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: Deepa Patel
2. a. Name of Accompanying Relative: _____ ***OR*** ☒ None
   b. Relationship to Traveler: ☐ Spouse ☐ Child ☐ Other (specify): _____
3. a. Dates: Departure: 8/22/23 Return: 8/26/23
   b. Dates at Personal Expense, if any: 8/23 morning due to flight limitations ***OR*** ☐ None
4. Departure City: Los Angeles, CA Destination: Boston, MA Return City: Los Angeles, CA
5. Sponsor(s), Who Paid for the Trip: Center Forward
6. Describe Meetings and Events Attended: Meetings included Pfizer for biotechnology and pharmaceutical innovations, Hospital groups for healthcareworkforce issues, MIT for emerging technology in energy and venturecapital and business incubators, and new tools in the finance and banking sectors by Fidelity.
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:** 8/31/2023

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: David Trone **Date:** 9/1/2023

Signature of Supervising Member: _____

last updated 7/2023

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 in 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 or provided in-kind support for the trip: Center Forward
2. Travel Destination(s): Boston, MA
3. Date of Departure: Wednesday, August 23, 2023 Date of Return: Saturday, August 26, 2023
4. Name(s) of Traveler(s): Deepa Patel

   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	$653.98	$765.00	$265.00	*All air and ground transportation included*
Accompanying Family Member	N/A	N/A	N/A	N/A

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: Riley Kilburg **Date:** Saturday, August 26, 2023

Name: Riley Kilburg **Title:** Executive Director

Organization: Center Forward

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

Address: 1214A Ingleside Ave, McLean VA 22101

Telephone: 563-542-6821 **Email:** riley@center-forward.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.

last updated 7/2023

U.S. House of Representatives
COMMITTEE ON ETHICS

TRAVELER FORM

1. Name of Traveler: Deepa Patel

2. Sponsor(s) who will be paying or providing in-kind support for the trip:
   Center Forward

3. City and State OR Foreign Country of Travel : Boston, MA

4. a. Date of Departure: 8/22/23 PST (8/23 EST) Date of Return: 8/26/23
   b. Yes ☐ No ☒ Will you be extending the trip at your personal expense?
   If yes, list dates at personal expense: 8/23 morning due to flight limitations

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 serve as a Senior Policy Advisor to Rep Trone, covering Homeland Security and Health as well appropriations. Through lectures, site visits, and interactions with local and state officials and academia, this trip will help me better understand a range of issue related to my portfolio. Bipartisanship is a top focus for Rep Trone, and i will be able to engage on these issues from this perspective which this itinerary and participants are helping to cultivate.

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 _____ Date 07/20/2023

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:
   Center Forward
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):
   Please see attached supplemental form.
5. Yes ☐ No ☒ Is travel being offered to an accompanying family member of the House invitee(s)?
6. Date of departure: Wednesday, August 23rd, 202 Date of return: Saturday, August 26th, 2023
7. a. City of departure: Washington, D.C.
   b. Destination(s): Boston, MA
   c. City of return: Washington, D.C.
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:

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:

    Please see attached supplemental form.

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):

       $70

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

       Please see attached supplemental form.

16. Name, nightly cost, and reasons for selecting each hotel or other lodging facility:
    Hotel Name: InterContinental Hotel Bostor City: Boston, MA Cost Per Night: $255
    Reason(s) for Selecting: Ample meeting space and central location to commercial districts in Boston ar
    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.*

18. **Total Expenses for each Participant:**

☐ Actual Amounts ☒ Good Faith Estimates	Total **Transportation** Expenses per Participant	Total **Lodging** Expenses per Participant	Total **Meal** Expenses per Participant
For each Member, Officer, or Employee	$550.00	$765.00	$240.00
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	$0.00	Air and ground transportation included above.
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: Riley Kilburg Date: Saturday, August 26, 2023

Name: Riley Kilburg Title: Executive Director

Organization: Center Forward

Address: 1214A Ingleside Ave, McLean VA 22101

Email: riley@center-forward.org Telephone: 563-542-6821

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**

Michael Guest, Mississippi
Chairman
Susan Wild, Pennsylvania
Ranking Member

David P. Joyce, Ohio
John H. Rutherford, Florida
Andrew R. Garbarino, New York
Michelle Fischbach, Minnesota

