



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-TRQ-P

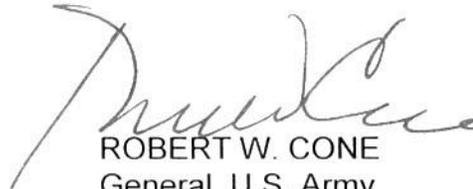
09 AUG 2012

MEMORANDUM FOR SEE DISTRIBUTION

SUBJECT: TRADOC Policy Letter 17, Guidance on TRADOC-Sponsored Conferences
- Update

1. Reference memorandum, HQ TRADOC, ATTG-TRQ-P, 15 Dec 11, subject: TRADOC Policy Letter 17, Guidance on TRADOC-Sponsored Conferences (enclosed).
2. On 11 May 12, Office of Management and Budget released a series of policies and practices designed to reduce expenses associated with conferences. All conferences costing over \$100K require Deputy Secretary of Defense approval and a thorough cost-benefit analysis by the Office of the Administrative Assistant. To that end, organizations should not submit any conference requests costing \$100K or more. Any conferences over \$100K should be submitted months in advance and dialogue must be maintained with the commander and DCG/CoS to ensure we can fully justify the conference.
3. We will closely scrutinize all conference requests ensuring they significantly further TRADOC's mission and comply with all applicable travel and conference directives, rules, and policies. The largest cost drivers are the number of participants. We must truly scrutinize the numbers. Collaborative information systems should always be our first choice to exchange information and garner feedback in this fiscally constrained environment.
4. This policy change is effective until superseded or rescinded.

Encl


ROBERT W. CONE
General, U.S. Army
Commanding

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Commander
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ATTG-TRQ-P

SUBJECT: TRADOC Policy Letter 17, Guidance on TRADOC-Sponsored Conferences
- Update

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Army Capabilities Integration Center
U.S. Army TRADOC Analysis Center
U.S. Army Aeronautical Services Agency

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



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ATTG-TRQ-P

15 DEC 2011

MEMORANDUM FOR SEE DISTRIBUTION

SUBJECT: TRADOC Policy Letter 17, Guidance on TRADOC-Sponsored Conferences

1. It is imperative that TRADOC exercise strict fiscal responsibility in planning and executing our programs and activities, including conferences. Changing the "business as usual" mindset as it relates to conferences is the right thing to do in this era of declining resources. Simply put, we must implement more cost-effective and efficient methods to train, plan, collaborate and disseminate information. Experience has shown that conferences are an expensive means of accomplishing these goals. When it is determined that only a conference will suffice to accomplish official business, I will hold you accountable for ensuring that all conference-related events comply with law, regulation and policy, and for exercising strict fiscal discipline in organizing and administering the conference.
2. The enclosed policy is effective immediately. It establishes conference approval authorities and applicability, defines key terms, clarifies processes, further emphasizes the need to instill fiscal restraint throughout the Army and designates the TRADOC DCS, G-3/5/7 as the proponent for conference policy.
3. In seeking to sponsor a conference, you will review and strictly adhere to all applicable law, regulation and policy, including the provisions of this directive. I charge each of you to consider how you can contribute to cost savings and eliminating waste in conference planning.
4. This policy is effective until superseded or rescinded.

Encl

ROBERT W. CONE
General, U.S. Army
Commanding

DISTRIBUTION:
(see next page)

Encl

ATTG-TRQ-P

SUBJECT: TRADOC Policy Letter 17, Guidance on TRADOC-Sponsored Conferences

DISTRIBUTION:

Commander

U.S. Army Accessions Command

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

TRADOC CONFERENCE POLICY

1. Definitions. As defined by the Joint Federal Travel Regulations (JFTR)/Joint Travel Regulations (JTR), "conference" is a meeting, retreat, seminar, symposium, or event that involves attendee travel. It also includes training activities that are defined as a "conference" under the provisions of 5 CFR § 410.404. Events included in this definition normally require registration, an agenda, and scheduled speakers or discussion. The definition does not include:

a. Events necessary to carry out the statutory command and staff oversight functions of the Department of the Army (DA), including investigations, inspections, audits or site visits;

b. Service-endorsed training that has been approved through the Army Deputy Chief of Staff, G-3/5/7; and

c. Regularly scheduled courses of instruction conducted at a Government or commercial training facility (for example, courses scheduled via the Army Training Requirements and Resources System); however, this exclusion does not apply to courses held in a non-training commercial facility, such as a hotel or conference center.

