

PART S: CONFERENCES**C4950 CONFERENCE PLANNING (FTR PART 301-74)**

A. Authority. OMB Bulletin No. 93-11, dated 19 April 1993, To The Heads of Executive Departments and Establishments, Subject: Fiscal Responsibility and Reducing Perquisites, Attachment 5.

B. Policy. (FTR §301-74.1) The public interest requires that the Uniformed Services exercise strict fiscal responsibility when selecting conference sites. Accordingly, the Services shall select conference sites that minimize conference costs. When Service representatives attend conferences sponsored by others, the Service must keep its representation to a minimum consistent with serving the public's interest.

C. Scope and Coverage. This guidance applies to all Executive Departments, agencies and the Uniformed Services that sponsor conferences or pay for travel to conferences. In addition to conference travel by employees, this guidance applies to conference travel paid for persons invited to travel in support of Service programs.

*D. Definitions

1. Conference: A meeting, retreat, seminar, symposium or event that involves attendee travel. Also applies to training activities that are conferences under 5 CFR 410.404. ***NOTE: This does not include regularly scheduled courses of instruction conducted at a Government or commercial training facility.***

2. Conference Costs: All costs paid by the Government for a conference, whether paid directly or reimbursed by DoD Agencies. Examples include:

- a. attendee's travel costs (i.e., travel to and from the conference, ground transportation, lodging, meals and incidental costs);
- b. attendee's time costs (i.e., the cost of attendee's time spent at the conference and traveling to and from the conference);
- c. meeting room and audiovisual costs;
- d. registration fees;
- e. speaker fees;
- f. conference-related administrative fees; and
- g. similar costs.

3. Conference Lodging Allowance: The lodging allowance that is up to 25 percent above (rounded up to the next higher dollar) the established geographical lodging portion of the per diem rate. The M&IE portion of the per diem allowance remains unchanged.

4. Site: Refers to both the geographical location and the specific facility selected.

E. Actions Required. (FTR §301-74.3) When planning a conference DoD Agencies must:

1. Determine which conference expenditures provide the greatest advantage to the Government; by
 - a. ensuring appropriate management oversight of the conference planning process;
 - b. performing cost comparisons of the size, scope, and location;
 - c. determining if a Government facility is available at a lesser rate;

- d. considering conference alternatives, e.g., teleconferencing;
 - e. maintaining written documentation of the alternatives considered and the selection rationale use; and
 - f. minimizing cost by exercising strict fiscal responsibility in determining the best site.
2. minimize the conference administrative costs;
 3. minimize the attendees' travel costs;
 4. minimize the attendees' time costs;
 5. use Government-owned or Government provided facilities as much as possible;
 6. identify ways to save costs in selecting a particular conference site (e.g., lower rates during the off-season); and
 7. develop and establish internal policies that ensure these standards are met.

NOTE: Individuals must have the requisite contracting authority to obligate the Government in connection with conference arrangements.

F. Cost Considerations. (FTR §301-74.2) When planning a conference, DoD Agencies should consider all direct and indirect conference costs paid by the Government. Conference costs to be considered include:

1. travel and per diem expenses;
2. rent of rooms for official business;
3. usage of audiovisual and other equipment;
4. computer and telephone access fees;

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5. light refreshments for morning, afternoon, or evening breaks excludes alcoholic beverages and includes: coffee, tea, milk, juice, soft drinks, donuts, bagels, fruit, pretzels, cookies, chips, muffins, and similar items;
NOTE: When a majority of the attendees (at least 51%) are in a travel status (see Appendix A), refreshments may be provided for all attendees (including local attendees).

6. printing;
7. registration fees;
8. ground transportation; and
9. attendees' travel and time cost.

G. Cost Comparisons. (FTR §301-74.4) When planning a conference, DoD Agencies must do cost comparisons to ensure the greatest benefit to the Government. Cost comparisons include:

1. determination of adequacy of lodging at the established per diem rate;
2. overall convenience;

3. fees;
4. meeting space availability;
5. equipment availability, e.g., audiovisual, fax;
6. commuting or travel distance of most attendees; and
7. other conference expenses.

H. Conference Site Selection (FTR §301-74.5)

1. Documentation. (FTR §301-74.19) DoD Agencies must maintain a record of the cost of each alternative conference site considered for each conference sponsored or funded, in whole or in part, for 30 or more attendees. A minimum of three sites must be considered for the conference and the documentation must be available for inspection by the Office of the Inspector General or other interested parties.

