

**RE-2 Employee Post Travel Disclosure of Travel Expenses**

Date/Time Stamp

**Post Travel Filing Instructions:** Complete this form within 30 days of returning from travel. Submit all forms to the Office of Public Records in 232 Hart Building. This form is a public disclosure. The form and all attachments will be made publicly available.

**Certification:** *In compliance with the Regulations Governing Privately Sponsored Travel, Senate Rule 35, and the Honest Leadership and Open Government Act of 2007, I certify that I accepted the following gift of privately sponsored travel:*

**Private Sponsor(s):**

Software.org: The BSA Foundation

**Travel Dates:**

August 2-4, 2023

**Name of accompanying family member (if any):**

None

**Relationship to Traveler:**

N/A

**Total Expenses**

| Transportation Expenses | Lodging Expenses | Meals Expenses | Other Expenses (Amount & Description) |
|-------------------------|------------------|----------------|---------------------------------------|
| 236.27                  | 472              | 181            | 0                                     |

*I also certify that attached to this form are all required documents for post travel disclosure, including:*

- The final **Employee Pre-Travel Authorization** (Form RE-1)
- The final **Private Sponsor Travel Certification Form** with all attachments
- The final invitation
- The final approved itinerary

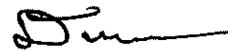
*Finally, I certify that all trip information reflected in the attachments above accurately reflects the travel that I accepted. If there were any changes to the trip after I received approval from the Committee, the changes are described in ATTACHMENT 1.*

8/29/2023

Date

Daniel Bleiberg

Printed Name of Traveler



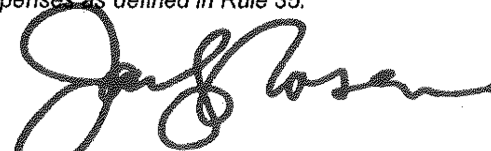
Signature of Traveler

**TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER**

*I have made a determination that the expenses set out above in connections with travel described in the Employee Pre-Travel Authorization form, are necessary transportation, lodging, and related expenses as defined in Rule 35.*

8/29/23

Date



Signature of Supervising Senator/Officer

## RE-1 Employee Pre-Travel Authorization

Date/Time Stamp

**Pre-Travel Filing Instructions:** Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics In SH-220**. Incomplete and late travel submissions will not be considered or approved.

**Name of Traveler:**

Daniel Bleiberg

**Employing Office/Committee:**

Office of Senator Jacky Rosen

**Private Sponsor(s):**

Software.org: The BSA Foundation

**Destination(s):**

New York City, NY

**Travel Dates:**

08/02/2023-08/04/2023

**NOTE:** If you plan to extend the trip for any reason you must notify the Committee.

**Explain how this trip is specifically connected to the traveler's official or representational duties.**

I advise Senator Rosen on homeland security issues, including on matters relating to AI and other emerging technologies.

**Do you have an accompanying family member or spouse on this trip? Name and Relationship to Traveler:**

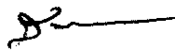
☐

(signify "yes" by checking box)

*I certify that the information contained in this form is true, complete and correct to the best of my knowledge.*

7/25/23

Date



Signature of Employee

**TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER**

(President of the Senate, Secretary of the Senate, Sergeant at Arms,  
Secretary for the Majority, Secretary for the Minority, and Chaplain)

Senator Jacky Rosen

Daniel Bleiberg

(Print Senator's/Officer's Name)

hereby authorize

(Print Traveler's Name)

*an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.*

*I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate.*

☐

(signify "yes" by checking box)

7/25/23

Date



Signature of Supervising Senator/Officer



**Senate Staffdel to New York City**  
**Wednesday, August 2 - Friday, August 4, 2023**  
**"AI & Software Enabling Digital Transformation"**

