

U.S. House of Representatives
Committee on Ethics

LEGISLATIVE RESOURCE CENTER

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EMPLOYEE POST-TRAVEL DISCLOSURE FORM

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: Lori Prater
2. a. Name of accompanying relative: _____ 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): _____ or None
4. Departure city: Washington DC Destination: Ft. Lauderdale, FL Return city: _____
5. Sponsor(s) (who paid for the trip): ITIF
6. Describe meetings and events attended: international policy panel; IT Enforcement / Intellectual Property; Trade; consulting panel
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: 3/29/2018

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: Congressman Mike Kelly DATE: 3/29/2018

SIGNATURE OF SUPERVISING MEMBER: [Signature]

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**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

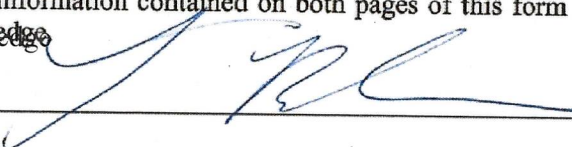
This form should be completed by House Members, officers, or employees seeking Committee approval of privately-sponsored travel or reimbursement for travel under House Rule 25, clause 5. The completed form should be submitted directly to the Committee by each invited House Member, officer, or employee, 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: Lori Peaterz

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: 

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: Lori.Peaterz@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)

**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: _____

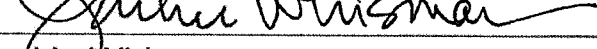
17. I represent that all expenses connected to the trip will be for actual costs incurred and not a per diem or lump sum payment. (signify that the statement is true by checking box):
18. TOTAL EXPENSES FOR EACH PARTICIPANT:

<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

(202) 225-7392 (fax)

Travel email: travel.requests@mail.house.gov

Version date 2/2013 by Committee on Ethics

Lori Prater

Sponsor(s)(who will be paying for the trip): ITIF

TRAVELER FORM

1. Name of Traveler:

2.

Travel destination(s): ~~27~~ Ft. Lauderdale, FL

a. Date of departure 2/22/2018

Date of return: 2/25/2018

3.

4.

b. Will you be extending the trip at your personal expense? [2 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: _____

Child Other (specify): _____

(2) Relationship to traveler: 8 years of age: Yes No
Spouse

(3) Accompanying relative is at least 18 years of age: yes

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:

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,

U.S. House of Representatives
Committee on Ethics

As Legislative Director and Tax Counsel, I handle
tax, trade, technology, and cyber issues related to the
high tech industry as well as related judicial issues including
IP.

9. Is the traveler aware of any registered federal lobbyists or foreign agents involved in planning, organizing, requesting, and/or arranging the trip? Yes o

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.

Congressman Mark Kelly
Signature of Employing Member

Date: 1/18/2018

PRIMARY TRIP SPONSOR FORM

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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.

I. 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 a 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

U.S. House of Representatives
Committee on Ethics

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: [2 or

b. The sponsor of the trip does not retain or employ a registered federal lobbyist or foreign agent: a 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. [2 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: 12

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: D If 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 _____ car _____ Other a (Specify: _____)
- b. Class of travel: Coach _____ Business _____ First class _____ Charter _____ Other CI _____ (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: CI 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): E

18. TOTAL EXPENSES FOR EACH PARTICIPANT:

C] actual amounts used 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 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		

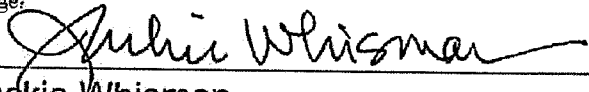
NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001.

19. Check one:

- a. I certify that I am an officer of the organization listed below.
- b. NIA — 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. a

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: 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 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

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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

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:

- b. I checked 8(a) or (b) above:
 - c. 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): a

11. Check one:

- (6) 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 QL
- b. N/A— trip sponsor is a U.S. institution of higher education. [2

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 ¹

¹) Provide reason for selecting the location of the event or trip;

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

- a. Mode of travel: air Bus a Car a Other (Specify:
- b. Class of travel: Coach Business a First a Charter Other (Specify:
- c. If travel will be 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):

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:

actual amounts 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			

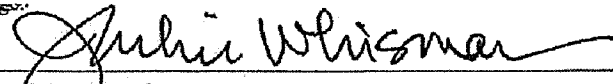
NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001.

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.


 Jackie Whisman

Knowledge:

Signature:

Name:

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

To: Congressional Participants

From: Kaya Singleton and Jackie Whisman, ITIF

Re: ITIF's Innovation Policy Retreat in Fort Lauderdale, February 22 – 24, 2018

Date: February 16, 2018

We are delighted you will be joining us for the Information Technology and Innovation Foundation's Innovation Policy Retreat in Fort Lauderdale, Florida. This memo contains background information about the trip, a current list of RSVPs, and the latest agenda.

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. All discussions are off-the-record and the event is closed to the press.

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

LOCATION

All of the retreat events will take place at the Westin Fort Lauderdale Beach Resort at 321 North Fort Lauderdale Beach Boulevard. Check-in is at 4:00 PM and check-out is 11:00 AM.

ATTIRE

We suggest business casual for all retreat events (no ties). Right now, the weather forecast is calling for mostly sunny skies with temperatures between 70 and 80 degrees.

TRAVEL

You each have a unique record locator for your roundtrip flight, which was provided upon booking. If you need it again, please don't hesitate to ask. We suggest taxi or ride share between the airport and the Westin, and are happy to reimburse your expenses up to \$20 each way if you provide your receipts within two weeks.

