

COMMITTEE ON ETHICS

MEMBER/OFFICER POST-TRAVEL DISCLOSURE FORM *Original* *Amendment*

This form is for disclosing the receipt of travel expenses from a private source for travel taken in connection with a Member or officer's official duties. This form does not eliminate the need to report privately-funded travel on the Member or officer's annual *Financial Disclosure Statement*. 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: _____
2. a. Name of Accompanying Relative: _____ **OR** None
b. Relationship to Traveler: Spouse Child Other (specify): _____
3. a. Dates: Departure: _____ Return: _____
b. Dates at Personal Expense, if any: _____ **OR** None
4. Departure City: _____ Destination: _____ Return City: _____
5. Sponsor(s), Who Paid for the Trip: _____
6. Describe Meetings and Events Attended (attach additional pages if necessary): _____

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 Member or officer; **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 in this form is true, complete, and correct to the best of my knowledge. I have determined that all of the expenses on the attached *Sponsor Post-Travel Disclosure Form* were necessary and that the travel was in connection with my duties as a Member or officer of the U.S. House of Representatives and would not create the appearance that I am using public office for private gain.

Member / Officer Signature:  _____

Date: _____

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: Software.org; the BSA Foundation

2. Travel Destination(s): San Francisco, CA

3. Date of Departure: October 11, 2023 Date of Return: October 13, 2023

4. Name(s) of Traveler(s): Joseph Zanzoni

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	929.80	618	181.60	
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: Victoria A. Espinel Date: 10/23/23

Name: Victoria A. Espinel Title: President

Organization: Software.org; the BSA Foundation

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

Address: 200 Massachusetts Avenue, NW Suite 310, Washington, DC

Telephone: 202-827-8200 Email: molly@mollyallenassociates.com

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.

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.

This form and any attachments may be submitted at 1015 Longworth House Office Building or 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: _____

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: Joe Zanon

Name of Signatory (if other than traveler): _____

For Staff (name of employing Member or Committee): _____

Office Address: _____

Telephone Number: _____

Email Address of Contact Person: _____

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 on Ethics at 202-225-7103 or via email: travel.requests@mail.house.gov.

COMMITTEE ON ETHICS

TRAVELER FORM

1. Name of Traveler: _____
2. Sponsor(s) who will be paying or providing in-kind support for the trip: _____

3. City and State **OR** Foreign Country of Travel: _____

4. a. Date of Departure: _____ Date of Return: _____

b. Yes No Will you be extending the trip at your personal expense?

If yes, list dates at personal expense: _____

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, invitation, 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 a counsel for Rep. Lofgren

9. **Yes No Is the traveler aware of any registered federal lobbyists or foreign agents involved in 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: _____

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's website (ethics.house.gov) provides detailed instructions for filling out the form. The Committee will notify the House invitees directly of its decision and will not notify the trip sponsors.

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. Signatures must comply with section 104(bb) of the Travel Regulations.

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, services, or in-kind assistance 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. _____
-

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 the statement is true by clicking the 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 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.*

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

<input type="checkbox"/> Actual Amounts <input type="checkbox"/> Good Faith Estimates	Total Transportation Expenses per Participant	Total Lodging Expenses per Participant	Total Meal Expenses per Participant
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		

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:  Date: _____

Name: _____ Title: _____

Organization: _____

Address: _____

Email: _____ Telephone: _____

If there are questions regarding this form, please contact the Committee on Ethics at 202-225-7103 or travel.requests@mail.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

October 4, 2023

Mr. Joseph Zanoni
Office of the Honorable Zoe Lofgren
1401 Longworth House Office Building
Washington, DC 20515

Dear Mr. Zanoni:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to San Francisco, California, scheduled for October 11 to 13, 2023, 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 \$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:tn



House Staffdel to San Francisco
Wednesday, October 11 - Friday, October 13, 2023
“AI & Software Enabling Digital Transformation”

Attachment A: Question 4 – Names, titles, and explanation for invitation for all House invitees.

Software.org has hosted educational programming for delegations of congressional staff seeking to learn about technology development and implementation in seats of innovation, commerce, and political leadership.

