



SECRETARY OF THE ARMY  
WASHINGTON

08 JUL 2015

MEMORANDUM FOR SEE DISTRIBUTION

SUBJECT: Army Directive 2015-01 (Army Conference Policy)

1. References:

a. Army Directive 2014-01 (Army Conference Policy), 18 Dec 2013 (hereby superseded).

b. Memorandum, Deputy Chief Management Officer, 6 Nov 2013, subject: Implementation of Updated Conference Oversight Requirements.

c. Memorandum, Director of Administration, 5 May 2015, subject: Department of the Army Request to Add Chief of Staff of the Army (CSA) as Tier One Conference Approval Authority.

2. The policy at enclosure 1 implements revisions to the Army's conference policy (reference 1a). The most significant changes are updated conference approval authorities, a new requirement mandating the use of the Army Conference Reporting and Tracking Tool beginning 1 October 2015, the elimination of exemptions and revised reporting requirements. A list of related definitions is at enclosure 2 and a complete list of references is at enclosure 3.

3. This policy provides the basis for designated Army leaders to make informed decisions about hosting and attending conferences. While conference participation often has significant value to the Army and a balanced approach to participation is appropriate, it also remains imperative that Army leaders closely scrutinize all proposed conference activity. The processes outlined in this policy, including requesting, approving and reporting conference participation, have been deliberately designed to ensure compliance with Office of Management and Budget and Department of Defense (DoD) policies and to optimize the use of scarce resources going forward. Every conference-related decision must be based not only on the return on investment of conference participation but also the optics of each discrete event. The Army must maintain an impeccable record and reputation for integrity and fiscal stewardship. Finally, commanders and leaders at all levels will continue to maximize the use of government and military facilities to the greatest extent possible.

4. The Army's commitment to oversight of conference activities and use of resources—both human and financial—to support conference activities is an enduring mission. Every conference participant shares the responsibility to prudently expend Army dollars,

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maximize the use of government and military facilities, and uphold the Army values while attending conferences.

5. The Administrative Assistant to the Secretary of the Army will continue to serve as the Army Conference Manager. This directive is effective immediately and supersedes all previous Army conference policies.



John M. McHugh

Encls

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**Enclosure 2: Definitions**

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# ARMY CONFERENCE POLICY

## 1. Introduction

a. Intent. As Army resources continue to decline, we must always seek the most cost-effective and efficient methods to plan and manage our missions, train our personnel and share information. A conference may sometimes be the appropriate means to accomplish these objectives. Therefore we must take a balanced approach to conference participation that enables us to remain good stewards of taxpayer dollars by keeping costs and attendance levels to the minimum necessary to accomplish the mission, while realizing the benefits of hosting or attending a conference. The participation of every conference attendee, including support staff, must be justified as mission-critical. When conference participation is determined to be critical to the Army mission, we must maximize the use of government and military facilities and exercise strict fiscal responsibility, good common sense regarding public perceptions, and ethical behavior in both hosting conferences and authorizing individual participation at DoD-hosted and non-DoD-hosted conferences. The Army's commitment to the oversight of conference activities—those we host and those we attend—must be a continuous effort and will remain an enduring mission.

b. Purpose. The approval of conference participation involves complex decisions governed by regulations and policies for many areas, including travel, fiscal, contracting, training, recordkeeping and ethics. This policy establishes the framework to implement Office of the Secretary of Defense (OSD) conference policy; to provide overarching guidance to help personnel requesting to attend conferences and planners hosting conferences; and to guide various other stakeholders—lawyers, resource managers, approval authorities and so on—through the decision making process.

c. Applicability. This policy applies to the Active Army, the U.S. Army Reserve and those organizations for which the Secretary of the Army is the designated DoD Executive Agent and for which the Army funds (regardless of the fund source) their activities, unless OSD has otherwise granted them approval authority. It does not apply to events fully funded with nonappropriated funds. This policy covers conferences the Department of the Army hosts and cosponsors, as well as conferences Army personnel attend. It does not apply to Army National Guard events. In accordance with OSD policy, the Chief, National Guard Bureau will promulgate conference policy for the Army National Guard. The Chief, National Guard Bureau is required to inform the Army of high-visibility conferences or conferences exhibiting unusual circumstances involving Guard personnel. The National Guard Bureau will direct appropriate conference correspondence to the Administrative Assistant to the Secretary of the Army (AASA).

d. Determination of a Conference. The determination of whether an event is a conference and subject to the conference policy is often a complicated, multistep process. First identify whether the Joint Travel Regulations (JTR) definition of a

conference applies to the event, then identify and analyze the event's specific indicia of a conference. The JTR definition of a conference and the indicia for each discrete event generally supply enough information for a fact-based determination. Consult your legal counsel for assistance in determining whether an event is a conference. *If you cannot make a clear-cut determination, categorize the event as a conference and process it under this policy.* Commands, organizations and activities will develop internal processes to ensure that conference determinations are made at an appropriate level consistent with this policy.

(1) *Definition of Conference.* The JTR defines "conference" as:

A meeting, retreat, seminar, symposium or event that involves attendee travel. Also applies to training activities that are conferences under 5 CFR 410.404.

(2) *Indicia of a Conference.* Conferences are often referred to as expositions, conventions, symposiums, seminars, workshops, exhibitions or meetings. They typically involve topical matters of interest to, and the participation of, multiple agencies and/or non-Federal participants. In addition to attendee travel, indicia of a conference include, but are not limited to, a registration process, registration fees, a published substantive agenda (typically on a Web site), scheduled speakers or discussion panels, multiple-day agendas, affiliated social events, the use of official representation funds in support of the event and the use of commercial facilities such as hotels. Generally, the presence or absence of any one indicator is not enough to determine whether the event is a conference; you must weigh the presence of multiple indicia.

(3) *Events Not Subject to the Conference Policy.* After weighing the presence of the indicia, if the event does not exhibit sufficient indicia of a conference, it is not subject to this policy. For example, sometimes temporary duty (TDY) is just TDY. Such events include daily or weekly staff calls within your office; individual participation in job fairs; investigations or audits; participation in fellowship programs; or enrollment in bachelor's, master's or doctoral degree programs. Events that are not characterized as a conference under this policy do not require further conference action. However, attendees will follow DoD, Army and their organization's TDY policies and abide by all pertinent travel policies and guidelines. *If you cannot make a clear-cut determination, categorize the event as a conference and process it under this policy.*

e. Types of Conferences. Conferences can be categorized as Army-hosted, Army Co-Sponsored, DoD-hosted or non-DoD-hosted. Each type of event may also qualify as an exemptible event or a conference with special circumstances. The approval process differs based on category.

(1) *Army-Hosted Conferences.* Army organizations often plan and/or fund conferences. Generally, most of the participants are Army personnel and the

conference topic is specific to the Army. These events may also be called Army-sponsored conferences.

(2) *Army Co-Sponsored Conferences.* On occasion, an Army command, organization or activity may co-sponsor an event with another organization. The Army is a co-sponsor of an event when an Army command, organization or activity develops the substantive aspects of the event; provides substantial logistical support, as defined by the Joint Ethics Regulation (JER); or provides 50 percent or more of the speakers at an event. Army co-sponsored conferences are a type of Army-hosted conference.

(3) *Army-Hosted Events Held in Conjunction With Non-DoD-Hosted Events.* At times, the Army and a non-DoD organization may concurrently or sequentially host separate events in the same location. These events must remain separate and distinct despite sharing a time or location.

(4) *DoD-Hosted Conferences.* On occasion, another non-Army DoD organization, such as the Air Force or Navy, will host a conference where participation may benefit the Army. For conferences hosted by a DoD organization external to the Army, the host DoD component is responsible for estimating and reporting total DoD attendance and costs.

(5) *Non-DoD-Hosted Conferences.* The Army may sometimes find it beneficial to participate in conferences hosted by a non-DoD organization, such as another Federal Government agency or a non-Federal entity. Non-Federal entities may be private associations or societies, training companies, multigovernmental organizations such as NATO, or privately owned businesses. Non-DoD conference participation encompasses all Army employees attending or participating at Army expense, including speakers, presenters, panel members or support staff, and may include the provision of exhibits and logistical support. A subset of non-DoD-hosted conferences are events considered to be "Major Non-DoD Conferences." A variety of special circumstances will make an event a Major Non-DoD Conference, such as the involvement of proffered funds, high visibility, traditionally high Army participation or high Army costs.

(6) *OSD Exemptible Events.* OSD identifies certain types of events that may be exempted from the conference policy, even if the event exhibits indicia of a conference. The Army has identified a subset of those events as not being conferences and therefore not subject to this policy. However, the Army does recognize the other types of events as conferences subject to this policy. Use the tables at paragraphs 1e(6)(a) and 1e(6)(b) to identify the events that are not considered conferences and those that are subject to this policy. *If you cannot make a clear-cut determination, categorize the event as a conference and process it under this policy.*

(a) *Events the Army Has Determined Are Not Conferences.* This table identifies events that generally are not conferences and are exempt from this policy. If an event clearly meets the criteria, no further conference action is required; however, all other



relevant policies, such as for travel, must be followed. Events involving spouse travel at Government expense will not meet any of the following definitions; such events will be categorized as conferences and processed in accordance with this policy.