AGENDA

Thursday, February 22, 2018

- 4:00 PM **Hotel Check In**
- 6:00 – 7:00 PM **Welcome Reception**
Location: Sky Terrace, Rooftop Level
- 7:15 – 9:00 PM **Dinner Discussion: The Future of Health Care Innovation**
Location: Oceanside, South Tower, Mezzanine Level
Jay Kaminski, Senior Vice President for Global Clinical Research and Development at Celgene, will join ITIF President Rob Atkinson and Vice President Daniel Castro for a discussion of how biologics, big data and nano are revolutionizing the health care industry.
- Innovation Trivia Ice Breaker** hosted by ITIF Senior Fellow Joe Kennedy

Friday, February 23, 2018

- 8:00 AM **Breakfast**
Location: Oceanside, South Tower, Mezzanine Level
- 9:00 AM **Welcome Remarks**, Hon. Phil English, Co-Chair of the ITIF Board
- 9:10 – 9:40 AM **Fireside Chat with Vishal Amin**, U.S. Intellectual Property Enforcement Coordinator
Moderated by ITIF Vice President for Global Policy, Stephen Ezell
- 9:45 – 10:55 AM **Panel: “Is the EU From Venus and U.S. From Mars?: Transatlantic Policy Issues”**
U.S. economic policy embraces entrepreneurial dynamism, risk-taking, and breakthrough innovations. Europe’s framework is grounded in the precautionary principle which in practice means limiting the use of data; regulating new technologies and generally resisting the kind of Schumpeterian creative destruction America is more comfortable with. But in an increasingly digital world the policy effects from one region increasingly affect the other. How can the EU and the U.S. build innovation cooperation, resolve innovation policy disagreements, and work together to address common challenges?
- Moderator: **Rob Atkinson**, President, ITIF
Confirmed: **Damien Levie**, Head of Trade, Embassy of the European Union
 Dan Mullaney, Assistant USTR for Europe
Invited: **Irene Braam**, Executive Director, Bertelsmann Foundation

11:05 – 12:30 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: **Rob Atkinson**, President, ITIF

Confirmed: **Hon. Byron Dorgan**, Senior Policy Advisor, Arent Fox
Claire Reade, Senior Counsel, Arnold and Porter
Tim Wineland, Deputy Assistant USTR for China Affairs

12:30 PM

Lunch

1:30 – 2:45 PM

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

A decade ago, innovation companies were generally seen as unmitigated forces of progress and societal improvement. Today companies in innovation industries face mounting criticism, not just in the United States, but around the world. 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)**
David Moschella, Research Director, Leading Edge Forum
Geoff Manne, Executive Director, International Center for Law & Economics

3:00 – 4:00 PM

TBA

Friday, February 23, 2018 (continued)

- 6:00 – 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 and Sara Decker of Walmart*
Location: Oceanside, South Tower, Mezzanine Level
- 7:30 – 9:00 PM **Dessert Reception**
Location: Pool Deck

Saturday, February 24, 2018

- 8:30 AM **Breakfast Buffet**
Location: Oceanside, South Tower, Mezzanine Level
- 9:15 – 10:30 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: **Rick Driggers**, Deputy Assistant Secretary, Office of Cybersecurity and Communications, Department of Homeland Security
 Brian Fonesca, Director, Jack D. Gordon Institute for Public Policy, Florida International University
 Bruce Heiman, K&L Gates
 Barbara Hoffman, Vice President Global Strategic Operations Government Vertical, Samsung Electronics

Saturday, February 24, 2018 (continued)

10:45 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: **James Bessen**, Boston University School of Law
Molly Conway, Deputy Chief of Staff, Office of the Secretary,
U.S. Department of Labor
Amit Singh, Head of Public Policy – Future of Work, Uber
Pamela Tate, CEO, Council on Adult Experiential Learning

12:30 PM

Lunch Buffet

1:00 – 2:00 PM

Panel: “Advancing U.S. Digital Policy in the Global Arena”

The United States has pioneered global innovation policy on many issues such as Internet governance, digital trade, data protection, online speech, and intellectual property protection. Yet many countries now look to other region and nations for guidance, including China and Europe, 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. innovation policy leadership?

Discussants: **Daniel Castro**, Vice President, ITIF and Director of ITIF’s Center
for Data Innovation

David Moschella, Research Director, Leading Edge Forum

3:00 – 4:00 PM

TBA

Saturday, February 24, 2018 (continued)

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.

Location: Oceanside, South Tower, Mezzanine Level

Confirmed:

- Rachel Appleton**, Rep. Derek Kilmer
- Dustin Carmack**, Rep. Ron DeSantis
- Machalagh Carr**, House Ways and Means Committee
- Josh Connolly**, Rep. Jackie Speier
- Austin Durrer**, Rep. Charlie Crist
- 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
- Lori Prater**, Rep. Mike Kelly
- Ansley Rhyne**, Sen. Marco Rubio
- Curtis Rhyne**, Rep. George Holding
- Aaron Schmidt**, Rep. Suzan DelBene
- Franz Wuerfmannsdobler**, Sen. Chris Coons

RETREAT ATTENDEES

Vishal Amin, U.S. Intellectual Property Enforcement Coordinator
Amanda Anderson, Uber
Rachel Appleton, Office of Rep. Derek Kilmer
Rebecca Arbogast, Comcast
Rob Atkinson, ITIF
Arrow Augerot, Amazon
James Bessen, Boston University School of Law
Stephen Bonner, Texas Instruments
Todd Bowers, Uber Technologies Inc.
Doug Brake, ITIF
Anissa Brennan, MPAA
Kasie Brill, U.S. Chamber of Commerce
Rudy Brioché, Comcast Corporation
Melissa Brown
David C. Crane, Autodesk
Dustin Carmack, Office of Rep. Ron DeSantis
Machalagh Carr, House Ways and Means Committee
Daniel Castro, ITIF
Josh Connolly, Office of Rep. Jackie Speier
Frank Cullen, Global Innovation Policy Center, U.S. Chamber of Commerce
Sara Decker, Walmart
Rick Driggers, Department of Homeland Security
Hon. Byron Dorgan, Arent Fox LLP
Austin Durrer, Office of Rep. Charlie Crist
Christiane English
Hon. Philip English, Arent Fox LLP & Co-Chair of the ITIF Board
Daniel Eubanks, Intuit
Lisa Ezell
Stephen Ezell, ITIF
Brian Fonesca, Florida International University
David Goldston, MIT Washington Office & ITIF Board Member
Chapin Gregor, U.S. Senate Commerce Committee
Tyler Grimm, Office of Rep. Darrell Issa
Bruce Heiman, K&L Gates
Barbara Hoffman, Samsung Electronics
Brad Howard, Office of Rep. Stephanie Murphy
Henry Hultquist, AT&T
Aruna Kalyanam, House Ways and Means Committee
Jay Kaminski, Celgene Corporation
Shannon Kellogg, Amazon & ITIF Board Member
Joe Kennedy, ITIF