Veronica Escobar, Texas
Mark DeSaulnier, California
Deborah K. Ross, North Carolina
Glenn F. Ivey, Maryland

ONE HUNDRED EIGHTEENTH CONGRESS

U.S. House of Representatives

COMMITTEE ON ETHICS

Thomas A. Rust
Staff Director and Chief Counsel

Keelie Broom
Counsel to the Chairman

David Arrojo
Counsel to the Ranking Member

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

August 17, 2023

Ms. Deepa Patel
Office of the Honorable David J. Trone
2404 Rayburn House Office Building
Washington, DC 20515

Dear Ms. Patel:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to Boston, Massachusetts, scheduled for August 22 to 26, 2023, sponsored by Center Forward. We note that this trip includes one day at your personal expense.

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 $480 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,

Michael Guest
Chairman

Susan Wild
Ranking Member

MG/SW:emw

Private Sponsor Travel Certification Form: Supplemental

4.

First	Last	Title	Affiliation	Reason
Rachel	Black	Legislative Director	Office of Representative Tony Gonzales	As a Legislative Director for a member of the Appropriations Committee, Ms. Black can speak to the federal programs supporting scientific research and business growth.
Cameryn	Blackmore	Health Policy Advisor	Office of Representative Terri Sewell	As a Health Policy Advisor for a member of the Ways and Means Committee, Ms. Blackmore can share her perspectives on funding for health care research and provider networks.
Skylar	Borchardt	Legislative Director	Office of Representative Angie Craig	As Legislative Director for a member of the Energy and Commerce Committee, Mr. Borchardt can provide insight into relevant policy issues in the energy and technology sectors
Troy	Dougall	Senior Legislative Assistant	Office of Representative John Curtis	As a Senior Legislative Assistant for the Chair of the Conservative Climate Caucus and member of the Energy and Commerce Committee, Mr. Dougall can provide insights into Congress's priorities and actions in the energy industry.
Mike	Dunn	Legislative Director	Office of Representative John Larson	As Legislative Director for a Member of the Ways and Means Committee, Mr. Dunn can share perspectives on incentives to research and development incentives.
Erin	Gooley	Legislative Assistant	Office of Representative Brendan Boyle	As a Legislative Assistant for a member of the Ways and Means the Ranking Member of the Budget Committee, Ms. Gooley can offer perspectives on federal funding for scientific research projects and business growth.
Natalie	Hellmann	Legislative Assistant	Office of Representative Buddy Carter	As a Legislative Assistant for a member of the Energy and Commerce Committee, Ms. Hellmann can provide insight into relevant policy issues in the health care and energy sectors.

Zach	Isakowitz	Legislative Director	Office of Representative Michael McCaul	As the Legislative Director for the Chair of the Foreign Affairs Committee and one of the lead authors of the CHIPS and Science Act, Mr. Isakowitz can add insight to the federal government's approach to the global semiconductor supply chain and its effect on the technology industry.
Sean	Lerner	Legislative Director	Office of Representative Victoria Spartz	As Legislative Director for a member of the Judiciary Committee, Mr. Learner can add insights to discussions of administrative law and antitrust policy to support business growth and development.
Megan	McCorquodale	Judiciary Legislative Assistant	Office of Representative Joe Neguse	As a Legislative Assistant for Judiciary issues to a member of that Committee, Ms. McCorquodale can speak to the federal policies protecting competitive markets and fostering new business growth.
Deepa	Patel	Senior Policy Advisor	Office of Representative David Trone	As a Senior Policy Advisor for a member of the Appropriations Committee, Ms. Patel can offer insight on the government's priorities for funding programs towards research and development projects.
Katie	Paulson	Legislative Director	Office of Representative Deborah Ross	As a Legislative Director to a Member on the House Science, Space, and Technology Committee, Ms. Paulson can offer her perspective on AI regulation and the future of this type of technology.
Donald	Pollard	Legislative Director	Office of Representative Jennifer McClellan	As a Legislative Director to a Member on the House Science, Space, and Technology Committee, Mr. Pollard can offer his perspective on the potential uses of fusion and other innovative energy technology.
George	Pulizzi	Policy and Coalitions Director	Office of Representative Nancy Mace	As Policy and Coalitions Director for the Chair of the Oversight Subcommittee on Cybersecurity, Mr. Pulizzi can speak to Congress's perspectives on AI and other emerging technologies.
Amber	Ray	Health Policy Advisor	Office of Representative Lisa Blunt Rochester	As a Health Policy Advisor for a member of the Energy and Commerce Committee, Ms. Ray can provide valuable insight to federal policy supporting biomedical research and development.