d. For questions about whether an event is excluded, contact your Staff Judge Advocate office. Requests for exceptions to policy should be submitted to Army Training and Doctrine Command (TRADOC) DCS, G-3/5/7 Priorities, Analysis, and Requirements Directorate (PAR) and must be fully justified.

2. Applicability. This policy applies to all TRADOC command and staff elements subordinate to the Commanding General, TRADOC.

3. General Responsibilities.

a. Commander's Intent. The Army, including TRADOC, is increasingly unable to afford business as usual for conference execution and travel expenses. Commanders at all levels must understand and comply with both the letter and spirit of the Army's conference policy. Not every assembly is a conference. Commanders have statutory obligations of mission, command, and staff oversight that may require assembly of key organizational leaders or subject matter experts to ensure commander and regulatory compliance. These events should be minimized in terms of frequency, duration, and attendance and must be clearly distinguishable from activities that define conferences, as depicted in paragraph 1 of this document. If you believe an activity is necessary under a statutory obligation, consult your SJA; the TRADOC SJA office will also help you make the appropriate distinctions. Conference approval authority for TRADOC will remain at HQ, TRADOC to emphasize the importance of this cost-saving effort to the command and to the Army.

b. Personnel will comply with law, regulation, and policy applicable to conference planning, including the provisions for conference planning in the JFTR/JTR, specifically Appendix R (Conferences); DoD 5000.7-R (Joint Ethics Regulation (JER)); and all other pertinent regulations. TRADOC personnel will familiarize themselves with these regulations and other travel policy guidelines before starting to plan a conference. Legal advisors in the Army are expected to assist their clients by providing thorough, accurate, and consistent legal reviews. Further, all personnel are expected to strictly apply sound fiscal principles throughout the conference planning and administration processes.

4. Procedures for Conference Requests.

a. These conference request and approval procedures apply to all conferences sponsored or funded by any TRADOC command, organization, or activity, without regard to the approval authority of the conference. Approval authorities are defined in paragraph 8.

b. All conference requests will be signed by a general officer or member of the senior executive service and staffed through the chain of command to the appropriate Conference Approval Authority defined in paragraph 8. The TRADOC officials signing and coordinating on the conference request submitted to the Conference Approval Authority are attesting to the accuracy of the statements in the request, including the cost-benefit analysis and cost estimates.

c. The sponsoring TRADOC command, organization, or activity will submit a complete and fully coordinated conference request through the appropriate command structure no later than 90 days before the start date of the conference. Conference requests requiring Secretary of the Army (SA) approval, as defined in paragraph 8, must be submitted no later than 120 days before the start date of the conference. Any organization submitting late requests will be asked to reschedule their conference to a later date to accommodate timely processing of the conference request. If the proponent expects to acquire contractor support and/or facilities contracts, the conference request must be approved before contract award. Each TRADOC command, organization or activity may put in place additional timelines to meet their specific milestones for approval or acquisition requirements.

d. All conference requests will be submitted to HQ TRADOC via AKO. Only two persons at each TRADOC organization/activity will be given access to the conference folders in AKO. You can reach the conference request folders on AKO by going to: DOD Organizations/Army/TRADOC/HQ Staff/TRADOC G-3/5/7/DCS, G-3-5-7 (Operations, Plans, and Training)/Priorities, Analysis, and Requirements (PAR) Directorate/Conferences. Do not send conference requests directly to the TRADOC Staff Judge Advocate's office or individual's e-mail accounts as they will be returned without action.

e. Approved conference requests reflect the approval authority's agreement that the venue, agenda, and costs of the conference are allowable

and acceptable. Any changes to these factors after the conference is approved must be submitted to TRADOC G-3/5/7 PAR directorate to determine the need for additional approval.

f. **The template at enclosure 1 must be used for all conference requests.**

Failure to provide detailed information or explanations will result in disapproval of the request. Of particular note, requests shall provide:

(1) A breakdown of attendees, including the rationale and criteria applied to scope the attendee population and the justification for the number of attendees.