Maria Kirby, Apple
Eli Kogan, Horizon Pharma
Matt Lee-Ashley
Courtney Lee-Ashley, Merck
Damien Levie, Delegation of the European Union
Lisa Malloy, Intel
Bernie McKay, Intuit & ITIF Board Member
Mike McMahan, Microsoft
Simon Morrison, Google
David Moschella, Leading Edge Forum
Dan Mullaney, Office of the U.S. Trade Representative
Sean Mulvaney, Procter and Gamble
Nika Nour, ESA
Daniel O'Connor, Amazon
David Ohrenstein, Autodesk
Jason Park, Expedia
Michelle Persaud, T-Mobile USA
Douglas Peterson, U.S. Senate Finance Committee
Steven Pfrang, Office of Rep. Darin LaHood
Robert Pivoris, Intuit
Lori Prater, Office of Rep. Mike Kelly
Claire Reade, Arnold & Porter
Ansley Rhyne, Office of Sen. Marco Rubio
Curtis Rhyne, Office of Rep. George Holding
Kevin Richards, SAP
James Robertson, CTIA
Dorothy Robyn, BU Institute for Sustainable Energy & ITIF Board Member
Aaron Schmidt, Office of Rep. Suzan DelBene
Matthew Schumaker, Celgene
Amit Singh, Uber
Kaya Singleton, ITIF
Amanda Slater, Visa Inc.
Representative Suzan DelBene (WA)
Eric Tamarkin, Samsung
Shannon Taylor, ITI
John Tuccillo, Schneider Electric & ITIF Board Member
Kevin Walsh, IBM
Jackie Whisman, ITIF
Bret Wincup, Hewlett Packard Enterprise
Tim Wineland, Office of the U.S. Trade Representative
Franz Wuerfmannsdobler, Office of Sen. Chris Coons
George York, RIAA

ITIF STAFF CONTACTS

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SPEAKER BIOGRAPHIES (in order of appearance)

Dr. Robert D. Atkinson, President, ITIF

As founder and president of the Information Technology and Innovation Foundation (ITIF), recognized as the world's top think tank for science and technology policy, Robert D. Atkinson leads a prolific team of policy analysts and fellows that is successfully shaping the debate and setting the agenda on a host of critical issues at the intersection of technological innovation and public policy.

He is an internationally recognized scholar and a widely published author whom The New Republic has named one of the "three most important thinkers about innovation," Washingtonian Magazine has called a "tech titan," Government Technology Magazine has judged to be one of the 25 top "doers, dreamers and drivers of information technology," and Business 2 Community has cited as a thought leader on manufacturing issues.

A sought-after speaker and valued adviser to policymakers around the world, Atkinson's books include Big is Beautiful: Debunking the Mythology of Small Business (MIT Press, 2018); Innovation Economics: The Race for Global Advantage (Yale, 2012), and The Past and Future of America's Economy: Long Waves of Innovation That Power Cycles of Growth (Edward Elgar, 2005). He also has conducted groundbreaking research projects and authored hundreds of articles and reports on technology and innovation-related topics ranging from tax policy to advanced manufacturing, productivity, and global competitiveness.

President Clinton appointed Atkinson to the Commission on Workers, Communities, and Economic Change in the New Economy; the Bush administration appointed him chair of the congressionally created National Surface Transportation Infrastructure Financing Commission; and the Obama administration appointed him to the National Innovation and Competitiveness Strategy Advisory Board. He also has served as co-chair of the White House Office of Science and Technology Policy's China-U.S. Innovation Policy Experts Group; as a member of the U.S. Department of Commerce's National Advisory Council on Innovation and Entrepreneurship; and on the U.S. State Department's Advisory Committee on International Communications and Information.

Atkinson is a member of the Markle Foundation Task Force on National Security in the Information Age and serves on the boards or advisory councils of the Internet Education Foundation, the NetChoice Coalition, the University of Oregon's Institute for Policy Research and Innovation, and the State Science and Technology Institute. Additionally, Atkinson is on the editorial boards of the Journal of Electronic Government and the Journal of Internet Policy; a member of the Global Innovation Forum Brain Trust;

a nonresident senior fellow at the Brookings Institution; a fellow at the Columbia University Institute of Tele-Information; and a fellow of Glocom, a Tokyo-based research institute.

Atkinson was previously vice president of the Progressive Policy Institute, where he directed the Technology & New Economy Project. He wrote numerous research reports on technology and innovation policy, covering issues such as broadband telecommunications, e-commerce, e-government, privacy, copyright, R&D tax policy, offshoring, and innovation economics.

Previously, Atkinson served as the first executive director of the Rhode Island Economic Policy Council (RIEPC), a public-private partnership whose members included the state's governor, legislative leaders, and both corporate and labor leaders. As head of RIEPC, Atkinson was responsible for drafting a comprehensive economic development strategy for the state and working with the legislature and executive branch of government to successfully implement each element of a 10-point action agenda.

Prior to his service in Rhode Island, Atkinson was a project director at the Congressional Office of Technology Assessment, where, among other projects, he spearheaded *The Technological Reshaping of Metropolitan America*, a seminal report examining the impact of the information technology revolution on America's urban areas.

