



REPLY TO  
ATTENTION OF

DEPARTMENT OF THE ARMY  
HEADQUARTERS, UNITED STATES ARMY TRAINING AND DOCTRINE COMMAND  
950 JEFFERSON AVENUE  
FORT EUSTIS, VIRGINIA 23604-5700

ATTG-ZA

1 5 AUG 2016

MEMORANDUM FOR SEE DISTRIBUTION

SUBJECT: TRADOC Policy Letter 16, TRADOC Conference and Competition Event Policy

1. References:

a. TRADOC Policy Letter 16, TRADOC Conference and Competition Event Policy, 21 Apr 2014.

b. Memorandum, Deputy Secretary of Defense, Sep 23, 2015, subject: Updated DoD Conference Guidance.

c. Memorandum, Director of the Army Staff, 20 April 2016, subject: Command and Subordinate Command Review of Conferences.

d. Army Directive 2016-14 (Army Conference Policy), 4 May 2016.

2. This policy hereby supersedes reference 1a and implements revisions to the TRADOC Conference and Competition Event Policy resulting from changes in Army and Department of Defense (DOD) policies. All TRADOC commands, organizations, and activities will comply with reference 1d, the Army Conference Policy (Encl 1), and the added requirements established within this TRADOC Conference and Competition Event Policy.

3. Processes outlined in reference 1d were designed to ensure compliance with DOD and Office of Management and Budget policies to optimize the use of scarce resources. The TRADOC Conference and Competition Event Policy supplements reference 1d to ensure oversight and provide a basis for TRADOC leaders to make informed decisions about hosting and attending conferences and competition events in order to minimize costs.

4. In order to address Chief of Staff, Army concerns about the costs associated with Army-hosted conferences and attendance at non-DOD events (Encl 2), all TRADOC commands, organizations, and activities will reduce Army-hosted conference costs by at least 10 percent, and strive for a 20-percent reduction. All TRADOC commands, organizations, and activities will also reduce non-DOD conference attendance costs by 20 percent. It is TRADOC's responsibility to continue to use resources in a prudent manner when requesting to host and/or attend non-DOD events.

5. Consistent with reference 1d, approval authority for Army-hosted events is delegated to the following major general and above-level commands. Authority may not be further delegated.

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SUBJECT: TRADOC Policy Letter 16, TRADOC Conference and Competition Event Policy

- a. U.S. Army Combined Arms Center
- b. U.S. Army Command Arms Support Command
- c. U.S. Army Cadet Command
- d. U.S. Army Recruiting Command
- e. U.S. Army Center for Initial Military Training
- f. Centers of Excellence (CoEs)
- g. Army Capabilities Integration Center
- h. TRADOC Analysis Center

6. Army-Hosted Conferences. In addition to Army Conference Policy requirements, the following restrictions apply to all TRADOC commands, organizations, and activities for Army-hosted conferences:

a. Individual conference costs will not exceed \$100K. Exceptions to the \$100K cap require DCG, TRADOC review and concurrence before action by the appropriate approval authority under the Army Conference Policy.

b. CoEs with multiple schools may execute independent conferences for each school. However, these independent conferences may not exceed a combined total of \$100K per calendar year.

c. Recurring conferences hosted by a TRADOC command, organization, or activity may not occur more frequently than once per calendar year (unless otherwise authorized by law, regulation, or directed by CG, TRADOC). The cost of a recurring conference will not exceed the actual costs for the previous event.

d. Attendance at CoE and branch conferences will be by invitation only and commanders will ensure control measures are in place to prevent uninvited attendance. Branch conferences are limited to Army-relevant branch or CoE business. Organizations/activities will not use non-Federal entities to organize or sponsor branch conferences.

e. Conference requests must clearly justify and articulate why participation of each proposed attendee, including support staff, is appropriately related to official duties and will demonstrably benefit the Army.

f. Once an event has been approved, any change in location for the event, increase in costs, addition of a type of attendee, or increase in the number of attendees will require submission of a new request.

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7. Participation in Non-DOD-Hosted Conferences. Consistent with reference 1d, any general officer (GO) or member of the senior executive service (SES) in the chain of command may approve participation in a non-DOD-hosted conference with costs less than \$100K and with fewer than 50 Army attendees, provided that attendance is appropriately related to official duties and is demonstrably beneficial to the Army. Generally, participation at such events will be treated like travel requests, and conference requests are not required. However, TRADOC commands, organizations, and activities are required to utilize the template provided at Encl 3 to formally document approval of attendance. As required by reference 1d, this memorandum must also be loaded into the Army Conference Reporting and Tracking Tool (ACRTT). The link to access ACRTT can be found at <https://secureappcac2.hqda.pentagon.mil/ACRTT/CommandHomePage.aspx>. You must request and be granted access to ACRTT by the HQ TRADOC Conference Manager.

8. Exemptible Events. Pursuant to reference 1d, certain types of events may be exempted from the policy, even if the event exhibits indicia of a conference. However, only a GO or SES may determine an event to be exempt. TRADOC commands, organizations, and activities must document these GO/SES determinations utilizing the template provided at Encl 4. The servicing legal counsel and appointed conference manager will be consulted on these determinations. Exemptions may not be granted unless events fully and unambiguously meet both the definition and intent of the relevant exemption criteria.

9. Appointment of Primary and Alternate Conference Managers. TRADOC commands, organizations, and activities must appoint a primary conference manager and at least one alternate. These appointed conference managers will: promulgate command-level procedures; help prepare conference and competition event request packages for approval authorities; receive, track, and transmit approvals and disapprovals, to include participation in non-DOD-hosted conferences as noted in paragraph 7 above; and submit any required reports. TRADOC commands, organizations, and activities will provide current names, phone numbers, and e-mail addresses of their appointed conference managers to the HQ TRADOC G-3/5/7 Conference Management Team.

10. Competition Events.

a. All competition events internal to, or hosted by, TRADOC for the Army, and all competitions that are hosted or attended by TRADOC involving international participants or sister services, require approval by the DCG, TRADOC if costs exceed \$100K. Competitions costing \$100K or less may be approved locally by the first GO/SES in the chain of command. Requests to host or attend competition events with costs exceeding \$100K will be submitted through the appointed conference manager to the TRADOC G-3/5/7 Conference Management Team, and will include a formal request memorandum (including a justification for the competition event, associated date(s), location(s), number and type of attendees, and estimated costs), the agenda, and a legal review.

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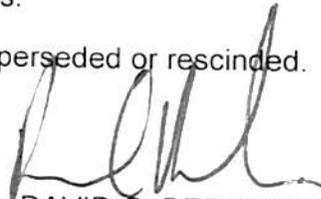
SUBJECT: TRADOC Policy Letter 16, TRADOC Conference and Competition Event Policy

b. In some instances, a competition event may demonstrate sufficient indicia of a conference. In such a case, TRADOC commands, organizations, and activities will process the competition event as a conference per reference 1d. Separate competition event and conference request packets for the same event are not required.

11. Exceptions to Policy. Approval authority for exceptions to this policy is the DCG, TRADOC. Requests for exceptions to policy must be in writing and submitted through the TRADOC G-3/5/7 Conference Management Team.