Jesse	von Stein	Legislative Director	Office of Representative Jim Baird	As a Legislative Director for a member of the Science, Space, and Technology Committee, Mr. von Stein can add insight to discussions of tax incentives for investment in research and development and small businesses.
Faith	Wilcox	Senior Legislative Assistant	Office of Representative Mary Gay Scanlon	As a Senior Legislative Assistant for a member of the Judiciary Committee, Ms. Wilcox can add insights to discussions of administrative law and antitrust policy to support business growth and development.
Josh	Woodward	Deputy Chief of Staff	Office of Representative Kat Cammack	As a Deputy Chief of Staff for a member on the Energy and Commerce Committee, Mr. Woodward can speak to Congress's perspective on regulating emerging technology and media.
Nick	Wooldridge	Legislative Assistant	Office of Representative Blake Moore	As a Legislative Assistant for a member of the Ways and Means Committee, Mr. Wooldridge can offer perspectives on funding to health care providers and networks.

12. Sponsor’s interest in the subject matter and role in organizing the trip:
Center Forward’s Innovation Conference is being convened to bring together a bipartisan group of senior legislative staffers from the House of Representatives to discuss innovation and development in America's critical industries and how the federal government can foster business growth and further scientific progress. Center Forward’s organizational mission is to provide centrists the information they need to craft common-sense solutions and provide support in turning those ideas into results. Center Forward brings together Members of Congress, their staffs, not-for profits, academic experts, trade associations, corporations, and unions to find common ground.

Center Forward is the sole organizer of the trip. Center Forward is planning the conference and is responsible for the organization and execution of the event logistics as well as the programming content. Discussion topics will include, healthcare and advancements biotechnology, alternative energy solutions, using technology for public infrastructure, artificial intelligence, quantum computing, and the current landscape in the financial industry to support small business growth and development. Conference attendees will be senior legislative staffers from House member offices, and will speak with researchers, startup founders, and business leaders in the Boston area.

15.b.2) Provide the reason for selecting the location of the event or trip:
Boston was selected as the location for the location of this conference to give attendees an on-the-ground experience in one of America's largest innovation hub cities. Outfitted with numerous world-class universities, Boston and Cambridge have birthed countless groundbreaking companies in the technology, healthcare, and finance industries. The rich culture of startups fueled by ideas coming out of the local schools and research institutions will give attendees insight into factors driving innovation and growth across sectors.

Center Forward Innovation Conference
Boston, Massachusetts — August 23 - August 26, 2023
Conference Agenda

Center Forward Contact Information

Riley Kilburg | (563) 542-6821 | riley@center-forward.org
Cori Kramer | (202) 550-0888 | cori@center-forward.org
Justin Davey | (703) 216-5608 | justin@daveydc.com
Eddie Huck | (317) 979-1185 | eddie@center-forward.org

Wednesday, August 23rd, 2023

3:03 pm	Congressional staff depart Washington Reagan National Airport American Airlines Flight 2145 | 1 h 48 min flight time
4:51 pm	Arrive at Boston Logan International Airport (Delta 5604) *After deboarding, collect any checked bags and proceed to Terminal B ground transportation. A Center Forward staff member will greet you and help organize transportation to the hotel.*
5:20 pm	Depart Boston Logan International Airport en route to InterContinental Hotel Boston via shuttle. (15 minute travel time) InterContinental Hotel Boston | 510 Atlantic Ave, Boston, MA 02210
5:35 pm	Check-in at the the InterContinental Hotel Boston
6:40 pm	Depart InterContinental Hotel Boston via shuttle to Samuel Adams Production Facility. (20 minute travel time)

7:00 pm - 9:00 pm Welcome Dinner – Federal and Local Government Working Together to Foster Growth

Samuel Adams Production Facility, Boston - Jamaica Plain | 30 Germania Street, Boston, MA 02130

Local government officials will join conference attendees to discuss their interface with the federal government, and how Congress can help foster business and economic growth in Boston and cities around the country.