As a respected policy expert and commentator, Atkinson has testified numerous times before the U.S. Senate and House of Representatives, and he appears frequently on news and public affairs programs. Among others, these appearances have included interviews on BBC, CNBC, CNN, Fox News, MSNBC, NPR, and NBC Nightly News.

Atkinson holds a Ph.D. in city and regional planning from the University of North Carolina, Chapel Hill, where he was awarded the prestigious Joseph E. Pogue Fellowship. He earned his master's degree in urban and regional planning from the University of Oregon, which named him a distinguished alumnus in 2014.

Daniel Castro, Vice- President, ITIF and Director of ITIF's Center for Data Innovation

Daniel Castro is vice president at the Information Technology and Innovation Foundation (ITIF) and director of ITIF's Center for Data Innovation.

Castro writes and speaks on a variety of issues related to information technology and internet policy, including privacy, security, intellectual property, Internet governance, e-government, and accessibility for people with disabilities. His work has been quoted and cited in numerous media outlets, including *The Washington Post*, *The Wall Street Journal*, NPR, *USA Today*, *Bloomberg News*, and *Bloomberg Businessweek*. In 2013, Castro was named to *FedScoop's* list of the "top 25 most influential people under 40 in government and tech." In 2015, U.S. Secretary of Commerce Penny Pritzker appointed Castro to the Commerce Data Advisory Council.

Castro previously worked as an IT analyst at the Government Accountability Office (GAO) where he audited IT security and management controls at various government agencies. He contributed to GAO reports on the

state of information security at a variety of federal agencies, including the Securities and Exchange Commission and the Federal Deposit Insurance Corporation. In addition, Castro was a visiting scientist at the Software Engineering Institute in Pittsburgh, PA, where he developed virtual training simulations to provide clients with hands-on training of the latest information security tools.

He has a B.S. in foreign service from Georgetown University and an M.S. in information security technology and management from Carnegie Mellon University.

Jay Kaminski, Senior Vice President, Global Clinical Research & Development, Celgene

Jay Kaminski is currently Senior Vice President, Global Clinical Research & Development Operations overseeing all Celgene sponsored clinical trials from early stage drug development through late stage life cycle management across all therapeutic areas for the company (Phase I-IV). The GCR&D Operations group is comprised of 500 employees within Study Management and Monitoring, Quality Management, Medical Writing and Submission Planning, Biostatistics, Data Operations, Programming, Standards, Portfolio Sourcing and Contracting, Analytics and Information, Technology and Innovation.

Jay joined Celgene in March 1997 as part of the initial commercial, clinical and regulatory management team of Celgene Corporation. Jay has held various positions with increasing responsibility with Celgene over the last 20 years including; Director Field Sales, Executive Director Sales and Commercial Operations, Vice President Strategic Operations, Vice President General Manager, Celgene Cellular Therapeutics and Vice President Business Development.

Prior to joining Celgene Corporation Jay was with TAP Pharmaceuticals for 7 years, a joint venture between Abbott Laboratories and Takeda Pharmaceuticals. Jay held various positions in sales, sales management and marketing with his last position at TAP Pharmaceuticals as Group Marketing Manager.

Jay Kaminski has close to 30 years of experience in the pharmaceutical and biotechnology industry covering a broad range of therapeutic areas. Accomplished biopharmaceutical executive equally adept at shaping strategy, driving execution and nurturing culture. Proven executive leadership capability characterized by seasoned judgment, reasoned decision-making, strong collaboration skills and inspiring trust. Consistent track record of delivering results and exceeding objectives, with a demonstrated ability to attract, mentor and grow key talent.

Extensive leadership experience across:

- Executive-level roles in strategic operations, in-line marketing and senior sales leadership
- Global operations in complex and challenging business environments
- High-profile development plans (brands) with large organizations in increasingly complex business models

- Biologics & small molecules in Hematology, Oncology, Immunology, Urology, Gynecology, Gastroenterology, Rheumatology and Dermatology
- All stages of product lifecycle: development - early commercialization – launch – growth – patent expiry
- Multiple alliance partnerships and joint ventures

Stephen Ezell, Vice-President, ITIF

Stephen Ezell is vice president, global innovation policy, at the Information Technology and Innovation Foundation (ITIF). He focuses on science and technology policy, international competitiveness, trade, manufacturing, and services issues.

He is the coauthor of *Innovating in a Service-Driven Economy: Insights, Application, and Practice* (Palgrave Macmillan, 2015) and *Innovation Economics: The Race for Global Advantage* (Yale, 2012).

Ezell comes to ITIF from Peer Insight, an innovation research and consulting firm he cofounded in 2003 to study the practice of innovation in service industries. At Peer Insight, Ezell led the Global Service Innovation Consortium, published multiple research papers on service innovation, and researched national service innovation policies being implemented by governments worldwide.

Prior to forming Peer Insight, Ezell worked in the New Service Development group at the NASDAQ Stock Market, where he spearheaded the creation of the NASDAQ Market Intelligence Desk and the NASDAQ Corporate Services Network, services for NASDAQ-listed corporations. Previously, Ezell cofounded two successful innovation ventures, the high-tech services firm Brivo Systems and Lynx Capital, a boutique investment bank.

Ezell holds a B.S. from the School of Foreign Service at Georgetown University, with an honors certificate from Georgetown's Landegger International Business Diplomacy program.

Honorable Phil English, Senior Advisor, Arent Fox and ITIF Board Chair

Former US Congressman Philip English is a senior government relations advisor at Arent Fox and serves as co-chair, along with former Sen. Byron Dorgan, of the firm's government relations practice. While in Congress, he developed an interest and rich experience in trade, health care, and tax and energy policy. Phil currently assists clients in these areas, plus state and municipal government operations.

