Print This Form... Clear Form

Employee Post-Travel Disclosure of Travel Expenses

RECEIVED
SECRETARY OF THE SENATE
PUBLIC RECORDS
2022 JUL 19 AM 10: 53

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.**

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

☐ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**
☐ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): The Heritage Foundation

Travel date(s): 6/23/2022

Name of accompanying family member (if any): N/A

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING **DID NOT INCREASE** DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☐ Good Faith Estimate ☒ Actual Amount	$128.62	$0	$80.95	$60 (the required battlefield tour guide)

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☐ Good Faith Estimate ☐ Actual Amount				

Provide a description of all meetings and events attended. *See* Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): We attended a tour of the Gettysburg National Military Park in Gettysburg, PA. We were provided lunch in a local civic center and dinner at our battlefield tour guide's home. (see attached detailed schedule.)

07/19/2022 (Date)

Ashley Satterfield (Printed name of traveler)

Ashley Satterfield (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.

07/19/2022 (Date)

Tammy Tuberville (Signature of Supervising Senator/Officer)

(Revised 1/3/11)

Form RE-2

Detailed Agenda:
The Heritage Foundation Marshall Fellowship Program Gettysburg Trip Itinerary

8:00 AM — Meet at The Heritage Foundation (214 Massachusetts Ave NE, Washington, D.C.)

8:30 AM — Depart Washington, D.C. for Gettysburg National Military Park, boxed breakfast served ($15/person). En route to the battlefield, we will discuss the battle with the Marshall Fellows, identifying key events and leaders, and getting their thoughts before we arrive.

10:30 AM — Arrive at battlefield, restroom break

10:45 AM — Begin discussion of first day of Battle of Gettysburg on location. We will begin at Seminary Ridge and discuss the events of the first day of the battle, such as the Union commander's decision to take and hold the high ground of Cemetery Hill and the Confederate commander's decision not to take Culp's Hill. We will also discuss where key leaders and units were at and why in relation to the first day of the battle. Conversation will be led by Luke Coffey, Tom Spoehr, and Steve Bucci.

12:30 PM — Break for lunch (catered sandwiches, $15/person)

1:30 PM — Break down into small groups, discuss scenarios and decision-making. We will have a series of questions about key decisions that were made during the battle. The small groups will deliberate what the commanders should have done and why, and then present these thoughts to the other groups. There will be a discussion on each vignette, including the real-world consequences of the decisions which were actually made. Conversations will be led by Luke Coffey, Tom Spoehr, and Steve Bucci.

2:30 PM — Resume battlefield tour and discussion on location. We will continue the tour of the battlefield, stopping at locations where key events happened and decision were made. We will stop where the Confederate troops assembled before assaulting the Union lines on the third day, and discuss the decision-making process and debate that went into the decision to assault the Union position. We will also stop by Devil's Den, the Orchard, and Little Roundtop, focusing on the conflict at the end of the Union's left flank, and finally the culminating engagement on Cemetery Ridge. We will then discuss the decisions each commander made in the wake of the battle. Conversations will be led by Luke Coffey, Tom Spoehr, and Steve Bucci.

5:30 PM — Final thoughts, review of day/lessons learned; dinner at local restaurant ($30/person). We will discuss the overall battle from a strategic perspective: what were the goals of the Confederate leadership and Union leadership, how the Battle of Gettysburg played into those goals, and the impact the battle had on each side's strategy.

6:30 PM — Return trip to Washington, D.C.

8:30 PM — Arrive at The Heritage Foundation, end of trip

Note: at each significant engagement of the battle, Marshall Fellows will discuss the involvement of their assigned military leader. This is what the on-location discussions and touring will consist of throughout the day. Three employees of The Heritage Foundation will lead the conversations at each of the discussions throughout the day: Luke Coffey, Director of The Heritage Foundation's Allison Center for Foreign Policy; Thomas Spoehr, Director of The Heritage Foundation's Center for National Defense; and Steve Bucci, Visiting Fellow at The Heritage Foundation.

Date/Time Stamp:

EMPLOYEE PRE-TRAVEL AUTHORIZATION

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. This form **must** be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Received 6/6/22 at 4:48 pm

Name of Traveler: Ashley Kay Satterfield

Employing Office/Committee: Senator Tommy Tuberville (R-AL)

Private Sponsor(s) (list all): The Heritage Foundation

Travel date(s): 06/24/2022 (Friday)

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

Destination(s): Gettysburg National Military Park, Gettysburg, PA

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

The purpose of the Marshall Fellowship is to discuss the history and future of grand strategy with mid-career national security professionals. This trip will provide an opportunity to walk the Gettysburg battlefield and learn more about the decision-making process of military leaders during the Civil War. As a Military Legislative Correspondent for Sen. Tuberville, trip / program will help expand my background knowledge and better assist the office.