12. Monitoring Costs. HQ TRADOC will monitor costs for all events described above by conducting Defense Travel System pulls and reviewing requests in the ACRTT to ensure compliance with these requirements.

13. This policy change is effective until superseded or rescinded.



DAVID G. PERKINS  
General, U.S. Army  
Commanding

4 Encls

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Commander  
U.S. Army Combined Arms Center  
U.S. Army Combined Arms Support Command  
U.S. Army Cadet Command  
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U.S. Army Center for Initial Military Training  
Centers of Excellence  
U.S. Army Soldier Support Institute  
Asymmetric Warfare Group

Commandants, TRADOC Schools

Director  
Army Capabilities Integration Center  
U.S. Army TRADOC Analysis Center  
Rapid Equipping Force

Deputy Chiefs of General and Chiefs of Special Staff Offices,  
HQ TRADOC

# Enclosure 1



SECRETARY OF THE ARMY  
WASHINGTON

04 MAY 2016

MEMORANDUM FOR SEE DISTRIBUTION

SUBJECT: Army Directive 2016-14 (Army Conference Policy)

1. References:

a. Army Directive 2015-01 (Army Conference Policy), 8 Jul 2015 (hereby superseded).

b. Memorandum, Deputy Secretary of Defense, 23 Sep 2015, subject: Updated DoD Conference Guidance.

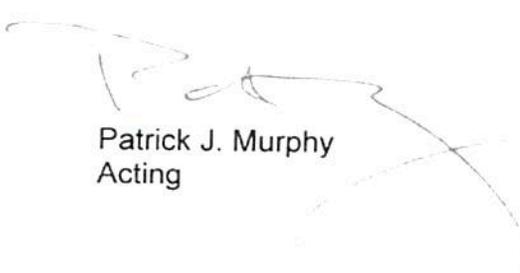
2. The policy at enclosure 1 implements revisions to the Army's conference policy resulting from changes in Department of Defense (DoD) policies. The most significant changes are updated conference approval authorities. A list of conference-associated definitions is at enclosure 2 and a complete list 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. The processes outlined in this policy have been deliberately designed to ensure compliance with DoD and Office of Management and Budget policies and to optimize the use of scarce resources. The Army will take a balanced approach to conference participation by removing excessive burdens and restrictions while maintaining oversight to ensure appropriate fiscal responsibility.

4. The Army's commitment to oversight of conference activities and associated resources—both human and financial—must remain a high priority for all decision authorities. Every conference-related decision must not only be based on the return on investment from conference participation but also on the public perception of each discrete event. In addition, every conference participant shares the responsibility to be a good steward of Army resources and uphold 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.

Encls

  
Patrick J. Murphy  
Acting

DISTRIBUTION:  
(see next page)

Final

SUBJECT: Army Directive 2016-14 (Army Conference Policy)

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Principal Officials of Headquarters, Department of the Army  
Commander

- U.S. Army Forces Command
- U.S. Army Training and Doctrine Command
- U.S. Army Materiel Command
- U.S. Army Pacific
- U.S. Army Europe
- 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
- 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
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- Executive Director, Arlington National Cemetery
- Commander, U.S. Army Accessions Support Brigade
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CF:

- Director, Army National Guard
- Director of Business Transformation
- Commander, Eighth Army
- Commander, U.S. Army Cyber Command

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# ARMY CONFERENCE POLICY

## 1. Introduction

a. Intent. We must always seek the most cost-effective and efficient methods to plan and manage missions, train personnel, and share information. A conference may sometimes be the appropriate means to accomplish certain Army objectives. The Army must remain a good steward 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 appropriately related to official duties and demonstrably benefit the Army. When conference participation is determined to be beneficial to the Army, 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 many factors governed by regulations and policies, including travel, fiscal, contracting, training, recordkeeping, and ethics. This policy establishes the framework to implement Office of the Secretary of Defense (OSD) conference policy; provide overarching guidance to help personnel requesting to attend conferences and planners hosting conferences; and guide various other stakeholders—lawyers, resource managers, approval authorities, and so on—through the decision-making process. Commands, organizations, and activities are encouraged to establish internal policies to supplement this Armywide policy. However, any additional restrictions must be briefed to the Army Conference Management Directorate (ACM) before implementation.

c. Applicability. This policy applies to the Active Army, the U.S. Army Reserve, and those organizations the Secretary of the Army is the designated DoD Executive Agent for and that 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 or foreign military sales. This policy covers conferences the Department of the Army hosts and co-sponsors, 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.

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 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. Regardless of how the event is titled, conferences typically involve topics 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, use of commercial facilities, a published substantive agenda (typically on a Web site), scheduled speakers or discussion panels, multiple-day agendas, guest speakers, affiliated social events, and the use of official representation funds in support of the event. 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 all the applicable indicia. In almost all cases, events that include Government-funded travel and are conducted in commercial facilities instead of government-owned facilities are conferences.

(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. Such events include individual participation in job fairs; investigations or audits; chaplain-led events, including Strong Bonds; widely attended gatherings; industry days and trade shows; participation in residency and 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 temporary duty (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 these categories.

(1) *Army-Hosted Conferences.* Army organizations often plan, fund, or execute 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.

(a) *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 DoD 5500.07-R (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.

(b) *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.

(2) *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.

(3) *Non-DoD-Hosted Conferences.* The Army may 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-DoD conference participation encompasses all Army employees attending or participating, including speakers, presenters, panel members, awardees, or support staff, and may include the provision of exhibits and logistical support. A limited number of non-DoD-hosted conferences, identified in a tasking memorandum signed by the Director of the Army Staff (DAS), (formerly called "Major Non-DoD-Hosted Conferences") will be assigned a conference lead. These conferences require approval at a higher level because of cross-command participation, high costs, high visibility, or the involvement of proffered funds. Consequently, ACM will centrally manage these conferences.

(4) *Exemptible Events.* Certain types of events may be exempted from the conference policy, even if the event exhibits indicia of a conference. Only general officers (GOs) or members of the Senior Executive Service (SEs) may determine an event is exempt from this policy; however, legal counsel and ACM may offer assistance. Exemptions from this guidance will be granted only when events fully and unambiguously meet the definition and intent of the criteria. If an event clearly meets the exemption criteria, no further conference action is required; however, all other relevant policies, such as for travel, must be followed. Events that involve spouse travel at Government

expense or are identified in the DAS tasking memorandum are not exemptible; such events will be categorized as conferences and processed in accordance with this policy.

(a) Meetings necessary to carry out statutory command and staff oversight functions. This exemption would include activities such as investigations, inspections, audits, or non-conference planning site visits. Other considerations include:

- The meeting is directly tied to language in a statute, government-wide regulation, or DoD regulation.
- The meeting is related to an official inquiry or investigation based upon reported wrongdoing or reports of systemic problems. The inquiry or investigation in these cases generally is conducted by a single official and is directed by a formal appointment memorandum.
- The exemption does not apply broadly to meetings designed to improve policies or processes or to prepare reports, such as "reengineering," "strategic planning," and the like even if the product of the meeting is a report mandated by statute or regulation.