WEDNESDAY, AUGUST 2, 2023

- |                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 7:10 AM                | Train departs from <b>Washington, DC Union Station</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 10:44 AM               | Train arrives in <b>New York Penn Station</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 11:30 – 12:00 PM       | Walk from Penn Station to <b>SAP</b><br><i>.4 miles, 11-minute walk</i>                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>12:00 – 1:30 PM</b> | <b>Lunch Program: AI 101 Bootcamp</b> (Lunch provided)<br><i>SAP (10 Hudson Yards, New York City)</i><br>Participants will learn about the fundamentals of AI and machine learning technology including foundation models, generative AI, enterprise applications, and public and private sector use cases.<br><u>Featured Speaker(s):</u> <ul style="list-style-type: none"><li>- Austin Carson, Founder &amp; President, SeedAI</li></ul>                                                                 |
| 1:30 – 2:00 PM         | Transition rooms within SAP facility                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>2:00 – 4:00 PM</b>  | <b>Company Visit: SAP</b><br><i>SAP (10 Hudson Yards, New York City)</i><br>Participants will learn how SAP is using data and artificial intelligence to improve systems for business and government customers. A demonstration of SAP Concur and overview of SAP's Digital Skills Initiative will be provided.<br><u>Featured Speaker(s):</u> <ul style="list-style-type: none"><li>- Charlie Sultan, President, Concur Travel</li><li>- Joshua Margo, Senior Director, Learner Experiences, SAP</li></ul> |
| 4:00 – 4:30 PM         | Bus transportation to <b>The Lexington Hotel</b><br><i>2.1 miles, 25-minute drive</i>                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 4:30 – 5:00 PM         | Hotel check-in at <b>The Lexington Hotel</b><br><i>(511 Lexington Avenue, New York City)</i>                                                                                                                                                                                                                                                                                                                                                                                                                |
| 5:00 – 5:30 PM         | Bus transportation to <b>Nasdaq MarketSite</b><br><i>Nasdaq (4 Times Square, New York City)</i><br><i>1.3 mile, 15-minute drive</i>                                                                                                                                                                                                                                                                                                                                                                         |
| <b>5:30 – 8:00 PM</b>  | <b>Dinner Program: AI &amp; Software in Financial Services</b> (Dinner provided)<br><i>Nasdaq (4 Times Square, New York City)</i><br>Participants will hear from a panel of technology and financial services leaders about how AI and software are transforming the financial services sector.                                                                                                                                                                                                             |

Featured Speaker(s):

- Gideon Lett, General Manager, Software.org (Moderator)
- Sachin Devand, EVP, Unit Chief Information Officer, American Express
- Gaurav Sharma, Managing Director, Global Head of Data, AI & Analytics, Citi
- Bob Prestly, Area Vice President, Financial Services, Salesforce
- Elena Kvochko, Chief Trust Officer, SAP

*Individual Transportation to hotel via Software.org-provided rideshare credit.*

8:30 PM                      Return to the **The Lexington Hotel**  
*(511 Lexington Avenue, New York City)*

THURSDAY, AUGUST 3

7:00 – 7:15 AM            Group assembles in the lobby of **The Lexington Hotel**

7:30 – 8:00 AM            Bus transportation from Lexington Hotel to **IBM**  
*2.7 miles, 20-minute drive*

**8:00 – 10:00 AM**        **Company Visit: IBM** (Breakfast provided)  
*IBM Innovation Studio (51 Astor Place, New York City)*  
Participants will be offered immersive, hands-on experiences to showcase the potential of emerging technologies such as quantum, hybrid cloud, and AI, across various industries.  
Featured Speaker(s):

- Christina Montgomery, Vice President, Chief Privacy & Trust Officer, IBM
- Catherine Quinlan, Vice President, AI Ethics, IBM

10:00 – 10:30 AM        Bus transportation to **Adobe**  
*2.6 miles, 21-minute drive*

**10:30 – 12:00 PM**        **Company Visit: Adobe**  
*Adobe (1540 Broadway, New York City)*  
Participants will learn about Adobe's Content Authenticity Initiative and experience a demonstration of the company's generative AI technology for creators, Firefly.  
Featured Speaker(s):

- Andy Parsons, Senior Director, Content Authenticity Initiative
- Anne Perkins, Director, State Government Relations, Adobe

12:00 – 12:30 PM        Walk to **Salesforce**  
*.3 miles, 6-minute walk*

**12:30 – 2:30 PM**        **Company Visit: Salesforce** (Lunch provided)  
*Salesforce (1095 Avenue of the Americas, New York City)*  
Participants will hear from experts about Salesforce approach to ethical and humane use of AI and demonstration of Slack GPT, the company's new enterprise generative AI integration. A presentation about Salesforce AI and



software products at work in the financial services industry will also be provided.

Featured Speaker(s):

- Susan Emerson, Senior Vice President, AI and Analytics & Industries, Salesforce
- Leslie Kramer, Vice President and Associate General Counsel, Salesforce
- Brandon Patterson, State & Local Government Affairs, Salesforce
- Margaret Taylor, Director, Public Affairs, Salesforce

2:30 – 3:00 PM

Walk to **Microsoft**

*.3 miles, 7-minute walk*

3:00 – 5:00 PM

**Company Visit: Microsoft**

*Microsoft (11 Times Square, New York City)*

Participants will experience immersive industry activations that demonstrate Microsoft's AI and software products at work across business and government customers. A presentation on Microsoft's equities in generative AI and related technologies will also be provided.