<b>Event Criteria</b>
Meetings to consider internal agency business matters held in a government or military facility. Includes meetings that take place as part of an organization's regular course of business, such as annual commander's conferences or yearly training briefs when held in government or military facilities.
Meetings necessary to carry out statutory command and staff oversight functions. Includes activities such as investigations, inspections, audits or nonconference planning site visits. Does not include activities mandated in Army policies, such as training requirements.
<p>Formal classroom training when one or more of the following applies:</p> <ul style="list-style-type: none"> <li>• Formal classroom training held in a government or military facility, educational institution or commercial training facility. For purposes of this policy, a commercial training facility is one where the primary purpose of the facility is regularly scheduled classroom training. Does not include a hotel or convention center where the facility is configured for a one-time training event.</li> <li>• Formal classroom training conducted by an educational institution regardless of facility.</li> <li>• Formal classroom training identified as Career Program courses regardless of facility.</li> <li>• Formal classroom training funded by Army Civilian Training, Education, and Development System (ACTEDS) regardless of facility.</li> </ul> <p>These activities may be offered by government organizations, institutions of higher learning or professional licensure and certification, or other training entities. This definition does not include association or society-type annual meetings.</p>
Change of command, official military award, funeral or other such ceremonies.
Meetings of advisory committees subject to DoD Instruction 5105.04 (Department of Defense Federal Advisory Committee Management Program) where membership consists of one or more individuals who are not full-time or permanent Federal officers or employees.
Meetings necessary to carry out planning or execution of operational or operational exercise activities, or predeployment, deployment or post-deployment activities held in a government or military facility. Includes activities such as planning and preparation for, as well as execution of, war games, military exercises and operational deployments when held in government or military facilities.
<p>Bilateral and multilateral international cooperation engagements when one or more of the following applies:</p> <ul style="list-style-type: none"> <li>• Hosted by the U.S. Army in the United States and held in a government or military facility.</li> <li>• Hosted by the U.S. Army in a foreign country and held government or military facility, or in a commercial facility when such facility is considered to be safer, more cost-effective or necessary to maintain the standing and prestige of the U.S. Army.</li> <li>• Hosted by a foreign government regardless of facility.</li> </ul> <p>Includes activities such as international military education and training events, traditional commander's activities and other regional assistance programs.</p> <p>Bilateral and multilateral international cooperation engagements provide a unique opportunity for the U.S. Army and its allies to develop and maintain beneficial international relationships and collaborate on necessary military matters. Therefore, should foreign participants bring spouses to participate in an official capacity at the event, Army spouses may also participate in an official capacity without conference approval. However, all relevant travel policies apply.</p> <p>Does not include events hosted by the U.S. Army and conducted in the United States in a commercial facility.</p>
U.S. Army Recruiting Command, U.S. Army Cadet Command and Army Marketing and Research Group participation in military or civilian recruiting and/or recruitment advertising events.

(b) Events the Army Has Determined Are Conferences. Although OSD identifies the events in this next table to be exemptible, the Army considers these events to be conferences subject to the provisions of this policy. Conference approval is required before execution of the event or obligation of any funds. Follow the procedures and requirements for conferences in this policy.

<b>Event Criteria</b>
Meetings to consider internal agency business matters held in a commercial facility. Includes meetings that take place as part of an organization's regular course of business, such as commander's conferences or yearly training briefs held in a commercial facility.
Bilateral and multilateral international cooperation engagements hosted by the U.S. Army when conducted in the United States and held in a commercial facility.
Events where the primary purpose of DoD's participation is military or civilian recruiting and/or recruitment advertising when participation is by personnel from other than U.S. Army Recruiting Command, U.S. Army Cadet Command or the Army Marketing and Research Group.
Formal classroom training held in a commercial facility that does not meet one of the criteria identified in the table in paragraph 1e6(a). This includes activities such as regular courses of instruction or training seminars offered by government organizations, institutions of higher learning or professional licensure and certification, or other training entities.
Meetings necessary to carry out planning or execution of operational or operational exercise activities, or predeployment, deployment or post-deployment activities held in a commercial facility. Includes activities such as planning and preparation for, as well as execution of, war games, military exercises and operational deployments when held in government or military facilities.

### *(7) Conferences With Special Circumstances*

(a) Local Conferences. In accordance with OSD policy, events that are within the local duty location and do not require travel may still qualify as conferences if participation incurs any cost to the Army. Participation in local conferences for which an attendee claims reimbursable travel costs on an official travel voucher requires conference approval.

(b) No-Cost Conferences. At times, Army organizations may attend conferences at no cost to the Army. This can occur through waived registration fees, local attendance or "gifted" travel benefits under 31 United States Code section 1353 (31 U.S.C. § 1353). For conferences involving absolutely no reimbursable costs or other Army expenditures, conference approval is not necessary; follow your organization's TDY or attendance policy. Miscellaneous official travel expenses, such as per diem on travel days, parking and local travel, often are not covered by gifted travel benefits. If an Army attendee claims those expenses as reimbursable travel costs on an official travel voucher, the attendance is no longer "no cost," and the attendee's participation in the conference will require approval under this policy.

(c) Virtual Conferences. Based on the JTR definition of a conference, participation in virtual conferences involving absolutely no attendee travel, even if virtual

participation incurs a registration fee, is not a conference. No conference approval is required for such virtual participation; however, attendees must adhere to all relevant policies. Participation in virtual conferences that require attendee travel meet the JTR definition of conference and are subject to this policy.

f. Use of the Army Conference Reporting and Tracking Tool. The Army Conference Reporting and Tracking Tool (ACRTT) is an online system designed to increase efficiency and decrease errors in the conference request and reporting processes. Information in ACRTT helps generate required reports; therefore the Command Conference Manager is responsible for ensuring that all information is both timely and accurate regardless of the approval authority. Beginning 1 October 2015, Army personnel must submit conference requests using ACRTT. The ACRTT record must contain the completed and accurate request memorandum, substantive agenda, legal review and any other relevant documents. After a conference request has been approved, the signed approval memorandum must be uploaded in ACRTT and the record marked as approved. After completion of the conference, the ACRTT record must be updated with actual attendance and cost information.

## 2. Responsibilities

a. Secretary of the Army. The Secretary of the Army (SA) will:

(1) issue Armywide conference policy.

(2) serve as the approval authority for waivers for Army conference expenditures in excess of \$500,000.

(3) serve as the approval authority for all conferences that include Army-funded spouse travel regardless of the cost of the conference.

b. Army Conference Manager. The AASA is the Army Conference Manager. With assistance from the Army Conference Management Directorate (ACM), the AASA will:

(1) publish Army conference policy.

(2) serve as a Tier Two approval authority.

(3) serve as the approval authority for all requests for exceptions to this policy.

(4) assign Conference Leads on behalf of the SA and in coordination with the Director of the Army Staff (DAS), who also has authority to assign conference leads, when appropriate to do so.

(5) review all conferences requiring SA approval.

(6) respond to congressional inquiries about the Army's conference activities as appropriate.

(7) provide assistance for conference stakeholders through ACM.

(8) serve as the liaison between the DoD Deputy Chief Management Officer (DCMO) and the Army.

c. Army Conference Management Directorate. Part of the Office of the Administrative Assistant (OAA), ACM will:

(1) draft Army conference policy.

(2) manage and provide training for ACRTT.

(3) implement a new version of ACRTT and revised reporting procedures on 1 October 2015.

(4) review and prepare conference request packages for AASA and SA approval.

(5) report the Army's conference activities to DoD DCMO as appropriate.

(6) implement the assignment of Conference Leads.

(7) act as the subject matter expert for conferences on behalf of the Army during all internal and external audits of the Army's conference activities.

(8) draft responses to congressional inquiries on the Army's conference activities for the approval and signature of the AASA or SA.

(9) provide guidance and assistance to all conference stakeholders.

(10) draft and publicize required templates for conference requests and after action reports (AARs).

(11) serve as the liaison between the Office of the DoD DCMO and OAA.

d. Approval Authorities. Conference approval authorities are limited to those officials identified in paragraph 3, beginning on page 10. Conference approval authorities will:

(1) review all conference requests thoroughly for compliance with this policy; the DoD conference policy; and all applicable laws, regulations and policies.

(2) approve only those requests that are mission critical; cost-effective; and in the best interests of the Army, the U.S. Government and taxpayers.

(3) document approval in the form of a formal, written memorandum when approval of a request is appropriate.

(4) disapprove requests that are extravagant, create the appearance of the improper use of Government funds, or lack mission-critical justification.

(5) ensure that Command Conference Managers and other necessary conference stakeholders are trained and proficient in the use of ACRTT.

e. Command Conference Managers. Each Army command, organization and activity will have a Command Conference Manager and one alternate. The name, phone number and email address of these managers must be provided to ACM monthly and updated as changes occur. Command Conference Managers will:

(1) publicize command-level policies and procedures.

(2) prepare conference requests for the approval authority's review.

(3) enter and/or review all requests and reports in ACRTT within the timelines identified in this policy. Beginning 1 October 2015, all conference requests must be submitted via ACRTT; until then, you may continue to use your usual requesting and reporting processes.

(4) ensure that your requesters and other conference stakeholders, as necessary, are trained and proficient in the use of ACRTT.

(5) maintain approval, request and supporting documentation on file for a minimum of 5 years or longer to meet Army records management requirements. Electronic copies of records are acceptable.

(6) be the primary point of contact between ACM and the manager's respective command, organization or activity for all conference matters.

f. Requesters. All persons or organizations submitting a conference request are called "requesters." Requesters will:

(1) comply with the timelines set forth in this policy.

(2) ensure that all conference requests are complete, accurate and contain all the documents required by this policy.

(3) submit requests to the Command Conference Manager.

(4) enter all requests and reports in ACRTT within the timelines identified in this and command conference policies if the Command Conference Manager requires.

(5) provide information to the Command Conference Manager for the timely submission of required reports.

g. Conference Leads. For non-DoD-hosted conferences where the Army will have participation across multiple commands, the AASA, in coordination with the DAS, may assign a Conference Lead. Conference Leads will be tasked only by the AASA or DAS. Conference Leads typically will be assigned for participation in non-DoD-hosted conferences identified on the Major Non-DoD Conference tasking memorandum signed out at the beginning of each fiscal year or those conferences where Army costs will require Tier One approval. The assigned Conference Lead will:

(1) comply with all Conference Lead tasking instructions from the AASA, DAS or ACM as appropriate.

(2) collect Armywide attendance information and cost estimates.

(3) generate and submit, via ACRTT, a single Armywide conference request.

(4) provide a copy of the approved request and approval memorandum to all Army commands, organizations or activities through the Command Conference Manager identified in the request.

(5) ensure that Army participation remains at or below approved levels.

(6) generate and submit, via ACRTT, a single Armywide AAR.

(7) maintain approval, request and supporting documentation for 5 years or longer to meet Army records management requirements.

h. Conference Planners. Host organizations, specifically those personnel involved in the planning and execution of a conference, will:

(1) plan and execute the conference in the most cost-effective format possible.

(2) invite only the minimum number of personnel to accomplish the mission.

(3) make government or military facilities the first choice of venue to conduct the event.