The staff members listed below were invited because of their work on policy issues in the tech ecosystem including AI, emerging technologies, cybersecurity, and digital trade. The invitees work as committee staff or for Members who serve on the Energy and Commerce, Homeland Security, Judiciary, Science, Space & Technology, and Financial Services Committees, or are in House Leadership offices.

FIRST	LAST	TITLE	OFFICE
Milla	Anderson	Policy Adviser	Kuster, Ann
Taylor	Andreae	Chief of Staff	Gallagher, Mike
Hannah	Anton	Senior Advisor	Committee on Energy and Commerce
Zach	Atran	Legislative Assistant	Lieu, Ted
Maggie	Ayrea	Deputy Chief of Staff	Graves, Garrett
Elizabeth	Barczak	Professional Staff Member	Subcommittee on Commerce, Justice, Science, and Related Agencies
Moira	Bergin	Staff Director	Subcommittee on Cybersecurity and Infrastructure Protection
Raj	Bharwani	Senior Professional Staff Member	Committee on Oversight and Accountability
Steven	Blattner	Legislative Director	Clarke, Yvette
Lorissa	Bounds	Chief of Staff	Obernolte, Jay
Emily	Burns	Policy Director	Committee on Oversight and Accountability
Steve	Carlson	Chief of Staff	Pappas
Emily	Carwell	Policy Director	Office of the Minority Whip (Clarke)
Rosaline	Cohen	Chief Counsel, Democratic	Committee on Homeland Security
Marcus	Coleman	Professional Staff Member	Committee on Homeland Security
Tony	Condarco	Legislative Director	Cardenas
Lillie	Coney	Chief of Staff	Jackson Lee, Sheila
Hallie	Coyne	Legislative Assistant	Wittman, Rob
Lydia	Dennett	Professional Staff Member	Homeland Security Subcommittee on Oversight
Mark	Dennin	Legislative Director	Panetta, Jimmy

Sonali	Desai	Executive Director	House Democratic Caucus
Michelle	Dorothy	Chief of Staff	Houlahan, Chrissy
Troy	Dougall	Senior Policy Advisor	Curtis, John
Laura	Dyer	Legislative Director	Johnson, Bill
Andrew	Eisenberger	Deputy Chief of Staff	Collins, Mike
McKenzie	Fields	Legislative Director	Pelosi, Nancy
Casey	Fitzpatrick	Deputy Chief of Staff	Armstrong, Kelly
Earl	Flood	Legislative Director/Counsel	Kelly, Robin
Ian	Foley	Policy Director	Office of the Majority Whip
Cameron	Foster	Chief of Staff	Hern, Kevin
Abe	Friedman	Senior Policy Advisor	DelBene, Suzan
Sierra	Fuller	Legislative Assistant	Clarke, Yvette
Ali	Fulling	Policy Adviser	Walberg, Tim
Hope	Goins	Staff Director	Committee on Homeland Security
Daniel	Greene	Professional Staff Member	Subcommittee on Innovation, Data, and Commerce (Energy & Commerce)
David	Greengrass	Parliamentarian, Democratic/Senior Counsel	Committee on the Judiciary
Tyler	Grimm	Chief Counsel, Policy and Strategy	Committee on the Judiciary
Tiffany	Guarascio	Staff Director, Democratic	Committee on Energy and Commerce
Cecily	Hahn	Senior Legislative Counsel	DelBene, Suzan
Iain	Hart	Legislative Director	Garamendi, John
Jennifer	Haynes	Legislative Director	Issa, Darrell
Michael	Helmer	Legislative Director	Burgess, Michael
Eric	Henshall	Legislative Director	Eshoo, Anna
Slate	Herman	Counsel	E&C Communications & Technology Subcommittee
Rob	Hicks	Legislative Director	Obernolte, Jay
Chris	Hixon	Staff Director, Republican	Committee on the Judiciary
Nate	Hodson	Staff Director, Republican	Committee on Energy and Commerce
Lisa	Hone	Chief Counsel, IDC Sub	Committee on Energy and Commerce
Zach	Isakowitz	Legislative Director	McCaul, Michael
Josh	Izaak	Legislative Director	Bonamicci
Dev	Jhaveri	Legislative Assistant	Trahan, Lori
Catherine (Cate)	Johnson	Professional Staff Member	Committee on Science, Space, and Technology
Chris	Jones	Senior Policy Advisor	Bilirakis, Gus
Keighle	Joyce	Deputy Staff Director	Committee on Homeland Security
Brian	Kaissi	Chief of Staff	Krishnamoorthi, Raja
Jacqui	Kappler	Chief Counsel, IP Sub	Committee on the Judiciary
Allen	Klump	Chief of Staff	Duncan, Jeff