Speakers include:

- Mayor Michelle Wu, City of Boston (*Invited*)
- Sam Hyun, Director of Federal Relations, City of Boston (*Invited*)

Thursday, August 24th, 2023

BREAKFAST ON YOUR OWN
Breakfast available in the Club Lounge on 12th floor from 7:00 am until 10:00 am

***Business casual attire*

9:00 am - 9:45 am Opening Welcome Remarks from Cori Kramer and Riley Kilburg

InterContinental Hotel Boston | Ballroom 200

- Cori Kramer, Chief Executive Officer, Center Forward
- Riley Kilburg, Executive Director, Center Forward

Cori Kramer and Riley Kilburg will lead an overview of the agenda for conference participants and provide an introduction to the pressing issues we will be discussing over the next three days. Topics will include biotechnology and pharmaceutical innovations, healthcare workforce issues, emerging technology in the energy industry, venture capital and business incubators, and new tools in the finance and banking sectors.

9:45 am - 10:00 am Break

10:00 am - 10:15 am Depart InterContinental Hotel Boston via shuttle en route to Pfizer R&D Labs and Center for Therapeutic Innovation Headquarters. (15 minute travel time)

10:15 am - 11:00 am Tour of Pfizer Research Labs

Pfizer R&D Laboratory and Center for Therapeutic Innovation Global Headquarters | Massachusetts Institute of Technology | 1 Portland St, Cambridge, MA 02139

Pfizer boasts a 280,000+ square foot R&D hub home to over 1,000 employees focused on developing medical breakthroughs in treatments for inflammation and immune disorders, rare diseases, and internal medicine. The site's laboratory facilities are leased from MIT, continuing Pfizer's tradition of working with the university and other leading academic institutions to advance science, research, and education. The Cambridge labs are also the global headquarters for Pfizer's Center For Therapeutic Innovation (CTI), an entrepreneurial network of collaborations with leading academic medical centers.

After a safety briefing, guests will tour the laboratory to see some of the ongoing projects and technologies used at the facility.

11:00 am - 12:00 pm Panel Remarks – Innovation and Collaboration in Medical Science

Pfizer executives will provide brief remarks and take questions from attendees. The discussion will focus on topics related to research and development, collaboration with academic institutions, the pharmaceuticals market, and health care policy.

Panelists include:

- Tanya Alcom, Senior Vice President for Global Supply Chain, Pfizer
- Lev Kubiak, Chief Security Officer, Pfizer

12:00 pm - 12:10 pm Depart Pfizer R&D Laboratory en route to MassBioHub. (5 minute walk)

12:15 pm - 2:15 pm Lunch and Panel Discussion – Biotechnology: Rare Diseases and Incentives for Research and Development

MassBioHub | 700 Technology Square, L5, Cambridge, MA 02139

A diverse representation of stakeholders in the biotechnology sector will provide an update on rare disease treatment production. Panelists will share their companies' experiences with how the federal government has hindered or enhanced innovation. Topics discussed are likely to include the rare disease exemption, small molecule penalty, oncology screening, diversity in medical trials, and more.

- Stephen Bandini, Head Oncology Strategy & Operations, Novartis
- Crystal Kuntz, Senior Vice President of Policy, BIO
- Chris Leibman, Vice President of Value, Access, Public Policy, and Government Affairs, Biogen
- Richard Olson, Vice President of State Public Affairs, Vertex
- Jennifer Roan, Vice President of US Neurology, PTC Therapeutics

2:15 pm - 3:00 pm Depart MassBioHub via shuttle en route to MetroWest Medical Center Framingham. (45 minute travel time)

Cori Kramer, Chief Executive Officer, Center Forward, will brief conference attendees on issues facing the biotechnology sector and the scientific research process.

3:00 pm - 3:45 pm Tour of MetroWest Medical Center Framingham

MetroWest Medical Center Framingham | 115 Lincoln Street, Framingham, MA 01702

Hospital staff will lead the groups through a tour of the facility, including the behavioral health center, pediatric care center, and emergency room and trauma center.

