



U.S. House of Representatives

COMMITTEE ON ETHICS


EMPLOYEE POST-TRAVEL DISCLOSURE FORM Original Amendment

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, by email at gifttravelreports@mail.house.gov, 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: Jeremy Marcus
2. a. Name of Accompanying Relative: _____ OR None
 b. Relationship to Traveler: Spouse Child Other (specify): _____
3. a. Dates: Departure: 8/10/2022 Return: 8/12/2022
 b. Dates at Personal Expense, if any: _____ OR None
4. Departure City: WASHINGTON DC Destination: Seattle, WA Return City: San Francisco, CA
5. Sponsor(s), Who Paid for the Trip: Software Education Foundation
6. Describe Meetings and Events Attended:
 Back to back visits to software companies such as Microsoft, Salseforce, Oracle etc to learn about their latest developments and policy issues.
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** the *Additional Sponsor Form(s)*;
 - 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 statement is true by checking the 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:  Date: 08/17/2022

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: Doris Matsui Date: 8/17/22

Signature of Supervising Member: 



U.S. House of Representatives

COMMITTEE ON ETHICS

SPONSOR POST-TRAVEL DISCLOSURE FORM

Original Amendment

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 ten 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: _____
2. Travel Destination(s): _____
3. Date of Departure: _____ Date of Return: _____
4. Name(s) of Traveler(s): _____

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 Question 4:

| | Total Transportation Expenses | Total Lodging Expenses | Total Meal Expenses | Total Other Expenses (dollar amount per item and description) |
|----------------------------|-------------------------------|------------------------|---------------------|---|
| Traveler | | | | |
| Accompanying Family Member | | | | |

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: Victor A. Espinal Date: _____

Name: _____ Title: _____

Organization: _____

- I am an officer of the above-named organization. Signify statement is true by checking box.

Address: _____

Email: _____ Telephone: _____

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

1. Name of Traveler: Jeremy Marcus

2. Sponsor(s) who will be paying or providing in-kind support for the trip:
Software Education Foundation d.b.a "Software.org: the BSA Foundation" (Software.org)

3. City and State OR Foreign Country of Travel: Seattle, Washington

4. a. Date of Departure: Wednesday, August 10, 2022 Date of Return: Friday, August 12, 2022

b. Yes No Will you be extending the trip at your personal expense?
If yes, list dates at personal expense: Friday, August 12, 2022 - Saturday August 13 J/M

5. a. Yes No Will you be accompanied by a family member at the sponsor's expense? If yes:

(1) Name of Accompanying Family Member: _____

(2) Relationship to Traveler: Spouse Child Other (specify): _____

(3) Yes No Accompanying Family Member is at least 18 years of age:

6. a. Yes No Did the trip sponsor answer "Yes" to Question 8(c) on the *Primary Trip Sponsor Form* (i.e., travel is sponsored by an entity that employs a registered federal lobbyist or a foreign agent)?

b. If yes, and you are requesting lodging for two nights, explain why the second night is warranted:

7. Yes No *Primary Trip Sponsor Form* is attached, including agenda, invitee list, and any other attachments and Additional 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.

I am Chief of Staff to a member of the Communications and Technology subcommittee of Energy and Commerce. The issues discussed on this trip are largely in the jurisdiction of our subcommittee.

9. Yes No Is the traveler aware of any registered federal lobbyists or foreign agents involved planning, organizing, requesting, or arranging the trip?

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.

Signature of Employing Member Donis O. Matsui Date 6/8/22



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 website (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:
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):
5. Yes No Is travel being offered to an accompanying family member of the House invitee(s)?
6. Date of departure: _____ Date of return: _____
7. a. City of departure: _____
b. Destination(s): _____
c. City of return: _____
8. **Check only one.** I represent that:
 - 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 only one of the following:**
 - a. I checked 8(a) or (b) above; **OR**
 - b. I checked 8(c) above but am not offering any lodging; **OR**
 - 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 you checked this box, explain why the second night of lodging is warranted:



U.S. House of Representatives

COMMITTEE ON ETHICS

10. Attached is a detailed agenda of the activities 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 only one of the following:**
- 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. *Not Applicable.* 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:
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 the box.*
15. **Check only one.** I represent that either:
- 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 the 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: _____ City: _____ Cost Per Night: _____
Reason(s) for Selecting: _____
- 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 the box.*



U.S. House of Representatives

COMMITTEE ON ETHICS

18. Total Expenses for each Participant:

| | | | |
|---|---|--|-------------------------------------|
| <input type="checkbox"/> Actual Amounts | Total Transportation Expenses per Participant | Total Lodging Expenses per Participant | Total Meal Expenses per Participant |
| <input type="checkbox"/> Good Faith Estimates | | | |
| For each Member, Officer, or Employee | | | |
| For each Accompanying Family Member | | | |

| | | |
|---------------------------------------|---|--|
| | 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 Family Member | | |

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

19. Check only one:

- a. I certify that I am an officer of the organization listed below; **OR**
- b. *Not Applicable*. Trip sponsor is an individual or a U.S. institution of higher education.