Bijan	Koohmaraie	Counsel	Office of the House Majority Leader
Tim	Kurth	Chief Counsel	Committee on Energy and Commerce
Ryan	Long	Senior Advisor	Office of the Speaker of the House
Morgan	McCue	Legislative Assistant	Bonamici, Suzanne
Nicole	McLaren	Legislative Director	Soto, Darren
James	McNamee	Legislative Director	Lawler, Mike
Phil	McNaughton	Policy Director	Committee on Armed Services
Randal	Meyer	Chief Counsel/Legislative Director	Mace, Nancy
Sarah	Moxley	Professional Staff Member	Committee on Armed Services
Jeffrey	Nowill	Legislative Director	Plaskett, Stacey
Connie	O'Connor	Senior Counsel	Committee on Energy & Commerce
Zoe	Oreck	Policy Director	Office of the Minority Leader (Jeffries)
Liz	Payne	Legislative Director	McMorris Rodgers, Cathy
John	Piazza	Chief of Staff	Committee on Science, Space, and Technology
Alicia	Porile	Legislative Assistant	Blunt Rochester, Lisa
George	Pulizzi	Director of Policy	Mace, Nancy
Brannon	Rains	Professional Staff Member	Committee on Energy and Commerce
Mary Ellen	Richardson	Chief of Staff	LaHood, Darin
Flynn	Rico-Johnson	Deputy Chief of Staff	Matsui, Doris
Victoria	Rubin	Professional Staff Member	Committee on Science, Space, and Technology
Kevin	Ryan	Chief of Staff	Lynch
Chris	Schloesser	Deputy Chief of Staff/Legislative Director	Degette, Diana
Brittan	Specht	Deputy Chief of Staff for Policy	Officer of the Speaker
Alex	Stepahin	Legislative Director	Hudson, Richard
Mark	Stephenson	Legislative Director	Committee on House Oversight
Lacey	Strahm	Tech Fellow	Committee on Energy and Commerce
Stuart	Styron	Senior Policy Advisor	Eshoo, Anna
Teddy	Tanzer	Senior Counsel	Committee on Energy and Commerce
Deena	Tauster	Chief of Staff	Garbarino, Andrew
Sydney	Terry	Chief of Staff	Schakowsky, Jan
Steve	Thornton	Legislative Director	Office of the Minority Whip (Clarke)
Kirby	Tidmore	Legislative Assistant	Hern, Kevin
Jonathan	Vecchi	Deputy Chief of Staff/Legislative Director	Bilirakis, Gus
Evan	Viau	Professional Staff Member	Subcommittee on Communications and Technology
Chris	Vieson	Staff Director	Committee on Armed Services
Rob	Wagener	Legislative Director	Fitzgerald, Scott
Peter	Warren	Senior Advisor	Committee on Oversight and Accountability

Joshua	Woodward	Deputy Chief of Staff for Policy	Cammack, Kat
Keifer	Wynn	Legislative Director	Buck, Ken
Joe	Zanoni	Legislative Counsel	Lofgren, Zoe

Attachment B: Question 12 – Sponsor’s interest and role

Software.org: the BSA Foundation is an independent and nonpartisan 501(c)(3) organization.

Our organization works to help policymakers and the broader public better understand the impact that software has on our lives, our economy, and our society. As such, congressional trips such as this raises awareness and deepens understanding around emerging software technologies and their impacts to society, the economy, and the environment.

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.