Featured Speaker(s):

- Cass Matthews, Office of Responsible AI, Microsoft
- Donna Powell, Director, Data & AI Solutions, Microsoft
- Danyelle Solomon, Director, Justice Reform and Racial Equity Policy, Microsoft

5:00 – 5:30 PM

Bus transportation to **The Lexington Hotel**

*1.2 miles, 16-minute drive*

5:30 – 6:00 PM

Walk to **United Nations Headquarters**

*.5 miles, 10-minute walk*

6:00 – 8:30 PM

**AI Considerations for National Security** (Dinner provided)

*Delegates Dining Room (1 United Nations Plaza, New York City)*

Participants will hear from a panel of experts on the role and implications of AI for US national security.

Featured Speaker(s):

- Niall Brennan, Vice President, Head of Strategic Security Partnerships, SAP
- Austin Carson, President, Seed AI (Moderator)
- Dr. Salvatore Stolfo, Professor of Computer Science, Columbia University
- Mark Tesone, Director, Geopolitical Risk and Strategy, Adobe
- David Ulevitch, Partner, Andreessen Horowitz

*Individual Transportation to hotel via Software.org-provided rideshare credit.*

9:00 PM

Return to **The Lexington Hotel**

*(511 Lexington Avenue, New York City)*

FRIDAY, AUGUST 4

|                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 7:30 – 8:00 AM   | Group assembles in the lobby of the Lexington Hotel.<br>(Luggage will be loaded onto the bus.)                                                                                                                                                                                                                                                                                                                                                                                                       |
| 8:00 – 9:00 AM   | Bus transportation from Lexington Hotel to <b>Autodesk - Newlab</b><br><i>7.1 miles, 30-minute drive</i>                                                                                                                                                                                                                                                                                                                                                                                             |
| 9:00 – 11:00 AM  | <b>Company Visit: Autodesk - Newlab</b><br><i>Newlab (19 Morris Avenue, Brooklyn)</i><br>Participants will learn about the role of software in architecture, engineering, and design along with a presentation and discussion on the future of buildings and infrastructure, including the role of AI. Autodesk will also share about their connection to the innovation community in New York City.<br><u>Featured Speaker(s):</u><br>- David Benjamin, Founding Principal, Autodesk’s “The Living” |
| 11:00 – 12:00 PM | Bus transportation to <b>New York Penn Station</b><br><i>5.1 miles, 35-minute drive</i>                                                                                                                                                                                                                                                                                                                                                                                                              |
| 12:40 PM         | Train departs from <b>New York Penn Station</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 4:21 PM          | Train arrives in <b>Washington, DC Union Station</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 4:30 PM          | Individual transportation home                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |



**Senate Staffdel to New York City**  
**Wednesday, August 2 - Friday, August 4, 2023**  
**"AI & Software Enabling Digital Transformation"**

WEDNESDAY, AUGUST 2, 2023

7:10 AM Train departs from **Washington, DC Union Station**

10:44 AM Train arrives in **New York Penn Station**

11:30 – 12:00 PM Walk from Penn Station to **SAP**  
.4 miles, *11-minute walk*

**12:00 – 2:00 PM** **Lunch Program: AI Technology & Policy: A Discussion of the Past, Present, and Future**  
*SAP (10 Hudson Yards, New York City)*

**Overview:**

Participants will learn about the history and evolution of AI technology as well as views on what might lie ahead. A second portion of the program will discuss how AI laws and policies have taken shape in other parts of the world as well as US states and localities.

Featured Speaker(s):

- Austin Carson, Founder & President;
- Aaron Cooper, Vice President, Global Policy, BSA | The Software Alliance;
- Mike Hind, Distinguished Researcher, AI Department, IBM; and
- Grace Yee, Director of Ethical Innovation, Adobe.

**2:00 – 4:00 PM** **Company Visit: SAP**  
*SAP (10 Hudson Yards, New York City)*

The delegation will learn how SAP is using AI now and plans to use it in the future. They will also discuss SAP's view on the ethics of AI and challenges opportunities for companies like theirs. The delegation will tour SAP's line of business booths (Highlighting Finance, spend management, supply chain, HR, and CX solutions) and receive a Retail Store tour (Retail fashion store powered by SAP and our partners).

Featured Speaker(s):

- Scott Sleeper, Vice President Business Technology Platform

- Doug Freud, VP Data Science & Data Management Business Technology Platform

4:00 – 4:30 PM Rideshare app to **The Lexington Hotel**

4:30 PM Arrive to **The Lexington Hotel**  
(511 Lexington Avenue, New York City)  
Delegation will have time to check in and deliver bags to individual rooms.