(b) Meetings to consider internal agency business matters. This exemption would include activities such as meetings that take place as part of an organization's regular course of daily business. Some indicia of a meeting to consider internal agency business are:

- The Army is the host, the event is held in a government facility, only local travel is involved, and the attendees are solely government personnel; and
- The meeting is a regular and recurring part of the employee's job description or job duties.

(c) Meetings necessary to carry out planning or execution of operational or operational exercise activities or pre-deployment, deployment, or post-deployment activities. This exemption would include activities such as planning and preparation for, as well as execution of, war games, military exercises, and operational deployments.

(d) Bilateral and multilateral international cooperation engagements. This exemption would include activities such as International Military Education and Training events, Traditional Commander's Activities, and other regional assistance programs. It would also include many of the activities of the Department's Regional Security Centers. 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, if foreign participants bring spouses to an event to participate in an official capacity, and an Army command, organization, or activity determines that the Army would demonstrably benefit from the participation of U.S. Army spouses in an official capacity,

they may do so without triggering conference approval. However, all relevant travel policies apply.

(e) Formal classroom training. This exemption would include activities such as regular courses of instruction or training seminars. These activities may be offered by government organizations, institutions of higher learning or professional licensure/certification, or other training entities. However, events are not exempt simply because they offer continuing education credits or the equivalent. Even when a portion of a larger event involves formal classroom training, this does not mean that the event as a whole falls within this exemption. For instance, if the annual meeting of Organization X has sessions that are comprised of formal classroom training but the remainder of events do not, the event as a whole does not fall within the exemption. Formal classroom training conducted in a conference center, hotel, or other commercial facility does not qualify for this exemption unless a college or university conducts the training. Some indicia of formal classroom training are:

- The sole purpose is training, as opposed to networking, sharing best practices, or other similar purposes;
- Continuing education credit is available for all event sessions other than meals;
- The event is held in a government or military facility or a facility regularly used for training, such as a university classroom, and not a hotel or conference center; or
- The means of instruction is typically in a classroom setting with an instructor and not speaking with exhibitors or obtaining others' views through participation in small groups.

(f) Change of command, official military award, funeral, or other such ceremonies.

(g) Events where the primary purpose of DoD's participation is military or civilian recruiting and/or recruitment advertising.

(h) Meetings of advisory committees subject to DoD Instruction 5105.04 (Department of Defense Federal Advisory Committee Management Program), where the membership of the committee consists of one or more individuals who are not full-time or permanent part-time Federal officers or employees or military personnel.

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

(a) Local Conferences. Using the JTR definition of a conference, local conferences are generally not subject to this policy, even if they involve reimbursable

local travel costs (such as parking or local mileage). However, local conferences with registration fees are subject to this policy.

(b) **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 a 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. All conference-related documents must be uploaded into ACRTT for Army-hosted and non-DoD-hosted conferences. ACRTT must be used to fulfill all reporting requirements. All Army-hosted conference requests must be submitted to the approval authority in ACRTT using the submission module regardless of approval authority. ACRTT will be used to report approved participation in non-DoD conferences with costs less than \$100,000. Use the Non-DoD Conference Submission Module in ACRTT to submit requests for non-DoD conferences meeting one or more of the following criteria:

- Costs of \$100,000 or more,
- 50 or more attendees within a GO/SES's purview,
- Involve proffered funds,
- Involve actual expense allowance (AEA) of 150 percent or more, or
- Include spouse travel at Army expense.

AEA will be approved only in rare circumstances with legitimate justification.

2. **Responsibilities.** Responsibilities for officials identified in the next paragraphs are for Army-hosted and attendance at non-DoD-hosted conferences.

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 exceeding \$500,000.

b. Army Conference Manager. The Administrative Assistant to the Secretary of the Army (AASA) is the Army Conference Manager. 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 and all requests involving AEA of 150 percent or more above per diem limits (the conference approval authority may approve AEA up to 149 percent). AEA will be approved only in those rare circumstances when critical justification is provided (see paragraph 6a(6) on page 25).

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

(5) review all conference request packages requiring SA approval.

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

(7) provide assistance to 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. As part of the Office of the Administrative Assistant (OAA), ACM will:

(1) draft Army conference policy.

(2) manage and provide training for ACRTT.

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

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

(5) implement the assignment of Conference Leads.

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

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

(8) provide guidance and assistance to conference stakeholders.

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

(10) serve as the liaison between the Office of the DoD DCMO and the Army.

d. Approval Authorities. Conference approval authorities are limited to those officials identified in paragraph 3, beginning on page 11. 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 (such as travel and ethics). Particular areas of focus are purpose and justification, funding and contracts, cost-benefit analysis, attendees, registration fees, refreshments (Army-hosted), honoraria or speaker fees (Army-hosted), per diem and any provided meals, security (Army-hosted), estimated costs, use of rental vehicles, requests for AEA, attendance by statutory volunteers, and lodging and/or meals for local attendees.

(2) approve only those requests that are demonstrably beneficial to the Army and appropriately related to attendees' official duties; cost-effective; and in the best interests of the Army, the U.S. Government, and taxpayers. Approval authorities must ensure that the participation of every conference attendee, including support staff, is appropriately related to official duties and will demonstrably benefit the Army. Approval authorities should consider not only the return on investment, but also the public perception of each event to ensure that participation benefits the Army.

(3) scrutinize any requests for AEA and rental vehicles to ensure that actual cost reimbursement is justified. AEA will be approved only in those rare circumstances when critical justification is provided. Rental vehicles will not be used for the convenience of the attendee, but only when a thorough cost-benefit analysis yields a benefit to the Army.

(4) scrutinize any requests involving exhibits for a demonstrable return on investment. Exhibits tend to have high visibility and the potential to be expensive. Therefore, each exhibit must be carefully and thoroughly evaluated to ensure appropriate oversight and fiscal responsibility.

(5) document approval or disapproval in a formal, written memorandum. The approval memorandum must specifically list the conference name, dates, and location; number of attendees; estimated costs; AEA (if approved); and spouse travel (if approved).

(6) disapprove requests when the return on investment is not evident, the number of participants is excessive, the request does not establish a demonstrable benefit to the Army for the participation of each proposed Army-funded attendee, the

event appears to be an improper use of Government funds, the event has public perception issues, or the request otherwise lacks sound justification.

(7) be accountable for their decisions.

e. Command Conference Managers. Each Headquarters, Department of the Army (HQDA) Principal Official; Army Command; Army Service Component Command; and Direct Reporting Unit will have one 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) review all requests and reports in ACRTT within the timelines identified in this policy.

(4) submit all requests requiring SA or AASA approval (ACM will accept requests only from the Command Conference Manager).

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

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

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

(8) be the primary point of contact between the Conference Lead and the manager's respective command, organization, or activity.

(9) coordinate requests for Office of the Judge Advocate General legal reviews as appropriate.