House Staffdel to San Francisco
Wednesday, October 11 - Friday, October 13, 2023
“AI & Software Enabling Digital Transformation”

ABOUT SOFTWARE.ORG: THE BSA FOUNDATION

Software.org: the BSA Foundation is an independent and nonpartisan 501c3 research organization established to help people better understand the impact software has on our lives, our economy, and our society. Headquartered in Washington, DC, the foundation publishes studies that examine the intersection of software and society, and it engages with policymakers and the public to inform policies that can stay ahead of cutting-edge technologies. The foundation also works directly to empower the workforce of tomorrow by encouraging a diverse community of young coders and working to increase opportunities for training and skills. Follow Software.org on Twitter at [@BSA Foundation](https://twitter.com/BSA_Foundation).

PARTICIPANTS

Software.org: the BSA Foundation’s Organizing Team

- **Austin Carson**, Founder & President, SeedAI
- **Gideon Lett**, Chief Growth Officer, Software.org: the BSA Foundation
- **Lilia Stone**, Manager of Strategic Initiatives, Software.org: the BSA Foundation

Republicans:

- **Raj Bharwani**, Senior Professional Staff Member, House Committee on Oversight & Accountability
- **Slate Herman**, Counsel, House Energy and Commerce Committee, Subcommittee on Communications and Technology
- **George Pulizzi**, Director of Policy and Coalitions, Office of Rep. Nancy Mace (SC-01)
- **Peter Warren**, Senior Advisor, House Committee on Oversight & Accountability

Democrats:

- **Lydia Dennett**, Professional Staff Member, House Homeland Security Committee, Subcommittee on Oversight, Investigations, and Accountability
- **Earl Flood**, Legislative Director and Counsel, Office of Rep. Robin Kelley (IL-02)
- **Daniel Greene**, Senior Professional Staff Member, House Committee on Energy and Commerce
- **Jeffrey Nowill**, Legislative Director, Office of Rep. Stacey Plaskett (VI-01)
- **Joe Zanon**, Counsel, Office of Rep. Zoe Lofgren (CA-18)

SCHEDULE

Please note: all times listed are Pacific Standard Time

DAY 1 - WEDNESDAY, OCTOBER 11, 2023

8:45 AM **Depart Washington Dulles International Airport (IAD) United #700**

11:28 AM Arrive at San Francisco International Airport (SFO)

12:00 PM Ground transportation from SFO to Autodesk

12:30 – 2:30 PM **Autodesk** (Lunch Provided)
Autodesk Gallery, The Landmark Building, 1 Market Street #200, San Francisco

At Autodesk, the delegation will see how technology is transforming infrastructure, buildings, manufacturing, and media & entertainment. Guests learn how machine learning and AI might alter these fields in the future and join in a discussion about how emerging technologies might benefit competitiveness, efficiency, and productivity in these industries.

Featured Speakers:

- **Mike Haley**, Senior Vice President, Research
- **Allison Rose**, Senior Director of Government Affairs

2:30 – 3:00 PM Ground transportation from Autodesk to Salesforce

3:00 – 4:30 PM **Salesforce**
Salesforce Tower, 425 Mission Street, San Francisco

Salesforce, the leading enterprise AI + CRM, welcomes the Software.org Delegation to our headquarters. We'll be focusing on how our enterprise AI solutions revolutionize the workplace and how we build and deploy this technology with trust.

Featured Speakers:

- **Taksina Eammano**, Executive Vice President
- **Yoav Schlesinger**, Senior Director of Ethical and Humane Use
- **Margaret Taylor**, Head of Public Affairs

4:30 PM Ground transportation from Salesforce to Grand Hyatt

5:00 PM Check in at **Grand Hyatt San Francisco**
345 Stockton Street, San Francisco

5:40 PM Ground transportation from Grand Hyatt to The Klamath, Pier 9

6:00 – 8:00 PM **Dinner Program: AI & Digital Tools in Healthcare**

The Klamath, Pier 9, San Francisco

The delegation will participate in a dinner program featuring perspectives from healthcare and technology leaders demonstrating how AI and digital tools are improving health outcomes.