5:15 PM Walk from Lexington Hotel to **Microsoft**  
  
.2 miles, 7-minute walk  
Group assembles in the lobby.

**5:30 – 8:00 PM** **Reception & Dinner Program: Harmonizing Global Perspectives on AI**  
Microsoft (885 2nd Avenue, 34th Floor New York, New York 10017)

**Overview:**

Participants will hear from UN officials, diplomats, and software executives about the global nature of AI and how public and private sector are working together across the globe to harmonize perspectives and find common ground. The UN Tech Envoy will also communicate the vision and mission of his office and strategic plan for AI.

**Featured Speaker(s):**

- Under-Secretary General Amandeep Gill, Tech Envoy, United Nations;
- Micaela McMurrough, Partner, Covington & Burling;
- Francesca Rossi, Fello & AI Ethics Global Leader, IBM; and
- Howie Wachtel, Senior Director, Policy, Microsoft.

8:30 PM Return to **The Lexington Hotel**  
(511 Lexington Avenue, New York City)

**THURSDAY, AUGUST 3**

7:00 – 7:15 AM Group assembles in the lobby of **The Lexington Hotel**

7:30 – 8:00 AM Bus transportation from Lexington Hotel to **IBM**  
2.7 miles, 20-minute drive

**8:00 – 10:00 AM** **Company Visit: IBM**  
IBM Innovation Studio (51 Astor Place, New York City)

**Overview:**

The delegation will receive hands-on experiences to showcase the potential of AI with interactive demonstrations while learning from how IBM's technological leadership is driving industry transformation with our clients from around the globe. In addition, the delegation will have an open Q&A discussion with Christina Montgomery, VP and Chief Privacy Officer, who recently testified at a Senate Judiciary Committee Hearing AI regulation.

**Featured Speaker(s):**

- Christina Montgomery, VP and Chief Privacy Officer, IBM
- Shobit Varshney, VP & Senior Partner, IBM Consulting (leads AI, Generative AI, Analytics & IoT practice in US, Canada and Latin America)
- John Michael De Carlo, Executive, IBM Government and Regulatory Affairs

10:00 – 10:30 AM      Bus transportation to **Adobe**  
*2.6 miles, 21-minute drive*

**10:30 – 12:00 PM      Company Visit: Adobe**  
*Adobe (1540 Broadway, New York City)*

**Overview:**

They are going to speak on Adobe's approach to ethical innovation and Artificial Intelligence. Grace will run through Adobe's AI Ethics Principles and AI Review process. Andy will address Adobe's Content Authenticity Initiative (CAI) and how it is intertwined with AI.

**Featured Speaker(s):**

- Andy Parsons, Senior Director of the Content Authenticity Initiative
- Grace Yee, Director of Ethical Innovation

12:00 – 12:30 PM      Walk to **Salesforce**  
*.3 miles, 6-minute walk*

**12:30 – 2:30 PM      Company Visit: Salesforce**  
*Salesforce (1095 Avenue of the Americas, New York City)*

**Overview:**

Patrick Stokes, EVP & GM of Product, will share how Salesforce is incorporating AI into their products to empower their customers, safely and responsibly. After the discussion, the delegation will tour the Salesforce offices.

Featured Speaker(s):

- Patrick Stokes, Executive Vice President & General Manager of Product, Salesforce

2:30 – 3:00 PM

Walk to **Microsoft***.3 mile, 7-minute walk*

3:00 – 5:00 PM

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

Featured Speaker(s):

- Cass Matthews, Office of Responsible AI
- Howie Wachtel, Senior Director, Policy

5:00 – 5:30 PM

Walk to **Nasdaq***.3 miles, 6-minute walk*

5:30 – 8:00 PM

**Dinner Program: AI in Financial Services***Nasdaq (4 Times Square, New York City)***Overview:**

Participants will visit the Nasdaq MarketSite for a tour and dinner program discussing the role of AI in financial services. The program will include a panel of software and financial services executives sharing real-world applications of AI, positive impacts to society and the economy, areas of caution, and promise for the future.