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

(1) submit requests only for those conferences that are demonstrably beneficial to the Army; appropriately related to official duties; cost-effective; and in the best interests of the Army, the U.S. Government, and taxpayers. Ensure the request contains justification that the participation of every attendee, including support staff, is appropriately related to official duties and will demonstrably benefit the Army.

(2) make sure requests comply with this policy; the DoD conference policy; and all applicable laws, regulations, and policies. Particular areas of focus are purpose and justification, funding and contracts, cost-benefit analysis, attendees, registration fees, refreshments (Army-hosted), honoraria or speaker fees (Army-hosted), per diem and any provided meals, security (Army-hosted), estimated costs, use of rental vehicles, requests for AEA, attendance by statutory volunteers, and lodging and/or meals for local attendees.

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

(4) submit requests to the Command Conference Manager.

(5) enter all requests and reports in ACRTT within the timelines identified in this directive and command conference policies.

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

g. Conference Leads. Conference Leads will be assigned for participation in non-DoD-hosted conferences with costs of \$100,000 or more or that involve proffered funds. Typically, these conferences will be identified in a DAS tasking memorandum. If it becomes apparent a conference not identified in the DAS tasking memorandum will exceed \$100,000 or involve proffered funds, the AASA or DAS may assign a Conference Lead. The assigned Conference Lead will:

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

(2) collect Armywide attendance information and cost estimates via ACRTT for submission to the approval authority.

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

(4) ensure that Army participation does not exceed approved levels.

(5) compile individual AARs into a single Armywide AAR for the approval authority.

(6) maintain approval, request, and supporting documentation for 5 years or longer to meet Army records management requirements. Electronic copies in ACRTT are acceptable.

h. Conference Planners. Army 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) consider government or military facilities first 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 benefits the Army.
- (4) provide attendance, cost estimates, and any requested information to the Command Conference Manager.
- (5) provide necessary information, identified in paragraph i4, 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.
- (6) not obligate any nonrefundable funds (such as registration fees or hotel reservations) before obtaining written conference approval from the appropriate approval authority.

3. **Conference Approvals**. Conference approval authority is hereby delegated to those personnel listed in paragraph 3c. *Further delegation is not allowed unless provided for in this policy or in writing by the SA.* Conferences costing more than \$500,000 are generally prohibited. The SA may grant a waiver for conferences with costs exceeding \$500,000; however, waivers will be limited and strictly scrutinized. Approval authorities will provide written approval or disapproval by memorandum. Other written approval, such as email, line throughs, and internal routing documents (such as an HQDA Form 5 (Army Staffing Form)), will not be considered written approval. The memorandum must provide the conference name, dates, and location; number of attendees; estimated cost; AEA (if approved); and spouse travel (if approved). Each event must have a separate request memorandum, approval memorandum, and ACRTT entry. "Batching" requests or approvals is prohibited. If an approval authority is unavailable to act upon a conference request, the next higher

approval authority may act on the request. The AASA may approve any conference with costs less than \$500,000 when the designated approval authority is unavailable.

a. Participation in Non-DoD-Hosted Conferences

(1) Any GO or SES in the chain of command (or O-6 commander of Army medical centers and community hospitals) may approve participation in a non-DoD-hosted conference with costs less than \$100,000 and fewer than 50 Army attendees within his or her purview if the conference is appropriately related to each attendee's official duties and is demonstrably beneficial to the Army. A list of medical treatment facility commanders with conference approval authority is on the OAA Conferences Home page (<https://securecac.hqda.pentagon.mil/oaacustomer/conferences.aspx>; common access card required).

(2) Generally, participation in non-DoD conferences should be treated like travel requests; a conference request is not required. However, participation must be approved via a formal, written memorandum and loaded into ACRTT. The memorandum must include the conference name, dates, and location; number of attendees; estimated cost; AEA (if approved); and spouse travel (if approved). The SA or AASA must approve conferences involving AEA of 150 percent or more regardless of cost (conference approval authorities may approve conferences with AEA up to 149 percent). AEA will be approved only in those rare circumstances when critical justification is provided.

(3) To ensure appropriate oversight and fiscal responsibility, the SA, CSA or AASA, as appropriate, must approve conferences meeting one or more of the following: total costs (attendance and exhibit) of \$100,000 or more, 50 or more attendees within a single GO/SES's purview, or the involvement of proffered funds. Conferences with costs exceeding \$500,000 are generally prohibited, although the SA may grant a written waiver.

b. Army-Hosted Approval Table

<b>Tier</b>	<b>Cost Threshold</b>
One	Costs ≥ \$500,000*
Two	Costs < \$500,000
Three	Costs < \$100,000
AASA	Conferences involving AEA of 150% or more with costs < \$500,000 (the SA with costs > \$500,000)
SA, USA, Four-Star GOs, AASA	Conferences involving spouse travel at Army expense regardless of cost.

\* Generally prohibited but may receive a written waiver.

c. Army-Hosted Approval Tiers. Officials identified in the following paragraphs may approve conferences their command, organization, or activity hosts.

(1) *Tier One*. This tier consists of the SA, USA, and the CSA. The SA is the approval authority for waivers for conferences with costs exceeding \$500,000 (generally prohibited). Requests requiring SA approval must be endorsed by a Tier Two official and routed through the AASA. The CSA is the approval authority for the Offices of the CSA, VCSA, DAS, and Sergeant Major of the Army; ASCCs; and DRUs reporting directly to the CSA. The CSA has approval authority up to \$500,000.

(2) *Tier Two*. This tier consists of the Vice Chief of Staff, Army (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); AASA; and DAS. The VCSA/DAS are the approval authorities for the Offices of the CSA, VCSA, DAS, and Sergeant Major of the Army; ASCCs; and DRUs reporting directly to the CSA. All other activities not reporting directly to an ACOM will route their requests to the AASA. Requests requiring AASA approval must be endorsed by a Tier Two or Tier Three official, or the most senior official in the requesting organization when the organization has no approval authority.

(3) *Tier Three*. This tier consists of Deputy Commanding Generals (DCGs) and the civilian equivalent of ACOMs; commanders of ASCCs and DRUs; and HQDA Principal Officials *when the position is held by a GO or SES*. This authority may be further delegated in writing to GOs or SESs. Delegations are not effective until ACM receives a copy of the written delegation.

d. Approvals for Special Circumstances

(1) *Conferences Involving Spouse Travel at Army Expense*. Only the SA, USA, four-star GOs, or the AASA may approve conferences involving spouse travel at Army expense regardless of conference cost. OSD policy requires "enhanced scrutiny" of all conference requests involving spouse travel at Government expense. The conference and spouse travel requests cannot be separated to reduce the conference approval authority.

(2) *Conferences Involving AEA*. Conference approval authorities may approve conferences with AEA up to 149 percent when sufficient justification is provided; such instances should be rare. Only the AASA or SA may approve conferences involving AEA of 150 percent or more regardless of the cost of the conference. AEA will be approved only in those rare circumstances when critical justification is provided. Submit a conference request package via ACRTT.

(3) *Conferences Involving Proffered Funds*. Only the SA or AASA may accept proffers and approve conferences involving proffered funds.