20. I certify by my signature that

- a. I read and understand the Committee's Travel Regulations;
- b. I am not a registered federal lobbyist or registered foreign agent; and
- c. The information on this form is true, complete, and correct to the best of my knowledge.

Signature: Victoria A. Espinal Date: _____

Name: _____ Title: _____

Organization: _____

Address: _____

Email: _____ Telephone: _____

INSTRUCTIONS

Complete the *Primary Trip Sponsor Form* and submit the agenda, invitation list, any attachments, and any *Additional Trip Sponsor Forms* directly to the Travelers.

Written approval from the Committee on Ethics is required before traveling on this trip. The Committee on Ethics will notify the House invitees directly and will not notify the trip sponsors.

Willful or knowing misrepresentation on this form may be subject to criminal prosecution under 18 U.S.C. § 1001. Signatures must comply with section 104(bb) of the Travel Regulations.

For questions, please contact the Committee on Ethics at:

1015 Longworth House Office Building
Washington, D.C. 20515

ethicscommittee@mail.house.gov | 202-225-7103
More information and forms available at ethics.house.gov

Theodore E. Deutch, Florida
Chairman
Jackie Walorski, Indiana
Ranking Member

Susan Wild, Pennsylvania
Dean Phillips, Minnesota
Veronica Escobar, Texas
Mondaire Jones, New York

Michael Guest, Mississippi
Dave Joyce, Ohio
John H. Rutherford, Florida
Kelly Armstrong, North Dakota



ONE HUNDRED SEVENTEENTH CONGRESS

U.S. House of Representatives

COMMITTEE ON ETHICS

Thomas A. Rust
Staff Director and Chief Counsel

David W. Arrojo
Counsel to the Chairman

Kelle A. Strickland
Counsel to the Ranking Member

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

July 27, 2022

Mr. Jeremy Marcus
Office of the Honorable Doris O. Matsui
2311 Rayburn House Office Building
Washington, DC 20515

Dear Mr. Marcus:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to Seattle, Washington, scheduled for August 10 to 12, 2022, sponsored by Software Education Foundation d.b.a. Software.org: the BSA Foundation ("Software.org").

You must complete an Employee Post-Travel Disclosure Form (which your employing Member must also sign) and file it, together with a Sponsor Post-Travel Disclosure Form completed by the trip sponsor, with the Clerk of the House within 15 days after your return from travel. As part of that filing, you are also required to attach a copy of this letter and both the Traveler and Primary Trip Sponsor Forms (including attachments) you previously submitted to the Committee in seeking pre-approval for this trip. If you are required to file an annual Financial Disclosure Statement, you must also report all travel expenses totaling more than \$415 from a single source on the "Travel" schedule of your annual Financial Disclosure Statement covering this calendar year. Finally, Travel Regulation § 404(d) also requires you to keep a copy of all request forms and supporting information provided to the Committee for three subsequent Congresses from the date of travel.

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

Sincerely,

Theodore E. Deutch
Chairman

Jackie Walorski
Ranking Member

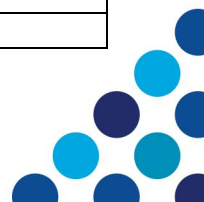
TED/JW:adw

Attachment 1 – Question #4 – Names, titles, and explanation for invitation for all House invitees.

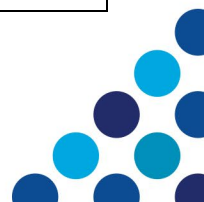
Software.org is inviting the congressional staff below because of their work on policy issues, including data policy, emerging technologies, cybersecurity, digital trade, intellectual property rights, and digital transformation, that are of importance to the software industry