Featured Speaker(s):

- Jeff Bandman, Founder & CEO, Bandman Advisors
- Alexander Freemantle, Engineering Manager, Nasdaq
- Doug Freud, VP Data Science & Data Management Business Technology Platform



- Syeed "Sid" Mansur, Cofounder & CEO, GreenLyne Inc. and Sentrana Inc.
- Ken Sena, Founder & CEO, Aiera
- Ronak Shah, AI & Privacy Counsel, Cohere

9:00 PM                      Return to **The Lexington Hotel**  
*(511 Lexington Avenue, New York City)*

FRIDAY, AUGUST 4

7:30 – 8:00 AM            Group assembles in the lobby of the Lexington Hotel.  
*(Luggage will be loaded onto the bus.)*

8:00 – 9:00 AM            Bus transportation from Lexington Hotel to **Autodesk - Newlab**  
*7.1 miles, 30-minute drive*

**9:00 – 11:00 AM        Company Visit: Autodesk - Newlab**  
*Newlab (19 Morris Avenue, Brooklyn)*

**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.

Featured Speaker(s):

- David Benjamin, Director of AEC Industry Futures

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

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

4:21 PM                      Train arrives in **Washington, DC Union Station**

# Trip Name: Software.org: the BSA Foundation Senate Staff Trip to New York City

## Organization Information

Organization Name:

Software.org: the BSA Foundation

Is your organization classified as a §501(c)(3)?



Yes



No

If Yes, §501(c)(3) Organization Type:



Private Foundation



Public Charity

Address:

200 Massachusetts Avenue NW Ste. 310

City, State, Zip:

Washington DC 20001

Phone Number:

202-746-5898

Organization URL:

<https://software.org/about/>

## History of Congressional Travel

Describe your organization's history of sponsoring congressional travel.

Software.org, the BSA Foundation is an independent and nonpartisan international 501(c)(3) organization that helps policymakers and the broader public better understand the impact that software has on our lives, our economy, and our society. As part of this mission since 2017, 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. Previous trips have included Atlanta, Boston, Brussels, San Francisco, and Seattle.

## Educational Activities

Describe the educational activities performed by your organization other than sponsoring congressional travel.

As an independent and nonpartisan international 501(c)(3) organization, Software.org has conducted research, released educational materials, and hosted events to raise awareness and deepen understanding around emerging technologies and their impacts to society, the economy, and environment. Software.org also sponsors an annual Girls Who Code program to teach basic coding skills and educate underserved high school students about software career paths in our Nation's Capitol and beyond.

## Lobbyist and Foreign Agent Registration Information

Lobbyist Registration Status (Select one):



I certify that the sponsor is not a federally registered lobbyist and does not retain or employ a federally registered lobbyist.



I certify that the sponsor is not a federally registered lobbyist but does retain or employ one or more federally registered lobbyists.

Foreign Agent Registration Status (Select one):



I certify that the sponsor is not an agent of a foreign principal and does not retain or employ an agent of a foreign principal.



I certify that the sponsor is not an agent of a foreign principal but does retain or employ one or more agents of a foreign principal.

## Foreign Government Involvement

Foreign Agent Registration Status (Must select all):



I certify that the sponsor is not a foreign government.



I certify that the sponsor is not an entity that is owned or operated by a foreign government.



I certify that the sponsor does not receive funding from a foreign government.

**Purpose and Details**

Provide a brief description of the trip.

The theme of the trip will be "AI & Software Enabling Digital Transformation." Participants will interact with AI experts, technologists, and business leaders on the forefront of emerging technologies from top software companies including Adobe, Autodesk, IBM, Microsoft, Salesforce, and SAP. Special program elements will take participants behind the scenes of AI's role in financial services and offer opportunities to discuss implications of AI to national security and workforce development.

Explain how the purpose of the trip relates to your organization's mission.

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 these raise awareness and deepen understanding around emerging software technologies and their impacts to society, the economy, and the environment.

Is your organization the only sponsor for this trip?

☒ Yes ☐ No

If No, describe your organization's role in planning the trip.

If there are multiple sponsors, each sponsor must submit Organization Information (Page 1 of the Private Sponsor Travel Certification Form) and a Signature Page Form.

**Grantmaking Organizations (Optional)**

If you have a Grantmaking Organization, you must attach a Grantmaking Organization Certification Form.

- 1.
- 2.
- 3.

## With or Without Regard to Congressional Participation (Select one):

- ☐ The trip is arranged or organized without regard to congressional participation.
- ☒ The trip is arranged or organized with regard to congressional participation.

## Lobbyist/Foreign Agent Involvement in Planning, Organizing, Requesting or Arranging

- ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal, other than de minimis involvement.

## Lobbyist/Foreign Agent Financing (Must select all):

- ☒ The trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
- ☒ No funds or in-kind contributions were earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.