(2) Cost information in accordance with Assistant Secretary of the Army (Financial Management and Comptroller) guidance, dated 17 May 2011 (available at http://armypubs.army.mil/epubs/asa_fmc_collection_1.html). **Specific cost elements are in the template at enclosure 2.** All requests must include the cost of hosting an event and the cost of attending an event.

(3) A detailed and credible **cost-benefit analysis (template at enclosure 3)**, which includes an explanation of other options considered (video teleconference, train-the-trainer, and so on), as well as information on **site selection (template at enclosure 4)** must be included as part of the conference request. Conference requests must include a certifying statement that the travel is essential and the objectives of the conference cannot be satisfactorily accomplished less expensively by correspondence, Web-based communications, teleconferencing or other appropriate means. Additionally, the JFTR/JTR require all individual travelers to justify all travel with a statement on their DD Form 1610 (Request and Authorization for TDY Travel of DOD Personnel) or in the Defense Travel System (DTS) that the "Objective cannot be satisfactorily accomplished less expensively by correspondence, teleconferencing, Web-based communications, or other appropriate means."

(4) A substantive **agenda** spanning the proposed conference from start to end; listing all planned speakers, programs, ceremonies, and other activities; and specifying any after-hour events or activities (**template at enclosure 5**). The agenda should provide planned or proposed locations for each event. Agendas that merely annotate "breakout sessions" are insufficient. If breakout sessions are planned, the agenda should explain the purpose and objectives of each breakout session.

(5) A conference security assessment that contains:

(a) A force protection assessment, including threat and vulnerability assessments for the conference facility site and any specific security requirements for the conference facility. For conferences held inside the National Capital Region (NCR), the Security and Safety Division (SSD-AT/FP), Office of the Administrative Assistant can assist with the assessment. For conferences outside the NCR, the local installation security or provost marshal office may provide technical expertise. Conferences held on Government or military installations may have different requirements than those in

commercial facilities, so check applicable security regulations. **A Criminal Activity Threat Assessment (CATA) guidance and request form at enclosure 6.**

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

(c) A statement indicating whether the conference will involve classified information and, if so, the name and location of the secure U.S. military installation, other U.S. Government installation, 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 Deputy Chief of Staff, G-2 if additional guidance is needed.

(6) A legal review that addresses all fiscal, ethics, contracting, and travel issues, including a comprehensive assessment of whether the conference complies with applicable regulations and DA policy. This review should provide sufficient legal advice to the approving official to make an informed decision on approval. Any legal objections must be mitigated before submission of the conference request.

(7) Actions taken to reduce costs (**template at enclosure 9**).

5. Selection of Conference Site.

a. The first choice for conference locations must always be military installations or other Government facilities. Organizations will maximize the use of Government-owned or Government-provided conference facilities. Military installations and Government-owned facilities may not be ruled out as a conference venue solely because the facility is not available on the exact dates the sponsor desires to hold the conference; efforts must be made to adjust the conference scheduling to fit the availability of military or Government facilities, when possible. If scheduling cannot be adjusted, a detailed explanation must be provided in the conference request. Additionally, military or Government facilities may not be ruled out simply because they do not offer the same refreshments, food options, or lodging availability as commercial facilities. Further, while planning the conference, the size of the conference should take into account the capacity of Government facilities; efforts should be made to contain the size of conferences to the capacity of military or Government facilities nearest the majority of local attendees.

b. Commercial facilities will be used only when they can be proven more economical, or when military or other Government facilities are unavailable when needed. If no military or Government-provided facility can meet conference requirements, the JFTR/JTR require that a minimum of three geographic sites be

evaluated and considered for conferences with more than 30 attendees in a temporary duty (TDY) status before the selection of any one site for the conference, unless an overriding operational reason can be shown for holding the conference in a specific city **(use template at enclosure 4)**.

