



U.S. House of Representatives

COMMITTEE ON ETHICS

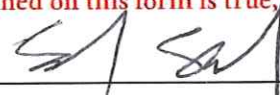
EMPLOYEE POST-TRAVEL DISCLOSURE FORM Original Amendment

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: Samuel Shepherd
2. a. Name of Accompanying Relative: _____ OR None
 b. Relationship to Traveler: Spouse Child Other (specify): _____
3. a. Dates: Departure: 05/29/24 Return: 05/31/24
 b. Dates at Personal Expense, if any: _____ OR None
4. Departure City: Washington DC Destination: NYC Return City: Washington DC
5. Sponsor(s), Who Paid for the Trip: software.org: The BSA Foundation
6. Describe Meetings and Events Attended:
 tours/meetings with tech companies in NYC to discuss how they are implementing artificial intelligence into their systems.
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: 06/12/2024

I authorized this travel in advance. I have determined that all of the expenses listed on the attached *Sponsor Post-Travel Disclosure Form* were necessary and that the travel was in connection with the employee's official duties and would not create the appearance that the employee is using public office for private gain.

Name of Supervising Member: Congressman Rick Allen Date: 6/12/24

Signature of Supervising Member: 

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.

- Sponsor(s) who paid or provided in-kind support for the trip: Software.org: The BSA Foundation
- Travel Destination(s): New York, N.Y.
- Date of Departure: Wednesday, May 29, 2024 Date of Return: Friday, May 31, 2024
- Name(s) of Traveler(s): Samuel "Cam" Shepherd

Note: You may list more than one traveler on a form only if *all* information is *identical* for each person listed.

- 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	\$339	\$735.61	\$341.44	
Accompanying Family Member				

- 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: 6/7/2024

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, D.C.

Telephone: 202-549-7565 Email: william.a.milligan@gmail.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

1. Name of Traveler: Samuel Shepherd
2. Sponsor(s) who will be paying or providing in-kind support for the trip: Software.org: The BSA Foundation
3. City and State **OR** Foreign Country of Travel: Washington, D.C. NY, NY
4. a. Date of Departure: Wednesday, May 29, 2024 Date of Return: Friday, May 31, 2024
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 legislative director for Congressman Rick Allen, who serves on the House Energy and Commerce Committee which has primary jurisdiction over artificial intelligence. I advise my boss on this issue. The presentations on this trip will help me understand how E&C legislation could impact these businesses.
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: 5/23/24

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:

Software.org: The BSA Foundation

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): _____

See Attachment A

5. Yes No Is travel being offered to an accompanying family member of the House invitee(s)?

6. Date of Departure: Wednesday, May 29, 2024 Date of Return: Friday, May 31, 2024

7. a. City of departure: Washington, D.C.

b. Destination(s): New York City, N.Y.

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 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:

See Attachment B

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): _____
Approximate cost (within per diem): May 29: \$59.25, May 30: \$79, May 31: \$59.25

2) Provide the reason for selecting the location of the event or trip: New York City and surrounding boroughs are home to numerous companies who are at the forefront of AI

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

Hotel Name: AC Hotel Times Square City: New York City Cost Per Night: 369.55

Reason(s) for Selecting: The hotel is located in a safe and convenient neighborhood and just exceeds the per diem.

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 checked="" 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	\$124 Amtrak train \$ 190 Ground transportation	\$735.61	\$197.50
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: 4/15/24
 Name: Victoria A Espinel Title: President
 Organization: Software.org: The BSA Foundation
 Address: 200 Massachusetts Aveune, NW, Suite 310, Washington, D.C.
 Email: williamm@software.org Telephone: 202 549 7565

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

May 28, 2024

Mr. Samuel "Cam" Shepherd
Office of the Honorable Rick Allen
462 Cannon House Office Building
Washington, DC 20515

Dear Mr. Shepherd:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to New York, New York, scheduled for May 29 to 31, 2024, 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:kjf



House Staffdel to New York City
 Wednesday, May 29 – Friday, May 31, 2024
“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.