2. Locality Per Diem Rate. (FTR §301-74.6; 74.7) Initial selection of a location must be based on the established per diem rate; however, to provide DoD flexibility in the selection of the appropriate lodging facility at the most advantageous location, the lodging portion of the established per diem rate may be exceeded by up to 25 percent, if necessary. For example, if the established geographical lodging portion of the per diem rate is \$100, then facilities with lodging rates up to \$125 may be considered when selecting the conference location.

3. Conducted in the District of Columbia. (FTR §301-74.17) Prior to scheduling, contact should be made with the GSA Public Buildings Service (PBS) of the National Capital Region to inquire about the availability of short-term conference and meeting facilities in the District of Columbia. A Customer Desk Guide can be found at the following website:

http://www.gsa.gov/attachments/GSA_PUBLICATIONS/pub/CustomerGuidebookmarkedversion.pdf

NOTE: This website is case sensitive.

I. Requirements for Attendance, Sponsoring or Funding a Conference at a Place of Public Accommodation (FTR §301-74.14; 74.15)

1. Attendance at a conference must be authorized by an official designated through the Secretarial Process.
2. Sponsoring or funding a conference by a DoD component at a place of public accommodations must be authorized by an official designated through the Secretarial Process.
3. When sponsoring or funding a conference, in whole or in part, at a place of public accommodation in the U.S., FEMA-approved accommodations must be used, unless the official designated through the Secretarial Process for authorizing the sponsoring and/or funding of a conference makes a written determination on an individual case basis that waiver of the requirement to use FEMA-approved accommodations is necessary and in the public interest for a particular event.

J. Advertisement or Application Form for Conference Attendance. (FTR §301-74.16) Any advertisement or application for attendance at a conference sponsored or funded by a DoD Agency must include:

- *1. notice that attendees must use FEMA-approved places of public accommodation unless a waiver has been issued as indicated in par. C4950-F3, and
2. notice of the prohibition of use of non FEMA-approved places of public accommodation to all non-Federal entities, e.g., contractors, to which the DoD Agency provides Federal funds.

K. Selection of Attendees. DoD must establish policies that reduce the overall cost of attending a conference. The policies and procedures must:

1. limit the Agency's representation to the minimum number of attendees necessary to accomplish the Agency's mission; and
2. provide for the consideration of travel expenses when selecting attendees.

L. Conference Administrative Costs. Conference administrative costs may not be included in an attendee's per diem allowance payment for attendance at a conference. Per diem is intended only to reimburse the attendee's subsistence expenses. Administrative costs must be paid separately.

M. Conference Lodging Allowance. The Conference Lodging Allowance is a pre-determined allowance of up to 125 percent of the applicable locality lodging per diem rate (rounded to the next highest dollar) and:

1. is not an actual expense allowance,
2. may not be used if the lodging rate exceeds the established lodging allowance by more than 25 per cent, and
3. may not be used concurrently with the actual expense method of reimbursement.

N. Conference Lodging Allowance Approval Authority (FTR, §301-74.24)

1. Government Sponsored Conference. (FTR, §301-74.8) Only a designated senior official of the sponsoring agency may determine that a conference lodging allowance is necessary, and authorize the conference lodging allowance rate. All agencies must use that rate in reimbursing their attendees' lodging expenses.
2. Non-government Sponsored Conference. (FTR, §301-74.9) The authorizing/order-issuing official may authorize a member to be reimbursed for lodging expenses incurred up to the conference lodging allowance rate.

NOTE: If the Conference Lodging Allowance is inadequate, see JTR, Chapter, 4, Part M, for actual expense reimbursement authorization procedures.

O. Conference M&IE Rate

1. Light Refreshments. When light refreshments are furnished at nominal or no cost by the Government, no deduction of the attendee's M&IE allowance is permitted.
2. Meals Included in Registration Fee. When one or two meals are furnished at nominal or no cost by the Government, or are included in the registration fee, the proportional meal rate applies for each day meals are furnished.

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A. General. Employees may attend and participate in conferences/meetings of recognized professional organizations to maintain and further their professional competency at Government expense (including TDY expenses), subject to the availability of funds and the employees' work responsibilities.

B. Authority. Title 5 U.S.C. §4110 authorizes conference attendance expenditures for meetings concerned with the functions and activities of the DoD component which contribute to improved conduct, supervision, or management of the component's functions and activities. This authority applies to attendance at technical, scientific, professional, or similar private membership non-Federal societies and organizations (38 Comp. Gen. 800 (1959)).