c. Factors to be considered when determining a geographic location to conduct a conference include, but are not limited to:

- (1) Per diem expenses;
- (2) Travel costs, including local travel and ground transportation;
- (3) Distance to the majority of attendees (if one area has a significant concentration of attendees, that location generally will be the most cost-effective option); and
- (4) Consideration of lower, off-season rates or peak seasons.

d. Once a particular city is chosen as the site of the conference, a minimum of three facilities in that city will be considered to ensure full and open competition. Factors that should be considered when determining the venue to conduct a conference include, but are not limited to:

- (1) Participation in the Lodging Success Program (for more information, visit https://www.defensetravel.dod.mil/Docs/Fact_Sheet_Lodging.pdf);
- (2) Inclusion on the national list of approved accommodations maintained by the Federal Emergency Management Agency (the Hotel-Motel National Master List is available at <http://www.usfa.fema.gov/applications/hotel/>);
- (3) Willingness to exempt taxes for lodging;
- (4) Distance to the nearest major airport and free shuttle availability;
- (5) Cost of the venue (if commercial space is to be rented); and
- (6) Availability of rooms at the established per diem rate.

e. Each TRADOC command, organization, or activity will document, maintain and make available to The Inspector General or other interested parties, a record of the conference site selection process, including the costs of each alternative site and venue considered.

f. All applicable local policies on site selection must be followed. For conferences to be held in the NCR, conference sponsors must coordinate through the Real Estate and Facilities Directorate, Office of the Administrative Assistant and obtain approval from the

Director, Space Policy and Acquisition Division, Defense Facilities Directorate, Washington Headquarters Services to contract for short-term conference space inside the NCR.

g. In addition to cost considerations, selection of the conference site must be sensitive to public perception. The conference sponsor should avoid the appearance that public funds are being expended in a careless, wasteful or unnecessarily extravagant manner. No venue, however, may be categorically prohibited from selection solely because of its reputation, location, or amenities.

h. If a conference is justified as training and conducted on a recurring basis, the sponsoring command, organization, or activity should seek to incorporate it into the institutional training domain, which includes Army centers and schools.

6. Cost, Contracting, and Ethical Considerations. When a conference is determined to be necessary, the sponsoring command, organization, or activity will adhere to strict fiscal controls and minimize costs. Accordingly, the conference sponsor must ensure the following:

a. The length of the conference is strictly determined by mission requirements. Socials, golf tournaments, military balls, or other ancillary activities will not be held during regularly scheduled duty hours or used as a basis to extend personnel in a TDY status. Award ceremonies held during a conference often may be considered official business, but in no case should an award ceremony extend the period for which a conference attendee will be in a TDY status. For example, an award ceremony will not be held in the evening if it would result in the extension of a conference attendee in TDY status for an extra day or delay the attendee's return to his/her permanent duty station.

b. Conference attendees are limited to the minimum number necessary to accomplish the objectives of the conference. Accordingly, the sponsor must establish clear criteria for attendance and strictly limit the number of attendees.

c. Appropriated funds may not be used to purchase conference mementos to distribute to attendees.

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

e. As a general rule, appropriated or nonappropriated funds are not authorized for refreshments. While serving light refreshments to conference attendees might be common business practice in private industry, and the JFTR/JTR authorizes light refreshments under very rare circumstances, Army policy is that appropriated or nonappropriated funds are not authorized to pay for light refreshments at Army-hosted conferences. Attendees may purchase refreshments at personal expense, which will

not be reimbursable to the traveler by the Government. In some extenuating circumstances, a commercial facility may provide refreshments when such costs are both non-segregable from the cost of the facility rental (the cost of the rental is a fixed fee, which includes refreshments at no additional cost to the Government) and nonnegotiable (the facility will not negotiate to reduce the cost of the facility to the Government); however, this situation is rare. Non-segregable and nonnegotiable refreshments must be specifically addressed in the written legal review submitted with the conference request. Further, by signing the conference request, the signing official is attesting to the fact that the refreshments are truly non-segregable and nonnegotiable.

f. Lodging and meals will not be authorized or provided at government expense to local attendees (those not in TDY status). This restriction does not authorize selecting a location outside the local commuting area solely to provide Government-furnished lodging and meals.