Conference attendees will be given PPE and be split into groups.

3:45 pm - 4:30 pm Remarks and Discussion – Health Care Workforce, Local Networks, and Lessons from COVID-19

Hospital staff and administrators will give brief remarks and answer questions. The discussion will focus on issues in the healthcare workforce, labor shortages, and funding and support for small and local networks. The group will also discuss lessons health care providers learned from the COVID-19 pandemic and how practices and issues in the workforce have changed.

- Joe Ricca, Principal, Dewey Square Group
- Melissa Wong, Government Relations Manager, Tenet Healthcare

4:30 pm - 5:15 pm Depart MetroWest Medical Center Framingham via shuttle en route to the InterContinental Hotel Boston. (45 minute travel time)

Water and snacks will be provided on the ride back. Riley Kilburg, Executive Director, Center Forward, will debrief attendees on the prior discussions and issues related to healthcare workforce and local provider networks.

5:15 pm - 6:55 pm Break

6:55 pm - 7:00 pm Depart the InterContinental Hotel walking en route to Smith & Wollensky. (5 minute travel time)

7:00pm - 9:00 pm Dinner – World-Class Universities Building a Culture of Innovation and Progress in Boston and Cambridge

Smith & Wollensky | 294 Congress St, Boston, MA 02210

Administrators from Harvard University and the Massachusetts Institute of Technology will join conference attendees to discuss how their institutions provide students with the knowledge and resources to grow into influential innovators and how their research faculty partner with business to advance progress.

Panelists include:

- Karen Frank, Chair of the Dean's Council, Harvard Kennedy School (*Invited*)
- Paolo Parravano, Co-Director of Community and Government Relations, Massachusetts Institute of Technology (*Invited*)

Friday, August 25th, 2023

BREAKFAST ON YOUR OWN
Continental breakfast available in Club Lounge on the 12th floor from 7:00 am - 10:00 am

***Business casual attire*

8:50 am - 9:00 am Depart InterContinental Hotel Boston via shuttle en route to Fidelity Center for Applied Technology. (5 minute travel time)

9:15 am - 10:00 am Panel Discussion — FinTech Innovation and Applied Technologies

Fidelity Center for Applied Technology (FCAT) | 245 Summer Street, Boston, MA 02128

Technology is rapidly changing and involved in almost every aspect of our lives, and financial services and banking are no exception. The Fidelity Center for Applied Technologies is working to create solutions for the increasing digitization of finance using AI, blockchain tokenization, and quantum computing.

Fidelity researchers and executives will discuss recent breakthroughs in the industry, ongoing projects at FCAT, and their impacts on the American economy and capital access.

Panelists include*:*

- Nabil Ashour, Director of Policy, Advocacy, and Communications, Fidelity
- Jeff Cathie, Head of Advocacy and Public Policy Communications, Fidelity

10:00 am - 10:45 am Tour and Demonstrations at FCAT.

10:45 am - 10:50 am Depart FCAT via shuttle to AutoDesk. (5 minute travel time)

10:50 am - 12:15 pm Tour and Demonstrations of AutoDesk technologies and project floor.

AutoDesk | 23 Drydock Avenue, Boston, MA 02210

AutoDesk is a software design company creating solutions for construction, engineering, and infrastructure projects. They are most widely known for their product ACAD, a program for architecture and design. AutoDesk's Boston office also hosts project managers

using their technologies and resources on groundbreaking enterprises in engineering, design, and media.

Andrew Friendly, Vice President of Government Affairs and Public Policy at AutoDesk, will host a tour of the facility and showcase some of their products on a few active projects. The discussion will focus on the several bills from the last Congress giving funding to infrastructure and manufacturing, and how the government can build related grant programs to optimize results.

12:15 pm - 12:30 pm Depart AutoDesk via shuttle en route to The Engine. (15 minute travel time)

12:30 pm - 1:15 pm Facility tour and meet and greet with portfolio companies at The Engine.

The Engine | 750 Main Street, Cambridge, MA 02139

The Engine, built by MIT, is a venture firm that invests in early-stage companies solving the world's biggest problems through the convergence of breakthrough science, engineering, and leadership. Ben Downing, Vice President of Public Affairs at The Engine, will lead conference attendees on a tour of the headquarters and introduce founders and leaders from several startup companies in The Engine's portfolio.