Name of accompanying family member (if any): _____

Relationship to Employee: ☐ Spouse ☐ Child

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

06/18/2022
(Date)

Ashley Kay Satterfield
(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

I, *Senator Tommy Tuberville* hereby authorize *Ashley Kay Satterfield*
(Print Senator's/Officer's Name) *(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)* ☐

06/06/2022
(Date)

Tommy Tuberville
(Signature of Supervising Senator/Officer)

(Revised 10/19/15) Form RE-1

Subject: FW: Marshall Fellowship Program
Date: Monday, June 6, 2022 at 4:53:59 PM Eastern Daylight Time
From: Satterfield, Ashley (Tuberville)
To: Cobbs, Shaunda (Ethics)
CC: Hankey, Mary Blanche (Tuberville)
Attachments: Marshall Fellowship Program Schedule 2022 .pdf

Shaunda –

I am forwarding the initial email invitation we received to join the Heritage Foundation's Marshall Fellowship Program. Please let me know if you need anything else from me.

Best,

Ashley

Ashley K. Satterfield | Military Legislative Correspondent
Senator Tommy Tuberville (AL)
c. 202.924.6132 | d. 202.228.6247

From: Braun, Andrew
Sent: Friday, March 25, 2022 12:36 PM
Cc: Coffey, Luke <Luke.Coffey@heritage.org>
Subject: Marshall Fellowship Program

Good afternoon,

I am reaching out on behalf of The Heritage Foundation's Davis Institute and Government Relations teams to cordially and formally invite you to join the 2022 class of the Marshall Fellowship Program.

As a Marshall Fellow, you will be invited to a series of dinners and lectures in which we bring in some of the foremost experts on a subject related to national security or foreign affairs, with an overarching theme of U.S. grand strategy. At these dinners, you will be provided the opportunity (and expected) to network with your peers from across multiple public and private entities in the national security arena, learn more about the subject matter being presented, and engage in vigorous questioning, discussion, and debate with your peers and the guest speakers.

While we understand personal emergencies may occur, and that unforeseen professional obligations may spring up, we are extending this offer with the understanding that you will make a serious effort to attend all our events.

The first event is scheduled to be **two weeks from today on Friday, April 8th**, at The Heritage Foundation (214 Massachusetts Ave NE). The first event is always one of our longest, and this one will last from **12:00 PM – 8:00 PM**. Lunch and dinner will be provided, along with drinks for a "happy hour." There will be several speakers at the first event.

I have attached a schedule for the rest of the year (you can see it below as well).

Friday, April 8 — first event: icebreaker, program overview, U.S. grand strategy,

Monday, May 9 — dinner/lecture
Monday, June 6 — dinner/lecture
Friday, June 24 — Gettysburg battlefield tour day trip
Monday, July 11 — dinner/lecture
Monday, August 22 — dinner lecture
Monday, September 12 — dinner lecture
Thursday-Friday, October 13 & 14 — Virginia Military Institute overnight, Yalta Simluation
Monday, November 7 — program graduation, closing dinner

These trips will come at no cost to you, however, in some instances (particularly with Congressional staff) we may need to file some Ethics paperwork.

Please let me know if you have any questions, comments, or concerns. We hope you accept this offer and look forward to getting to know you over the coming year.

V/R
Andy

0000000002324 RECEIVED BY: SECRETARY OF THE SENATE Date: July 19, 2022

The Heritage Foundation

Marhsall Fellowship Program Class of 2022 Schedule

Friday, April 8 — first event: icebreaker, program overview, U.S. grand strategy, threat briefs

Monday, May 9 — dinner/lecture

Monday, June 6 — dinner/lecture

Friday, June 24 — Gettysburg battlefield tour day trip

Monday, July 11 — dinner/lecture

Monday, August 22 — dinner lecture

Monday, September 12 — dinner lecture

Thursday-Friday, October 13 & 14 — Virginia Military Institute overnight, Yalta Simluation

Monday, November 7 — program graduation, closing dinner

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

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1. Sponsor(s) of the trip (please list all sponsors): The Heritage Foundation

2. Description of the trip: This is a one day trip to the Gettysburg National Military Park as part of the Marshall Fellowship Program to discuss grand strategy & actions of leaders as we tour the battlefield.

3. Dates of travel: 6/24/2022

4. Place of travel: Gettysburg National Military Park

5. Name and title of Senate invitees: see attachment

6. I *certify* that the trip fits one of the following categories:

☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal **and** do not retain or employ registered lobbyists or agents of a foreign principal **and** no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

– OR –

☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) *(see question 9)*.

7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.

– AND –

☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions 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.

8. I *certify* that:

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

– AND –

☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**
I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in 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.

– OR –

☐ (B) The trip is for attendance or participation in 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 (*see questions 6 and 10*).