| Name | Title | Office |
|---------------------|-------------------------------------|--|
| Russell Anello | Staff Director | House Committee on Oversight & Reform |
| Zach Atran | Legislative Assistant | Rep. Ted Lieu |
| Elizabeth Barczak | Professional Staff Member & Counsel | House Committee on Science, Space, & Technology |
| Melissa Beaumont | Professional Staff Member | House Committee on Transportation & Infrastructure |
| Allison Behuniak | Professional Staff Member | House Committee on Financial Services |
| Nate Beltran | Tech Policy Advisor | Rep. Mark Veazey (TX-33) |
| Thomas Blanford | Legislative Assistant | Rep. Scott Fitzgerald |
| Steven Blattner | Legislative Director | Rep. Yvette Clarke |
| Brent Blevins | Senior Policy Advisor | House Committee on Science, Space, & Technology |
| Jake Bornstein | Deputy Chief of Staff | Rep. John Curtis |
| Gideon Bragin | Executive Director | House Democratic Caucus |
| James Braid | Chief of Staff | Rep. Ken Buck |
| Courtney Broderick | Legislative Director | Rep. Sylvia Garcia |
| Francis Brooke | Policy Director | House Republican Whip |
| Marshale Bryant | Legislative Assistant | Rep. Mike Quigley |
| Molly Buening | Legislative Assistant | Problem Solvers Caucus |
| Emily Burdick | Professional Staff | House Committee on Homeland Security |
| Ashley Callen | Deputy Staff Director | House Committee on Oversight & Reform |
| Michael Cameron | Policy Analyst | House Committee on Energy & Commerce |
| Alexis Castaneda | Legislative Assistant | Rep. John Katko |
| Dwayne Clark | Legislative Assistant | Rep. Robert Aderholt |
| Ryan Clough | Legislative Counsel | Rep. Zoe Lofgren |
| Rosaline Cohen | Chief Legislation Counsel | House Committee on Homeland Security |
| Jordan Colvin | Legislative Director | Rep. Josh Gottheimer |
| Lillie Coney | Deputy Chief of Staff | Rep. Sheila Jackson Lee |
| Alexis Covey-Brandt | Chief of Staff | Rep. Steny Hoyer |
| Christopher Cox | Chief of Staff | Rep. Yvette Clarke |
| Mike Davin | Legislative Director | Rep. Bob Latta |
| Earnestine Dawson | Digital Director | House Democratic Caucus |
| Michael Demakos | Legislative Director | Rep. Kathleen Rice |

| | | |
|---------------------|--|---|
| Matt Dernoga | Legislative Director | Rep. Nanette Diaz Barragan |
| Kevin Diamond | Deputy Chief of Staff | Rep. Lisa Blunt Rochester |
| Jordan Dickinson | Legislative Director | Rep. Dan Kildee |
| Lauren Doney | Deputy Chief of Staff | Rep. Jamie Raskin |
| Erin Doty | Legislative Director | Rep. Raul Ruiz |
| Will Dunham | Deputy Chief of Staff, Policy | House Republican Leader |
| Matthew Ellison | Policy Director | House Majority Whip |
| Brystol English | Policy Advisor | House Committee on Science, Space, & Technology |
| Jennifer Epperson | Senior Counsel | House Committee on Energy & Commerce |
| Vincent Evans | Executive Director | Congressional Black Caucus |
| Anna Ferrara | Professional Staff Member | House Committee on Science, Space, & Technology |
| Casey Fitzpatrick | Deputy Chief of Staff | Rep. Kelly Armstrong |
| Julian Fleischman | Senior Legislative Assistant | Rep. Peter Meijer |
| Meagan Foster | Legislative Director | Rep. Peter Welch |
| Scott Friedman | Senior Policy Advisor | House Committee on Homeland Security |
| Garrett Fultz | Legislative Director | Rep. Mike Johnson |
| Christopher Goldson | Legislative Director | Rep. Gwen Moore |
| Waverly Gordon | Deputy Staff Director, General Counsel | House Committee on Energy & Commerce |
| Emily Greene | Senior Legislative Assistant | Rep. Jim Jordan |
| Tiffany Guarascio | Staff Director | House Committee on Energy & Commerce |
| Elliott Guffin | Deputy Chief of Staff | Rep. Richard Hudson |
| Ben Harney | Deputy Staff Director | House Committee on Oversight & Reform |
| Brighton Haslett | Senior Counsel | House Committee on Financial Services |
| Jennifer Haynes | Legislative Director | Rep. Darrell Issa |
| Hayden Haynes | Chief of Staff | Rep. Mike Johnson |
| Claytrice Henderson | Legislative Director | Rep. Bennie Thompson |
| Rob Hicks | Legislative Director | Rep. Jay Obernolte |
| Matt Hodge | Legislative Director | Rep. Dan Crenshaw |
| Nate Hodson | Staff Director | House Committee on Energy & Commerce |
| Christian Hoehner | Policy Director | House Committee on Oversight & Reform |
| Ryan Hofmann | Policy Advisor | House Republican Conference |
| Melissa Hopkins | Fellow | Rep. Anna Eshoo |
| Brett Horton | Chief of Staff | House Republican Whip |
| Omar Hossino | Professional Policy Staff | Republican Study Committee |
| John Howes | Legislative Assistant | Rep. Marcy Kaptur |
| Rachel Huggins | Legislative Director | Rep. Michael Burgess |
| Zachary Isakowitz | Legislative Director | Rep. Michael McCaul |
| Joshua Izaak | Legislative Director | Rep. Suzanne Bonamici |