Speakers include:

- Francesco Benedetti, Co-Founder and Chief Executive Officer, Osmoses
- Ben Downing, Vice President of Public Affairs, The Engine
- Cameron Holiday, Co-Founder and Chief Executive Officer, Mantel
- Dr. Mariana Matus, Co-Founder and Chief Executive Officer, Biobot

1:15 pm - 2:15 pm Lunch and Panel Discussion – From R&D to Manufacturing: The Tech Ecosystem in Greater Boston, Present & Future

Together, The Engine and FORGE Impact provide funding, consulting, and resources as a full suite of business incubation services. The Engine connects seed-stage companies with venture capital, and FORGE Impact connects companies with widget manufacturers, suppliers, and distributors to build their physical products and bring them to market.

Leaders from The Engine and FORGE will lead a discussion on what has made the Greater Boston tech ecosystem successful over the last 15 years, where has the ecosystem benefitted from public support, what weaknesses remain in the region and how their companies are working to address those gaps. As the federal government makes a new round of investments in regional economic development and undertakes a new era of industrial policy, this discussion will help participants consider the merits, challenges and opportunities of different approaches.

Panelists include:

- Ben Downing, Vice President of Public Affairs, The Engine
- Conrad Holloman, Director of Government Programs, The Engine
- Emily Knight, President, The Engine
- Laura Teicher, Executive Director, FORGE Impact

2:15 pm - 3:10 pm Depart The Engine via shuttle en route to Commonwealth Fusion Systems. (55 minute travel time)

Riley Kilburg, Executive Director of Center Forward, will brief guests on the history and current state of nuclear energy and provide an overview of recent breakthroughs in fusion technology.

3:15 pm - 4:00 pm Tour of Commonwealth Fusion Systems facilities.

Commonwealth Fusion Systems | 117 Hospital Road, Devens, MA 01434

After a safety briefing and safety equipment, conference attendees will tour Commonwealth Fusion Systems' facilities and laboratories, showcasing the latest innovations in nuclear fusion and projects to develop new forms of alternative energy production.

ALL cell phones and electronics **MUST** be left in the secure storage outside of the CFS factory floor and laboratories.

4:00 pm - 5:00 pm Panel Discussion – The Future of Fusion Technology and Renewable Energy

Researchers and Executives from CFS will discuss recent breakthroughs in fusion technology, and what future developments could bring to the energy sector and other industries.

Panelists include:

- Alex Creely, Head of Tokamark Operations, Commonwealth Fusion Systems
- Darby Dunn, Vice President of Operations, Commonwealth Fusion Systems
- Bob Mumgaard, Chief Executive Officer, Commonwealth Fusion Systems

5:00 pm - 5:55 pm Depart Commonwealth Fusion Systems via shuttle en route to InterContinental Hotel Boston. (55 minute travel time)

5:55 pm Arrive at InterContinental Hotel Boston.

5:55 pm - 6:45 pm Break

6:45 pm - 7:05 pm Depart the InterContinental Hotel Boston via Shuttle en route to Bleacher Bar. (20 minute travel time)

Bleacher Bar | 82A Lansdowne Street, Boston, MA 02215

7:05 pm - 9:30 pm Dinner – Betting, Competition, and More: What's Next for Professional Sports Franchises?

David Friedman, Senior Vice President of Government Affairs for the Boston Red Sox will lead a discussion on recent developments and the future direction of the professional sports business.

Speaker includes:

- David Friedman, Senior Vice President of Legal and Government Affairs, Boston Red Sox (*Invited*)

Saturday, August 26th, 2023

BREAKFAST ON YOUR OWN

Breakfast available in Club Lounge on the 12th floor from 7:00am - 11:00am

8:30 am - 8:40 am	Conference attendees check out and depart the InterContinental Hotel Boston en route to Boston Logan International Airport. (10 minute travel time)
10:15 am - 11:58 am	Conference attendees depart Boston Logan International Airport American Airlines Flight 2169 | 1 h 48 min flight time
11:58 am	Arrive at Washington Reagan National Airport