Featured Speakers:

- **Dr. Akshay Chaudhari**, Assistant Professor, Biomedical Data Science, Stanford University (Moderator)
- **Joydeep Ganguly**, SVP, Corporate Operations & Chief Sustainability Officer, Gilead
- **Srini Vinnakota**, Vice President, Product Management – Oracle Digital Assistant, Oracle
- **Chris Waugh**, Chief Innovation Officer, Sutter Health
- **Dr. Julien Williard**, Global Leader, Life Sciences Strategy, IBM

RON **Return to Grand Hyatt San Francisco via ride-share or cab**

345 Stockton Street, San Francisco

DAY 2 - THURSDAY, OCTOBER 12, 2023

6:45 AM Group assembles in the lobby

7:00 AM Ground transportation from Grand Hyatt Hotel to IBM Research

8:30 – 10:00 AM **IBM** (Breakfast Provided)

IBM Research - Almaden Lab, 650 Harry Road, San Jose

At IBM's Almaden Research Lab, participants will engage in robust discussion with senior IBM researcher (Jeff Welsler, COO IBM Research) on the Future of Artificial Intelligence, while learning about how IBM's technological leadership is driving industry transformation with our partners and clients from around the globe. In addition, IBM business leader Laura Guio (IBM Senior State Executive for CA), will dive into IBM's longstanding commitment to AI through our Principles for Trust and Transparency, and our public policy PoV on "Precision Regulation" of AI. This session will be designed for maximum participant interaction, with questions encouraged.

Featured Speaker(s):

- **Laura Guio**, General Manager & Managing Partner, IBM Global Strategic Partnership - California Senior State Executive
- **Dr. Jeffrey Welsler**, Chief Operating Officer for IBM Research and Vice President, Exploratory Science and University Collaborations

10:00 – 10:30 AM Ground transportation from IBM to Adobe

10:30 – 12:00 PM **Adobe**

Adobe Founders Tower, 333 W San Fernando Street, San Jose

The delegation will tour Adobe’s newly constructed Founders Tower to learn about the building’s innovations around sustainability. A presentation about the Content Authenticity Initiative will be provided in addition to a discussion about Adobe’s AI ethics.

Featured Speaker(s):

- **Robert Abelon**, Senior Manager, Government Relations
- **Anne Perkins**, Director, Government Relations
- **Amanda Perrot**, Director, Associate General Counsel
- **Grace Yee**, Director, Ethical Innovation

12:00 – 12:30 PM Ground transportation from Adobe to Microsoft

12:30 – 2:30 PM **Microsoft** (Lunch Provided)

Microsoft Silicon Valley Campus, 1045 La Avenida Street, Mountain View

Overview:

Generative Artificial intelligence (AI) is transforming the world in unprecedented ways. Microsoft’s Ryan Harkins will present on how we can ensure that AI is used in a responsible and ethical manner, while respecting the rights and interests of individuals and society. This will be followed by a 45-minute walking tour of the Executive Briefing Center and the rooftop.

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 MS customer stories highlighting our technologies including O365, Azure IoT, HoloLens, Machine learning, and more. Participants will also experience a hands-on demonstration of HoloLens technology.

Featured Speaker(s):

 **Ryan Harkins**, Senior Director of Public Policy

2:30 – 3:00 PM Ground transportation from Microsoft to Oracle

3:00 – 4:30 PM

Oracle

Oracle Executive Briefing Center, 500 Oracle Parkway, Redwood Shores

Artificial intelligence has the promise to accelerate change across the healthcare industry, driving unprecedented improvements in efficiency, cost-effectiveness, and overall patient outcomes. Oracle's portfolio of healthcare solutions is rapidly adopting AI technologies to transform the way healthcare works, for the better.

Join Greg Pavlik to learn how Oracle's generative AI addresses the end-to-end needs of enterprise customers. For example, by augmenting and automating repetitive, manual tasks with content generation, extracting key concepts from complex inputs with summarization, and improve quality of human outputs with copyediting.