(4) not obligate any nonrefundable funds before obtaining written conference approval from the appropriate approval authority.

i. Conference Participants. Conference participants are those personnel hosting, attending or facilitating any conference, whether Army-, DoD-, or non-DoD-hosted. This includes the support staff of conference hosts or attendees. Conference participants will:

(1) represent the Army in a manner consistent with the Army's core values.

(2) participate in the most cost-effective method possible, including use of available virtual participation options.

(3) participate only when the approval authority has determined that both the conference and the individual's participation is mission critical.

(4) provide attendance and cost estimates and any requested information to the Command Conference Manager.

(5) provide necessary information, identified above, to the Conference Lead (if assigned), through the Command Conference Manager; adhere to Conference Lead-directed timelines; and participate only to the level the Conference Lead identified.

**3. Conference Approvals.** The Army takes a tiered approach to conference approvals, with each tier based on cost to the Army. Conference approval authority is hereby delegated to those personnel listed in paragraph 3c. *Further delegation is not allowed unless provided for in writing by the SA.* Full implementation of the SA's delegation to Tier Four officials is at the discretion of the appropriate Tiers Two and Three officials. Although Tier Four officials are identified in paragraph 3c, they have no conference approval authority unless the respective Tier Two or Three official implements the SA's delegation in writing and provides a copy of the memorandum to ACM. *When a conference is identified as a Major Non-DoD Conference, all delegations to Tiers Three and Four officials are revoked; participation may only be approved in a consolidated request by the SA; Chief of Staff of the Army (CSA); AASA; or the commander of an Army Command (ACOM) when the ACOM is assigned as the Conference Lead.*

a. Prohibitions. Conferences costing more than \$500,000 are generally prohibited. (Conference costs are defined in Section V of the DoD Conference Guidance Version 2.0.) The SA may grant a waiver for conferences with costs exceeding \$500,000; however, waivers will be limited and strictly scrutinized.

b. Documentation

(1) Approval authorities will provide written approval or disapproval by memorandum. Other written approval, such as email, line throughs and signatures or initials on internal routing documents (such as an HQDA Form 5 (Army Staffing Form)), will not be considered written approval. Oral approval is not authorized.

(2) Each event must have a separate request memorandum, approval memorandum and entry in ACRTT. "Batching" conference requests or approvals is prohibited.

c. Approval Tiers

(1) *Tier One.* This tier consists of the SA and CSA. The SA is the approval authority for waivers for conferences with costs exceeding \$500,000 (generally prohibited) and all conferences involving Army-funded spouse travel regardless of the cost of the conference. For conferences hosted or attended by personnel from the Offices of the CSA, Vice Chief of Staff of the Army (VCSA), DAS and Sergeant Major of the Army (SMA); Army Service Component Commands (ASCCs); and Direct Reporting Units (DRUs) reporting directly to the CSA, the CSA is the approval authority for Army-hosted conferences and participation in non-DoD-hosted conferences with costs less than \$500,000. For all other organizations, the SA is the approval authority for participation in non-DoD-hosted conferences where Army expenditures exceed \$75,000.

(2) *Tier Two.* This tier consists of the Under Secretary of the Army (USA); VCSA; Commanding General (CG), U.S. Army Forces Command (FORSCOM); CG, U.S. Army Training and Doctrine Command (TRADOC); CG, U.S. Army Materiel Command (AMC); and AASA. These officials may approve Army-hosted conferences with costs less than \$500,000 and participation in non-DoD-hosted conferences with costs less than \$75,000. The VCSA is the approval authority for the Offices of the CSA, VCSA, DAS and SMA; ASCCs; and DRUs reporting directly to the CSA. All other activities not reporting directly to an ACOM will route their requests to the AASA.

(3) *Tier Three.* This tier consists of Deputy Commanding Generals (DCGs) and the civilian equivalent of ACOMs; commanders of ASCCs and DRUs; and Headquarters, Department of the Army (HQDA) Principal Officials *when the position is held by a general officer or member of the Senior Executive Service (SES)*. Tier Three officials may approve Army-hosted conferences with costs less than \$100,000 and participation in non-DoD-hosted conferences with costs less than \$20,000.

(4) *Tier Four.* This tier consists of general officers or members of the SES in the following positions:

- HQDA Principal Officials: Deputies to HQDA Principal Officials and Program Executive Officers reporting to the Assistant Secretary of the Army (Acquisition, Logistics and Technology).
- ACOMs: three-star commanders of FORSCOM and TRADOC major subordinate commands, two-star commanders of AMC major subordinate commands.
- ASCCs: DCGs or civilian equivalent.
- U.S. Army Medical Command: Chief of Staff and commanders of U.S. Army Medical Department Center and School, Medical Research Material



Command, U.S. Army Public Health Command and regional medical commands.

- U.S. Army Intelligence and Security Command, U.S. Army Installation Management Command and Military District of Washington: DCGs or civilian equivalent.
- Second Army: Director of Operations
- U.S. Army Corps of Engineers: DCGs, Director of Civil Works and Emergency Operations, Director of Military Programs and International Operations, Director of the Corps' Engineer Research and Development Center and division commanders.
- U.S. Military Academy: Dean and Commandant.

If the respective Tier Two or Three official implements the SA's delegation in writing, Tier Four officials may approve Army-hosted conferences with costs less than \$50,000 and participation in non-DoD-hosted conferences with costs less than \$10,000.

d. Approval Table. This next table lays out the approval authorities for both Army-hosted and non-DoD-hosted conferences.

Tier	Army-Hosted	Non-DoD-Hosted
One (SA)	Costs ≥ \$500,000* Conferences with Army-funded spouse travel regardless of cost	Costs ≥ \$75,000 Conferences with Army-funded spouse travel regardless of cost
Two (CSA)	Costs < \$500,000**	Costs < \$500,000**
Two	Costs < \$500,000	Costs < \$75,000
Three	Costs < \$100,000	Costs < \$20,000
Four	Costs < \$50,000	Costs < \$10,000

\* Generally prohibited but may get a written waiver.

\*\* Offices of the CSA, VCSA, DAS and SMA; ASCCs; and DRUs reporting directly to the CSA.

e. Office of the Chief, Army Reserve (OCAR); U.S. Army Reserve Command (USARC); and Military Surface Deployment and Distribution Command (SDDC) Approvals

(1) *OCAR Events*. The Chief, Army Reserve (CAR) as an HQDA Principal Official, the AASA or the SA can approve conferences sponsored or hosted by OCAR when the primary purpose is to address specific reserve component-level issues. Determination of the approval authority must be based on the host of the event, not the

proponent for the program or topic of the event. The CAR as an HQDA Principal Official, the AASA or the SA may approve attendance at non-DOD-hosted conferences by personnel assigned or attached to OCAR, as appropriate. As an HQDA Principal Official, the CAR will obtain legal reviews from the Office of the Judge Advocate General for all conference requests.

(2) *USARC Events.* Conferences sponsored or hosted by USARC or one of its subordinate units must be routed to the CG, USARC; DCG or CG, FORSCOM; or the SA as appropriate. Determination of the approval authority will be based on the host of the event, not the proponent for the program or topic of the event. For example, a family programs training event hosted by a USARC subordinate unit must be approved by the CG, USARC; DCG or CG, FORSCOM; or the SA as appropriate—not the CAR. Attendance at non-DoD-hosted conferences by personnel assigned or attached to USARC or a subordinate unit of USARC may be approved by the CG, USARC; DCG or CG, FORSCOM; or the SA as appropriate.

(3) *SDDC Events.* As an ASCC, the CG, SDDC may approve conferences as a Tier Three official and the DCG or civilian equivalent may approve conferences as a Tier Four official. However, as a major subordinate command to AMC, SDDC must forward conferences requiring Tier One or Two approval to the CG, AMC.

**4. Reporting Requirements.** To comply with Office of Management and Budget (OMB) and OSD guidance, and the Consolidated and Further Continuing Appropriations Act, 2015 (H.R. 83), the Army is required to report its conference activities. ACM will compile and submit all reports and notifications to comply with these requirements. Reported costs and attendee numbers for Army-hosted conferences must include totals for all DoD-sponsored attendees. Army-hosted conferences with costs exceeding \$100,000 are publically reportable on OSD’s Web site. All reports will be submitted by updating the conference record in ACRTT. Organizations may institute additional timelines to ensure that ACM receives reports in accordance with the timelines established in this policy.

a. Requirements. This next table identifies reporting requirements based on conference approval authority:

Approval Authority	Before the Conference	After the Conference
Tiers One and Two	Notify ACM of unusual or high-visibility conferences. Mark conference as “approved” in ACRTT.	Update “estimated actuals” and submit AAR via ACRTT.
Tiers Three and Four	Notify ACM of unusual or high-visibility conferences. Mark conference as “approved” in ACRTT.	Update “estimated actuals” and justify any variance of 10 percent or more via ACRTT.

## b. Types of Conference Reporting

### (1) *Before the Conference*

(a) Unusual or High-Visibility Conferences. OSD policy requires the Army to notify the DoD DCMO when a conference exhibits unusual circumstances or has particularly high visibility. OSD has defined “unusual circumstances” as conferences that are particularly high cost (whether the total cost of the conference or the cost for each attendee), have garnered critical media or congressional interest, involve potentially controversial topics or event sponsors, or include planned recreational activities on the agenda that may be questioned as inappropriate uses of taxpayer funds or official time. If you determine that any conference may fall within this category, notify ACM through your Command Conference Manager.

(b) Approved Conferences. Within 5 business days of approval, the Command Conference Manager must upload the approval memorandum into ACRTT and mark the conference record as approved. Once a record is marked “approved” in ACRTT, the initial reporting requirement has been met. The record must contain the signed approval memorandum; request package, including request memorandum, agenda and legal review; and precontract decisional documents.

(2) *After the Conference*. Once you complete the following three tasks, you have met the final reporting requirement for a conference.

(a) Estimated Actuals. Within 25 calendar days after the conference, update the ACRTT conference record with “estimated actuals,” which are the actual attendance figure and estimated actual cost information based on the final attendance.

(b) After Action Report. Conferences approved by a Tier One or Two official or identified on the Major Non-DoD Conference list must also submit an AAR within 25 days of the end of the conference. For conferences the AASA or SA approved, an ACOM, ASCC or DRU commander or HQDA Principal Official must sign the AARs. Templates for AARs are available on OAA’s Army Conferences home page.