STAFF FNAME	STAFF LNAME	TITLE	ORG
Steve	Ackerman	Legislative Director	Fulcher, Russ (R-ID, 1st)
Rebecca	Angelson	Chief of Staff	Office of Representative Bob Latta
Zach	Atran	Legislative Assistant	Lieu, Ted W. (D-CA, 36th)
Yuri	Beckelman	Chief of Staff	Frost, Maxwell (D-FL, 10th)
Megan	Bel Miller	Chief of Staff	Scalise, Steve (R-LA, 1st)
Ian	Bennitt	Staff Lead	Committee on Armed Services
Nora	Blalock	Legislative Director	Office of Representative Kathy Castor
Tia	Bogeljic	Staff Assistant	Office of Rep. Neguse
Jake	Bornstein	Deputy Chief of Staff/Legislative Director	Curtis, John (R-UT, 3rd)
Gideon	Bragin	Executive Director	Office of the Democratic Leader Hakeem Jeffries
Francis	Brooke	Policy Director	Office of the House Majority Leader
Francis	Brooke	Policy Director	Office of the House Majority Leader
Joanna	Brown	Legislative Director	Walberg, Tim (R-MI, 5th)
Emily	Burns	Policy Director	Committee on Oversight and Accountability
Jasmine	Caruthers	Counsel & Legislative Assistant	Office of Re. Haley Stevens
Selene	Ceja	Senior Tech Policy Advisor	Khanna, Ro (D-CA, 17th)

AMENDED 4/29/24 6:28 PM

Christopher	Cox	Chief of Staff	Clarke, Yvette D. (D-NY, 9th)
Christopher	Crawford	Chief of Staff	Carter, Buddy (R-GA, 1st)
Matt	Dernoga	Legislative Director	Office of Representative Nanette Diaz Barragán
Patrick	Devney	Chief of Staff	Kuster, Ann McLane (D-NH, 2nd)
Kevin	Diamond	Deputy Chief of Staff	Blunt Rochester, Lisa (D-DE, At Large)
Kate	Durkin	Chief of Staff	Schakowsky, Jan (D-IL, 9th)
Lizzy	Fallon	Legislative Director	Office of Rep. Tom Emmer
Jay	Fields	Deputy Policy Director	Office of the Speaker of the House of Representatives
Casey	Fitzpatrick	Deputy Chief of Staff/ Legislative Director	Armstrong, Kelly M. (R-ND, At Large)
Ian	Foley	Policy Director	Office of the House Majority Whip
Abe	Friedman	Senior Policy Advisor	DelBene, Suzan K. (D-WA, 1st)
Ali	Fulling	Senior Advisor	Office of Rep. Tim Walberg
Kevin	Gannon	Legislative Director	Garbarino, Andrew R. (R-NY, 2nd)
Teri	Geiger	Chief of Staff	Office of Rep. Troy Balderson
Justin	German	Chief of Staff	Stevens, Haley (D-MI, 11th)
Daniel	Greene	Professional Staff Member	Committee on Energy and Commerce
Tyler	Grimm	Chief Counsel for Policy and Strategy	Committee on the Judiciary
Joshua	Gross	Deputy Chief of Staff/Legislative Director	Duncan, Jeff (R-SC, 3rd)
Tiffany	Guarascio	Staff Director	Committee on Energy and Commerce
Cecily	Hahn	Legislative Counsel	Office of Rep. Suzan DelBene
Emily	Hebein	Legislative Director	Latta, Bob (R-OH, 5th)
Rob	Hicks	Legislative Director	Oberholte, Jay (R-CA, 23rd)
Elizabeth	Hittos	Chief of Staff	Office of Representative Gus M. Bilirakis
Lisa	Hone	Chief Counsel	Committee on Energy and Commerce
Omar	Hossino	House Republican Study Committee	Office of Chairman Kevin Hern (R-OK)
Joshua	Izaak	Legislative Director/Counsel	Bonamici, Suzanne (D-OR, 1st)
Tasia	Jackson	Chief of Staff	Jeffries, Hakeem (D-NY, 8th)
Catherine	Johnson	Staff Director	Committee on Science, Space, and Technology
Elizabeth	Joseph	Policy Director	Office of Rep Michael Guest
Megan	Kanne	Policy Advisor	Office of Rep. Schakowsky