Featured Speaker(s):

- **Greg Pavlik**, Senior Vice President of Data and AI Services

4:30 – 5:00 PM

Ground transportation from Oracle to Toy Soldier

5:00 – 8:00 PM

Dinner Program: Harmonizing Global Perspectives on AI

Toy Soldier, 52 Belden Place, San Francisco

The delegation will participate in a dinner program featuring foreign diplomats to discuss how governments across the globe are approaching AI implementation and regulation.

Featured Speaker(s):

Moderator:

- Kathy Baxter, Principal Architect, Ethical AI Practice, Salesforce, Salesforce

Panelists:

- Gerard De Graaf, Senior Envoy for Digital to the US, European Union
- Will Cutler, Head of Tech Policy & Deputy Technology Envoy to the US, UK Embassy
- Hon. Scott Wiener, California Senate District 11 – INVITED

RON

Return to Grand Hyatt San Francisco (walking distance)
345 Stockton Street, San Francisco

DAY 3- FRIDAY, OCTOBER 13

7:45 – 8:00 AM

Group meets in the hotel lobby and checks out of the hotel. Luggage will be loaded onto the bus.

Ground transportation from Grand Hyatt to Unity Technologies

8:00 - 9:30 AM

Unity Technologies (Breakfast Provided)

Unity Technologies, 30 Third Street, San Francisco

Unity is the world's leading platform for the development and operation of real-time 3D content. Our presentation will introduce staff to our company and show how creators across industries are harnessing the Unity platform to bring immersive experiences to life, ranging from digital twins that serve critical infrastructure to massive multiplayer video games. We'll also focus on our approach to emerging technologies like generative AI and outline our approach to ethical and responsible use of AI.

Featured Speaker(s):

- **Anirma Gupta**, Senior Vice President and Chief Legal Officer, Unity Technologies

9:30 – 9:45 AM

Ground transportation from Unity Technologies to SAP

9:45 - 11:15 AM

SAP

SAP Labs, 135 Townsend Street, San Francisco

During the delegation's visit to SAP's San Francisco Lab, participants will delve into SAP's nuanced application of Artificial Intelligence (AI) across its enterprise solutions. They will gain insights into:

- How SAP uses AI in its enterprise application portfolio
- SAP observation on how AI will shape the future of business and IT
- The guidelines and guardrails that SAP follows to use AI in a reliable and responsible way, and how SAP as a European company is informed by existing or upcoming policies such as EU AI act, GDPR etc.

Featured Speaker(s):

➤ **Yaad Oren**, Head of SAP Innovation Center Network

11:15 - 11:45 AM Ground transportation from SAP to San Francisco International Airport

1:00 PM Depart **San Francisco International Airport (SFO) United #2667**

9:01 PM Arrive at **Washington Dulles International Airport (IAD)**

PARTICIPANT BIOS

SOFTWARE.ORG: THE BSA FOUNDATION



Austin Carson, Founder & President, SeedAI

Austin Carson is President of SeedAI, a nonprofit advocacy organization established to create a more robust, responsive, and inclusive future for artificial intelligence in America. Founded by Carson in 2021, SeedAI coordinates and collaborates with public and private stakeholders, conducts research, and works to facilitate AI resources designed to help traditionally underserved communities create transparent, trustworthy, and transformative technology.

Prior to founding SeedAI, Carson established and led the government affairs team for NVIDIA, translating NVIDIA's expertise in artificial intelligence and high-performance computing for policymakers. Prior to his work with NVIDIA, Carson held a number of public sector and NGO positions, including serving as Legislative Director for Chairman Michael McCaul and Executive Director for the Technology Freedom Institute. Carson also co-founded the Congressional Tech Staff Association, co-led the Congressional Cybersecurity Caucus and the Congressional High Tech Caucus, and is a founding fellow of the Internet Law and Policy Foundry.

Carson graduated from the University of Georgia and currently resides in Washington, D.C.



Gideon Lett, Vice President & General Manager, Software.org: the BSA Foundation

Gideon Lett is the Vice President and General Manager of Software.org: the BSA Foundation, where he directs the Foundation’s programs and operations. Lett also serves as Chief Growth Officer for BSA | The Software Alliance, where he drives global organization growth, member success, and executive engagement among the world’s most innovative software companies.

