RE-2 Employee Post Travel Disclosure of Travel Expenses

Date/Time Stamp

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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

Travel Dates:
08/07/2024 to 08/10/2024

Name of accompanying family member (if any):

Relationship to Traveler:

Expenses

Transportation Expenses	Lodging Expenses	Meals Expenses	Other Expenses (Amount & Description)
$1,540.50	$520.00	$207.08	$0.00

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.

8/20/24
Date

Frances Schroeder
Printed Name of Traveler

Frances Schroeder
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.

8/20/24
Date

Signature of Supervising Senator/Officer

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	$207.08	Cost per person was revised based on lower actual costs for meals per person. Final amount was $207.08 p.p.
Transportation	$1,540.50	Revised final transportation cost was $1,540.50 per person.

Were there any changes to the pre-approved itinerary?

○ Yes ◉ No

Explanation: There were no changes to the pre-approved itinerary.

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

○ Yes ◉ No

Explanation: There were no additional changes to the pre-approved trip.

Software.org: Software.org: the BSA Foundation Senate Staff Trip to San Francisco, CA

Frances Schroeder

Title:
Congressional Innovation Fellow

Employing Office/Committee:
OSSOFF, JON

Duty Station:
None

Destination(s):
San Francisco, California

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

This trip will allow me the opportunity to interact and engage with AI experts, technologists, and business leaders on the forefront of emerging technologies from some of the top software companies. Covering the AI portfolio for my office, this will be a valuable and informative educational experience.

Name of accompanying family member (if any):
Not Entered

Name and Relationship to Traveler:
None

Organization Information

Organization Name
Software.org

Is your organization classified as a §501(c)(3)?
● Yes ○ No

§501(c)(3) Organization Type
Public Charity

Address
200 Massachusetts Ave NW

Address 2 (Optional)
Suite 310

City, State Zip
Washington, District Of Columbia 20001 United States

Phone Number
2025497565

Organization URL

History of 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. Previous Ethics-approved Senate trips took place in 2017 and 2018.

Educational Activities

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

Foreign Agent Registration Status: *I certify that the sponsor is not an agent of a foreign principal and do not retain or employ an agent of a foreign principal.*

Foreign Government Involvement

Foreign Agent Registration Status:

● 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.

Comments

None Entered

Signature Page

The signature page is below.

Purpose and Details

Provide a brief description of the trip.

The theme of the trip with 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

Grantmaking Organizations (Optional)

There are no grantmaking organizations.

With or Without Regard for Congressional Participation

The trip is arranged or organized specifically 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

- ☑ 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

- ☑ 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

Complete if any of the sponsors is not a §501(c)(3) organizations.

- ○ 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

○ 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

✓ 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.

Invitees

ⓘ Members and staff from the House of Representatives **will** receive invitations.

The list of invitees is below.

Travel Details

Trip Start Date/Time:
08/07/2024 @ 08:25 AM

⇄

Trip End Date/Time:
08/09/2024 @ 09:13 PM

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

○ Yes ✓ No

Itinerary

The itinerary is below.

Transportation (Per Member/Officer/Employee: $961.89 | Accompanying Family Member: $0.00)

Transportation Type	Class	Amount
Airfare	Coach	$673.05
Note Roundtrip		
Ground Transportation	Coach	$288.84
Note Shuttle Bus / Van		

Lodging (Per Member/Officer/Employee: $520.00)

Check-In	Check-Out	Facility	City	State	Country	Nights	Cost/Night	Cost Exceed Per Diem
08/07/2024	08/09/2024	W Hotel	San Francisco	California	United States	2	$260.00	No

Meals (Per Member/Officer/Employee: $180.00)

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem
08/07/2024	$0.00	$22.00	$39.00	$0.00	**$61.00**	San Francisco	California	United States	No
08/08/2024	$18.00	$22.00	$39.00	$0.00	**$79.00**	San Francisco	California	United States	No
08/09/2024	$18.00	$22.00	$0.00	$0.00	**$40.00**	San Francisco	California	United States	No

Reasonable Miscellaneous Expenses (Per Member/Officer/Employee: $0.00)

Expense Type	Amount	Notes

There are no miscellaneous expenses.