(c) By Name List of Travelers for Army-Hosted Conferences. Army-hosted conferences with costs of \$100,000 or more must include a by name list of all travelers submitted within 25 calendar days of the end of the conference. This list must include only those personnel who attended the event—not the proposed attendee or invitee list. The actual attendee list will include everyone traveling at DoD expense, including non-Army DoD personnel and those on invitational travel orders.

**5. Conference Request Requirements.** *ACRTT must be used to submit all conference requests regardless of approval authority.* Failure to provide detailed information or explanations may result in a delayed decision, the request being returned without action or disapproval. In addition to ACRTT-required fields, note the following:

a. Staffing. Staff all requests through the chain of command to the approval authority. The request must be signed or endorsed one tier lower than the approval authority. ACM will accept requests only from Command Conference Managers to ensure proper routing, approval and reporting.

b. Timelines. All requests must adhere to the timelines in this policy. All conference requests must be submitted to the approval authority at least 30 days before the start of the event, or earlier to be in advance of any contracting requirements or registration deadlines. *Every effort must be made to take advantage of any discounted registration fees for early registration.* In general, the conference approval process should not exceed 30 days. The process begins with the submission of a complete and accurate request to the appropriate approval authority.

c. Required Documents and Information. Each conference request must include the following information.

(1) *Dates*. Conference dates must include travel days. The length of the conference is strictly determined by mission requirements. Ice breakers, receptions, socials, golf tournaments, military balls or other ancillary activities will not be held during duty hours or used to extend the duration of a conference. Award ceremonies held during a conference may be considered official business but may not extend the conference.

(2) *Purpose and Justification*. The justification for hosting or attending the conference must overcome the presumption that face-to-face collocation of personnel is not necessary. *The request must contain a statement that hosting or attending the event is mission critical and fully substantiate how the event is mission critical for all proposed attendees.* The justification must also specifically address how hosting or attending the conference will further the Army's mission.

(3) *Cost-Benefit Analysis*. Conference requests will include a detailed and credible cost-benefit analysis that includes an explanation of other options considered (such as video teleconference or train-the-trainer).

(4) *Estimated Total Costs*. OSD requires use of the Cost Assessment and Program Evaluation cost estimating calculator, which is available on the DoD Cost Guidance portal at <https://www.cape.osd.mil/CostGuidance/>. However, Army policy also requires use of the cost calculator in ACRTT, or the cost estimation table in the request template, because both provide more detailed and accurate costing information. Estimated costs for Army-hosted conferences *must* include expenses for all DoD-funded attendees, not just Army-funded attendees. Host organizations are responsible for gathering cost estimate data on non-Army attendees from other DoD components.

(a) Approval levels are based on total conference costs, which are the net of any revenue received. While conference fees and other revenues may be used to defray the Army's costs for hosting a conference, revenue should never be sought as a way to reduce approval levels.

(b) Estimated costs will exclude Federal employee time for planning, executing and attending the conference; security costs during the conference; and use of Government-owned transportation.

(c) Revenue includes all direct or indirect conference fees paid to the Army, as allowable by 10 U.S.C. § 2262 and applicable regulations. Revenue includes, but is not limited to, registration fees from non-DoD sources, exhibitor fees, sponsor fees and grant monies (unless otherwise prohibited). Any revenue in excess of the Army's costs must be deposited in the U.S. Treasury as miscellaneous receipts. See paragraph 6g (page 20) for further restrictions on the collection of conference fees.

(5) *Attendees*. Using the chart in ACRTT, supply a breakdown of attendees. The attendance numbers must include all participants: support staff, aides, guest speakers, presenters and non-Army personnel. Provide attendee justification including the rationale and criteria applied to scope the attendee population, and the mission-critical justification for all requested attendees. A general mission-critical justification for some number of attendees is not sufficient. Senior officials should seek to limit the attendance of aides, executive officers and similar personal staff to one support staff person for each principal. *Each attendee must have a mission-critical justification*. You may use a separate document, such as an Excel spreadsheet, to supply mission-critical justifications for each attendee.

(6) *Agenda*. The agenda must be substantive and span the proposed conference from start to finish; list planned speakers, programs and other activities; and identify any after-hour events or activities. Agendas that merely annotate "breakout sessions" are insufficient. If breakout sessions are planned, the agenda must explain the purpose and objective(s) for each session.

(7) *Legal Review*. All conference requests require a legal review. The legal review must address all fiscal, ethics, contracting and travel issues, including a comprehensive assessment of whether the conference complies with applicable regulations and Army policy. *Any legal objections must be mitigated before submission of the conference request*. Although no required format is prescribed, a recommended template for the legal review is available on OAA's Army Conferences home page. Use of this template will help ensure that the legal review is sufficiently comprehensive to cover all areas of concern.

d. Additional Requirements for Army-Hosted Conferences. For auditing purposes, all conference-related documents must be submitted in ACRTT. Use of ACRTT meets OSD's requirements for the retention of conference records. Each submitted conference request must include the following items.

(1) *Site Selection.* Each Army-hosted request must contain a narrative describing the site selection process. Detailed information on the site selection process is in paragraph 6a (page 17).

(2) *Security Assessment.* A security assessment is required for all conferences held in a commercial facility. The security assessment will include:

(a) a force protection assessment, including threat and vulnerability assessments for the conference facility site and any specific security requirements for the conference facility. For conferences held inside the National Capital Region, OAA's Directorate of Mission Assurance can help with the assessment. For conferences outside the region, the local installation directorate of emergency services may provide technical expertise. Conferences held on government or military installations may have different requirements than those in commercial facilities, so check applicable security regulations.

(b) a statement indicating whether foreign government representatives will attend the conference. If so, the assessment will include a statement that the conference sponsor coordinated the screening of foreign national attendees with the Office of the Deputy Chief of Staff, G-2 and will comply with all procedures set forth in AR 380-10 (Foreign Disclosure and Contacts With Foreign Representatives). Coordination with the Office of the Deputy Chief of Staff, G-2 generally requires 120 days leadtime before the conference date.

(c) a statement indicating whether the conference will involve classified information and, if so, the name and location of the secure U.S. military installation or other U.S. Government facility, or cleared U.S. contractor facility where the conference will be held. Follow the procedures in AR 380-5 (Department of the Army Information Security Program) and coordinate directly with the Office of the Deputy Chief of Staff, G-2 for additional guidance.

(3) *Predecision Contract Documents.* The requester must include any contract-related documents that would assist the approval authority, such as the letter of intent from the hotel or a request for proposal.

**6. Hosting Policies.** Requests for Army-hosted conferences are the responsibility of the Army organization hosting the conference. Unless required by your command, no request is necessary for individual attendance at an Army-hosted conference. However, attendees are required to adhere to attendance and travel policies set forth in this and all relevant Army and DoD policies.

a. Selection of Conference Site. The overarching goal of the site selection process is to conduct the conference in the least expensive location and venue that can meet requirements. *Government and military facilities will be the first choice of conference*

*venue*. The price of the available government, military or commercial venues within a geographic area is one factor in determining the cheapest geographic locale.

(1) *Geographic Selection*. The JTR requires planners to evaluate and consider a minimum of three geographic sites (cities) for conferences with more than 30 attendees in a TDY status before selecting a site (city) for the conference. Factors to be considered when determining a geographic location for a conference include, but are not limited to:

- per diem expenses;
- travel costs, including local travel and ground transportation;
- distance from most attendees (if one area has a significant concentration of attendees, that location generally will be the most cost-effective option); and
- consideration of lower off-season rates or peak seasons.

(2) *Facility Selection*. Once a particular city is chosen as the site, a minimum of three venues in that city will be considered with the preference toward government or military facilities. If no government or military facilities exist and a public venue (for example, a hotel) is chosen, the hotel must be on the national list of approved accommodations maintained by the Federal Emergency Management Agency (the Hotel-Motel National Master List is at <http://www.usfa.fema.gov/applications/hotel>). In addition, factors to be considered when selecting the venue for a conference include but are not limited to:

- availability of on-post lodging;
- participation in the Lodging Success Program (for more information, visit [http://www.armymwr.com/travel/lodging/lodging\\_success.aspx](http://www.armymwr.com/travel/lodging/lodging_success.aspx));
- willingness to exempt taxes for lodging;
- distance to the nearest major airport and the availability of free shuttle service;
- cost of the venue (if commercial space is to be rented);
- availability of rooms at or below the established per diem rate; and
- public perception. Although no venue may be prohibited from selection solely because of its location, reputation or amenities, increased scrutiny must be applied when choosing resort-like locations to ensure true justification of the cost. The requester and approval authority must avoid the appearance that public funds are being expended in a careless, wasteful or unnecessarily extravagant manner.

(3) *Government and Military Facilities.* The SA requires conference sponsors to consider government facilities (Federal, State or local) and military installations first. The sponsor must carefully consider public perception as well as cost in selecting the conference venue. Generally, a government or military facility should be the primary venue of choice, even if slightly more costly than a commercial facility. If a government or military facility is not available or suitable to meet the conference requirements, the request must include an explanation.

(a) *Efforts must be made to adjust the conference scheduling to fit the availability of government or military facilities.* Government and military locations may not be ruled out as a conference venue solely because the facility is not available on the exact dates the sponsor wants to hold the conference.

(b) *Conference hosts must make an effort to limit the number of attendees at the conference to the capacity of government or military facilities.* Organizations must take into account the capacity of government or military facilities closest to the majority of attendees when planning the size of the conference, or explain in the conference request why limiting attendance to government or military facilities' capacity is not feasible if the goals of the conference are to be met.

(c) Commercial facilities will be used only when demonstrated to cost less than government or military facilities, a fact-based determination indicates insufficiency of government or military facilities, or an overriding operational requirement necessitates use of a commercial facility. If government or military facilities are not used for these reasons, the conference request must include detailed justifications. Although some commercial facilities may prove to cost less than government and military facilities, perception issues may reasonably lead decision makers to opt to use a government or military facility.

(4) *Documentation.* Each command, organization or activity will document and maintain a record of the site selection process, including the costs of each alternative site and venue considered. The approval authority may request this documentation.