AMENDED 4/29/24 6:28 PM

Melissa	Kelly	Chief of Staff	Franklin, Scott (R-FL, 18th)
Bijan (B.J.)	Koohmarale	Counsel	Scalise, Steve (Office of the House Majority Leader)
Tim	Kurth	Chief Counsel	Committee on Energy & Commerce
John	Lee	Chief Counsel	Committee on the Judiciary
Giulia	Leganski	Professional Staff Member	Committee on Energy and Commerce (E&C)
Roz	Leighton	Chief of Staff	Office of Representative Kelly M. Armstrong
James	Leuschen	Policy Director	Hoyer, Steny H. (D-MD, 5th)
John	Lin	Senior Counsel	McMorris Rodgers, Cathy (R-WA, 5th)
Craig	Link	Senior Advisor, General Counsel, Director of Member Services	Clyburn, James
Lauren	Lombardo	Deputy Policy Director	Committee on Oversight and Accountability
Cam	Madsen	Legislative Director	McCaul, Michael (R-TX, 10th)
Matthew	McMurray	Chief of Staff	Kelly, Robin (D-IL, 2nd)
Alan	McQuinn	Professional Staff Member	Committee on Science
Jake	Middlebrooks	Legislative Director	Office of Representative Jake LaTurner
Jeff	Morehouse	Leadership Chief of Staff	Hudson, Richard (R-NC, 9th)
Corey	Norman	Chief of Staff	Curtis, John (R-UT, 3rd)
John	Piazza	Chief of Staff	Committee on Science, Space, and Technology
Alicia	Porile	Legislative Assistant	Blunt Rochester, Lisa (D-DE, At Large)
Jared	Powell	Chief of Staff	McMorris Rodgers, Cathy (R-WA, 5th)
Brannon	Rains	Professional Staff Member	Subcommittee on Innovation, Data, and Commerce
Mary Ellen	Richardson	Chief of Staff	LaHood, Darin (R-IL, 16th)
Flynn	Rico-Johnson	Deputy Chief of Staff/Legislative Director	Matsui, Doris O. (D-CA, 7th)
Victoria	Rivas	Deputy Chief of Staff	Office of Rep. Pete Aguilar
Janet	Rossi	Legislative Director	Office of Representative Rick Crawford
Nick	Runkel	Legislative Director	Office of Rep. Steve Womack
Zac	Rutherford	Chief of Staff	Harshbarger, Diana (TN, 1)
Geo	Saba	Chief of Staff	Khanna, Ro (D-CA, 17th)
Brooke	Scannell	Chief of Staff	Office of Representative Katherine Clark
Alex	Scheuer	Policy Researcher	Office of the Democratic Leader Hakeem Jeffries