Additional Attachments All additional attachments are below.

Document Name
Agenda
Revised StaffDell Agenda

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 S.F.

Travel Date(s): August 7- August 9, 2024

Travel Destination(s): San Francisco, CA

Sponsor: Software.org: The BSA Foundation.

Victoria Espinel — *(printed name of sponsor representative)*

President — *(title)*

(signature of sponsor representative)

6/24/24 — *(date)*

AMENDED 7/30/24 1:07 PM



House Staffdel to San Francisco, CA
Wednesday, August 7 – Friday, August 9, 2024
"AI & Software Enabling Digital Transformation"

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

FName	Lname	Title	Organization
Steve	Ackerman	Legislative Director	Fulcher, Russ (R-ID, 1st)
Rebecca	Angelson	Chief of Staff	Latta, Bob
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
Moira	Bergin	Subcommittee Director	Subcommittee on Cybersecurity and Infrastructure Protection (Homeland Security)
Nora	Blalock	Legislative Director	Castor, Kathy
Kevin	Block	Counsel	Committee on Homeland Security
Tia	Bogeljic	Legislative Director	Neguse, Joe
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	Legislative Counsel	Stevens, Haley
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	Barragan, Nanette
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 the Majority Whip
Jay	Fields	Deputy Policy Director	Office of the Speaker of the House
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	Walberg, Tim (R-MI)
Kevin	Gannon	Legislative Director	Garbarino, Andrew R. (R-NY, 2nd)
Teri	Geiger	Chief of Staff	Balderson, Troy

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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
Emily	Hebein	Legislative Director	Latta, Bob (R-OH, 5th)
Rob	Hicks	Legislative Director	Obernolte, Jay (R-CA, 23rd)
Elizabeth	Hittos	Chief of Staff	Bilirakis, Gus
Lisa	Hone	Chief Counsel	Committee on Energy and Commerce
Omar	Hossino	Senior Policy Counsel	House Republican Study Committee
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	Guest, Michael
Megan	Kanne	Technology Advisor	Schakowsky, Jan
Jacqueline	Kappler	Chief Counsel	Committee on the Judiciary
Melissa	Kelly	Chief of Staff	Franklin, Scott (R-FL, 18th)
Bijan (B.J.)	Koohmaraie	Counsel	Scalise, Steve (Office of the House Majority Leader)
Tim	Kurth	Chief Counsel	Committee on Energy & Commerce
Giulia	Leganski	Professional Staff Member	Committee on Energy and Commerce (E&C)
Roz	Leighton	Chief of Staff	Armstrong, Kelly
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)
Jake	Middlebrook	Deputy Chief of Staff	LaTurner, Jake
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
Brannon	Rains	Professional Staff Member	Subcommittee on Innovation, Data, and Commerce
Mary Ellen	Richardson	Chief of Staff	LaHood, Darin (R-IL, 16th)
Victoria	Rivas	Policy Director	House Democratic Caucus

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Janet	Rossi	Deputy Chief of Staff	Crawford, Rick
Nick	Runkel	Deputy Chief of Staff	Womack, Steve
Zac	Rutherford	Chief of Staff	Harshbarger, Diana (TN, 1)
Geo	Saba	Chief of Staff	Khanna, Ro (D-CA, 17th)
Brooke	Scannell	Chief of Staff	House Minority Whip
Alex	Scheuer	AI Policy Lead	Jeffries, Hakeem (NY-08)
Alexandra	Seymour	Staff Director	House Committee on Homeland Security
Rajiv	Sicora	Legislative Director	Bowman, Jamaal
William	Smith	Chief of Staff	Palmer, Gary
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
Claire	Trokey	Legislative Director	Scalise - Office of the Majority Leader
Matt	Tucker	Deputy Chief of Staff	Joyce, John
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	Senior Policy Advisor	House Republican Study Committee
Veronica	Wong	Chief of Staff	Issa, Darrell E. (R-CA, 48th)
Connor	Wood	Legislative Assistant	Stevens, Haley
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)
Dan	Ziegler	Policy Director	Office of the Speaker of the House of Representatives
Nate	Zimpher	Legislative Director	Balderson, Troy (R-OH, 12th)

Trip Name: Software.org: the BSA Foundation Senate Staff Trip to San Francisco, CA

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:
202 549 7565

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. Previous Ethics-approved Senate trips took place in 2017 and 2018.