## Lobbyist/Foreign Agent Accompaniment

## Complete if all sponsors are §501(c)(3) organizations (Select one):

- ☒ The trip is limited to three days (for trips inside the continental United States) or seven days (for trips outside the continental United States), and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip
- ☐ The trip is limited to a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip
- ☐ The trip is limited to a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip

## Complete if any of the sponsors is not a §501(c)(3) organizations (Select one):

- ☐ The trip is limited to three days (for trips inside the continental United States) or seven days (for trips outside the continental United States), and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip
- ☐ The trip is limited to a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip
- ☐ The trip is limited to a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip

## Certification of No Recreational Activity and No Alcohol (Must select all):

- ☒ Travel expenses paid for will not include expenditures for recreational activities.
- ☒ Travel expenses paid for will not include expenditures for alcohol, except as permitted by the Regulations Governing Privately Sponsored Travel.

## Will members and staff from the House of Representatives receive invitations?

- ☐ Yes ☒ No

## Travel Details (Submit additional pages as needed)

Trip Start Date/Time:  
August 2, 2023, 7:10am



Trip End Date/Time:  
August 4, 2023, 4:21pm

Will the traveler be accompanied by a family member for whom the sponsor will pay travel expenses?

☐ Yes ☒ No

Transportation (Member/Officer/Employee: \$<sup>493</sup> Accompanying Family Member: \$<sup>0</sup>)

| Transportation Type                                                   | Class            | Amount |
|-----------------------------------------------------------------------|------------------|--------|
| Amtrak                                                                | Coach            | \$131  |
| NYC Ground Transportation                                             | Van service/Uber | \$322  |
| DC Ground Transportation to/from Union Station                        | Uber             | \$40   |
| Details (optional)                                                    |                  |        |
| Estimated train ticket cost based on availability as of June 3, 2023. |                  |        |

Lodging (Member/Officer/Employee: \$<sup>472</sup> Accompanying Family Member: \$<sup>0</sup>)

| Check-In | Check-Out  | Facility                      | City                                                                                     | State | Country |
|----------|------------|-------------------------------|------------------------------------------------------------------------------------------|-------|---------|
| 8/2/23   | 8/4/23     | The Lexington Hotel           | New York City                                                                            | NY    | USA     |
| Nights   | Cost/Night | Cost Exceed Per Diem (Yes/No) | If Yes, please explain why expenses over the per diem rate are reasonable and necessary. |       |         |
| 2        | \$236      | Yes                           | This was the lowest rate available in a safe and convenient location.                    |       |         |
| Check-In | Check-Out  | Facility                      | City                                                                                     | State | Country |
|          |            |                               |                                                                                          |       |         |
| Nights   | Cost/Night | Cost Exceed Per Diem (Yes/No) | If Yes, please explain why expenses over the per diem rate are reasonable and necessary. |       |         |
|          |            |                               |                                                                                          |       |         |
| Check-In | Check-Out  | Facility                      | City                                                                                     | State | Country |
|          |            |                               |                                                                                          |       |         |
| Nights   | Cost/Night | Cost Exceed Per Diem (Yes/No) | If Yes, please explain why expenses over the per diem rate are reasonable and necessary. |       |         |
|          |            |                               |                                                                                          |       |         |

Meals (Member/Officer/Employee: \$<sup>181</sup> Accompanying Family Member: \$<sup>0</sup>)

| Date   | Breakfast | Lunch | Dinner | Incidentals | Total | City          | State | Country | Cost Exceeds Per Diem (Y/N) |
|--------|-----------|-------|--------|-------------|-------|---------------|-------|---------|-----------------------------|
| 8/2/23 | 0         | 20    | 36     | 3           | 59    | New York City | NY    | USA     | N                           |
| 8/3/23 | 18        | 20    | 36     | 5           | 79    | New York City | NY    | USA     | N                           |
| 8/4/23 | 18        | 20    |        | 5           | 43    | New York City | NY    | USA     | N                           |
|        |           |       |        |             |       |               |       |         |                             |
|        |           |       |        |             |       |               |       |         |                             |
|        |           |       |        |             |       |               |       |         |                             |
|        |           |       |        |             |       |               |       |         |                             |

If costs exceed the federal per diem, please explain why expenses over the per diem rate are reasonable and necessary.

### Reasonable Miscellaneous Expenses

(Member/Officer/Employee: \$<sup>40</sup> Accompanying Family Member: \$<sup>0</sup>)

| Expense Type | Amount | Notes |
|--------------|--------|-------|
|              |        |       |
|              |        |       |
|              |        |       |
|              |        |       |

### Additional Details (optional)

We will provide Uber vouchers so final transportation costs may be lower. The Uber vouchers will be set up with restricted access for travel only on trip dates and any unused vouchers will expire on August 4, 2023.