Alexandra	Seymour	Staff Director	Committee on Homeland Security
Samuel "Cam"	Shepherd	Legislative Director	Allen, Rick W. (R-GA, 12th)
Rajiv	Sicora	Legislative Director	Office of Representative Jamaal Bowman
William	Smith	Legislative Director	Office of Rep. Nick Langworthy
Dahlia	Sokolov	Policy Director	Committee on Science, Space, and Technology
Stuart	Styron	Senior Technology Policy Counsel	Eshoo, Anna G. (D-CA, 16th)
AJ	Sugarman	Policy Advisor	Scalise, Steve (R-LA, 1st)
Teddy	Tanzer	Senior Counsel	Committee on Energy & Commerce
Matt	Tucker	Deputy Chief of Staff/ Legislative Director	Office of Representative John Joyce
Jonathan	Vecchi	Deputy Chief of Staff/Legislative Director	Bilirakis, Gus M. (R-FL, 12th)
Jake	Vreeburg	Policy Director	House REpublican Conference
Beau	Walker	Chief of Staff	Womack, Steve (R-AR, 3rd)
Kelsey	Wall	Policy Director	House Republican Policy Committee
Veronica	Wong	Chief of Staff	Issa, Darrell E. (R-CA, 48th)
Joshua	Woodward	Deputy Chief of Staff for Policy/Legislative Director	Cammack, Kat (R-FL, 3rd)
Lenny	Young	Chief of Staff	Brownley, Julia (D-CA, 26th)
Joseph	Zanoni	Legislative Counsel	Lofgren, Zoe (D-CA, 18th)
Dan	Ziegler	Policy Director	Office of the Speaker of the House of Representatives
Nate	Zimpher	Legislative Director	Balderson, Troy (R-OH, 12th)

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 New York City
Wednesday, May 29 – Friday, May 31, 2024
“AI & Software Enabling Digital Transformation”

SCHEDULE

DAY 1 – WEDNESDAY, MAY 29

- 7:15 AM Train 172 departs from Washington, DC Union Station
- 10:45 AM Train arrives in Moynihan Train Hall at Penn Station, New York, NY
- 11:30 – 12:00 PM Walk from Penn Station to SAP
.4 miles, 10-minute walk
- 12:00 – 2:00 PM **Company Visit: SAP (lunch provided)**
Grand Central Room, 52nd Fl. 10 Hudson Yards, New York City

Featured Speaker(s):

- **Jared Coyle**, AI Technologist
- **Tim DeVries**, Innovation Advisor

Overview:

Jared will give a 30-minute talk about SAP’s approach to AI. This will be followed by a 30-minute tour of the Experience Center focusing on Joule and SAP’s business AI applications. The group will then have a question-and-answer session.

- 2:00 – 2:30PM Shuttle Bus to **AC Hotel**
1.0 miles, 15-minute drive
- 2:30 – 3:00 PM Arrive to **AC Hotel** and Check-in
260 W. 40th Street, New York, N.Y. 10018
- 3:00 – 3:15 PM Walk to **Adobe** *0.4 miles, 15-minute walk*
- 3:30 – 5:00 PM **Company Visit: Adobe**
Adobe, 1540 Broadway, New York City

Featured Speaker(s):

- **Nick Gatz**, Senior Manager of Government Relations
- **Chris Parkerson**, Sr. Manager of Adobe’s Security Enablement team



Overview:

Adobe will be demoing our text-to-image tool, Adobe Firefly, and the Content Authenticity Initiative (CAI) while discussing how these tools are intertwined with our approach to responsible AI Innovation.

5:00 – 5:15 PM

Walk to **Microsoft**
0.3 miles, 10-minute walk

5:30-8:00 PM

Reception & Dinner Program at Microsoft: Building a Workforce for an AI Future
Microsoft, 11 Times Sq, New York, NY 10036

Featured Speaker(s):

- Austin Carson, Founder & President, SeedAI
- Dr. Daniel Voloch, Chief Program Officer, Girls Who Code

8:00 PM

Return to **AC Hotel**. *600 ft. 4 minute walk*

DAY 2 - THURSDAY, MAY 30

7:45 AM

Gather downstairs for the Continental Breakfast, lower level of **AC Hotel**

8:00 – 10:00 AM

Oracle Presentation
AC Hotel, Media Room, lower level

Featured Speaker(s):

- **Rebekah Butterfield**, Innovation Scientist, Oracle Health Innovation and Scientific Advisory
- **Caitlin Rice**, Senior Manager, Oracle Health
- **CJ Robison**, Senior Manager, Oracle Health Innovation and Scientific Advisory

Overview:

A briefing with leading experts to discuss the transformative power of technology and data and its application across all stages of the healthcare system. The briefing will demonstrate how health systems can leverage cutting-edge technology to deliver improved patient outcomes and create a more equitable and efficient health system overall.