| | | |
|--------------------|---|---|
| Ben Jackson | Deputy Chief of Staff | Rep. Lizzie Fletcher |
| Corey Jacobson | Legislative Director | Rep. Ted Lieu |
| Catherine Johnson | Senior Professional Staff Member, Research and Technology | House Committee on Science, Space, & Technology |
| James Johnson | Legislative Director | Rep. Frank Pallone |
| Sarah Jorgenson | Deputy Staff Director | House Select Committee on the Climate Crisis |
| Keighle Joyce | Director of Member Services | House Committee on Homeland Security |
| Megan Kanne | Legislative Assistant | Rep. Jan Schakowsky |
| Priscilla Kim | Senior Policy Advisor | Rep. Zoe Lofgren |
| Kevin Klinkenberg | Policy Aide | New Democrat Coalition |
| Michael Koren | Senior Professional Staff Member | House Committee on the Judiciary |
| Timothy Kurth | Chief Counsel, Consumer Protection and Commerce | House Committee on Energy & Commerce |
| Anna Lenhart | Senior Legislative Assistant | Rep. Lori Trahan |
| Gerald Leverich | Chief Communications Counsel | House Committee on Energy & Commerce |
| Isaac Loeb | Legislative Director | Rep. Mikie Sherrill |
| Kelvin Lum | Legislative Director | Rep. Ami Bera |
| Lauren Lyles-Stolz | Legislative Assistant | Rep. Brad Schneider |
| Chris Malen | Deputy Chief of Staff | Rep. Tony Gonzalez |
| Michael Monsour | Deputy Chief of Staff | Rep. Adam Kinzinger |
| Jeremy Marcus | Chief of Staff | Rep. Doris Matsui |
| Mark Marin | Staff Director | House Committee on Oversight & Reform |
| Josh Mathis | Staff Director | House Committee on Science, Space, & Technology |
| Matt McMurray | Legislative Director | Rep. Robin Kelly |
| Tim Medeiros | Legislative Director | Rep. Randy Feenstra |
| Daniel Meyer | Chief of Staff | House Republican Leader |
| Jake Middlebrooks | Legislative Director | Rep. Jake LaTurner |
| Dan Miller | Professional Staff Member | House Committee on Energy & Commerce |
| James Min | Chief of Staff | Rep. Kevin McCarthy |
| Dylan Moore | Deputy Chief of Staff | Rep. Larry Bucshon |
| Elizabeth Mount | Policy Advisor | House Republican Conference |
| Elaina Murphy | Senior Legislative Assistant | Rep. Brett Guthrie |
| Emily Noriega-May | Deputy Executive Director | House Democratic Caucus |
| Ben Nyce | Policy Advisor | House Republican Conference |
| Kate O'Connor | Chief Counsel, Communications and Technology | House Committee on Energy & Commerce |
| Jaclyn O'Day | Executive Director | Problem Solvers Caucus |
| Whitley O'Neal | Legislative Director | Rep. Colin Allred |