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 with 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):

- ○ No sponsor retains or employs a registered lobbyist or agent of a foreign principle, 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

Required if selecting the third option in either column - Please explain why the second overnight stay is practically required and necessary to accomplish the purpose 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.

Invitees list

- ☑ A list of all Senate invitees is attached to this form (required).
- ☑ Members and staff from the House of Representatives will also receive invitations.

Travel Details (Submit additional pages as needed)

Trip Start Date/Time:	⇄	Trip End Date/Time:
August 7, 2024 8:25 AM		August 9, 2024 9:13 PM

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

○ Yes ◉ No

Transportation (Member/Officer/Employee: $961.89 Accompanying Family Member: $_____)

Transportation Type	Class	Amount
Airfare	Coach	$673.05
Ground	Van	$288.84

Details (optional)

Lodging (Member/Officer/Employee: $520 Accompanying Family Member: $_____)

Check-In	Check-Out	Facility	City	State	Country
8/7/24	8/9/24	W Hotel	San Francisco	CA	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	$260		

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: $180 Accompanying Family Member: $_____)

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem (Y/N)
8/7	$0	$22	$39		$61	San Francisco	CA	USA	N
8/8	$18	$22	$39		$79	San Francisco	CA	USA	N
8/9	$18	$22	$0		$40	San Francisco	CA	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: $0 Accompanying Family Member: $_____)

Expense Type	Amount	Notes

Additional Details (optional)

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 S.F.

Travel Date(s): August 7- August 9, 2024

Travel Destination(s): San Francisco, CA

Sponsor: Software.org: The BSA Foundation.

Victoria Espinel — *(printed name of sponsor representative)*

President — *(title)*

Victoria A Espinel — *(signature of sponsor representative)*

6/24/24 — *(date)*

software.org
BSA Foundation

Bicameral Staffdel to San Francisco
Wednesday, August 7 - Friday, August 9, 2024
"AI & Software Enabling Digital Transformation"

SCHEDULE

DAY 1 – WEDNESDAY, AUGUST 7

8:18 AM	**Depart Washington Dulles International Airport (IAD) United #267**
11:10 AM	Arrive at San Francisco International Airport (SFO)
12:00 PM	Ground transportation from the airport to Microsoft
12:30 – 2:30 PM	**Microsoft** Microsoft Silicon Valley Campus, 1045 La Avenida Street, Mountain View 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. Featured Speaker(s): ➢ **Ryan Harkins**, Senior Director of Public Policy
2:30 PM	Ground transportation to IBM
3:15 – 4:45 PM	**IBM** IBM Research - Almaden Lab, 650 Harry Road, San Jose At IBM's Almaden Research Lab, participants will engage in robust discussion 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 Speakers: *Introductions:* ➢ **Laura Guio**, GM & Managing Partner, IBM TechnoloSchegy Consulting Alliance & Red Hat, California Senior State Executive *IBM Research AI Strategy:* ➢ **Sandeep Gopisetty**, Director & Distinguished Engineer, Enterprise Data & Governance for AI Models

IBM Software Development AI Strategy:

- **Madhu Kochar,** Vice President, Product Development, IBM Automation

4:45 PM Ground transportation to The Dutch Goose 3567 Alameda De Las Pulgas, Menlo Park, CA

5:30 – 7:30 PM **Dinner Program: Building a Workforce for an AI Future**

Dinner program focused on building a workforce for an AI-driven future. The program will feature a panel of experts from aiEDU, The AI Education Project, discussing how AI is changing workforce needs and how pipeline development and reskilling the existing workforce should meet the coming challenges and opportunities.