10:00 - 10:30 AM

Walk to **Microsoft**

10:30 - 12:00 PM

Company Visit: Microsoft
Microsoft (11 Times Sq, New York, NY 10036)



Featured Speaker(s):

- **Cass Mathews**, Assistant General Counsel, Office of Responsible AI

Overview:

Microsoft's Public Policy team and Responsible AI team will present on the seismic developments in Responsible Artificial Intelligence. The company's commitment to Responsible AI is founded on six core principles: fairness, inclusiveness, safety and reliability, transparency, accountability, and security. Speakers will also touch on emerging product integration.

12:00 – 12:30 PM Walk to **Salesforce** .4 miles, 10-minute walk

12:30 – 2:30 PM **Company Visit: Salesforce at Bryant Park**
1095 Avenue of the Americas, New York

Featured Speaker(s):

- **Itai Asseo**, Head of Incubation and Brand Strategy, Salesforce AI Research
- **Enki Toto**, Director, Salesforce Ventures Impact Fund

Overview:

Itai and Enki will share how Salesforce is incorporating AI into their products to empower their customers, safely and responsibly, and how we are investing in ethical AI. After the discussion, the delegation will tour the Salesforce offices.

2:30-3:00 PM Bus transportation to **IBM** *2.8 miles, 23-minute drive*

3:00 – 5:00 PM **Company Visit: IBM Innovation Studio** *51 Astor Place, New York City*

Featured Speaker(s):

- **Christina Montgomery**, IBM Vice President and Chief Privacy & Trust Officer
- **Dr. Lisa Precht**, IBM WorldWide Watsonx Customer Care & Conversational AI Lead, IBM Client Engineering

Overview:

IBM business leaders and legal experts will share perspectives on enterprise use cases of AI, applications for conversational AI assistants, and other topics of interest raised by participants in interactive dialogue.



5:30-7:30 PM

Reception & Dinner Program: Perspectives at the Intersection of AI & Cyber

Carmine's, Perry Como Room, Times Square, 200 W 44th Street, New York

Overview:

This working dinner discussion will explore the workforce needs of an AI future and the intersection of AI and cybersecurity. Expert will discuss solutions to build a robust STEM pipeline, reskill the existing workforce to meet the needs of a dynamic AI-enabled economy and how AI technologies are helping to bolster cyber defense and promote a more secure future.

Featured Discussant(s):

- **Rina Niles**, COO, Cyphlens
- **Caitlin Rice**, Senior Manager, Oracle Health
- **Henry Young**, Senior Director, Policy for BSA | The Software Alliance - Moderator

8:00 PM

Return to **AC Hotel**

DAY 3- FRIDAY, MAY 31

7:30 – 8:00 AM

Group assembles in the lobby of the **AC Hotel**
Luggage will be loaded onto shuttle bus

8:00 – 9:00 AM

Bus transportation from **AC Hotel** to **Autodesk - Newlab**
7.4 miles, 45-minute drive

9:00 – 11:00 AM

Company Visit: Newlab, Autodesk
Floor 1, Brooklyn Navy Yard, 19 Morris Ave, Brooklyn
Continental Breakfast provided.

Featured Speaker(s):

- **John Locke**, Senior Principal Research Scientist, Americas
- **Ray Wang**, Principal Research Scientist, Autodesk

Overview:

Congressional staff will visit Newlab, an incubator that supports the acceleration, scalability and adoption of critical technologies required to decarbonize the global economy and improve societal outcomes. Autodesk – a design and make company - is a resident at Newlab and the meeting will highlight how software technology, machine learning and artificial intelligence are transforming the architecture, engineering, and



construction industry to reduce costs, and speed construction and improve sustainability outcomes.

- 11:00 – 12:00 PM **Bus transportation to New York Penn Station**
5.1 miles, 35-minute drive

- 12:40 PM **Train #171 departs from New York Penn Station**

- 4:26 PM **Train arrives in Washington, DC Union Station**