(5) *Local Policies.* All applicable local policies on site selection must be followed. For conferences in the National Capital Region, conference requesters must coordinate commercial venue selection through OAA's Real Estate and Facilities - Army Directorate. In accordance with U.S. General Services Administration policy, requesters also must obtain approval from the Director, Space Policy and Acquisition Division, Defense Facilities Directorate, Washington Headquarters Services to contract for short-term conference space.

b. Conference Attendees. Host organizations will limit the attendees invited to a particular event to the minimum mission-essential number. Aides and executive officers provide unique and important support to their principals while in a travel status. However, consistent with the mission-critical standard, senior officials should limit the attendance of aides, executive officers and similar personal staff as much as possible.



Support staff does not include personal safety officers. *Further, every effort must be made to contain attendance to the capacity of government or military facilities. Each attendee must have a mission-critical justification.* Conference hosts will not issue invitations before conference approval.

c. Official Representation Funds. Requests to use official representation funds must be explained in the conference request. The request for official representation funds must be approved separately from the conference request and in accordance with Army Regulation 37-47 (Representation Funds of the Secretary of the Army). Any requested official representation funds must be included in the total cost of the conference.

d. Awards and Gifts. Conferences involving awards or gifts must follow all relevant award and gift policies.

e. Entertainment-Related Expenses. OSD policy expressly prohibits entertainment-related expenses as part of DoD-hosted conferences. Approval authorities must ensure that funds, including those paid through travel disbursements or conference fees, are not used to pay these expenses. Prohibited expenses include:

- motivational speakers;
- musicians or entertainers (with the exception of military bands, as permitted by regulation);
- extraneous promotional items, decorations or other goods and services for participants that are unrelated to the purpose of the conference;
- tickets to recreational activities outside the conference setting; and
- audiovisual materials that do not offer substantive content.

f. Conference Planners. As appropriate and cost-effective, the Army may contract with a non-Federal entity (NFE) for help in planning and executing a conference. However, enhanced scrutiny is necessary to ensure that no prohibited expenses are involved, and the conference circumstances do not create the appearance of Government impropriety.

g. Conference Fees. Title 10 U.S.C. § 2262 allows the Army to collect fees in advance of a conference, either directly or through a contractor, from individuals and commercial participants attending Army-hosted conferences. Such fees may only be used to offset the host organization's reasonable and allowable costs. *Fees will not be collected as a way to reduce the approval authority for the conference.* Fiscal limitations on the expenditure of appropriated funds for conference expenses also apply

to the use of collected fees. In addition, collected fees may not be used for prohibited expenses, such as paying for food for attendees not on TDY or for entertainment.

(1) Army host organizations who use contractors, including those under no-cost contracts, to collect fees are permitted to structure the contracts to allow the contractors to offset from the collected fees the actual costs the contractor incurred (including its fee) to provide conference-related services. Contractor costs must be allowable costs authorized by the JTR and other applicable laws and regulations.

(2) Fees that exceed the cost of hosting the conference must be deposited in the U.S. Treasury as miscellaneous receipts. Excess fees may not be kept or used for any other purpose.

(3) DoD 7000.14-R (Department of Defense Financial Management Regulation (DoD FMR)), Volume 12, chapter 32 (Collection and Retention of Conference Fees From Non-Federal Sources) requires all organizations to report the collection of conference fees. Conference sponsors should contact their resource managers for further instructions.

h. Honorariums and Speakers. In most cases, honorariums and fees for speakers are limited to \$2,000 a speaker. Refer to DoD 7000.14-R, Volume 10, chapter 12, paragraph 1208 (Payments of Fees for Guest Speakers, Lecturers, and Panelists) for specific guidance on speaker fees.

i. Contracting Guidelines. The following provisions and guidelines apply:

(1) It is impermissible to commit the Government to use any facility, sign any agreement or otherwise obligate the Government for conference facilities or support before the approval authority approves the conference. Personnel may visit facilities, discuss space needs, collect pricing information, develop cost estimates, make tentative space reservations (only if at no cost and without any liability to the Government), and request other conference-related information. *However, no contract or task order related to conference requirements will be awarded, and no funds will be obligated for a conference, until the conference has been approved. Any actions and all documents related to the contract will be included with the conference request to assist decision making.*

(2) A warranted contracting officer or, when authorized, a Government purchase cardholder must sign all conference-related contracts. Requirements will not be split to reduce costs to within the limits of the cardholder's authority. Personnel cannot make any commitment until a warranted contracting officer or, when authorized, a Government purchase cardholder signs a written agreement. *Support contractors are not authorized to enter into contracts on behalf of the Government for conference arrangements.*

(3) An agreement signed by anyone other than a warranted contracting officer or, when authorized, a Government purchase cardholder is an unauthorized commitment. A Government employee who lacks the authority to bind the Government could be held personally liable if he or she signs an agreement for conference facilities or other conference support. Additionally, Government employees are prohibited from directing or recommending that a support contractor take any action that purports to bind the Government in any way.

j. Army Co-Sponsored Events. The Army is a co-sponsor of an event when an Army command, organization or activity develops the substantive aspects of the event, provides substantial logistical support as defined by the JER, or *provides 50 percent or more of the speakers and panel members at a single conference*. Generally, avoid situations where the circumstances are or suggest that we are “paying to hear ourselves speak.” Co-sponsored conferences must abide by the request, hosting and travel policies for all Army-hosted conferences. The approval authority for a co-sponsored conference is the same as for an Army-hosted conference.

(1) *Co-Sponsorships With Other U.S., Foreign or Multi-Government Organizations*. These conferences may be co-sponsored with other DoD, Federal, State, or local municipalities or multigovernment organizations (such as NATO). Although many provisions of the JER do not apply to these types of co-sponsored events, hosts should enter into written agreements to detail what support each party will provide to the conference (resources, services in kind, and so on).

(2) *Co-Sponsorships With an NFE (Other Than Above)*. NFEs can include associations, societies, nonprofit organizations, charities, and so on. Because the Army does not control all aspects of the planning, use caution to ensure compliance with Army conference policy.

(a) OSD policy requires “enhanced scrutiny” of all conferences co-sponsored with an NFE. Requesters and approval authorities must ensure that they do not create the appearance of Government impropriety or of endorsing or providing preferential treatment to the NFE.

(b) In addition, the JER requires written agreements for conferences co-sponsored with an NFE. The JER requires the sponsor’s ethics advisor to review these agreements and forward them to the Designated Deputy Agency Ethics Official for action. *Approval of the co-sponsorship agreement is separate and distinct from approval of the conference.*

(c) Army personnel may not officially endorse the NFE co-sponsor(s) or its activities.

(d) Army personnel may not show preferential treatment to similar NFEs that have a demonstrable interest in the subject matter of the conference. Generally, this means no preferential treatment for one NFE over another.

(e) It must not appear that the NFE co-sponsor's role in or support of the conference will improperly influence Army personnel in other official matters the NFE may have an interest in.

(f) The conference cannot be a profit-making endeavor for the NFE co-sponsor(s), including any vendor exhibition.

(g) When an Army command, organization or activity co-sponsors a conference and the co-sponsor incurs costs, the co-sponsor is permitted to collect registration fees from non-Federal attendees to cover its costs. Co-sponsors who collect fees from Army attendees or commingle fees collected from non-Federal and Army attendees will comply with the provisions in 10 U.S.C. § 2262. If a varied conference fee structure is used (certain categories of attendees pay different amounts), no individual category of attendees will bear an unreasonable burden of the costs.

k. Army-Hosted Events Held in Conjunction With Non-DoD-Hosted Events. Army and NFE events will be separate and distinct; they will not be commingled. All official Army activities, including award ceremonies and outbriefings, will be held as part of the Army event and will not be scheduled so that Army personnel must attend events hosted by an NFE. Army conference activities will not be scheduled immediately before and after an NFE event (known as "bookending") to create a captive audience for the NFE event. Moreover, the Army conference will not be scheduled or the venue chosen to accommodate, benefit or promote attendance at the NFE event.

(1) Holding an Army conference at the same location as an NFE event does not relieve the Army conference sponsor of the requirement to comply with applicable law, regulation and policy, including the provisions of this directive. The requester must still demonstrate that a thorough site selection was made and justify the final choice of city and venue.

(2) Non-DoD organizations may not provide services, facilities or support to an Army conference unless the support has been acquired through normal acquisition procedures or the event is cosponsored.

(3) Army personnel will not officially sanction a non-DoD-hosted event. Senior leaders must use caution when distributing information about non-DoD-hosted conferences so that they do not appear to endorse the conference.

## **7. Attendance Policies**

a. General Travel Guidance. All DoD personnel traveling in conjunction with conference attendance must abide by the JTR and Army and DoD travel policies. Obtaining approval for the conference does not negate the requester's need to obtain approval of the travel.

(1) *Defense Travel System*. DoD has mandated the use of DTS for all Government travelers unless a waiver has been granted. Further, the *Army requires that travelers using DTS or other approved automated travel system must list their travel as "conference" in the purpose field* and select the appropriate conference name in the dropdown box. If the conference name is not available, select "Other" and fill in the full, unabbreviated conference name.

(2) *Travel Certification Statements*. As the JTR requires, individuals must attest that the proposed TDY travel is essential by including the following statement on their DD Form 1610 (Request and Authorization for TDY Travel of DoD Personnel) or in the DTS request for authorizations/orders:

The travel objective cannot be satisfactorily accomplished less expensively by alternate methods (correspondence, secure video teleconferencing or other Web-based communication).

This statement must be supported by data in the cost-benefit analysis.

(3) *Tax-Exempt Status*. Conference participants will request the tax exemption of lodging as appropriate. Information about tax exemption in individual States may be found at <https://smartpay.gsa.gov/about-gsa-smartpay/tax-information/state-response-letter>.

(4) *Rental Vehicles*. Conference planners must be aware of decisions that would require or encourage rental vehicles. When necessary, shuttle buses, taxis or other public transportation will be used to reduce the need for individual rental vehicles. Any individual request for rental cars must be preauthorized on travel orders. When rental cars are used, expenses must be minimized, such as by maximizing the number of passengers in a vehicle. Further, the legal review of the conference request must specifically address the use of rental vehicles.

(5) *Government-Provided Meals, Per Diem and Refreshments*. Generally, meals and refreshments are a personal expense. However, please note the following.