Prior to joining BSA, Lett launched and led California operations for Monument Advocacy, served as a longtime government affairs and growth executive at TechNet, and advanced global fair tech and social impact initiatives as a Senior Advisor for Access Partnership. Earlier in his career, Lett served as a senior political aide to congressional leadership and state attorneys general, directed political operations for the National Association of Home Builders (NAHB), and advised clients on issues management and strategic communications campaigns at the global public affairs consultancy, APCO Worldwide. Lett holds a degree in Public Administration from Samford University. He resides in San Francisco, California.



Lilia Stone, Manager, Strategic Initiatives, Software.org: the BSA Foundation




Lilia Stone is the Manager of Strategic Initiatives of Software.org: the BSA Foundation, where she supports the Foundation’s programs, operations, and outreach. Stone also serves as BSA’s Manager of Strategic Initiatives. In this role, she is responsible for program support to drive global organization growth, member success, and engagement among the world’s most innovative software companies.

Prior to that, Stone worked to advance the California Life Sciences advocacy priorities, including implementation of strategy, member relationship development, and business advancement initiatives with state policymakers. Stone also has experience working as a legislative aide in the California State Assembly, and as a field representative for a California State Senator. Stone received her bachelor’s degree in International Studies – Political Science at the University of California, San Diego. She is currently getting her

	<p>master's in business administration at Boston University. She resides in Washington, DC.</p>
--	---

CONGRESSIONAL ATTENDEES

Republicans

	<p>Raj Bharwani, Senior Professional Staff Member, House Committee on Oversight & Accountability</p> <p>Raj Bharwani is a Senior Professional Staff Member with the House Committee on Oversight and Accountability. With a portfolio that includes Cybersecurity and Artificial Intelligence, Raj works closely with the Subcommittee on Cybersecurity, Information Technology, and Government Innovation. Prior to his current position, Raj worked at the U.S. Department of Energy's Office of Cybersecurity, Energy Security, and Emergency Response. Raj's tenure as a congressional staffer includes working for the House Committee on Science, Space, and Technology, the House Select Committee on Energy Independence and Global Warming, and in the personal offices of two Wisconsin Representatives. Born in India, Raj grew up in East Africa before moving to the United States.</p>
	<p>George Pulizzi, Director of Policy and Coalitions, Office of Rep. Nancy Mace (SC-1)</p> <p>George Pulizzi is the Director of Policy and Coalitions for Rep. Nancy Mace (SC-01). In his role, George helps to craft Rep. Mace's policy agenda and facilitate engagement with a diverse set of local and national stakeholders to amplify and support legislation introduced by the Congresswoman. Prior to his time as a Congressional staffer, George worked in the oil and gas industry as a Policy, Government and Public Affairs Specialist for Chevron.</p>
	<p>Peter Warren, Senior Advisor, House Committee on Oversight & Accountability</p> <p>Peter Warren is the Senior Advisor for the House Committee on Oversight and Accountability, chaired by Committee Chair James Comer (R-KY), as well as for the Subcommittee on Cybersecurity, Information Technology and Government Innovation. Peter helps to organize subcommittee hearings on AI, cybersecurity, and information technology acquisition and contribute to legislative efforts in these areas. Prior to this, he served as the Research Director at the Empire Center for Public Policy in New York. Peter received a Master of Arts from American University in Washington, D.C.</p>



Slate Herman, Counsel, House Energy and Commerce Committee

Slate Herman is a counsel for the House Energy and Commerce Committee, Subcommittee on Communications and Technology. After graduating from the University of Colorado Law School, he spent a year and half working in the general counsel's office of the National Telecommunications and Information Administration at the Department of Commerce. Since joining the E&C team in February, his portfolio has varied from wireline and public safety to cybersecurity and national security issues. He has lived in D.C. for roughly 2 years and is happily married to his wife Abbie for just over a year.