| | | |
|--------------------------|--|---|
| Richard Obermann | Chief of Staff | House Committee on Science, Space, & Technology |
| Zoe Oreck | Legislative Director | Rep. Hakeem Jeffries |
| Stephanie Palencia | Policy Advisor | Rep. Joaquin Castro |
| Nishith Pandya | Chief of Staff | Rep. Bobby Rush |
| Liz Payne | Legislative Director | Rep. Cathy McMorris Rodgers |
| Armita Pedramrazi | Deputy Chief of Staff | Rep. Mary Gay Scanlon |
| John Piazza | Chief Counsel | House Committee on Science, Space, & Technology |
| Julia Poirier | Legislative Assistant | Rep. Haley Stevens |
| Ryan Propis | General Counsel | House Committee on Homeland Security |
| Kevin Rambosk | Legislative Director | Rep. Debbie Dingell |
| Flynn Rico-Johnson | Deputy Chief of Staff | Rep. Doris Matsui |
| Keanu Rivera | Legislative Assistant | Rep. Mary Gay Scanlon |
| Bill Rockwood | Deputy Legislative Director, Technology and Financial Policy Advisor | Rep. Darren Soto |
| Alexah Rogge | Policy Advisor | Rep. Russ Fulcher |
| Brian Romick | Deputy Chief of Staff | House Majority Leader |
| Marisa Salemme | Legislative Director | Rep. Ann Kuster |
| Chris Schloesser | Legislative Director | Rep. Karen Bass |
| Sarah Shapiro | Legislative Director | Rep. Eric Swalwell |
| Kaitlynn Skoog | Legislative Director | Rep. Markwayne Mullin |
| Kim Soffen | Legislative Director | Rep. Bill Foster |
| Patrick Stewart Hester | Chief of Staff | Rep. Elise Stefanik |
| Jeff Tomkowitz | Legislative Assistant | Rep. Randy Feenstra |
| Buyandelger Tsetsengarid | Caucus Assistant | House Democratic Caucus |
| Nicole Varner | Chief of Staff | Rep. Marc Veasey |
| Evan Viau | Professional Staff Member | House Committee on Energy & Commerce |
| Michele Viterise | Counsel | House Committee on Energy & Commerce |
| Jake Vreeburg | Policy Director | House Republican Conference |
| Conor Walsh | Legislative Director | Rep. Thomas Suozzi |
| Austin Walton | Policy Advisor | Rep. Steve Scalise |
| Tanner Warbinton | Legislative Director | Rep. Billy Long |
| Yelberton Watkins | Chief of Staff | Rep. Jim Clyburn |
| Robert Wehagen | Legislative Director | Rep. Buddy Carter |
| Jennifer Wickre | Deputy Staff Director | House Committee on Science, Space, & Technology |
| Laura Wilson | Legislative Director | Rep. Bill Johnson |
| Thomas Woodburn | Legislative Director | Rep. Diana DeGette |
| Dan Ziegler | Executive Director | Republican Study Committee |



August 2022 Seattle Agenda

Day 1 – Wednesday, August 10, 2022

6:30 AM EDT Group assembles at **Washington Dulles International Airport (IAD)** for check-in, security screening.

8:36 AM EDT United Flight #1964 Departs **Washington Dulles International Airport (IAD)**

11:07 AM PDT United Flight #1964 Arrives at **Seattle-Tacoma International Airport (SEA)**

25-30 minutes' drive time

11:45 – 12:15 PM Introduction of Software.org Staff and review of the day's schedule
Software.org Team will meet the Group upon arrival in Seattle and give an update about themselves and the goals of today's meetings.

12:30– 2:30 PM First Stop – **Salesforce / Tableau**
(744 N. 34th Street, Seattle, WA 98103)

At the Tableau Data1 office in downtown Seattle, Salesforce will showcase how the Salesforce platform and Tableau are being used to help digital transformation at government agencies, particularly highlighting how Tableau was used to configure COVID-19 dashboards that informed decision making at the federal, state, and local levels. Salesforce will also focus on cybersecurity issues as well as workforce development at Tableau.

Guest Speakers: **Steve Schwartz**, Director of Salesforce's new Transformational Philanthropy Team
Rob Katz, Vice President of Product Management
Wendy Turner-Williams, Vice President, Chief Data Officer, Tableau
Margaret Taylor, Senior Director of Public Affairs

15 minutes' drive time

3:00 – 4:30 PM

Second Stop – **Oracle**
(1501 4th Avenue, #1800, Seattle, WA 98101)

Oracle's technical experts will present on the Oracle Cloud infrastructure that is largely developed at the Seattle offices and lead a conversation on cybersecurity and the scalability of Oracle's software products.

Guest Speakers: **Mahesh Thiagarajan** is Senior Vice President of OCI Security & Developer Platform
Scott Twaddle is Vice President of Oracle Cloud Infrastructure (OCI) Product and Industries.

15 minutes' drive time



Day 1 – Wednesday, August 10, 2022

5:00 – 6:00 PM Third Stop – **Tour of the Port of Seattle**
(401 Alaskan Way, South Seattle, WA 98121)

Representatives from the Port of Seattle and the Northwest Seaport Alliance will lead our delegation on an educational tour of the Port and describe its role in the supply chain for the Pacific Northwest region.

6:00 – 8:00 PM Dinner & Roundtable Discussion at Port of Seattle
Roundtable working dinner discussion on how software and emerging technologies are being implemented in this sector.