(a) *Government-Provided Meals*. Meals provided via Government contract or Government-funded conference fees are considered Government-provided meals. The JTR states that light refreshments served during meal hours constitute a Government-provided meal. Travel approval authorities should verify whether meals are included in registration fees to ensure that travelers properly annotate their vouchers and are not incorrectly reimbursed for meals that were Government-funded. The cost of meals the

Government provides must not exceed the per diem (meals component) for that location.

(b) *Per Diem*. When the Government provides meals, attendees must be instructed to appropriately annotate the provided meals on their travel vouchers. If the Government funds one or two meals, the attendee must receive the proportional meal rate (PMR). If PMR is used, the cost of meals the Government provides plus PMR must not exceed the per diem rate (meal component) for that location. If the Government funds all meals, the traveler will be reimbursed only the incidental expenses component on those days. This applies even if an attendee chooses not to consume the provided meal(s) or refreshment(s) unless documented medical or religious reasons prevent the attendee from taking the meal(s) or refreshment(s).

(c) *Refreshments*. Refreshments at conferences are a personal expense and may not be funded at Army expense, unless the refreshments are nonsegregable (that is, they cannot be eliminated from the conference venue contract or registration fee) and nonnegotiable (that is, the venue will not offer a lower rate if refreshments are not provided).

(6) *Actual Expense Allowance (AEA)*. All attendees are expected to obtain lodging at or below the established General Services Administration per diem rate for that locale, in accordance with OMB guidance. If a conference is held at a commercial facility that does not honor the Government per diem rate, attendees are expected to locate nearby hotels that do honor the rate. Requests for AEA must be justified in the request and must be specifically addressed in the legal review. Only the conference approval authority may authorize AEA for conference attendance. If the conference approval authority specifically authorizes AEA, individual agencies sending Army attendees may approve AEA on the attendees' travel orders.

(7) *Local TDY*. Army commands, organizations or activities hosting a conference must take care that the agenda does not require attendees to travel during unreasonable hours, thereby necessitating lodging for local attendees. Further, meal times and activities must be planned so that local attendees have the opportunity to purchase meals or bring their own and are not required to participate in Government-provided meals. The conference request and supporting written legal review must specifically address all requests for lodging and/or meals for local attendees for approval by the conference approval authority.

(8) *Permissive TDY or Annual Leave*. Personnel must use discretion while attending conferences in an unofficial capacity. While military personnel are on permissive TDY or civilians are on annual leave, they generally may not make official speeches or appear to represent the Army while making public presentations. Consult your legal or ethics advisor for guidance on conference attendance while in a permissive TDY or leave status.

#### (9) *Travel by Non-DoD Personnel*

(a) Contractors. Travel costs for Government contractors and contractor employees are governed by the rules in Federal Acquisition Regulation § 31.205-46. A contractor is not eligible for an invitational travel authorization during the execution of a contract. Contractor attendees cannot receive per diem or be reimbursed for travel and/or travel-related expenses, except as specified in the contract. Contractor attendance will be billed pursuant to the appropriate contract.

(b) Spouses. Every instance of accompanied spouse travel represents an exception to policy. Therefore, as a general rule, spouses may not be placed on invitational travel authorizations to accompany Army personnel on official business at Government expense. Further, spouses on accompanying travel are authorized per diem only for conferences the AASA has designated as Service-endorsed training. Refer to the prevailing Army travel policy for more information on spouse travel. If a conference includes spouses, a separate and substantive spousal agenda must be provided with the conference request. *The SA must approve all conferences, regardless of cost, that include Army-funded spouse travel.*

(c) Statutory Volunteers. Statutory volunteers are a limited category of volunteers authorized by Federal statute (10 U.S.C. § 1588) and are approved through the secretarial process to provide services in certain DoD activities, such as morale, welfare and recreation functions; Family programs; museums; chaplain programs; and child care. At times, statutory volunteers may be issued invitational travel authorizations to participate in a conference, for example an official conference specifically concerning Army Family Programs or Qualifying Life issues, based upon their expertise in a particular subject matter, other than being an Army spouse or dependent, of interest to conference attendees. *However, they will not be issued invitational travel authorizations simply to attend a conference at Army expense.* Further, Army Regulation 608-1 (Army Community Service) stipulates that Army personnel, whether Soldier or civilian, may not have approval authority for individual travel orders when the volunteer is a Family member. Contact your legal advisor for more information on statutory volunteers. If personnel participate in a statutory volunteer status, all required statutory volunteer documentation must be loaded into ACRTT with the estimated actuals.

#### (10) *Travel and Fees Funded by Others*

(a) 1353 Travel. On occasion, an NFE may offer to provide travel benefits to Army personnel participating in a non-DoD-hosted conference. Usually, such offers are for “in kind” travel benefits, such as the waiver of the registration fee, meals and lodging at the conference. If certain conditions are met, the travel approval authority may authorize the attendee to accept such travel benefits on behalf of the Army under the authority of 31 U.S.C. § 1353. All “1353 travel” benefits represent a gift to the Army. Solicitation of travel benefits is strictly prohibited. Unless the offer of travel benefits includes all reimbursable official travel expenses (such as registration fees, airfare,

lodging, meals, per diem on travel days, airport parking and incidentals), personnel must follow the requirements of this directive. Travel benefits may only be accepted when attending the event in an official TDY travel status (that is, on TDY travel orders); acceptance of 1353 travel benefits is not authorized for attendance at a local conference. Approval authorities must receive written concurrence from their ethics counselor before approving acceptance of travel benefits, and any such approval must be issued in writing before the travel starts. Finally, if the total value of the accepted travel benefits exceeds \$250, within 30 days of completing the travel, the traveler must coordinate and file with their ethics counselor a report of all travel payments received from the NFE under 31 U.S.C. § 1353 using Standard Form 326.

(b) **Non-DoD Federal Agencies.** Other Federal agencies external to DoD may offer to provide travel benefits to Army personnel in exchange for their participation in their official capacity. The offer can be accepted, if appropriate, under the terms of the Economy Act. Contact your assigned legal advisor as soon as an offer is received.

(c) **Acceptance of Proffered Funds.** While most offers of travel benefits are for “in kind” travel benefits, an NFE may “proffer” funds in advance of a conference, under 31 U.S.C. § 1353, to be used to pay for an attendee’s TDY travel-related costs, such as travel, per diem and registration fees at their conference. Approval authorities must exercise caution when authorizing acceptance and use of proffered funds to avoid the appearance that Army personnel may be improperly influenced by the NFE. Because of this concern, general officers and members of the SES must never travel to conferences using cash gifts proffered to the Army. They may, however, continue to accept “in-kind” 1353 travel benefits when otherwise legally acceptable. The SA, or a Tier Two official if they are the approval authority for a conference, must approve and accept gifts of proffered funds, and then each travel approval authority must approve the use of the proffered funds for individual travelers. Proffered funds will be sent to the Defense Finance and Accounting Service and then confirmed by the U.S. Treasury. Finance officials will ensure that all cash gift proffers are properly processed and loaded into the appropriate financial system(s) for management and execution. Further, a specific line of accounting will be created for travelers. An overall legal review of the acceptance of proffered funds, and local legal reviews for each traveler using proffered funds, must be completed and sent to the Army Budget Office to include in the apportionment request to OMB before final acceptance of any proffered funds under 31 U.S.C. § 1353. An NFE’s proffer of funds for anything other than attendee travel benefits may not be accepted under § 1353. Commands should consult with their respective legal office if the NFE makes such a proffer (for example, transport of an exhibit) to determine if the proffer may be accepted under another authority.

b. **Attending Army-Hosted Conferences.** Generally, a request is not required for individual attendance at an Army-hosted conference. The host Army organization is responsible for estimating, approving and reporting the attendance of all Army attendees. Attendance at Army-hosted conferences will be limited to mission-critical



levels. All participants, whether military or civilian, represent the Army and must conduct themselves accordingly.

c. Attending DoD-Hosted Conferences. Generally, Army attendees do not need to submit a conference request to attend a DoD-hosted conference. The host DoD organization is responsible for estimating, approving and reporting the attendance of all DoD attendees. However, *attendance will be limited to those mission-critical attendees included in the host's approved request and costs will be kept to a minimum.* Army attendees must follow DoD, Army and their organization's TDY policies for approval and abide by all pertinent travel policies and guidelines. *The SA and AASA may limit attendance, or require a conference request, for Army participation in DoD-hosted conferences when they determine it is necessary.*

d. Attending Non-DoD-Hosted Conferences. Although travel for the individuals participating in conferences is approved locally, attendance at a conference must be approved in accordance with this policy. *Attendance will be limited to only those demonstrably mission-critical attendees and costs will be kept to a minimum.*

(1) *Registration Fees.* Often, non-DoD-hosted conferences charge registration fees for participation that include lavish meals, socials and other entertainment events. The requesting organization is responsible for contacting the conference host to request a "no frills" registration fee excluding any unnecessary expenses to the Army. Further, if registration fees include meals, *local attendees must contact the organization to request a reduced fee that does not include meals.* If no such fee is available, local attendees may pay the full fee and consume the meals. Approval authorities must use their best judgment when approving participation in non-DoD-hosted conferences when registration fees may be used to offset expenses that would be prohibited for a DoD-hosted conference. In such cases, approval authorities must balance the value of the conference against the elevated risk of an appearance of impropriety and weigh whether Army participation is truly appropriate and necessary. Approval authorities should instruct attendees not to attend inappropriate events conducted during the conference.

(2) *Continuing Education Units.* The Army is authorized, *but not required,* to pay for training resulting in continuing education units and associated expenses, such as examinations or processing fees. The training must directly benefit the Army, and the conference request must sufficiently explain the benefit. *The sole purpose of Army attendance at a conference may not be to receive continuing education credits or other similar requirements to maintain licensing or credentialing that are a minimum requirement to hold an Army position.* The Assistant Secretary of the Army (Manpower and Reserve Affairs) is the proponent for the Army Credentialing Program. Consult the Office of the Assistant Secretary of the Army and/or the Office of the Deputy Chief of Staff, G-3/5/7 for training guidance.