– OR –

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**
If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:
The Heritage Foundation holds the Marshall Fellowship Program each year in which mid-career professionals working in the field of national security meet monthly to discuss grand strategy. Part of this program is a trip to Gettysburg to walk the battlefield discussing the decision-making of military leaders.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:
The Heritage Foundation's mission is to formulate and promote public policies based on the principles of free enterprise, limited government, individual freedom, traditional American values, and a strong national defense. This trip cultivates national security professionals to support a strong defense.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:
The Heritage Foundation was established in 1973, and has sponsored many congressional trips for nearly 50 years. The Marshall Fellowship Program includes an annual Gettysburg trip (i.e. this trip) every year and has done so for over a decade.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

The Heritage Foundation routinely provides expert analysis on nearly every topic to government employees and congressional staff. We provide free educational seminars to congressional staffers, host public lectures and debates, and regularly provide policy briefs to Members, Senators, and their staff.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
☒ Good Faith estimate ☐ Actual Amounts	$90/individual		$60/individual	

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

Thetrip involves an event arranged or organized specifically with regard tocongressional participation

18. Reason for selecting the location of the event or trip

Gettysburg National Military Park is where the Battle of Gettysburg was fought. We will tour the battlefield and discuss the battle as part of the Marshall Fellowship Program.

19. Name and location of hotel or other lodging facility:

N/A

20. Reason(s) for selecting hotel or other lodging facility:

N/A

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

The approximate, estimated cost of meals is $1 more than the $59 per diem on the GSA website.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Charter bus.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

N/A

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Signature of Travel Sponsor: Andrew Braun

Name and Title: Andrew Braun, Government Relations Manager

Name of Organization: The Heritage Foundation

Address: 214 Massachusetts Ave, NE, Washington, D.C. 20002

Telephone Number: 202-608-1631

Fax Number:

E-mail Address: andrew.braun@heritage.org

Additional Private Sponsor Travel Certification Form

Question #5:

Name and title of Senate invitees:

- Celia Morte, Military Legislative Assistant
- Ashley Satterfield, Military Legislative Correspondent
- Anna Hardage, Defense and Foreign Policy Analyst
- Ryan Rasins, Military Legislative Assistant

Explanation of why the individual was invited:

Each of the individuals invited is a member of The Heritage Foundation's Marshall Fellowship Program. This is a fellowship for mid-career level professionals who work on national security issues. The program focuses on grand strategy, and each of the individuals was assigned a military leader at the Battle of Gettysburg to discuss with his or her peers as we tour the battlefield throughout the day.

0000000002330 RECEIVED BY: SECRETARY OF THE SENATE Date: July 19, 2022

ORIGINAL Agenda recieved

Detailed Agenda:
The Heritage Foundation Marshall Fellowship Program Gettysburg Trip Itinerary

8:00 AM — Meet at The Heritage Foundation (214 Massachusetts Ave NE, Washington, D.C.)

8:30 AM — Depart Washington, D.C. for Gettysburg National Military Park, boxed breakfast served ($15/person)

10:30 AM — Arrive at battlefield, restroom break

10:45 AM — Begin discussion of first day of Battle of Gettysburg on location

12:30 PM — Break for lunch (catered sandwiches, $15/person)

1:30 PM — Break down into small groups, discuss scenarios and decision-making

2:30 PM — Resume battlefield tour and discussion on location

5:30 PM — Final thoughts, review of day/lessons learned; dinner at local restaurant ($30/person)

6:30 PM — Return trip to Washington, D.C.

8:30 PM — Arrive at The Heritage Foundation, end of trip

Note: at each significant engagement of the battle, Marshall Fellows will discuss the involvement of their assigned military leader. This is what the on-location discussions and touring will consist of throughout the day.

0000000002331 RECEIVED BY: SECRETARY OF THE SENATE Date: July 19, 2022

FINAL

Detailed Agenda:
The Heritage Foundation Marshall Fellowship Program Gettysburg Trip Itinerary

8:00 AM — Meet at The Heritage Foundation (214 Massachusetts Ave NE, Washington, D.C.)

8:30 AM — Depart Washington, D.C. for Gettysburg National Military Park, boxed breakfast served ($15/person). En route to the battlefield, we will discuss the battle with the Marshall Fellows, identifying key events and leaders, and getting their thoughts before we arrive.

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5:30 PM — Final thoughts, review of day/lessons learned; dinner at local restaurant ($30/person). We will discuss the overall battle from a strategic perspective: what were the goals of the Confederate leadership and Union leadership, how the Battle of Gettysburg played into those goals, and the impact the battle had on each side's strategy.

6:30 PM — Return trip to Washington, D.C.

8:30 PM — Arrive at The Heritage Foundation, end of trip

Note: at each significant engagement of the battle, Marshall Fellows will discuss the involvement of their assigned military leader. This is what the on-location discussions and touring will consist of throughout the day. Three employees of The Heritage Foundation will lead the conversations at each of the discussions throughout the day: Luke Coffey, Director of The Heritage Foundation's Allison Center for Foreign Policy; Thomas Spoehr, Director of The Heritage Foundation's Center for National Defense; and Steve Bucci, Visiting Fellow at The Heritage Foundation.