(4) *No-Cost Conferences*. At times, Army personnel may attend conferences at no cost to the Army. This can occur through waived registration fees or “gifted” travel benefits under 31 United States Code section 1353 (31 U.S.C. § 1353). Approval for participation in no-cost conferences is commensurate with normal travel approval. Maintain documentation supporting the approval authority’s decision; however, it is not necessary to submit a conference request or report approval in ACRTT. Because local conferences do not meet the JTR definition of a conference, participation at no cost to the Army (including no registration fees) does not require conference approval.

e. Office of the Chief, Army Reserve; U.S. Army Reserve Command; and Military Surface Deployment and Distribution Command Approvals

(1) *Office of the Chief, Army Reserve (OCAR) Events*. The SA, the AASA, or the Chief, Army Reserve (CAR), as an HQDA Principal Official, can approve conferences sponsored, hosted, or executed by OCAR when the primary purpose is to address specific reserve component-level issues. Determination of the approval authority must be based on the organization hosting or executing the event, not the proponent for the program or topic of the event. *As an HQDA Principal Official, the CAR will obtain legal reviews from the Office of the Judge Advocate General for all OCAR conference requests.*

(2) *Reserve Command (USARC) Events*. Conferences sponsored, hosted, or executed 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 organization hosting or executing the event, not the proponent for the program or topic of the event. For example, a family programs training event executed by a USARC subordinate unit must be approved by the CG, USARC; DCG or CG, FORSCOM; or the SA as appropriate—not the CAR.

(3) *Military Surface Deployment and Distribution Command (SDDC) Events*. As an ASCC, the CG, SDDC may approve conferences as a Tier Three official. However, as a major subordinate command to AMC, SDDC must forward conferences requiring Tier One or Two approval to the CG, AMC.

**4. Conference Request Requirements.** *All conference requests must be submitted in ACRTT regardless of the approval authority. Failure to provide detailed information or explanations may result in a delayed decision, return of the request without action, or disapproval. Unless the approval authority requires otherwise, participation in non-DoD-hosted conferences with costs less than \$100,000 and fewer than 50 attendees within a GO/SES’s purview do not require a conference request, only a written approval memorandum. All conferences requiring SA or AASA approval must have a full conference request. In addition to ACRTT-required fields, note the following requirements for conference requests.*

a. General

(1) *Staffing.* Staff all requests through the chain of command to the approval authority or the senior-most official in the organization when the organization does not have conference 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.

(2) *Timelines.* 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.*

(3) *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.

(4) *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 justification must also specifically address how hosting or attending the conference will further the Army's mission.

(5) *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, train-the-trainer, or local conferences).

(6) *Estimated Total Costs.* Provide a detailed and accurate breakdown of all costs associated with the conference. 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. Although 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; use of Government-owned transportation; and costs related to contractor attendance.

(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 5g (page 20) for further restrictions on the collection of conference fees.

(7) *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 justification for all requested attendees. Senior officials should seek to limit the attendance of aides, executive officers, and similar personal staff to one support staff person for each principal. A general justification for attendance is not sufficient. *Each attendee must have a justification that explains how participation is related to their job duties and benefits the Army.* You may use a separate document, such as an Excel spreadsheet, to supply justifications for each attendee.

(8) *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 not sufficient. If breakout sessions are planned, the agenda must explain the purpose and objective(s) for each session. Avoid agendas that are excessively long; instead, provide an "at a glance" agenda or program overview.

(9) *Legal Review*. All conference requests require a legal review for compliance with applicable laws and policies. Although no required format is prescribed, it is strongly recommended that counsel use the relevant template available on OAA's Army Conferences home page. Each legal review must address all elements in the relevant legal review template regardless of whether the template is used. *Any legal objections must be mitigated before submission of the conference request.*

b. 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 Army-hosted conference request must include these items.

(1) *Site Selection*. Each request must contain a narrative describing the site selection process. Detailed information on the site selection process is in paragraph 5a.

(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. 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).

(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.

5. **Hosting Policies**. Conference hosts, planners, and organizers must take note of the following requirements.

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*. Maintain a record of the site selection process, including the costs of each alternative site and venue considered, and submit it with the conference request.

(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, even if a government or military facility is selected. 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);

- consideration of lower off-season rates or peak seasons; and
- availability of government or military facilities.

(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. Army commands, organizations, and activities should never host a conference in a facility that does not honor the prevailing per diem rate for that locale; and
- public perception. Although no venue may be prohibited from selection solely because of its location, reputation, or amenities, the requester and approval authority must avoid the appearance of the inappropriate use of taxpayer funds.

(3) *Government and Military Facilities.* 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) *Local Policies.* All applicable local policies on site selection must be followed. For conferences in the National Capital Region, 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 minimize attendees to those whose participation is appropriately related to official duties and demonstrably benefits the Army. Aides and executive officers provide unique and important support to their principals while in a travel status. However, 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 justification explaining how participation is related to their job duties and benefits the Army.* 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 AR 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 an 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 (see DoD 7000.14-R, chapter 12, paragraph 1208). For organizations within HDQA, the AASA is the approval authority to exceed \$2,000 for a speaker; for all other organizations, the VCSA is the approval authority. Organizations must route a separate request to exceed the threshold to the appropriate approval authority before submitting a conference request. Submit the signed approval to exceed the honorarium threshold with the conference request.

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 requesting, 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 Multinational Organizations.* These conferences may be co-sponsored with other DoD, Federal, State, or local municipalities or multinational 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 for an event, 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) 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 an NFE is hosting. 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 co-sponsored.

(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.

## 6. Attendance Policies

a. General Travel Guidance. All DoD personnel traveling in conjunction with conference participation 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 to travel.

(1) *Defense Travel System (DTS)*. 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 systems 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 enter 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 conference request's 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 the use of rental vehicles. When necessary, shuttle buses, taxis, or other public transportation will be used to reduce the need for individual rental vehicles. *Rental vehicles will not be used simply for the attendee's convenience*. Rental vehicles will be used only when a thorough cost-benefit analysis yields a benefit to the Army. In general, rental vehicles will not be authorized for participation in conferences held in major metropolitan areas with public transportation options. 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 the 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 (cannot be eliminated from the conference venue contract or registration fee) and nonnegotiable (the venue will not offer a lower rate if refreshments are not provided).

(6) *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 Office of Management and Budget 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 honor the rate. Army personnel lodging in lavish, resort-like accommodations may create the appearance of inappropriate use of taxpayer funds and lead to a negative public perception. *AEA will not be approved simply to stay in the conference hotel for the attendee's convenience or networking benefits. Use of AEA must provide a benefit to the Army and not subject the Army to potential negative public perception.* The legal review of the conference request must specifically address the use of AEA. AEA will be approved only in those rare circumstances when critical justification is provided. *The AASA is the approval authority for all conferences involving AEA of 150 percent or more regardless of the cost of the conference (the SA is the approval authority for conferences in excess of \$500,000).* Conference approval authorities may approve AEA up to 149 percent. If the conference approval authority specifically authorizes AEA in the approval memorandum, 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. Local TDY will be approved only in rare circumstances.