(3) *Army Speakers or Panel Members.* Army personnel serving as speakers or panel members at conferences or other events sponsored by an NFE must comply with

the JER, chapter 3, section 2 (Official Participation in Non-Federal Entities) in addition to this policy. Speakers and panelists must take care to safeguard and prevent the dissemination of Army procurement, technology, classified and nonpublic information and must make sure they do not appear to endorse the NFE. Approval authorities should consult with their legal advisor before authorizing participation as a speaker or panel member at an NFE conference.

e. Attending Non-DoD-Hosted Conferences When a Conference Lead is Assigned.

When a conference is identified on the list of Major Non-DoD Conferences, a Conference Lead will be assigned. The Conference Lead will compile Armywide cost and attendance information into a single request for approval. All requesting organizations must submit their attendance information—including estimated cost and attendance numbers, mission-critical justifications and the commander's endorsement—to the Conference Lead. *Conference Lead organizations are authorized to set additional deadlines to meet the timelines set forth in this policy.* All organizations will adhere to the attendance rules the Conference Lead establishes.

f. Attending International Events. During this period of constrained resources, special scrutiny is required for international conferences. Approval authorities will apply the same strict mission-critical standard as for all conferences and will ensure that the intended benefit from the event cannot be met through other means.

## DEFINITIONS

### **1353 Travel**

Travel benefits or expenses paid by an entity external to the Army. Often called “gifted” travel.

### **ACRTT Record**

A systematic and electronic collection of documents and data in relation to a single conference.

### **Actual Expense Allowance (AEA)**

Authorization for reimbursement for actual lodging expenses that exceed per diem.

### **Advisory Committees**

Any committee, subcommittee, board, commission, council, conference, panel, task force, or other similar group which is established by statute or reorganization plan, established or used by the President of the United States, or established or used by one or more agencies to obtain advice or recommendations for the President or one or more Federal agencies or employees. As defined, “Advisory Committee” does not include any committee that is composed solely of full-time or permanent part-time Federal employees or any committee created by the National Academy of Sciences or the National Academy of Public Administration.

### **After Action Report (AAR)**

A report consisting of both qualitative and quantitative data on an event. Required 25 days after every conference a Tier One or Two official approves.

### **Army**

The Active Army, U.S. Army Reserve and those organizations for which the Secretary of the Army is the designated DoD Executive Agent and for which the Army funds their activities. NOTE: The Army National Guard will follow National Guard Bureau conference policy and will report conference activity through the Chief, National Guard Bureau.

### **Army Civilian Training, Education, and Development System**

The Armywide training and career management system that develops technical, professional and leadership knowledge, skills and abilities in civilian personnel as they progress from entry-level to supervisory, managerial and executive positions.

### **Army Commands (ACOMs)**

U.S. Army Forces Command (FORSCOM)

U.S. Army Training and Doctrine Command (TRADOC)

U.S. Army Materiel Command (AMC)

### **Army Conference Management Directorate (ACM)**

The Army organization responsible for drafting Armywide conference policy; developing processes to analyze, track, and report conference activities; ensuring compliance with OSD, OMB and congressional requirements; and preparing packages for AASA and SA review.

### **Army Conference Reporting and Tracking Tool (ACRTT)**

A Web-based tool that allows users to track, edit and report conference details and information. The required system for submitting conference requests and reports.

### **Army-Hosted Conference**

An event with sufficient indicia of a conference hosted or sponsored by an Army organization. The Army is considered the host when it plans and/or funds the event. Generally, most participants will be Army personnel and the conference topic or purpose is specific to the Army.

### **Army Service Component Commands (ASCCs)**

U.S. Army Pacific

U.S. Army Central

U.S. Army North

U.S. Army South

U.S. Army Africa/Southern European Task Force

U.S. Army Special Operations Command

Military Surface Deployment and Distribution Command

U.S. Army Space and Missile Defense Command/Army Strategic Command

### **Attendee**

Individual participating in the mission of the event, including support staff of conference participants. Does not include the staff of a contracted venue.

### **Batch Request/Batch Approval**

Requesting and/or approving multiple iterations of a single event under one memorandum.

### **Career Program**

Specified occupational series and functional fields grouped together on the basis of population, occupational structure, grade range and commonality of job and qualification characteristics. The Deputy Chief of Staff, G-3/5/7 is the proponent for career programs. Refer to Army Regulation 690-950 (Career Management) for or contact the Office of the Deputy Chief of Staff, G-3/5/7 for guidance on career programs.

### **Command Conference Manager**

A single command, organization or activity point of contact for conference questions, policies, requests and reports. This individual is responsible for publicizing command-level procedures, preparing conference requests and submitting required reports.

**Commercial Facility**

A facility owned or leased by an organization other than the government or military. These facilities are often, but not always, owned by profit-making organizations and can include hotels, conference centers, privately owned building, etc.

**Commercial Training Facility**

A facility that primarily offers regularly scheduled classroom training. This term does not include a hotel or convention center that is configured for a one-time training event. Examples include The Learning Tree International and Management Concepts, Incorporated.

**Conference**

The JTR defines “conference” as a meeting, retreat, seminar, symposium or an event that involves attendee travel. The term “conference” also applies to training activities that are considered to be conferences under Title 5, Code of Federal Regulations, section 410.404. However, any event exhibiting sufficient indicia of a conference should be categorized as a conference.

**Conference Lead**

The Army command, organization or activity designated by the AASA or DAS as responsible for promulgating a single request and AAR for all Army attendance at a non-DoD-hosted event. A Conference Lead will not be assigned by anyone other than the AASA or DAS.

**Conference Sponsor/Conference Host**

The organization hosting the conference either by planning or funding the event. NOTE: An event may have more than one sponsoring organization. If the Army sponsors an event in collaboration with another organization external to the Army, the event is considered a co-sponsored event.

**Co-Sponsored Conference**

An event in which an Army command, organization or activity sponsors an event in collaboration with another organization external to the Army by developing the substantive aspects of the event or providing substantial logistical support as defined by the JER. NOTE: If the Army provides 50 percent or more of the speakers or presenters on the agenda, the event is co-sponsored.

**Cost-Benefit Analysis**

Systematic process to compare the costs and benefits of a decision. Often used to determine if something is a sound decision, the analysis provides a basis for comparing options or alternatives.

**Deputy Chief Management Office (DCMO)**

The DoD DCMO is responsible for DoD’s conference oversight on behalf of the Secretary and Deputy Secretary of Defense, including issuing and maintaining guidance

and executing reporting requirements. The DCMO is authorized to act on behalf of the Secretary and Deputy Secretary on all conference-related matters.

**Direct Reporting Units (DRUs)**

U.S. Army Medical Command  
U.S. Army Intelligence and Security Command  
U.S. Army Criminal Investigation Command  
U.S. Army Corps of Engineers  
U.S. Army Military District of Washington  
U.S. Army Test and Evaluation Command  
U.S. Army Installation Management Command  
United States Military Academy  
U.S. Army Acquisition Support Center  
Arlington National Cemetery  
U.S. Army Accessions Support Brigade  
U.S. Army War College  
Second Army

**Discussion Panel**

Formal dialogue before an audience for which the topic and speakers are selected in advance.

**DoD Executive Agent**

The head of a DoD component to whom the Secretary of Defense or the Deputy Secretary of Defense has assigned specific responsibilities, functions and authorities to provide support for operational missions, or administrative or other designated activities that involve two or more of the DoD components.

**DoD-Hosted Conference**

A conference hosted or sponsored by a DoD organization external to the Army.

**Educational Institution**

An organization founded and united for the purpose of education. Examples include public or private schools, colleges or universities.

**Estimated Actuals**

An approximate total cost to be submitted within 25 days of the end of the conference. This approximate total cost is based on the number of participants who attended the event, not those who were invited or planned to attend. The estimate may use general averages for travel costs multiplied by the actual number of attendees. This requirement should never be construed as reporting the estimated or approved cost.

**Estimated Total Costs**

The total costs for all Army-funded attendees. Includes travel, lodging, meals and incidentals, registration fees, exhibit fees, Government-provided meals, audiovisual, and

any other costs. NOTE: Do not include salary costs for employee time at, or en route to, the event.

### **Estimated Travel Costs**

The total costs for the physical movement of attendees. Includes air, rail, ship and/or automotive conveyance to and from an event. Does not include costs for Government-owned transportation.

### **Exhibit**

An object or a collection of objects that have been set up in a public space for people to look at.

### **Exhibit Fee**

The sum of money the host of an event requires for the Army to purchase space, electricity or other such requirements to display an exhibit, also called a booth or display, at an event. NOTE: Include all costs for the exhibit, including transportation to the event.

### **Formal Classroom Training**

Training or education imparted in a room where classes are taught, such as at a school, college or university. The appearance or location of the setting may change to be conducive for learning the subject being taught. For example, administrative training will likely be taught in a room with desks and/or tables for students to take notes, whereas flight school may have components behind a desk as well as in a hangar or on a tarmac.

### **Government or Military Facility**

A venue that is owned or leased by the U.S. Federal, State or local government or military, or foreign government or military.

### **Government-Provided Meals**

The JTR considers these “deductible meals.” A deductible meal is a meal that is (i) made available pursuant to an agreement between the Army and any organization, (ii) included in a Government paid registration fee, (iii) furnished at no cost to the traveler by a school while attending a course of instruction if the Government ultimately pays the school for the meal cost, (iv) furnished by the Government at no cost to a traveler, (v) provided by a lodging establishment for which a charge is added in the lodging cost, or (vi) provided by a lodging establishment when meal(s) are included in the lodging cost under an agreement between the Government and the lodging establishment. “Light refreshments” (including a continental breakfast) constitute a deductible meal if otherwise qualified above and served at a meal time.

### **High-Visibility Conferences**

Conferences that have garnered critical media or congressional interest, include widespread participation, or garnered interest in OSD or Congress.

**Host**

Also called sponsor. The organization that fully or partially funds the event, is responsible for developing the substantive aspects of the event or provides substantial logistical support.

**In Conjunction With a Non-Federal Entity**

An Army-hosted event that is scheduled concurrently or sequentially, but separate from, another non-DoD-hosted event in the same location.

**Indicia**

Plural form of indicium; an indicator or characteristic.