Phil currently serves as Coordinator of the Healthcare Group Purchasing Industry Initiative (HGPII), which enforces industry standards, promotes best business practices, and monitors adherence to its ethics code by healthcare group purchasing organizations (GPOs). HGPII is an independent ethics oversight organization with responsibility for a major part of the healthcare supply chain.

Phil is also the Co-Chair of the Institute for Representative Government (IRG). He also serves as the Honorary Co-Chairman of the Center for Strategic Tax Reform (CSTR) and Chairman of CSTR's Board of Advisors.

Damien Levie, Head of Trade & Agriculture Team, Embassy of the European Union, DC

Damien Levie heads the Trade and Agriculture Section of the European Union Delegation in Washington, DC.

Before coming to Washington, he was a member of the Cabinet (personal office) of EU Trade Commissioner Karel De Gucht from 2009 to 2012. He subsequently headed the USA and Canada team of the Directorate General for Trade at the European Commission. During that period, he contributed to the pursuit of an ambitious EU trade policy agenda with the Americas, in particular the launch of the Transatlantic Trade and Investment Partnership (TTIP) negotiations between the U.S. and the EU, for which he was deputy chief negotiator.

Damien joined the European Commission in 2001, working on issues including merger control policy and REACH, the EU's basic chemical regulation. From 2005 to 2009, he served in the Cabinet of Louis Michel, EU Commissioner for Development and Humanitarian Aid. During that period, he worked on economic development policy in Africa as well as European economic integration issues.

Damien Levie has law degrees from KU Leuven and the University of Chicago Law School and an economics degree from UC Louvain. He was a lawyer at a major US law firm in Brussels and New York from 1994 to 2001.

He was a member of the Board of Directors of the *KunstenFestivaldesArts* and President of the Belgian Alumni Club of the University of Chicago.

Daniel Mullaney, Assistant United States Trade Representative for Europe and the Middle East

Dan Mullaney has served as Assistant United States Trade Representative for Europe and the Middle East at the Office of the United States Trade Representative since 2010. As head of USTR's Europe and Middle East office, he is responsible for developing and implementing U.S. trade policy with Europe, including the European Union, Eurasia, including Russia, and the Middle East/North Africa.

Mr. Mullaney served from 2006 to 2010 as USTR's Senior Trade Representative in the United States Mission to the European Union in Brussels, Belgium, representing the United States in all aspects of U.S. trade policy at the various institutions of the European Union and the broader Brussels trade policy community. Before becoming Senior Trade Representative in Brussels, Mr. Mullaney served for seven years in USTR's Office of General Counsel, where he led various negotiations and acted as legal counsel for free trade and other agreements and represented the United States in dispute settlement proceedings at the World Trade Organization.

Prior to joining USTR in 1999, Mr. Mullaney was a partner in the law firm of Dorsey and Whitney, specializing in international trade law.

Mr. Mullaney is a native of Cincinnati, Ohio. He earned a B.A. degree from Amherst College in 1979, and a joint law/foreign service masters degree from Georgetown University in 1984.

Irene Braam, Executive Director, Bertelsmann Foundation

Irene Braam joined the Bertelsmann Foundation as executive director in April 2016. She is also the first vice president and board director of the Bertelsmann Foundation Board of Directors.

Irene is an experienced lawyer and media expert, and worked for over ten years with the Bertelsmann company. She began as director of government relations of the Brussels Liaison Office in 2005 and became senior vice president of government relations in September 2011.

Irene developed, among other things, a European platform for global discussion about the digital transformation of the media world. The series was held in Brussels, Berlin, Madrid and London. Not only did she represent and position Bertelsmann's interests in the EU, she also promoted Bertelsmann in other cultural and social events in Brussels, such as UFA Film nights, previews of Fremantle Media's productions, exhibitions and public panel discussions.

After studying law at Maastricht University, the Dutch native began her professional career in 1998 in the music industry. Irene was head of international, legal and business affairs at Naïve Records in Paris, in charge of business development for Midbar Tech Ltd. in Tel Aviv, and served as both director of public policy and government affairs, and director of legal and business affairs at the Universal Music Group in London and Brussels.

Hon. Byron Dorgan, Senior Policy Advisor, Arent Fox

Senator Dorgan is a senior policy advisor at Arent Fox and serves as co-chair, along with Phil English, of the firm's government relations practice.

Senator Dorgan served in the US Senate leadership for 16 years, first as Assistant Democratic Floor Leader and then as Chairman of the Democratic Policy Committee. He has had a prolific career in public service at both the state and federal levels. He served as the elected State Tax Commissioner for the state of North Dakota followed by 12 years in the US House of Representatives and 18 years in the US Senate.

Over the course of his career in public office, Senator Dorgan consistently promoted and defended the economic needs of rural America, advocated for renewable energy and energy independence, and for sound economic policies. He was a senior Senator on the Appropriations, Energy, and Commerce Committees in the Senate and chairman of key subcommittees on aviation, energy, water, and Indian issues. He served on the Ways and Means Committee in the House. He is recognized as someone with substantial knowledge in the issues of energy, aviation, agriculture, water policy, Native American issues, and issues dealing with the economy.

Senator Dorgan is a *New York Times* bestselling author of four books:

- *Reckless! How Debt, Deregulation and Dark Money Nearly Bankrupted America*
- *Take This Job and Ship It: How Corporate Greed and Brain-Dead Politics Are Selling Out America*
- *Blowout*, his first novel, published in 2012
- *Gridlock*, his second novel, published in 2013

Claire Reade, Senior Counsel, Arnold and Porter

Claire Reade provides clients with strategic counsel and assistance with major regulatory and governmental issues in the US and China, guides Chinese companies investing or operating in the US, and advises a broad range of clients on strategic and legal issues and policies related to other international matters, including trade negotiations, trade litigation, and dispute settlement under the World Trade Organization (WTO). She has more than three decades of experience handling international trade strategy, negotiations, and litigation.