Guest Speakers: **Zachary Thomas**, Director, Northwest Seaport Alliance
Bill Hubbard, Digital Supply Chain Senior Account Executive, SAP

15 minutes' drive time

8:30 PM Arrive at **Motif Seattle**
(1415 5th Avenue, Seattle, WA 98101)

Remain Overnight

Day 2 – Thursday, August 11, 2022

8:15 AM Group assembles in the lobby of the **Motif Seattle**. Ground transportation to Microsoft.

25–30 minutes' drive time

8:15 AM – 8:30AM Software.org Team shares the meetings of the day and highlights some of the topics

9:00 AM – 11:00 AM Fourth Stop – **Microsoft Redmond Campus**
(One Microsoft Way, Redmond, WA 98052)

Digital Transformation #InRealLife (DTIRL) brings to life real world customer stories across key solution areas and industries at the Redmond EBC. Participants will watch staff showcase the latest and greatest Microsoft customer stories highlighting technologies including Office 365, Azure IoT, HoloLens, Machine Learning, and more. Participants will also experience a hands-on demonstration of HoloLens technology.

Guest Speaker: **Brett Reifers**, Business Program Manager, Demos, Microsoft

15 minutes' drive time

11:00 AM Ground transportation to SAP.



Day 2 – Thursday, August 11, 2022

11:45 AM– 1:45 PM Fifth Stop – **SAP Concur**
(601 108th Avenue, NE, Suite 1000, Bellevue, WA 98004)

At SAP’s Bellevue offices, experts will demonstrate how the adoption of commercial technology and IT modernization can be positive in the public sector space, specifically sharing how Concur, SAP’s travel management software, is helping government agencies such as the US Department of Defense. SAP will also present on digital transformation innovations in the retail sector and how recent trends in consumer behavior are matched to technology capabilities to support a better overall shopping experience.

Guest Speakers: **Joe Reilly**, Retail Solution Advisor, SAP
Robin Barrett Wilson, Industry Advisor, focused on the Retail and Fashion, at SAP
Matt Gibbons, Senior Director, Sales at SAP Concur
Larissa Kim, SAP Concur Principal Customer Success Partner dedicated to the US Department of Defense
Charlie Motter, Delivery Executive for DoD My Travel Program

10 minutes’ drive time

1:45 PM Ground transportation to Unity.

2:00-3:30 PM Sixth Stop – **Unity Technologies**
(10400 NE 4th Street, Bellevue, WA 98004)

At Unity’s Bellevue offices, participants will learn how Unity’s software products are used outside the video gaming sector to facilitate digital transformation using digital twins, real-time 3D simulations, and more.

Guest Speakers: **Marc Whitten**, SVP & GM, Create, Unity Technologies
Danny Lange, SVP of AI, Unity Technologies

3:30 PM Ground transportation to the Pike Place

4:00 – 5:30 PM Seventh Stop – **Shopify Merchants at Pike Place Market**
(85 Pike Street, Seattle, WA 98101)

Shopify, a leader in e-commerce software for millions of enterprises worldwide, will showcase how local small businesses in Seattle and the State of Washington are utilizing Shopify’s platform to digitally transform their operations.

10-minute walk Guest Speakers: **Angela Kung**, US State Lead, Government Affairs, Shopify
Erin Andrews, Founder and CEO of indi chocolate



Day 2 – Thursday, August 11, 2022

6:00 – 8:00PM Eight Stop- **Keynote Dinner**
Wild Ginger – (1401 3rd Avenue, Seattle, WA 98101)

Over a working dinner, **Dr. Oren Etzioni - entrepreneur, investor, and founding Chief Executive Officer of the Allen Institute for Artificial Intelligence (AI2)** - will engage attendees in an interactive roundtable discussion about digital transformation and emerging technologies, as well as his work at the University of Washington and the National AI Research Resource Task Force.

10-minute walk

8:15 PM Arrive the Motif

Remain Overnight

Day 3 – Friday, August 12, 2022

8:30 AM Group assembles in the lobby of the **Motif Seattle**. Ground transportation to Adobe.

9:00-10:30 AM Final Stop – **Adobe**
(801 N. 34th Street, Seattle, WA 98103)

At Adobe's downtown Seattle offices, experts will demonstrate the company's Content Authenticity Initiative to mitigate inauthentic content online and share more about the company's social impact commitments in a roundtable discussion on digital transformation.