Featured Discussants:
Alex Kotran, CEO & Co-Founder, The AI Education Project
Loni Mahanta, Chief Operating Officer & General Counsel, The AI Education Project
Christian Pinedo, Chief of Staff, The AI Education Project

8:00 PM Ground transportation to W Hotel

DAY 2 - THURSDAY, AUGUST 8

7:30 AM Group assembles in the lobby

8:00 AM Ground transportation from Hotel to **Autodesk**

8:30 – 10:30 AM **Autodesk**

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

10:30 AM Ground transportation to Salesforce

11:00 AM – 1:00 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:

- **Boris Gamazaychikov**, Senior Manager of Emissions Reduction
- **Dr. Rachel Gillum**, Vice President of Ethical & Humane Use of Technology
- **Margaret Taylor**, Head of Public Affairs

1:00 PM Ground transportation to **SAP**

1:30-3:00 PM **SAP**

SAP Labs, 135 Townsend Street, San Francisco

Shaping the Future of Innovation: SAP's Holistic Approach to AI-Driven Business Transformation

The delegation will participate in an enlightening session that explores SAP's holistic approach to innovation. This session provides an overview of SAP Business AI, showcasing how advanced AI technologies are transforming the enterprise landscape. Gain valuable insights into the strategies and technologies that leading companies use to unlock their data's full potential, propelling them towards unprecedented success. This session promises to equip participants with the knowledge and tools needed to catalyze transformative growth and stay at the forefront of digital innovation.

Featured Speaker(s):

- **Jeanine L.K. LeFlore**, Vice President of Product Growth, Innovation BTP Innovation

3:00 PM Ground transportation to **Adobe**

3:30-5:00 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):

- **Anne Perkins,** Head of Public Policy
- **Andrew Kaback**, Lead Project Manager, CAI
- **J. Scott Evans** Associate General Counsel, Trademark

5:00 PM Ground transportation to Toy Soldier

5:30 – 8:00 PM **Dinner Program: Perspectives at the Intersection of AI & Cybersecurity**

Toy Soldier, 52 Belden Place, San Francisco

The delegation will participate in a dinner discussion on how governments across the globe are approaching AI cybersecurity, implementation and regulation.

Featured Discussants:

- **Bruce Byrd**, Executive Vice President & General Counsel, Palo Alto Networks
- **Jim Dempsey**, Lecturer, UC Berkeley School of Law Senior Policy Advisor, Stanford Program on Geopolitics, Technology and Governance

DAY 3- FRIDAY, AUGUST 9

8:30 AM Group meets in the W hotel lobby, with luggage and checks out of the hotel.

8:45 AM Ground Transportation to Atlassian

9:00 – 11:00 AM	**Company Visit: Atlassian** *350 Bush Street, Floor 13, San Francisco* **Overview:** Delegation participants will visit the San Francisco office of Atlassian, a leading provider of collaboration and productivity software. Attendees will learn how Atlassian leverages artificial intelligence to enhance team collaboration and productivity. Featured Speaker: ➢ **Aaron Kleiner**, Government Affairs and Public Policy
11:00 AM	Ground Transportation to SFO
1:10 PM	Depart **San Francisco International Airport (SFO) United #1738**
9:13 PM	Arrive at **Washington Dulles International Airport (IAD)**

DRAFT 6/25/24 5:03 PM

software.org
BSA Foundation

Bicameral Staffdel to San Francisco
Wednesday, August 7 - Friday, August 9, 2024
"AI & Software Enabling Digital Transformation"

SCHEDULE

DAY 1 – WEDNESDAY, AUGUST 7

8:18 AM **Depart Washington Dulles International Airport (IAD) United #267**

11:10 AM Arrive at San Francisco International Airport (SFO)

12:00 PM *Ground transportation from the airport to Microsoft*

12:00 – 2:00 PM **Microsoft** (Lunch Provided)
Microsoft Silicon Valley Campus, 1045 La Avenida Street, Mountain View
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.

Featured Speaker(s):
- **Ryan Harkins**, Senior Director of Public Policy

2:00 PM *Ground transportation to IBM*

2:45 – 4:15 PM ***IBM***
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 Welser, 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 Welser**, Chief Operating Officer for IBM Research and Vice President, Exploratory Science and University Collaborations*

4:15 PM *Ground transportation to The Dutch Goose or Stanford University*

5:00 PM **Reception**

6:00 PM **Dinner Program: AI & Cybersecurity**

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*

8:00 PM *Ground transportation to W Hotel*

DAY 2 - THURSDAY, AUGUST 8

7:00 AM Group assembles in the lobby

7:30 AM Ground transportation from Hotel to **Autodesk**

8:30 – 10:30 AM ***Autodesk** (Breakfast 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*