## PRIVATELY SPONSORED TRAVEL

## SPONSOR SIGNATURE PAGE

I hereby certify that the information submitted in connection with the trip listed below is true, complete, and correct to the best of my knowledge and belief.

Trip Name: Software.org: the BSA Foundation Senate Staff Trip to NYC

Travel Date(s): August 2, 2023 - August 4, 2023

Travel Destination(s): New York City, NY

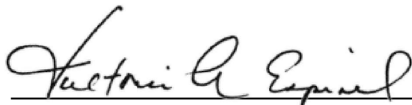
Sponsor: Software.org: the BSA Foundation

Victoria Espinel

*(printed name of sponsor representative)*

President

*(title)*



*(signature of sponsor representative)*

06/16/2023

*(date)*



## ATTACHMENT 1 – CHANGES FROM APPROVED PRE-TRAVEL

**Note:** Material changes to a trip that occur after the Committee has issued an approval letter may invalidate the Committee's approval. Please contact the Committee with any questions regarding changes to an approved trip.

Were there any changes to the pre-approved travel expenses? (Transportation, Meals, Lodging, Other)?

☒ Yes ☐ No

| Expense Change | Revised Amount | Explanation                                                   |
|----------------|----------------|---------------------------------------------------------------|
| Meals          | 181            | Lunch was not provided on 8/4.                                |
| Transportation | 217            | Actual rideshare costs were lower than the original estimate. |

Were there any changes to the pre-approved itinerary?

☒ Yes ☐ No

**Explanation:**

Please see attached final itinerary.

Were there any additional changes to the pre-approved trip?

☐ Yes ☒ No

**Explanation:**

Please see attached final itinerary.



200 Massachusetts Avenue, NW, Suite 310 Washington, DC 20001  
202 872 5500 [www.software.org](http://www.software.org)

**Senate Staffdel to New York City – Invitation List**  
**Wednesday, August 2 - Friday, August 4, 2023**  
**“AI & Software Enabling Digital Transformation”**

| First    | Last       | Staffer Title                             | Office Name                                                              |
|----------|------------|-------------------------------------------|--------------------------------------------------------------------------|
| Anne     | (Brewster) | Staff Director                            | Senate Democratic Policy & Communications Committee                      |
| Jon      | Adame      | General Counsel,<br>Legislative Director  | Blackburn                                                                |
| Michelle | Altman     | Chief of Staff                            | Lankford                                                                 |
| Colin    | Anderson   | Policy Advisor                            | Blumenthal                                                               |
| Michelle | Ankenbrand | (Detailee)                                | Judiciary - Sub on Privacy, Technology, and the Law                      |
| Andre    | Barbe      | Senior Fellow on AI                       | Commerce                                                                 |
| Didier   | Barjon     | Legislative Assistant                     | Schumer                                                                  |
| Michelle | Barlow     | Chief of Staff                            | Wicker                                                                   |
| John     | Beezer     | Senior Advisor                            | Commerce - Sub on Consumer Protection, Product Safety, and Data Security |
| Michelle | Benecke    | Senior Counsel                            | Homeland Security & Governmental Affairs                                 |
| Daniel   | Bleiberg   | Senior Policy Advisor                     | Rosen                                                                    |
| Ryan     | Carroll    | Senior Counsel                            | Wyden                                                                    |
| Kyle     | Chase      | Deputy Chief of Staff,<br>General Counsel | Rounds                                                                   |
| Dan      | Cheever    | Legislative Assistant                     | Young                                                                    |
| John     | Connell    | Chief of Staff                            | Young                                                                    |
| Chance   | Costello   | Senior Legislative Assistant              | Thune                                                                    |
| John     | Daukas     | Chief Civil Counsel                       | Judiciary                                                                |
| Reema    | Dodin      | Chief of Staff                            | Schatz                                                                   |
| Veronica | Duron      | Chief of Staff                            | Booker                                                                   |
| Tony     | Eberhard   | Chief of Staff                            | Hoeven                                                                   |
| Erik     | Elam       | Legislative Director                      | Sullivan                                                                 |
| Seth     | Gainer     | Senior Policy Advisor                     | Manchin                                                                  |
| Kathleen | Gayle      | Legislative Assistant                     | Rounds                                                                   |