Ms. Reade returned to the firm in 2015 after an eight-year tenure at the Office of the United States Trade Representative (USTR), where she served as the Assistant US Trade Representative for China Affairs (2010-2014) and Chief Counsel for China Trade Enforcement (2006-2010).

As Assistant US Trade Representative for China Affairs, Ms. Reade was responsible for managing US trade negotiations with China, developing core strategies, coordinating US interagency efforts, and leading successful efforts to eliminate key trade barriers. In her role as Chief Counsel for China Trade Enforcement, she was responsible for coordinating USTR efforts to ensure that China met its international trade obligations to the US, playing a leading role in nine WTO disputes, as well as the special safeguard action against Chinese tires.

Prior to joining USTR, Ms. Reade counseled US and foreign companies, industries, and governments on international market access issues. She also litigated in diverse US agency proceedings, court appeals, and in international dispute settlement fora, regularly representing clients on NAFTA and WTO-related goods and services matters. She has helped clients on a wide range of US trade law investigations, from countervailing duty and antidumping cases, to Section 301 cases and Section 201 safeguard actions.

Ms. Reade has frequently served as an outside lecturer, including at the Foreign Service Institute, National War College, and Washington area universities, and she is a well-known speaker at international trade events.

Tim Wineland, Deputy Assistant USTR for China Affairs

Timothy Wineland is Deputy Assistant U.S. Trade Representative in the Office of China Affairs at the office of the United States Trade Representative (USTR). USTR is responsible for the development of U.S. trade policy with respect to the People's Republic of China. In the Office of China Affairs, Mr. Wineland focuses on information technology and telecom issues, standards and technical barriers to trade issues, and intellectual property issues.

Prior to joining USTR in 2004, Mr. Wineland worked in the U.S. Department of Commerce's Office of the Chinese Economic Area between 2001 and 2004, where he focused on standards-related trade issues and Technical Barriers to Trade.

Prior to his Commerce Department service, Mr. Wineland was a Congressional staffer handling international trade, agriculture, and tax issues, as Legislative Director to U.S. Congressman Dave Camp from the state of Michigan, from 1995 to 2000.

Congresswoman Suzan DelBene (WA-01)

Congresswoman Suzan DelBene represents Washington's First Congressional District, which spans from northeast King County to the Canadian border, and includes parts of King, Snohomish, Skagit and Whatcom counties.

First sworn into the House of Representatives on Nov. 13, 2012, Suzan brings a unique voice to the nation's capital, with more than two decades of experience as a successful technology entrepreneur and business leader. Her experience and focus on achieving common sense solutions allowed Suzan to break through congressional gridlock and get things done, earning her early praise from the Everett Herald, where she was named her "the most prolific, effective member of her freshman class."

Suzan takes on a wide range of challenges both in Congress and in the First District and is a leader on issues of technology, health and agriculture.

Suzan currently serves on the House Ways and Means Committee, which is at the forefront of debate on taxes, healthcare and security. There, Suzan is working to ensure all Americans have meaningful access to affordable, quality healthcare. She is also fighting against attempts to dismantle Medicare, repeal the Affordable Care Act (ACA) and slash Social Security benefits, all of which would affect millions of families. Instead of these dangerous proposals, Suzan believes Congress should build on the progress made by increasing high-quality patient care, reducing costs for small businesses and expanding access for our most vulnerable populations.

In addition, Suzan serves on the House Budget Committee where she is working toward a bipartisan, long-term budget solution that reduces our deficit and grows our economy. She also serves as Vice-Chair of the New Democrat Coalition, and co-chair of the High-Tech Caucus, Internet of Things Caucus, Dairy Caucus and Aluminum Caucus.

Suzan spent part of her early childhood in Newport Hills and Mercer Island before her father, an airline pilot, lost his job. After high school, her family moved all over the country in search of work. With hard work and financial aid, such as student loans and work-study programs, she earned a bachelor's degree in biology from Reed College.

Following Reed, Suzan worked in the biotechnology industry before earning an MBA from the University of Washington and launching a successful career as a technology leader and innovator. In more than two decades as an executive and entrepreneur, she has worked at start drugstore.com as its vice president of marketing and store development, and served as CEO and president of Nimble Tech, a business software company based on technology developed at the University of Washington. Suzan also spent 12 years at Microsoft recently as corporate vice president of the company's mobile communications business.

Before being elected to Congress, Suzan served as Director of the Washington State Department of Revenue. During her tenure, she proposed reforms to cut red tape for small businesses. She also enacted an innovative tax amnesty program that generated \$34 million in revenue to help close the state's budget gap, while easing the burden on small businesses.

Suzan's mix of real world experience in the private and public sector gives her a deep understanding of how to build successful businesses, create jobs, implement real fiscal accountability and adopt policies that provide individuals with access to opportunity.

David Moschella, Research Director, Leading Edge Forum

David Moschella is a Research Fellow for Leading Edge Forum. David's focus is on industry disruptions, machine intelligence and related business model strategies. David was previously Global Research Director of the programme.

David's key areas of expertise include globalization, industry restructuring, disruptive technologies, and the co-evolution of business and IT. He is the author of multiple research reports, including *Disrupting the Professions through Machine Learning and Digital Trust*, *2016 Study Tour Report: Applying Machine Intelligence, There is Now a Formula for Machine Intelligence Innovation*, *Embracing 'the Matrix' and the Machine Intelligence Era* and *The Myths and Realities of Digital Disruption*.

An author and columnist, David's second book, *Customer-Driven IT, How Users Are Shaping Technology Industry Growth*, was published in 2003 by Harvard Business School Press. The book predicted the shift from a supplier-driven to today's customer-led IT environment. His 1997 book, *Waves of Power*, assessed global competition within the IT supplier community. He has written some 200 columns for *Computerworld*, the IT industry's leading publication on Enterprise IT, and has presented at countless industry events all around the world.