10:30 AM Ground transportation to Salesforce

11:00 AM – 1:00 PM **Salesforce (Lunch Provided - Confirmed)**

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

1:00 PM *Ground transportation to **SAP***

1:30-3:00 PM ***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*

3:00 PM *Ground transportation to **Adobe***

3:30-5:00 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):

- **Anne Perkins**, Director, Government Relations
- **Sanjeev Sethi**, Senior Director, Facilities
- **Grace Yee**, Director, Ethical Innovation

5:00 PM *Ground transportation to Toy Soldier*

5:30 – 8:00 PM **Dinner Program: AI & Workforce**

Toy Soldier, 52 Belden Place, San Francisco
The delegation will participate in a dinner discuss on how governments across the globe are approaching AI implementation and regulation.

Featured Speaker(s):

- ***Kathy Baxter**, Principal Architect, Ethical AI Practice, Salesforce, Salesforce (Moderator)*
- ***William Cutler**, Head of Tech Policy & Deputy Technology Envoy to the US, UK Embassy*
- ***Gerard De Graaf**, Senior Envoy for Digital to the US, European Union*
- ***Hon. Scott Wiener**, California Senate District 11 – INVITED*

8:00 PM *Ground transportation to W Hotel*

DAY 3- FRIDAY, AUGUST 9

7:45 AM *Group meets in the hotel lobby and checks out of the hotel.*

8:00 AM *Ground transportation to **Oracle – Redwood Shores***

9:00-11:00 AM ***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*

11:00 AM *Ground transportation to SFO*

1:10 PM Depart **San Francisco International Airport (SFO) United #1738**

9:13 PM Arrive at **Washington Dulles International Airport (IAD)**

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BSA Foundation

Bicameral Staffdel to San Francisco
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SCHEDULE

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12:30 – 2:30 PM **Microsoft**
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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.

Featured Speaker(s):
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2:30 PM Ground transportation to IBM

3:15 – 4:45 PM **IBM**
IBM Research - Almaden Lab, 650 Harry Road, San Jose
At IBM's Almaden Research Lab, participants will engage in robust discussion 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 Speakers:
Introductions:
- **Laura Guio**, GM & Managing Partner, IBM TechnoloSchegy Consulting Alliance & Red Hat, California Senior State Executive

IBM Research AI Strategy:
- **Sandeep Gopisetty**, Director & Distinguished Engineer, Enterprise Data & Governance for AI Models

IBM Software Development AI Strategy:

- **Madhu Kochar,** Vice President, Product Development, IBM Automation

4:45 PM Ground transportation to The Dutch Goose 3567 Alameda De Las Pulgas, Menlo Park, CA

5:30 – 7:30 PM **Dinner Program: Building a Workforce for an AI Future**

Dinner program focused on building a workforce for an AI-driven future. The program will feature a panel of experts from aiEDU, The AI Education Project, discussing how AI is changing workforce needs and how pipeline development and reskilling the existing workforce should meet the coming challenges and opportunities.

Featured Discussants:
Alex Kotran, CEO & Co-Founder, The AI Education Project
Loni Mahanta, Chief Operating Officer & General Counsel, The AI Education Project
Christian Pinedo, Chief of Staff, The AI Education Project

8:00 PM Ground transportation to W Hotel

DAY 2 - THURSDAY, AUGUST 8

7:30 AM Group assembles in the lobby

8:00 AM Ground transportation from Hotel to **Autodesk**

8:30 – 10:30 AM **Autodesk**

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Featured Speaker(s):

- **Jeanine L.K. LeFlore**, Vice President of Product Growth, Innovation BTP Innovation

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3:30-5:00 PM **Adobe**

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Toy Soldier, 52 Belden Place, San Francisco

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- **Bruce Byrd**, Executive Vice President & General Counsel, Palo Alto Networks
- **Jim Dempsey**, Lecturer, UC Berkeley School of Law Senior Policy Advisor, Stanford Program on Geopolitics, Technology and Governance

DAY 3- FRIDAY, AUGUST 9

8:30 AM Group meets in the W hotel lobby, with luggage and checks out of the hotel.