**Internal Agency Business Matters**

Events geared toward Army-specific topics with attendance mostly restricted to Army personnel (not spouses, contractors or external personnel). Topics will be directly related to the organization's mission and often will be recurring. These events often have mostly local attendance and are conducted at the place of duty. Examples include quarterly in-progress reviews, working groups, annual or semiannual senior leader meetings, strategy and planning sessions, and budgeting meetings.

**Local Attendee**

Attendee residing, or whose permanent duty station is, within 25 miles of the conference venue. NOTE: Local attendees may not receive per diem.

**Local Conference**

A conference occurring within the attendee's or attendees' local commuting area.

**Local TDY**

An official status in which personnel within their local commuting area may receive per diem.

**Logistical Support**

Assistance in planning, implementing and coordinating details of an event. Includes providing DoD facilities and/or equipment (and the services of DoD personnel to ensure proper use equipment).

**Meals and Incidentals (M&IE)**

The component of per diem reimbursed to attendees in a TDY status for subsistence. M&IE is a fixed amount reimbursed to attendees regardless of actual expenses.

**Mission Critical**

The Army will not prescribe a "one size fits all" definition of mission critical. Instead, each approval authority must determine if and how the lack of participation in an event may affect the mission, which can be the Army's mission, the organization's mission or the ability of individual personnel to support the mission. Events that are "nice to have"



or could train personnel for a job they are not performing would not be mission critical. Usually, a brief description of how participation in the event will further the organization's mission or goals will be acceptable.

### **No-Cost Conference**

Participation in the event incurs no cost to the Army. NOTE: A conference is no cost only if it has absolutely no reimbursable costs, including incidental or travel expenses.

### **Nonappropriated Funds**

Cash and other assets received by nonappropriated fund instrumentality from sources other than moneys appropriated by the Congress of the United States. Nonappropriated funds are Government funds used for the collective benefit of those who generate them: military personnel, their Family members and authorized civilians. These funds are separate and apart from funds that are recorded in the books of the Treasurer of the United States.

### **Non-Federal Entity (NFE)**

An organization external to the U.S. Federal Government. Includes foreign, State and local governments; multigovernmental organizations, such as NATO; federally funded research and development centers; and private organizations.

### **Non-DoD-Hosted Conference**

Conference hosted or sponsored by an organization external to DoD. These organizations could be other Federal agencies, such as the U.S. Environmental Protection Agency, or NFEs such as NATO.

### **OSD Exemptible Events**

Events that OSD has identified as being exempt or excluded from the conference policy. The Army segregates these events into two types: those it considers not to be conferences and those it considers to be conferences.

### **Official Military Award**

Recognition given to an individual or unit for certain acts or services. This would include the Medal of Honor, Distinguished Service Cross, Silver or Bronze Star, Meritorious Service Medal, and Army Superior Unit Award, among others.

### **Official Representation Funds**

An appropriation the Army uses to maintain the standing and prestige of the United States by extending official courtesies to various dignitaries, officials and prominent citizens.

### **Operational Activities/Operational Exercises**

Events often focused on military, not civilian, personnel. These events usually will be held in government or military facilities and focus on troop deployment, movement or

training. The majority of attendees should be military personnel. Examples include war games or exercises or maneuver conferences.

**Panel Member**

An individual who is part of a small group of people chosen to do something, such as discuss an issue in public.

**Participation/Participant**

The act of taking part or being involved in an event. A person who is involved in an activity or event. This includes attendees, speakers, presenters and support staff.

**Per diem**

A specific amount of money, based on locale, the Government gives an individual on TDY orders to cover expenses when traveling in an official capacity. Per diem consists of lodging, meals and incidentals. Lodging reimbursement is listed as the maximum amount reimbursed to an attendee but will be reimbursed at the actual cost if obtained below the per diem rate.

**Permissive TDY**

A TDY status that does not grant per diem.

**Precontract Decision Documents**

Documents that are used to make contract-related decisions. Examples include quotes, estimates and letters of intent.

**Pre-Deployment/Deployment/Post Deployment Activities**

Events or activities that facilitate the planning, resourcing, training and executing actions necessary to deploy and redeploy forces. Includes Family programs activities in support of troop deployment.

**Presenter**

Person who conveys information on a particular topic, item or piece of work. Often selected in advance and may appear on the agenda. Examples include individuals invited to present and discuss their papers or research.

**Proffered Funds**

An offer of money, typically from an NFE. This differs from “1353” travel benefits in that proffered funds are given to the Army instead of the payment of goods or services.

**Proportional Meal Rate (PMR)**

PMR is an amount based on the locality meal rate and is used when a traveler receives one or two meals at Government expense (for example, one or two deductible meal(s) on 1 or more days included in a conference registration fee). PMR was implemented as part of the travel simplification process to create a single meal rate to replace the cumbersome meal-by-meal deduction and per diem adjustment. PMR is an average

amount of two meal rates: the lower daily meal rate provided for three meals in a Government dining facility or mess and the higher full locality meal rate.

### **Published Agenda**

The formal sequence of events shared through the official conference Web site or by invitation.

### **Registration Fee**

Also called conference fee. The sum of money the host of an event requires for attendees to be granted permission to participate in the event. This does not include exhibit fees. NOTE: For Army-hosted events, the fee is considered revenue when collected from non-DoD attendees.

### **Registration Fees Collected From a DoD Source**

The sum of money the Army collects for DoD-funded attendees to be granted permission to participate in the event. This does not include exhibit fees.

### **Registration Process**

Providing your name, at minimum, to the conference host as a condition of attending the event. Other information commonly provided includes phone number, organization, duty title, email address and mailing address. A fee is often required to register but not always. This differs from an RSVP list in that an individual is not granted access to the event without registering.

### **Reimbursable Costs**

Monies the Army pays to personnel for travel-related expenses, such as per diem, transportation costs, conference registration fees or other expenses that are included on an official travel voucher.

### **Requester**

The command, organization or activity seeking to sponsor or send personnel assigned or attached to the command, organization or activity to a conference or exempted event.

### **Service-Endorsed Training**

Event that the AASA has designated as Service-endorsed training. These are the only conferences for which spouses are eligible to receive per diem for attendance.

### **Speaker**

A person who speaks formally before an audience as part of the published program. Also called lecturer or orator.

### **Major Non-DoD-Hosted Conferences**

A subset of non-DoD-hosted conferences identified on the list of Major Non-DoD-Hosted Conferences the DAS publishes at the beginning of each fiscal year. Conferences may be considered "Major Non-DoD-Hosted Conferences" when total

Army costs necessitate Tier One approval; involve proffered funds; garner critical congressional, OSD or media attention; or exhibit any unusual circumstances.

### **Spouse Travel**

An event where one or more spouses of Army personnel is/are attending with the Army funding all or part of the costs incurred as a result of the spouse's (spouses') participation.

### **Statutory Command and Staff Oversight Functions**

These are events or functions controlled, determined or mandated by Federal statute, law or OSD regulation. Events or functions mandated within Army policies do not constitute statutory functions. These events or functions would include audits, inspections, counterintelligence measures and nonconference planning site visits.

### **Statutory Volunteer**

A person in a limited category of volunteers authorized by Federal statute (10 U.S.C. § 1588), approved through the secretarial process, to provide services in certain DoD activities, such as morale, welfare and recreation functions; Family programs; museums; chaplain programs; and child care. The following paperwork is required for an individual to be accepted into a statutory volunteer status: DD Form 2793; DA Form 4162, DA Form 4713, DA Form 5671 (if the volunteer is unmarried and under age 18), and a position description. Such paperwork must be maintained in the Volunteer Management Information System for 3 years. It must be uploaded into ACRTT at the end of the conference with the estimated actuals and maintained for 5 years.

### **Temporary Duty (TDY)**

Official duty at a location other than the permanent duty station.

### **TDY Attendees**

Attendees in a TDY status who are eligible to draw per diem.

### **Unusual Circumstances**

Conferences that are particularly high cost (whether the total cost of the conference or the cost for each attendee), have garnered critical media or congressional interest, involve potentially controversial topics or event sponsors, or include planned recreational activities on the agenda that may be questioned as inappropriate uses of taxpayer funds or official time.

### **Venue**

The actual building, campus or physical setting of the event, not the city and State.

### **Virtual Conference**

An event that is conducted or may be viewed on a computer where no attendee travel is required to participate in the event.

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19. AR 690-950 (Career Management) 31 December 2001,  
[http://www.apd.army.mil/pdffiles/r690\\_950.pdf](http://www.apd.army.mil/pdffiles/r690_950.pdf)
20. Memorandum, Secretary of Defense, Dec 27 2010, subject: Consideration of Costs in DoD Decision-Making  
<https://dap.dau.mil/policy/Lists/Policy%20Documents/Attachments/3257/OSD14152-10.pdf>
21. Memorandum, Deputy Chief Management Officer, 6 Nov 2013, subject: Implementation of Updated Conference Oversight Requirements  
<http://dcmo.defense.gov/products-and-services/conference-policies-controls/DoD%20Conference%20Guidance%20-%2006%20November%202013.pdf>

22. Memorandum, Secretary of the Army, 04 Apr 2013, subject: Mission-Critical Constraints on Official Travel  
[http://armypubs.army.mil/epubs/SecArmy\\_Collection\\_1.html](http://armypubs.army.mil/epubs/SecArmy_Collection_1.html)

23. Memorandum, SAFM, May 17 2011, subject: Guidance for Consideration of Costs in Army Decision-Making  
[http://armypubs.army.mil/epubs/ASA\\_FMC\\_Collection\\_1.html](http://armypubs.army.mil/epubs/ASA_FMC_Collection_1.html)

24. DoD Cost Guidance Portal (requires common access card)  
<https://www.cape.osd.mil/CostGuidance/>

25. Army Conferences home page (requires common access card)  
<https://securecac.hqda.pentagon.mil/oaacustomer/conferences.aspx>

This site contains all conference-related templates as well as useful reference information:

- Army-hosted conference request template,
- non-DoD conference request templates,
- Army conference policy exemption determination tool,
- conference AARs ,and
- legal review template (optional).

26. Army Lodging Success Program  
[http://www.armymwr.com/travel/lodging/lodging\\_success.aspx](http://www.armymwr.com/travel/lodging/lodging_success.aspx)

27. Hotel-Motel National Master List  
<https://apps.usfa.fema.gov/hotel/>