David previously spent 15 years with International Data Corporation, where he was IDC's main spokesperson on global IT industry trends and was responsible for its worldwide technology, industry and market forecasts.

Geoff Manne, Executive Director, International Center for Law & Economics

Geoffrey A. Manne is the founder and executive director of the International Center for Law and Economics (ICLE), a nonprofit, nonpartisan research center based in Portland, Oregon. He is also a distinguished fellow at Northwestern Law School's Searle Center on Law, Regulation, & Economic Growth. In April 2017 he was appointed by FCC Chairman Ajit Pai to the FCC's Broadband Deployment Advisory Committee, and he recently served for two years on the FCC's Consumer Advisory Committee.

Mr. Manne earned his JD and AB degrees from the University of Chicago and is an expert in the economic analysis of law, specializing in competition, telecommunications, consumer protection, intellectual property, and technology policy.

Prior to founding ICLE, Manne was a law professor at Lewis & Clark Law School. From 2006-2009, he took a leave from teaching to develop Microsoft's law and economics academic outreach program. Manne has also served as a lecturer in law at the University of Chicago Law School and the University of Virginia School of Law. He practiced antitrust law and appellate litigation at Latham & Watkins, clerked for Hon. Morris S. Arnold on the 8th Circuit Court of Appeals, and worked as a research assistant for Judge Richard Posner. He was also once (very briefly) employed by the FTC.

Mr. Manne's publications have appeared in numerous journals including the *Journal of Competition Law and Economics*, the *Harvard Journal of Law and Technology*, the *Supreme Court Economic Review*, and the *Arizona Law Review*, among others. With former FTC Commissioner, Joshua Wright, Manne is the editor of a volume from Cambridge University Press entitled, *Competition Policy and Intellectual Property Law Under Uncertainty: Regulating Innovation*. Manne has also testified on several occasions before Congress and at the FCC and FTC, and he regularly files written comments and amicus briefs on key antitrust, IP, and telecommunications issues. His analysis is frequently

published in popular print and broadcasting outlets such as the Wall Street Journal, Wired, Foreign Affairs, NPR, and Bloomberg, among others.

Manne is a member of the American Law and Economics Association, the Canadian Law and Economics Association, and the Society for Institutional & Organizational Economics.

Sara Decker, Director of Federal Government Affairs, Walmart

Sara Decker joined Walmart in May 2017 and currently serves as the Director of Federal Government Affairs at Walmart handling all energy, transportation, and commerce policy issues.

Previously, Decker served as Legislative Director for Senator Marco Rubio. Decker joined Rubio's office in February 2011 as a Legislative Assistant for energy, environment, agriculture and trade legislative policy. She then served as a Professional Staff Member on the Senate Committee on Commerce, Science & Transportation, handling Rubio's legislative portfolio as Ranking Member on the Subcommittee on Oceans, Atmosphere, Fisheries and Coast Guard. Decker was promoted to Legislative Director with Senator Rubio in December 2014 and worked in Senator Rubio's office until joining Walmart.

Prior to joining Rubio's office, Decker served as a Legislative Assistant to retired Congressman John Shadegg (R-AZ) doing energy, environment, agricultural, and transportation policy and as a Legislative Aide to the late Senator Pete Domenici (R-NM) on the Senate Energy and Natural Resources Committee.

Rick Driggers, Deputy Assistant Secretary, Office of Cybersecurity and Communications, Department of Homeland Security

Currently, Driggers serves as the National Protection and Programs Directorate (NPPD) Deputy Assistant Secretary for the Office of Cybersecurity and Communications (CS&C) where he supports the development and implementation of operational programs designed to strengthen the security and resilience of the nation's critical infrastructure.

Prior to this position, Driggers served as the Principal Deputy Director for Operations for the NCCIC. Joining the DHS in 2003, he has served in a variety of roles including Chief Technology Officer for the NPPD.

Brian Fonesca, Director, Jack D. Gordon Institute for Public Policy, Florida International University

Brian Fonseca is director of the Jack D. Gordon Institute for Public Policy at FIU's Steven J. Green School of International and Public Affairs. Mr. Fonseca serves as the Institute's technical expert for national security and foreign policy. His analysis has been featured in local and national media, including BBC, Bloomberg, Fox News, and the Miami Herald. He serves as WSVN-Fox 7's on-air political expert.

Mr. Fonseca joined the Gordon Institute in 2015 after serving as Director of Operations at FIU's Applied Research Center (ARC) where he led the center's expansion into national security and Cybersecurity initiatives.

He joined FIU after serving as the senior research manager for socio-cultural analysis at United States Southern Command. His recent book publications include: Brian Fonseca and Eduardo A. Gamarra, eds., *Culture and National Security in the Americas* (Lanham, MD: Lexington Books, January 2017) and

Brian Fonseca and Jonathan D. Rosen, *The New Security Agenda: Trends and Emerging Threats* (New York, NY: Palgrave Macmillan, April 2017).

Mr. Fonseca holds degrees in International Business and International Relations from Florida International University in Miami, Florida, and he has attended Sichuan University in Chengdu, China and National Defense University in Washington D.C. From 1997 to 2004, he served in the United States Marine Corps and facilitated the training of foreign military forces in both hostile theaters and during peacetime operations.

Bruce Heiman, Practice Area Leader, Policy / Regulatory, K&L Gates

Bruce Heiman engages in a wide ranging federal counseling and lobbying practice. He has represented leading companies and trade associations in technology, financial services, postal, trade, transportation and manufacturing industries. He is one of two Practice Area Leaders of K&L Gates' Policy and Regulatory Practice. He is nationally ranked as a top government relations lawyer by both Chambers USA and The Legal 500.

Mr. Heiman regularly assists clients design and implement a Washington, D.C. "game plan" to protect and promote their interests before Congress and federal departments and agencies. He helps them pursue legislation, implement enacted laws, and achieve their objectives in industry meetings as well as government negotiations. He also often helps clients assemble and advocate on behalf of a coalition of parties with similar objectives, including interest groups and think tanks. He writes and speaks frequently and is often quoted in the media on current developments.