Guest Speakers: **Dan Ramirez** Senior Quality Assurance Engineer
Tim Langlois, Senior Research Scientist
Amy White is the Head of Social Impact and Communications

30-40 minutes' drive time

10:30 AM Ground transportation to **Seattle-Tacoma International Airport (SEA)**

12:51 PM PDT United Flight #2275 Departs **Seattle-Tacoma International Airport (SEA)**

8:39 PM EDT United Flight #2275 Arrives at **Washington Dulles International Airport (IAD)**

###



Attachment 2 – Question #12 – Sponsor’s interest and role

Software.org, the BSA Foundation is an independent and nonpartisan 501(c)(3) research organization that helps policymakers and the broader public better understand the impact that software has on our lives, our economy, and our society. We believe that by working together to examine these issues we can better prepare for the future and help shape government policies and industry culture that will promote both technological advancement and widespread growth.

Software.org seeks to take Congressional staff on an educational tour of global software companies at their Seattle area facilities. We have invited staff whose Members serve on the Energy and Commerce, Homeland Security, Judiciary, Science, Space & Technology Committees, and Financial Services Committees, or are in House Leadership offices, in order to educate them about the software industry and issues of importance to the industry, including its economic impact, the need for computer science education, trade, privacy, intellectual property rights, digital transformation across industry sectors, and other issues. Software.org planned and organized all aspects of the trip, made lodging and travel arrangements, and corresponded with businesses involved to set up events and tours at each location. Software.org is the sole sponsor for this trip, including responsibility for covering cost of meals throughout the trip.

Attachment 3 – Question #15(b)(2) – Reason for selecting location of the event or trip

Seattle, Washington was selected due to the number of software companies with major offices located in close proximity to one another. This allows Software.org to efficiently share insight into the software industry through in-depth, on-premises conversations with a variety of industry experts.



August 2022 Seattle Agenda

Day 1 – Wednesday, August 10, 2022

6:30 AM EDT Group assembles at **Washington Dulles International Airport (IAD)** for check-in, security screening.

8:36 AM EDT United Flight #1964 Departs **Washington Dulles International Airport (IAD)**

11:07 AM PDT United Flight #1964 Arrives at **Seattle-Tacoma International Airport (SEA)**

25-30 minutes' drive time

11:45 – 12:15 PM Introduction of Software.org Staff and review of the day's schedule
Software.org Team will meet the Group upon arrival in Seattle and give an update about themselves and the goals of today's meetings.

12:30– 2:30 PM First Stop – **Salesforce / Tableau**
(744 N. 34th Street, Seattle, WA 98103)

At the Tableau Data1 office in downtown Seattle, Salesforce will showcase how the Salesforce platform and Tableau are being used to help digital transformation at government agencies, particularly highlighting how Tableau was used to configure COVID-19 dashboards that informed decision making at the federal, state, and local levels. Salesforce will also focus on cybersecurity issues as well as workforce development at Tableau.

Guest Speakers: **Steve Schwartz**, Director of Salesforce's new Transformational Philanthropy Team
Rob Katz, Vice President of Product Management
Wendy Turner-Williams, Vice President, Chief Data Officer, Tableau
Margaret Taylor, Senior Director of Public Affairs

15 minutes' drive time

3:00 – 4:30 PM

Second Stop – **Oracle**
(1501 4th Avenue, #1800, Seattle, WA 98101)

Oracle's technical experts will present on the Oracle Cloud infrastructure that is largely developed at the Seattle offices and lead a conversation on cybersecurity and the scalability of Oracle's software products.

Guest Speakers: **Mahesh Thiagarajan** is Senior Vice President of OCI Security & Developer Platform
Scott Twaddle is Vice President of Oracle Cloud Infrastructure (OCI) Product and Industries.

15 minutes' drive time



Day 1 – Wednesday, August 10, 2022

5:00 – 6:00 PM Third Stop – **Tour of the Port of Seattle**
(401 Alaskan Way, South Seattle, WA 98121)

Representatives from the Port of Seattle and the Northwest Seaport Alliance will lead our delegation on an educational tour of the Port and describe its role in the supply chain for the Pacific Northwest region.

6:00 – 8:00 PM Dinner & Roundtable Discussion at Port of Seattle
Roundtable working dinner discussion on how software and emerging technologies are being implemented in this sector.

Guest Speakers: **Zachary Thomas**, Director, Northwest Seaport Alliance
Bill Hubbard, Digital Supply Chain Senior Account Executive, SAP

15 minutes' drive time

8:30 PM Arrive at **Motif Seattle**
(1415 5th Avenue, Seattle, WA 98101)

Remain Overnight

Day 2 – Thursday, August 11, 2022

8:15 AM Group assembles in the lobby of the **Motif Seattle**. Ground transportation to Microsoft.