(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 spouse agenda must be provided with the conference request.

(c) Statutory Volunteers. Statutory volunteers are a limited category of volunteers authorized by Federal statute (10 U.S.C. § 1588) to provide services in certain DoD activities, such as morale, welfare, and recreation functions; Family programs; and chaplain programs. At times, statutory volunteers may be issued invitational travel authorizations to participate in a conference based on their expertise in a particular subject matter of interest to conference attendees, not for being an Army spouse or dependent. Statutory volunteer status will not be used to circumvent Secretarial approval authority for accompanied spouse travel. Contact your legal advisor for more information on statutory volunteers. Legal reviews for conference requests that include statutory volunteers will specifically address the request's compliance with the applicable requirements. If personnel participate in a statutory volunteer status, all required statutory volunteer documentation must be loaded into ACRTT with the estimated actuals. Army spouses in an approved statutory volunteer status are not considered spouses for the purposes of this policy.

*(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 or 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. Travel benefits may only be accepted when personnel are 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. To avoid the appearance that Army personnel may be improperly influenced by the NFE, GOs and SESs will not attend conferences using cash gifts proffered to the Army. They may, however, continue to accept "in-kind" 1353 travel benefits (for example, an offer of a hotel room or specific meals while attending the event) when otherwise legally acceptable. The SA or AASA 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. An overall legal review of the acceptance of proffered funds, and local legal reviews for each traveler using proffered funds, must be completed 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, personnel attending an Army-hosted conference do not need to submit a request to participate. The host organization is responsible for estimating, approving, and reporting all Army attendees.

c. Attending DoD-Hosted Conferences. Generally, a conference request is not required to attend a DoD-hosted conference. The host DoD organization is responsible for estimating, approving, and reporting all DoD attendees. However, *attendance will be limited to those attendees included in the host's approved request and costs 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 or 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 individuals is approved locally, attendance at a conference must be approved in accordance with this policy. *Attendance must be appropriately related to each attendee's job duties and demonstrably benefit the Army. Further, costs will be kept to a minimum.* Generally, a request is not required to participate in non-DoD-hosted conferences with costs less than \$100,000 and fewer than 50 attendees within a GO/SES's purview.

(1) Registration Fees. Often, conferences charge registration fees 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. In addition, 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. 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 must comply with this policy and the JER, chapter 3, section 2 (Official Participation in Non-Federal Entities). 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.

(4) *Additional Information for Attending Non-DoD-Hosted Conferences Requiring SA or AASA Approval.* A Conference Lead will be assigned for all non-DoD-hosted conferences costing \$100,000 or more or involving proffered funds. The Conference Lead will compile Armywide cost and attendance information into a single request for approval. All requesting organizations must submit their attendance information via the Non-DoD Conference Submission Module in ACRTT—including estimated cost and attendance numbers, attendance justifications, and the commander's endorsement—to the Conference Lead. Individual requesting organizations must also update the conference record in ACRTT with actual cost and attendance information and submit an AAR signed by their HQDA Principal Official or ACOM, ASCC, or DRU commander. *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.

**7. Reporting Requirements.** ACM will compile and submit all reports to comply with OSD and Office of Management and Budget guidance, and the Consolidated Appropriations Act, 2016 (H.R. 2029) requirements. Reporting requirements are

detailed in paragraphs 7a and 7b. Reported costs and attendee numbers for Army-hosted conferences must include totals for all DoD-sponsored attendees. Submit all reports using 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:

Conference Type	Approval Authority	Before the Conference	After the Conference
Army-Hosted	Tiers One, Two, and Three	Mark conference as "approved" in ACRTT	Update "estimated actuals" and submit AAR via ACRTT
Non-DoD Hosted	GO/SES	Submit approval memo and input required fields into ACRTT	Not Applicable
Non-DoD Hosted	SA and AASA	Not Applicable	Update "estimated actuals" and submit AAR via ACRTT

b. Types of Conference Reporting

(1) *Before the Conference (Within 10 Business Days of Approval)*

(a) Approved Non-DoD-Hosted Conferences. Upload the signed approval memorandum and complete the required fields in ACRTT.

(b) Approved Army-Hosted Conferences. The Command Conference Manager must upload the approval memorandum to the existing ACRTT record and mark it 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 (Within 45 Business Days After the Conference)*

(a) Estimated Actuals. Update the ACRTT conference record with "estimated actuals," which include the actual attendance figure and estimated actual cost information based on the final attendance. If the actual cost varied from the estimated cost by 10 percent or more, include a plausible justification for the variance.

(b) After Action Report. Submit an AAR for every Army-hosted conference and participation in non-DoD-hosted conferences approved by the SA and AASA. If the actual cost varied from the estimated cost by 10 percent or more, include a plausible justification for the variance. For conferences the SA or AASA approved, an HQDA Principal Official or ACOM, ASCC, or DRU commander must sign the AARs. Templates

for AARs are available on OAA's Army Conferences home page. Failure to submit an AAR may result in disapproval of future requests to participate in recurring conferences.

## DEFINITIONS

### **1353 Travel**

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

### **ACRTT Record**

An 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 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 45 business days after every Army-hosted conference and non-DoD conferences approved by the SA or AASA.

### **Army**

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

### **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 and Office of Management and Budget requirements; and preparing packages for SA and AASA 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 conferences event under one memorandum.

### **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. Facilities owned by Federally Funded Research and Development Centers are commercial facilities under this policy.

### **Conference**

The JTR defines "conference" as a meeting, a retreat, a seminar, a 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 the AASA or DAS designated as responsible for promulgating a single request and AAR for all Army attendance at a non-DoD-hosted event.

**Conference Sponsor/Conference Host**

The organization hosting the conference by planning, funding, or executing 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 of Defense 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 with the topic and speakers selected in advance.

**DoD Executive Agent**

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

**DoD-Hosted Conference**

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

**Estimated Actuals**

An approximate total cost based on the number of participants who attended the event, not those who were invited or planned to attend, to be submitted within 45 business days of the end of the conference. 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.

**Exhibit**

An object or a collection of objects 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.

**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, while flight school may have components behind a desk as well as in a hangar or on a tarmac. Attendees earning a certificate or continuing education credits at the end of a course does not make an event formal classroom training and excluded from this policy.

**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. This includes Armed Forces Recreation Centers. Does not include Federally Funded Research and Development Centers.

**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.

### **Host**

Also called sponsor. The host is the organization that fully or partially funds the event; is responsible for developing the substantive aspects of the event, such as date, location, and attendees; provides substantial logistical support; or executes the event.

### **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**

Recurring events geared toward Army-specific topics with attendance mostly restricted to Army personnel (not spouses, contractors, or external personnel). Topics are directly related to the organization's mission. These events have mostly local attendance and are often conducted at the place of duty. Examples include quarterly in-progress reviews, working groups, 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 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 of the 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.

**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 a nonappropriated fund instrumentality from sources other than monies 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 from funds recorded in the books of the Treasurer of the United States.

**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.

**Non-Federal Entity (NFE)**

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

**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**

Funds 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 and maneuver conferences.