8:45 AM Ground Transportation to Atlassian

9:00 – 11:00 AM	**Company Visit: Atlassian** *350 Bush Street, Floor 13, San Francisco* **Overview:** Delegation participants will visit the San Francisco office of Atlassian, a leading provider of collaboration and productivity software. Attendees will learn how Atlassian leverages artificial intelligence to enhance team collaboration and productivity. Featured Speaker: ➢ **Aaron Kleiner**, Government Affairs and Public Policy
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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:
Frances Schroeder

Employing Office/Committee:
OSSOFF, JON

Private Sponsor(s):
Software.org

Destination(s):
San Francisco, California

Travel Dates:
8/7-8/9/2024

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.
This trip will allow me the opportunity to interact and engage with AI experts, technologists, and business leaders on the forefront of emerging technologies from some of the top

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.

8/5/24
Date

Frances Schroeder
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)

I Jon Ossoff (Print Senator's/Officer's Name) hereby authorize Frances Schroeder (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)

8/5/2024
Date

Signature of Supervising Senator/Officer

0000000005809 RECEIVED BY: SECRETARY OF THE SENATE Date: August 20, 2024

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BSA Foundation

Bicameral Staffdel to San Francisco
Wednesday, August 7 - Friday, August 9, 2024
"AI & Software Enabling Digital Transformation"

SCHEDULE

DAY 1 – WEDNESDAY, AUGUST 7

8:18 AM	**Depart Washington Dulles International Airport (IAD) United #267**
11:10 AM	Arrive at San Francisco International Airport (SFO)
12:00 PM	Ground transportation from the airport to Microsoft
12:30 – 2:30 PM	**Microsoft** Microsoft Silicon Valley Campus, 1045 La Avenida Street, Mountain View 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. Featured Speaker(s): ➢ **Ryan Harkins**, Senior Director of Public Policy
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DAY 3- FRIDAY, AUGUST 9

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9:00 – 11:00 AM **Company Visit: Atlassian**
350 Bush Street, Floor 13, San Francisco

Overview:
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Featured Speaker:

- **Aaron Kleiner**, Government Affairs and Public Policy

11:00 AM Ground Transportation to SFO

1:10 PM Depart **San Francisco International Airport (SFO) United #1738**

9:13 PM Arrive at **Washington Dulles International Airport (IAD)**

AMENDED 7/30/24 1:07 PM

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House Staffdel to San Francisco, CA
Wednesday, August 7 – Friday, August 9, 2024
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Attachment A: Question 4 – Names, titles, and explanation for invitation for all House invitees.

FName	Lname	Title	Organization
Steve	Ackerman	Legislative Director	Fulcher, Russ (R-ID, 1st)
Rebecca	Angelson	Chief of Staff	Latta, Bob
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
Moira	Bergin	Subcommittee Director	Subcommittee on Cybersecurity and Infrastructure Protection (Homeland Security)
Nora	Blalock	Legislative Director	Castor, Kathy
Kevin	Block	Counsel	Committee on Homeland Security
Tia	Bogeljic	Legislative Director	Neguse, Joe
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	Legislative Counsel	Stevens, Haley
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	Barragan, Nanette
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 the Majority Whip
Jay	Fields	Deputy Policy Director	Office of the Speaker of the House
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	Walberg, Tim (R-MI)
Kevin	Gannon	Legislative Director	Garbarino, Andrew R. (R-NY, 2nd)
Teri	Geiger	Chief of Staff	Balderson, Troy