25–30 minutes' drive time

8:15 AM – 8:30AM Software.org Team shares the meetings of the day and highlights some of the topics

9:00 AM – 11:00 AM Fourth Stop – **Microsoft Redmond Campus**
(One Microsoft Way, Redmond, WA 98052)

Digital Transformation #InRealLife (DTIRL) brings to life real world customer stories across key solution areas and industries at the Redmond EBC. Participants will watch staff showcase the latest and greatest Microsoft customer stories highlighting technologies including Office 365, Azure IoT, HoloLens, Machine Learning, and more. Participants will also experience a hands-on demonstration of HoloLens technology.

Guest Speaker: **Brett Reifers**, Business Program Manager, Demos, Microsoft

15 minutes' drive time

11:00 AM Ground transportation to SAP.



Day 2 – Thursday, August 11, 2022

11:45 AM– 1:45 PM Fifth Stop – **SAP Concur**
(601 108th Avenue, NE, Suite 1000, Bellevue, WA 98004)

At SAP’s Bellevue offices, experts will demonstrate how the adoption of commercial technology and IT modernization can be positive in the public sector space, specifically sharing how Concur, SAP’s travel management software, is helping government agencies such as the US Department of Defense. SAP will also present on digital transformation innovations in the retail sector and how recent trends in consumer behavior are matched to technology capabilities to support a better overall shopping experience.

Guest Speakers: **Joe Reilly**, Retail Solution Advisor, SAP
Robin Barrett Wilson, Industry Advisor, focused on the Retail and Fashion, at SAP
Matt Gibbons, Senior Director, Sales at SAP Concur
Larissa Kim, SAP Concur Principal Customer Success Partner dedicated to the US Department of Defense
Charlie Motter, Delivery Executive for DoD My Travel Program

10 minutes’ drive time

1:45 PM Ground transportation to Unity.

2:00-3:30 PM Sixth Stop – **Unity Technologies**
(10400 NE 4th Street, Bellevue, WA 98004)

At Unity’s Bellevue offices, participants will learn how Unity’s software products are used outside the video gaming sector to facilitate digital transformation using digital twins, real-time 3D simulations, and more.

Guest Speakers: **Marc Whitten**, SVP & GM, Create, Unity Technologies
Danny Lange, SVP of AI, Unity Technologies

3:30 PM Ground transportation to the Pike Place

4:00 – 5:30 PM Seventh Stop – **Shopify Merchants at Pike Place Market**
(85 Pike Street, Seattle, WA 98101)

Shopify, a leader in e-commerce software for millions of enterprises worldwide, will showcase how local small businesses in Seattle and the State of Washington are utilizing Shopify’s platform to digitally transform their operations.

10-minute walk Guest Speakers: **Angela Kung**, US State Lead, Government Affairs, Shopify
Erin Andrews, Founder and CEO of indi chocolate



Day 2 – Thursday, August 11, 2022

6:00 – 8:00PM Eight Stop- **Keynote Dinner**
Wild Ginger – (1401 3rd Avenue, Seattle, WA 98101)

Over a working dinner, **Dr. Oren Etzioni - entrepreneur, investor, and founding Chief Executive Officer of the Allen Institute for Artificial Intelligence (AI2)** - will engage attendees in an interactive roundtable discussion about digital transformation and emerging technologies, as well as his work at the University of Washington and the National AI Research Resource Task Force.

10-minute walk

8:15 PM Arrive the Motif

Remain Overnight

Day 3 – Friday, August 12, 2022

8:30 AM Group assembles in the lobby of the **Motif Seattle**. Ground transportation to Adobe.

9:00-10:30 AM Final Stop – **Adobe**
(801 N. 34th Street, Seattle, WA 98103)

At Adobe's downtown Seattle offices, experts will demonstrate the company's Content Authenticity Initiative to mitigate inauthentic content online and share more about the company's social impact commitments in a roundtable discussion on digital transformation.

Guest Speakers: **Dan Ramirez** Senior Quality Assurance Engineer
Tim Langlois, Senior Research Scientist
Amy White is the Head of Social Impact and Communications

30-40 minutes' drive time

10:30 AM Ground transportation to **Seattle-Tacoma International Airport (SEA)**

12:51 PM PDT United Flight #2275 Departs **Seattle-Tacoma International Airport (SEA)**

8:39 PM EDT United Flight #2275 Arrives at **Washington Dulles International Airport (IAD)**

###