|               |           |                                     |                                          |
|---------------|-----------|-------------------------------------|------------------------------------------|
| Ryan          | Giles     | General Counsel                     | Republican Policy Committee              |
| Brad          | Grantz    | Staff Director (Minority)           | Commerce                                 |
| Drew          | Hammill   | Senior Advisor                      | Commerce                                 |
| Jeff          | Hantson   | Senior Counsel                      | Judiciary                                |
| Catherine     | Hazelwood | Legislative Director, Chief Counsel | Peters                                   |
| Lila          | Helms     | Staff Director (Maj)                | Commerce                                 |
| Anderson      | Helton    | Legislative Assistant               | Wicker                                   |
| Garrison      | Holmberg  | Legislative Assistant               | Moran                                    |
| Chris         | Jaarda    | Deputy Chief of Staff for Policy    | Cruz                                     |
| JT            | Jezierski | Legislative Director                | Capito                                   |
| Scott         | Jorgenson | Associate Counsel                   | Judiciary                                |
| Max           | Katz      | Legislative Fellow                  | Heinrich                                 |
| Tucker        | Knott     | Chief of Staff                      | Budd                                     |
| Michael       | Kuiken    | National Security Advisor           | Schumer                                  |
| Lot           | Kwarteng  | Legislative Director                | Warner                                   |
| Grace         | Magaletta | Legislative Correspondent           | Schumer                                  |
| Rafi          | Martina   | Senior Policy Advisor               | Intelligence                             |
| Neri          | Martinez  | Chief of Staff                      | Scott, Tim                               |
| Jessica       | McBride   | Legislative Director                | Thune                                    |
| Ishan         | Mehta     | Policy Advisor                      | Schatz                                   |
| Arjun         | Mody      | Staff Director                      | Senate Republican Conference             |
| Mike          | Needham   | Chief of Staff                      | Rubio                                    |
| Kat           | Nikas     | Staff Director                      | Judiciary                                |
| Lauren        | O'Brien   | Legislative Director                | Young                                    |
| Peter-Anthony | Pappas    | Counsel Detailee                    | Judiciary - Sub on Intellectual Property |
| Stephanie     | Parks     | Senior Advisor                      | McConnell                                |
| Shil          | Patel     | Chief of Staff                      | Tillis                                   |
| Richard       | Perry     | Chief of Staff                      | Graham                                   |
| David         | Pigue     | Counsel                             | Sullivan                                 |
| Scott         | Raab      | Deputy Chief of Staff for Policy    | McConnell                                |

|           |              |                                  |                                                                          |
|-----------|--------------|----------------------------------|--------------------------------------------------------------------------|
| Lauren    | Reamy        | Legislative Director             | Rubio                                                                    |
| Jacob     | Reses        | Chief of Staff                   | Vance                                                                    |
| Kelly     | Riddle       | Deputy Legislative Director      | Rosen                                                                    |
| Edgar     | Rivas        | Senior Policy Advisor            | Hickenlooper                                                             |
| Tim       | Ryder        | Legislative Assistant            | Schumer                                                                  |
| Scarlet   | Samp         | Liaison to Legislative Directors | Whip (Minority)                                                          |
| Saurabh   | Sanghvi      | Counsel                          | Coons                                                                    |
| Eli       | Schooley     | Legislative Counsel              | Peters                                                                   |
| Sarah     | Seitz        | Legislative Director, Counsel    | Lankford                                                                 |
| Baz       | Selassie     | Legislative Director / Counsel   | Klobuchar                                                                |
| Kristina  | Sesek        | Legislative Director             | Ernst                                                                    |
| Alexandra | Seymour      | Professional Staff Member        | Commerce                                                                 |
| Shannon   | Smith        | Staff Director                   | Commerce - Sub on Consumer Protection, Product Safety, and Data Security |
| Aaron     | Stanislawski | Counsel                          | Coons                                                                    |
| David     | Stoopler     | Chief Counsel                    | Blumenthal                                                               |
| Dan       | Sullivan     | Chief Counsel                    | Commerce                                                                 |
| Jamie     | Susskind     | Policy Advisor                   | Blackburn                                                                |
| Sean      | Sweeney      | Senior Policy Advisor            | Warner                                                                   |
| Dan       | Taylor       | Legislative Director             | Cantwell                                                                 |
| Darin     | Thacker      | Chief of Staff                   | Daines                                                                   |
| Olivia    | Trusty       | Lead                             | Armed Services - Sub on Cybersecurity                                    |
| Annie     | Wang         | Deputy Legislative Director      | Warnock                                                                  |
| Dave      | Weinberg     | Staff Director                   | Homeland Security & Governmental Affairs                                 |
| Joel      | Wellum       | Counsel                          | Commerce                                                                 |
| Brian     | Winseck      | Deputy Chief of Staff for Policy | Coons                                                                    |
| Chad      | Yelinski     | Deputy Chief of Staff            | Budd                                                                     |