Democrats






Lydia Dennett, Professional Staff Member, House Homeland Security Committee, Subcommittee on Oversight, Investigations, and Accountability


Lydia has served in the United States House of Representatives from October 2019 to today. She serves on the Committee's Oversight, Investigations, and Accountability Subcommittee, chaired by Representative Glen Ivey (D-MD). Her responsibilities include oversight over the Department of Homeland Security's Headquarters functions with particular expertise in the Department's Office of Civil Rights and Civil Liberties, Center for Prevention Programs and Partnerships, and the Federal Protection Service.

Prior to coming to Capitol Hill, Lydia worked for almost a decade at the non-profit Project On Government Oversight (POGO), which seeks to investigate waste, fraud, and abuse in the Federal government and to advocate for public policy solutions. She started as an intern before formally joining the organization as an Investigator and ultimately served as POGO's Deputy Director of Investigations. Her investigative work focused on the intersection between foreign money and U.S. political influence. She also worked on reports detailing how poor contract oversight has compromised the safety and security of nuclear weapons and power facilities.

In 2015, Lydia won the Non-Breaking News award from the DC chapter of the Society of Professional Journalists for her work with Department of Veterans Affairs whistleblowers and in 2016 won the same award for her work on the FDA's drug approval process.

She earned a B.A. in English Literature and European History from Hartwick College.

	<p>Earl Flood, Legislative Director and Counsel, Office of Rep. Robin Kelley (IL-02)</p> <p>Earl Flood is the Legislative Director and Counsel for U.S. Representative Robin L. Kelly (IL-02). Earl advises Representative Kelly on her roles as a member of the House Committee on Energy and Commerce and Chair of the House Tech Accountability Caucus. Immediately following law school, Earl was a Health and Judicial Policy Aide for U.S. Senator Claire McCaskill (D-MO). After working in the Senate, Earl worked for the American Association for Justice (AAJ), where he worked on legislative issues that focused on increasing and strengthening access to the courts. Earl returned to Congress to serve as Counsel for U.S. Representatives Cedric Richmond and Terri Sewell where he focused on issues including voting rights and improving health care services for rural and underserved communities during the height of the COVID-19 pandemic.</p>
	<p>Daniel Greene, Senior Professional Staff Member, House Committee on Energy and Commerce</p> <p>Daniel Greene is a Senior Professional Staff Member for House Energy and Commerce Committee’s Subcommittee on Innovation, Data, and Commerce. In that capacity, Daniel is responsible for cultivating and managing the House Democratic Caucus’s portfolio on privacy, consumer protection, commercial practices, automobile safety, fuel economy, and manufacturing. Prior to joining the Committee, Daniel was a Legislative Assistant in the Office of Senator Edward J. Markey, where he developed and executed the Senator’s telecommunications, privacy, transportation, infrastructure, consumer protection, and cybersecurity portfolio on both the Commerce, Science, and Transportation Committee and the Environment and Public Works Committee. Daniel received his Masters in Public Policy from the George Washington University.</p>
	<p>Jeffrey Nowill, Legislative Director, Office of Rep. Stacey Plaskett (VI-01)</p> <p>Jeffrey Nowill is Attorney and Legislative Director for Congresswoman Plaskett, who is a member of the House Intelligence Committee and previously served on the House Ways and Means Committee. Jeffrey previously served as a counsel to Congressman Patrick Murphy of Florida on the House Financial Services Committee and as a legislative aide to Congressman Barney Frank of Massachusetts.</p>

 A professional headshot of Joe Zanoni, a man with dark hair and a beard, wearing a dark suit, white shirt, and light blue tie. He is smiling and looking directly at the camera.	<p>Joe Zanoni, Counsel, Office of Rep. Zoe Lofgren (CA-18)</p> <p>Joe Zanoni serves as the Legislative Counsel for Congresswoman Zoe Lofgren, with a primary focus on technology policy, especially in the realm of artificial intelligence. Within Congresswoman Lofgren’s Judiciary Committee portfolio, Joe takes the lead on privacy matters, intellectual property, and antitrust law. Additionally, he oversees issues pertaining to financial services, banking, and commerce. Joe holds a Juris Doctor from the University of Georgia and a Bachelor of Arts in Political Science from the University of Arizona. Joe is a member of the LGBTQ+ DC Bar Association and volunteers for the DC Volunteers Lawyers Project.</p>