevitable economic transitions? And how can supporters of technological innovation win the fight against the “neo-Luddites” and their sympathizers.

Moderator: **Rob Atkinson**, President, ITIF

Confirmed: **Amit Singh**, Senior Vice President, Global Public Policy, Uber

Invited: **James Bessen**, Boston University School of Law

Reed Cordish, Special Assistant to the President for
Intragovernmental and Technology Initiatives

James Manyika, Chairman and Director, McKinsey Global
Institute

Eduardo Padrón, President, Miami Dade College

Pamela Tate, CEO, CAEL

12:30 PM **Lunch Buffet**

1:00 – 2:00 PM **Remarks by Alex Acosta, Secretary, United States Department of Labor**
(invited)

2:30 – 3:45 PM **Panel: “Advancing U.S. Digital Policy in the Global Arena”**

The United States has pioneered global digital policy on many issues such as Internet governance, digital trade, data protection, online speech, and intellectual property protection. Yet many countries now look to replicate ideas from Europe, rather than the United States, when formulating their own policy initiatives for the digital economy. How should U.S. policymakers and businesses educate and promote innovation-friendly policies with other countries and ensure continued U.S. digital policy leadership?

5:00 – 7:00 PM

Dinner Discussion on Tech Policy Prospects with Congressional Staff

2017 was an eventful year for technology policy, and 2018 promises to be just as eventful with Congress potentially weighing in on a host of different tech issues, including telecom reform, open government data, copyright, cybersecurity and privacy. A panel of Congressional staff members focused on tech policy will engage in a moderated discussion of what is likely in store for the rest of the 115th Congress.

Confirmed:

- Rachel Appleton**, Rep. Derek Kilmer
- Dustin Carmack**, Rep. Ron DeSantis
- Machalagh Carr**, House Ways and Means Committee
- Josh Connolly**, Rep. Jackie Speier
- Ryan Dattilo**, House Judiciary Committee
- Austin Durrer**, Rep. Charlie Crist
- Andy Flick**, Rep. Seth Moulton
- Chapin Gregor**, Senate Commerce Committee
- Tyler Grimm**, Rep. Darrell Issa
- Brad Howard**, Rep. Stephanie Murphy
- Aruna Kalyanam**, House Ways and Means Committee
- Douglas Peterson**, Senate Finance Committee
- Steven Pfrang**, Rep. Darin LaHood
- Ansley Rhyne**, Sen. Marco Rubio
- Curtis Rhyne**, Rep. George Holding
- Tricia Russell**, Rep. Josh Gottheimer
- Franz Wuerfmannsdobler**, Sen. Chris Coons
- Aaron Schmidt**, Rep. Suzan DelBene

Invited Members of Congress:

Rep. Suzan DelBene (WA) (confirmed)
Rep. Darrell Issa (CA) (confirmed)
Rep. Michael Burgess (TX)
Rep. Jerry McNerney (CA)
Rep. Hank Johnson (CA)
Chairman Michael McCaul (TX)
Rep. Richard Neal (MA)
Rep. Gerry Connolly (VA)
Rep. Jackie Speier (CA)
Rep. Ted Deutch (FL)
Sen. Cory Gardner (CO)
Sen. Amy Klobuchar (MN)
Rep. Susan Davis (CA)
Rep. Joe Courtney (CT)
Sen. Todd Young (IN)
Rep. Mike Kelly (PA)
Rep. Carlos Curbelo (FL)
Rep. Ryan Costello (PA)
Rep. Erik Paulsen (MN)
Rep. Susan Brooks (IN)
Rep. Jackie Walorski (IN)
Rep. Val Demings (FL)
Rep. Lisa Blunt Rochester (DE-AL)

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM – HOUSE ATTACHMENTS

ITIF'S ANNUAL INNOVATION POLICY RETREAT – FEBRUARY 22 – 24, 2018

Attachment 1 – Question 4:

We invited Members on committees with jurisdiction over technology, trade and tax issues, and staff from the offices of Members who have demonstrated an interest in those issues:

Rep. Suzan DelBene (WA) (confirmed)
Rep. Darrell Issa (CA) (confirmed)
Rep. Michael Burgess (TX)
Rep. Jerry McNerney (CA)
Rep. Hank Johnson (CA)
Chairman Michael McCaul (TX)
Rep. Richard Neal (MA)
Rep. Jackie Speier (CA)
Rep. Ted Deutch (FL)
Sen. Cory Gardner (CO)
Sen. Amy Klobuchar (MN)
Rep. Susan Davis (CA)
Rep. Joe Courtney (CT)
Sen. Todd Young (IN)
Rep. Mike Kelly (PA)
Rep. Carlos Curbelo (FL)
Rep. Ryan Costello (PA)
Rep. Erik Paulsen (MN)
Rep. Susan Brooks (IN)
Rep. Jackie Walorski (IN)
Rep. Val Demings (FL)
Rep. Lisa Blunt Rochester (DE-AL)
Rachel Appleton, Rep. Derek Kilmer
Dustin Carmack, Rep. Ron DeSantis
Machalagh Carr, House Ways and Means Committee
Josh Connolly, Rep. Jackie Speier
Ryan Dattilo, House Judiciary Committee
Austin Durrer, Rep. Charlie Crist
Andy Flick, Rep. Seth Moulton
Chapin Gregor, Senate Commerce Committee
Tyler Grimm, Rep. Darrell Issa
Brad Howard, Rep. Stephanie Murphy
Aruna Kalyanam, House Ways and Means Committee
Douglas Peterson, Senate Finance Committee
Steven Pfrang, Rep. Darin LaHood
Ansley Rhyne, Sen. Marco Rubio
Curtis Rhyne, Rep. George Holding
Tricia Russell, Rep. Josh Gottheimer
Aaron Schmidt, Rep. Suzan DelBene
Franz Wuerfmannsdobler, Sen. Chris Coons
Lori Prater, Rep. Mike Kelly

Attachment 2 – Question 12:

ITIF is a 501(c)(3) non-profit organization founded in 2006 whose mission is to formulate and promote public policies to advance technological innovation and productivity. Recognizing the vital role of technology in ensuring American prosperity, ITIF focuses on innovation, productivity and digital economy issues.

Our fourth policy retreat will bring together leaders from business, government, and academia to facilitate serious discussions to explore creative solutions to difficult economic and innovation challenges facing our nation.

ITIF is co-chaired by former members of Congress Vic Fazio and Phil English, and governed by a board of distinguished IT and innovation policy leaders and experts. Senators Chris Coons and Orrin Hatch are the Foundation's Honorary Senate Co-Chairs, and Congresswoman Anna Eshoo and Congressman Darrell Issa are the Foundation's Honorary House Co-Chairs.

ITIF is the sole sponsor, and is organizing and executing all aspects of this event.