Previously, he served as Legislative Director and Trade Counsel to U.S. Senator Daniel Patrick Moynihan of New York from 1984 to 1987.

He first joined the firm in 1980 after graduating with degrees in law and public policy from Harvard Law School and Harvard's Kennedy School of Government.

Mr. Heiman is a member of and previously served on the Board of the Capitol Historical Society.

Barbara Hoffman, Samsung - Vice President, Global Strategic Operations Government Vertical

Barbara Hoffman joined Samsung in January 2018 as Vice President for Global Strategic Operations Government Vertical furthering the company's role in Business to Government (B2G) IT and Mobile Communications.

Appointed the Department of Defense Chief Information Officer (DOD CIO), Principal Deputy for the Information Enterprise September 2016. Lead the delivery of the first ever Software as a Service (SaaS) for Enterprise Collaboration and Productivity Services (ECAPS) across the entire DOD. The effort streamlined all office productivity (word processing); messaging (email); content management (portal); collaboration (chat); video conferencing and voice mail for all of DOD and impacted how DOD budgets and acquisitions for these capabilities.

Named DOD CIO Deputy for Business Process and Systems Review February 2016, conducting business process and IT systems reviews as directed by the Deputy Secretary of Defense to increase mission effectiveness, ensure security, and identify savings for reinvestment in DOD.

Named Acting Deputy Director of the Joint Service Provider (JSP) July 2015. Guided the establishment of a single service provider consolidating and delivering common/shared IT services within the Pentagon and National Capital Region.

Appointed to the Enterprise Performance Division of the DoD Office of the Deputy Chief Management Officer (DCMO) November 2014 responsible for measuring performance against the Department's Agency Strategic Plan and establishing strategic goals and objectives, while also serving as the project lead for the development and implementation of JSP.

From 2009 – 2014 served as the Principal Deputy Chief Information Officer (CIO) for the Department of the Navy (DON). Managed the DON CIO's cybersecurity and infrastructure, IT efficiencies and analysis, and information and workforce management functional teams. Led the development of policies, plans, architectures, standards, and process guidance to achieve and sustain interoperability, security, and IT business transformation consistent with the Department's vision, goals and mission. Provided strategic guidance for integrated product teams to identify and implement cost saving efficiencies in the information management and IT/cyberspace environments. As DON senior security assurance officer, was responsible for developing and maintaining an agency-wide information security program.

Previously, served in several key positions within the DON CIO - Director of Investment Management responsible for personnel, comptroller, contracts and security management and Director of E-business responsible for smart card and common access card (CAC) policy.

Prior to the DON CIO served with OPNAV N4 as the Deputy to the Smart Card program manager, responsible for the roll out and issuance of CACs within the DON. Also served in the Naval Sea Systems Command and the Naval Surface Warfare Center Headquarters as part of the Federal Woman's Executive Leadership Program. Starting my government career in 1983 with the Naval Surface Warfare Center in Indian Head, MD.

Mrs. Hoffman holds a bachelor's degree in technology management from the University of Maryland and a master's degree in management and technology from George Mason University. She is a graduate of the

Federal Women's Executive Leadership Program. Awards include the DON Meritorious Civilian Service Award, the Federal 100 Award, and Government Computer News IT Leader Award.

James Bessen, Economist and Executive Director of Technology & Policy Research Initiative, Boston University School of Law

James Bessen, an economist, serves as Executive Director of the Technology & Policy Research Initiative at Boston University School of Law. Mr. Bessen has done research on whether patents promote innovation, why innovators share new knowledge, and how technology affects jobs, skills, and wages. With Michael J. Meurer, Bessen wrote *Patent Failure* (Princeton University Press, 2008), highlighting the problems caused by poorly defined property rights. His research first documented the large economic damage caused by patent trolls and showed the link between information technology and job growth. His latest book, *Learning by Doing: The Real Connection Between Innovation, Wages, and Wealth* (Yale University Press, 2015), looks at history to understand how new technologies affect wages and skills today.

Bessen's work has been widely cited in the press as well as by the White House, the US Supreme Court, judges at the Court of Appeals for the Federal Circuit, and the Federal Trade Commission. In 1983, Bessen developed the first commercially successful "what-you-see-is-what-you-get" PC publishing program, founding a company that delivered PC-based publishing systems to high-end commercial publishers.

Amit Singh

Amit Singh leads Uber's future of work policy efforts out of San Francisco. He previously served as a senior economic adviser to two Australian Prime Ministers and as Deputy Chief of Staff to the Leader of the Opposition. Earlier in his career he worked as a lawyer and corporate M&A adviser and helped a friend co-found a consumer startup that has grown to over 270,000 members. Amit is passionate about improving economic participation across all groups which he pursues through his support for Fitted for Work, an organisation that supports women to return to work.

Pamela Tate, CEO, Council on Adult Experiential Learning

President and CEO of CAEL since 1990, Pamela Tate is recognized for her work within the higher education, public, and private sectors to make it easier for adults to get the education and training they need to succeed. Pam has worked with employers on tuition assistance policy, implementation of career and educational advising for employees, and exemplary practices in employee learning and development. She has led CAEL in the development of projects that unite business, government, labor and postsecondary education to address workforce skill shortages - resulting in industry-sponsored degree and certificate programs on-line, industry-wide career pathways programs, and regional lifelong learning and talent development initiatives.

Among Pam's numerous professional activities, she currently serves on the Board of Trustees for Excelsior College, and is a member of the Commission on Quality Assurance and Alternative Higher Education, formed in 2013 by the Council for Higher Education Accreditation. Pam completed her

doctoral coursework at the University of Pennsylvania, Annenberg School of Communications, and earned master's degrees in both English and Journalism from the University of Illinois at Champaign.

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.