AMENDED 7/30/24 1:07 PM

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
Emily	Hebein	Legislative Director	Latta, Bob (R-OH, 5th)
Rob	Hicks	Legislative Director	Obernolte, Jay (R-CA, 23rd)
Elizabeth	Hittos	Chief of Staff	Bilirakis, Gus
Lisa	Hone	Chief Counsel	Committee on Energy and Commerce
Omar	Hossino	Senior Policy Counsel	House Republican Study Committee
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	Guest, Michael
Megan	Kanne	Technology Advisor	Schakowsky, Jan
Jacqueline	Kappler	Chief Counsel	Committee on the Judiciary
Melissa	Kelly	Chief of Staff	Franklin, Scott (R-FL, 18th)
Bijan (B.J.)	Koohmaraie	Counsel	Scalise, Steve (Office of the House Majority Leader)
Tim	Kurth	Chief Counsel	Committee on Energy & Commerce
Giulia	Leganski	Professional Staff Member	Committee on Energy and Commerce (E&C)
Roz	Leighton	Chief of Staff	Armstrong, Kelly
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)
Jake	Middlebrook	Deputy Chief of Staff	LaTurner, Jake
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
Brannon	Rains	Professional Staff Member	Subcommittee on Innovation, Data, and Commerce
Mary Ellen	Richardson	Chief of Staff	LaHood, Darin (R-IL, 16th)
Victoria	Rivas	Policy Director	House Democratic Caucus

AMENDED 7/30/24 1:07 PM

Janet	Rossi	Deputy Chief of Staff	Crawford, Rick
Nick	Runkel	Deputy Chief of Staff	Womack, Steve
Zac	Rutherford	Chief of Staff	Harshbarger, Diana (TN, 1)
Geo	Saba	Chief of Staff	Khanna, Ro (D-CA, 17th)
Brooke	Scannell	Chief of Staff	House Minority Whip
Alex	Scheuer	AI Policy Lead	Jeffries, Hakeem (NY-08)
Alexandra	Seymour	Staff Director	House Committee on Homeland Security
Rajiv	Sicora	Legislative Director	Bowman, Jamaal
William	Smith	Chief of Staff	Palmer, Gary
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
Claire	Trokey	Legislative Director	Scalise - Office of the Majority Leader
Matt	Tucker	Deputy Chief of Staff	Joyce, John
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	Senior Policy Advisor	House Republican Study Committee
Veronica	Wong	Chief of Staff	Issa, Darrell E. (R-CA, 48th)
Connor	Wood	Legislative Assistant	Stevens, Haley
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)
Dan	Ziegler	Policy Director	Office of the Speaker of the House of Representatives
Nate	Zimpher	Legislative Director	Balderson, Troy (R-OH, 12th)

Trip Name: Software.org: the BSA Foundation Senate Staff Trip to San Francisco, CA

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:
202 549 7565

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. Previous Ethics-approved Senate trips took place in 2017 and 2018.

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.

Provide a brief description of the trip.

The theme of the trip with 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.

○ 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):

○ No sponsor retains or employs a registered lobbyist or agent of a foreign principle, 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

Required if selecting the third option in either column - Please explain why the second overnight stay is practically required and necessary to accomplish the purpose 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.

Invitees list

☑ A list of all Senate invitees is attached to this form (required).

☑ Members and staff from the House of Representatives will also receive invitations.

Travel Details (Submit additional pages as needed)

Trip Start Date/Time:	⇄	Trip End Date/Time:
August 7, 2024 8:25 AM		August 9, 2024 9:13 PM

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

◯ Yes ◉ No

Transportation (Member/Officer/Employee: $961.89 Accompanying Family Member: $_____)

Transportation Type	Class	Amount
Airfare	Coach	$673.05
Ground	Van	$288.84

Details (optional)

Lodging (Member/Officer/Employee: $520 Accompanying Family Member: $_____)

Check-In	Check-Out	Facility	City	State	Country
8/7/24	8/9/24	W Hotel	San Francisco	CA	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	$260		

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.

0000000005821 RECEIVED BY: SECRETARY OF THE SENATE Date: August 20, 2024

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 S.F.

Travel Date(s): August 7- August 9, 2024

Travel Destination(s): San Francisco, CA

Sponsor: Software.org: The BSA Foundation.

Victoria Espinel — *(printed name of sponsor representative)*

President — *(title)*

Victoria A Espinel — *(signature of sponsor representative)*

6/24/24 — *(date)*

Meals (Member/Officer/Employee: $180 Accompanying Family Member: $_____)

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem (Y/N)
8/7	$0	$22	$39		$61	San Francisco	CA	USA	N
8/8	$18	$22	$39		$79	San Francisco	CA	USA	N
8/9	$18	$22	$0		$40	San Francisco	CA	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: $0 Accompanying Family Member: $_____)

Expense Type	Amount	Notes

Additional Details (optional)