**Participant**

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 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 "in kind" 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. It is used when a traveler receives one or two meals at Government expense (for example, one or two deductible meal(s) included in a conference registration fee).

**Published Agenda**

The 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**

Provision of attendee's name, at minimum, to the conference host as a condition of attending the event. Other information commonly provided includes phone number, organization, duty title, and address. A fee is often, but not always, required. 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 an 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.

**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 DoD 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 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 is required for an individual to be accepted into a statutory volunteer status: DD Form 2793 (Volunteer Agreement for Appropriated Fund Activities and Nonappropriated Fund Instrumentalities), DA Form 4162 (Volunteer Service Record), DA Form 4713 (Volunteer Daily Time Record), DA Form 5671 (Parental Permission) (if the volunteer is unmarried and under age 18), and a position description.

**Temporary Duty (TDY)**

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

**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, or other electronic source, where no attendee travel is required to participate in the event.

## REFERENCES

1. Consolidated Appropriations Act, 2016  
Rules Committee Print 114-39, House Amendment to the Senate Amendment to H.R. 2029, December 18, 2015  
<https://www.gpo.gov/fdsys/pkg/CPRT-114HPRT98155/pdf/CPRT-114HPRT98155.pdf>
2. 10 U.S.C. § 1588 (Authority to Accept Certain Voluntary Services)  
<http://www.gpo.gov/fdsys/granule/USCODE-2010-title10/USCODE-2010-title10-subtitleA-partII-chap81-sec1588/content-detail.html>
3. 10 U.S.C. § 2262 (Department of Defense conferences: collection of fees to cover Department of Defense costs)  
<http://www.gpo.gov/fdsys/granule/USCODE-2010-title10/USCODE-2010-title10-subtitleA-partIV-chap134-subchapII-sec2262/content-detail.html>
4. 31 U.S.C. § 1353 (Acceptance of travel and related expenses from non-Federal sources)  
<http://www.gpo.gov/fdsys/granule/USCODE-2011-title31/USCODE-2011-title31-subtitleII-chap13-subchapIII-sec1353/content-detail.html>
5. 31 U.S.C. § 1535 (Agency agreements) (known as the Economy Act of 1932, as amended)  
<http://www.gpo.gov/fdsys/pkg/USCODE-2011-title31/pdf/USCODE-2011-title31-subtitleII-chap15-subchapIII-sec1535.pdf>
6. 5 Code of Federal Regulations. § 410.404 (Determining if a conference is a training activity) <http://www.gpo.gov/fdsys/pkg/CFR-2013-title5-vol1/xml/CFR-2013-title5-vol1-sec410-404.xml>
7. Federal Acquisition Regulation § 31.205-46 (Travel costs)  
<http://www.gpo.gov/fdsys/pkg/CFR-2010-title48-vol1/pdf/CFR-2010-title48-vol1-sec31-205-46.pdf>
8. The Joint Travel Regulations Uniformed Service Members and DoD Civilian Employees, 1 March 2016  
<http://www.defensetravel.dod.mil/Docs/perdiem/JTR.pdf>
9. DoD 5105.05 (Department of Defense Federal Advisory Committee Management Program), August 6, 2007  
<http://www.dtic.mil/whs/directives/corres/pdf/510504p.pdf>

10. DoD 5500.07-R (Joint Ethics Regulation (JER)), August 30, 1993, Incorporating Change 7, November 17, 2011  
<http://www.dtic.mil/whs/directives/corres/pdf/550007r.pdf>
11. DoD 7000.14-R (Department of Defense Financial Management Regulation (DoD FMR)); Volume 10 (Contract Payment Policy), chapter 12 (Miscellaneous Payments), June 2012  
[http://comptroller.defense.gov/Portals/45/documents/fmr/Volume\\_10.pdf](http://comptroller.defense.gov/Portals/45/documents/fmr/Volume_10.pdf)
12. DoD 7000.14-R; Volume 12 (Special Accounts, Funds and Programs); chapter 32 (Collection and Retention of Conference Fees From Non-Federal Sources), July 2009  
[http://comptroller.defense.gov/Portals/45/documents/fmr/Volume\\_12.pdf](http://comptroller.defense.gov/Portals/45/documents/fmr/Volume_12.pdf)
13. Army Directive 2007-01 (Policy for Travel by Department of the Army Officials), 25 Jan 2007  
[http://www.apd.army.mil/pdffiles/ad2007\\_01.pdf](http://www.apd.army.mil/pdffiles/ad2007_01.pdf)
14. Army Regulation (AR) 1-100 (Gifts and Donations), 15 November 1983  
[http://www.apd.army.mil/pdffiles/r1\\_100.pdf](http://www.apd.army.mil/pdffiles/r1_100.pdf)
15. AR 37-47 (Representation Funds of the Secretary of the Army), 18 September 2012  
[http://armypubs.army.mil/epubs/pdf/r37\\_47.pdf](http://armypubs.army.mil/epubs/pdf/r37_47.pdf)
16. AR 380-5 (Department of the Army Information Security Program), 29 September 2000  
[http://www.apd.army.mil/pdffiles/r380\\_5.pdf](http://www.apd.army.mil/pdffiles/r380_5.pdf)
17. AR 380-10 (Foreign Disclosure and Contacts with Foreign Representatives), 4 December 2013  
[http://www.apd.army.mil/pdffiles/r380\\_10.pdf](http://www.apd.army.mil/pdffiles/r380_10.pdf)
18. AR 600-8-22 (Military Awards), 11 December 2006, 25 June 2015  
[http://www.apd.army.mil/pdffiles/r600\\_8\\_22.pdf](http://www.apd.army.mil/pdffiles/r600_8_22.pdf)
19. AR 608-1 (Army Community Service), 13 March 2013  
[http://www.apd.army.mil/pdffiles/r608\\_1.pdf](http://www.apd.army.mil/pdffiles/r608_1.pdf)
20. 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)
21. 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>

22. Memorandum, Deputy Secretary of Defense, 23 Sep 2015, subject: Updated DoD Conference Guidance  
[http://dcmo.defense.gov/Portals/47/Documents/Products\\_Services/Conference\\_Policies/DoD\\_Conference\\_Guidance\\_3.pdf](http://dcmo.defense.gov/Portals/47/Documents/Products_Services/Conference_Policies/DoD_Conference_Guidance_3.pdf)

23. Memorandum, Secretary of the Army, 09 Apr 2015, subject: Travel by HQDA Principal Officials  
[http://armypubs.army.mil/epubs/SecArmy\\_Collection\\_1.html](http://armypubs.army.mil/epubs/SecArmy_Collection_1.html)

24. 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)

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

26. 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).

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

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

# Enclosure 2



REPLY TO  
ATTENTION OF

DEPARTMENT OF THE ARMY  
OFFICE OF THE CHIEF OF STAFF  
200 ARMY PENTAGON  
WASHINGTON DC 20310-0200

DACS-ZDV

20 April 2016

MEMORANDUM FOR SEE DISTRIBUTION

SUBJECT: Command and Subordinate Command Review of Conferences

1. The Army spends a significant amount of resources, in terms of time and money, to host and attend conferences each year. The Chief of Staff recently reviewed his conferences and reduced the number, frequency, and duration resulting in significant savings. Furthermore, he asked the Army Commands (ACOMs), the Director of the Army National Guard, and the Chief of the Army Reserve to review their conferences. It is time to expand this review to the Army Staff, the ACOM subordinate commands, and the Army Service Component Commands (ASCCs) and the Direct Reporting Units (DRUs) and their respective subordinate commands.
2. Using your FY 2016 conference schedule as a baseline (format in enclosure 1), please review your projected FY 2017 conferences (format in enclosure 1) and report on your plans to reduce the number, frequency, and duration of conferences you and your subordinate commands will host and/or attend (format in enclosure 2). You are further required to report actual activity for FY17 on 1 April 2017 and 1 October 2017.
3. I encourage commanders to strive for a 20% reduction in conference attendance costs through alternatives such as on-line training, local venues, and video teleconferences. We will report your reductions to the Chief of Staff and share best practices Army wide.
4. I ask that you complete your review in 60 days. The point of contact for this review is Mr. Steve Redmann, Vice Director of the Army Staff. He can be reached at (703) 695-0294 or [steven.j.redmann.civ@mail.mil](mailto:steven.j.redmann.civ@mail.mil).

Encls

  
GARY H. CHEEK  
Lieutenant General, United States Army  
Director of the Army Staff

DISTRIBUTION:  
Deputy Chief of Staff, G-1  
Deputy Chief of Staff, G-2

*Encl 2*

DACS-ZDV

SUBJECT: Command and Subordinate Command Review of Conferences

(CONT)

DISTRIBUTION: (CONT)

Deputy Chief of Staff, G-3/5/7

Deputy Chief of Staff, G-4

Deputy Chief of Staff, G-8

Chief, Army Reserve

Director, Army National Guard

Chief of Engineers

The Surgeon General

Assistant Chief of Staff for Installation Management

The Judge Advocate General

Chief of Chaplains

Provost Marshall General

Commander

U.S. Army Forces Command

U.S. Army Training Command

U.S. Army Materiel Command

U.S. Army Pacific

U.S. Army Europe

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

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

Superintendent, United States Military Academy

Director, U.S. Army Acquisition Support Center

Executive Director, Arlington National Cemetery

Commander, U.S. Army Accessions Support Brigade

Commandant, U.S. Army War College

Commander, Second Army

Commander, Eighth Army

Commander, U.S. Army Cyber Command

Non-DoD Hosted Conferences (FY16)

Org	Sub Org	Conference Name	Number of Confs	Start Date	End Date	Actual Army Attendees	Actual Costs	Travel Costs	Other Conference Costs	Cost Per Army Attendee	Cancel Conference	Reduce Frequency	# Attendees Reduced	# Days Reduced	Cost Saving	

*End*

Projected Savings Army Hosted Conferences (FY17)

Cost Saving Measure	Org	Conference Name	Number of Confs	Start Date	End Date	Actual Army Attendees	Actual Costs	Travel Costs	Conference Costs	Other Costs	Cost Per Army Attendee
Total Savings											
Total Savings			0								
Total Savings											
Combined Savings											

End 2

# Enclosure 3

[Office Symbol]

[Date]

MEMORANDUM FOR RECORD

SUBJECT: Attendance at the Non-DOD-Hosted [Conference Name, Conference Dates (*include travel days*), City, State, or Country if OCONUS]

1. References:

- a. Army Directive 2016-14 (Army Conference Policy), 4 May 2016.
- b. TRADOC Policy Letter 16, TRADOC Conference and Competition Event Policy, [Date].

2. In accordance with the references above, I hereby approve attendance at [conference name, a non-DOD-hosted event], [conference dates], to be held in [City, State] for [number of Army-funded attendees] Army personnel at an estimated cost of \$ [total estimated cost]. [If meals (or receptions during meal hours) are included as part of the registration fee, include a statement here to ensure travel approval authorities account for the provided meals in official travel orders and vouchers].

3. Estimated Costs:

Expense	Estimated Cost	Any Applicable Remarks
Lodging costs for attendees	\$	$\$/\text{night lodging} \times \# \text{ nights} \times \# \text{ attendees} = \$$
M&IE costs for attendees	\$	FIRST & LAST DAY OF TRAVEL: $75\% \text{ M\&IE} \times \# \text{ travel days} \times \# \text{ attendees} = \$$ CONFERENCE DAY: $\text{M\&IE} \times \# \text{ attendees} = \$$
Government- furnished meals	\$	# of Meals
Travel costs for attendees	\$	Include airline ticket cost; rental car cost, etc.
Conference Fee	\$	
GRAND TOTAL	\$	

[If actual expense authorization or spouse travel at Army expense are approved by the appropriate authority, explicitly state that approval here and provide the written approval as an enclosure].

Encl 3

**[Office Symbol]**

**SUBJECT: Attendance at the Non-DoD-Hosted [Conference Name, Conference Dates (*include travel days*), City, State, or Country if OCONUS]**

4. This approval is contingent upon continued attention to this event to ensure the best use of Government funds and adherence to all applicable policies. Changes, including a change in location, increased attendees, or associated costs, will require approval. An After Action Report must be submitted no later than 20 days after the completion of the event.

**[GO/SES Signature Block]**

# Enclosure 4

[Office Symbol]

[Date]

MEMORANDUM FOR RECORD

SUBJECT: Army Conference Policy Exemption Determination – [Name of Event]

1. References:

a. Army Directive 2016-14 (Army Conference Policy), 4 May 2016.

b. TRADOC Policy Letter 16, TRADOC Conference and Competition Event Policy, [Date].

2. Based upon thorough review of all information available and the references above, I have determined [Name of Event, Date] is exempt from the Army Conference Policy as [ (a meeting necessary to carry out statutory command and staff oversight functions) (a meeting to consider internal agency business matters) (a meeting necessary to carry out planning or execution of operational or operations exercise activities or pre-deployment, deployment, or post-deployment activities) (a bilateral / multilateral international cooperation engagement) (formal classroom training) (a change of command, official military award, funeral, or other such ceremony) (an event where the primary purpose of DOD participation is military or civilian recruiting and/or recruitment advertising) (a meeting of an advisory committee subject to DOD Instruction 5105.04) ].

3. [Provide a description of the event to include the name, date, and location of the event, the host of the event, the purpose of the event, approximate number of attendees, and cost. Provide enough information / justification as to why the event fully and unambiguously meets the criteria for the selected exemption]. This event will not involve spouse travel at government expense, nor is this event identified in a tasking memorandum signed by the Director of the Army Staff (DAS).

4. A copy of this exemption determination will be furnished to the (organization name) conference manager and retained for a period of 5 years.

[GO/SES Signature Block]

*Encl 4*

**[Office Symbol]**

SUBJECT: Army Conference Policy Exemption Determination – **[Name of Event]**

Conference Manager Review: Concur / Non-Concur

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Legal Review: Concur / Non-Concur

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date