(1) If meals are provided for personnel in a TDY status, the command or organization sponsoring the conference must identify the cost of each meal, whether included in a registration fee or contracted for separately; ensure that the appropriate proportional meal rate (PMR) is used; and issue a notice to all attendees to ensure that they correctly annotate travel vouchers. The cost of meals the Government provides must not exceed the per diem for that location. If a PMR is authorized, the cost of meals the Government provides plus the PMR must not exceed the per diem for that location. **Computation examples are in enclosure 7.**

(2) Special consideration should be taken when attendees include both local attendees and those in TDY status. Meal breaks should be given to allow both local attendees and travelers the opportunity to purchase meals, or local attendees may be offered the opportunity to personally purchase nonreimbursable meals being provided to travelers.

g. The JFTR/JTR specify the criteria under which an actual expense allowance (AEA) may be authorized. The competitive site selection process based on the JFTR/JTR should prevent the need for AEA except in very rare cases. If AEA is authorized, it should be uniform (if possible) among personnel traveling at Government expense when they travel together or to the same location where AEA has been authorized. AEA should not be used to provide upgraded rooms or suites based solely on rank or grade. AEA is prescribed only on an individual trip basis and only after consideration of the existing facts of each case. Blanket authority prescribing an AEA for all travel to an area is prohibited, and AEA shall not be authorized as part of a "blanket" travel order.

h. Conference planners should request the tax exemption of lodging for federal employees and/or servicemembers during the conference selection process. Contracting officers can often negotiate the tax exemption into commercial contracts. Any approval to hold a conference with a commercial lodging establishment that refuses

to accept federal employee and/or servicemember tax exemption must break out the cost of lodging-related taxes for the total number of attendees and include that amount in its cost calculation to achieve either the best value or lowest cost for the conference.

i. Contracts. The following provisions and guidelines apply:

(1) All conference-related contracts must be signed by a warranted contracting officer or, when authorized, a Government purchase cardholder. When authorized and if the cost of the conference space is within the limits of the cardholder's purchasing authority, the Government purchase card may be used to rent conference space. Requirements will not be split to reduce costs to within the limits of the cardholder's authority. Personnel cannot make any commitment until a written agreement is signed by a warranted contracting officer or, when authorized, by a Government purchase cardholder. Support contractors are not authorized to enter into contracts on behalf of the Government for conference arrangements.

(2) 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 authority to bind the Government could be held personally liable if he/she signs an agreement for conference facilities or for 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.

(3) A Government employee will not commit the Government to the use of any facility, sign any agreement or otherwise obligate the Government for conference facilities or support before approval of the conference by the conference approval authority. Personnel may visit facilities, discuss space needs, collect pricing and develop cost estimates, tentatively reserve space (only if at no cost and without any liability to the Government) or request other conference-related information. No contract or task order related to conference requirements will be awarded and no funds will be obligated for a conference until that conference has been approved by the Conference Approval Authority. This prohibition includes charges to be made using the Government purchase card.

(4) After the Conference Approval Authority approves the conference, the conference sponsor will forward documentation of the approval to the servicing resource manager and contract procurement activity. The conference sponsor must forward to the contract procurement activity a funding document indicating the availability of funds and a contract statement of work setting forth conference-related contract requirements. With a view to securing the best value, the conference sponsor must secure approval of the conference and forward funding and requirements documents in enough time to allow for competitive procurement of conference support and/or facility contracts. All contracts related to holding a conference (for example, facility contracts and conference support contracts) must be fully funded with the authorized Government appropriation before contract award. Recurring conferences must be included in the command,

organization or activity budget. Conference planners must ensure that all conference funding complies with 31 U.S.C. §1341, 31 U.S.C. § 3302 and DoD 7000.14-R.

7. Command Responsibilities.

a. Appoint a conference manager along with a backup, at the command or organization level who will be the primary point of contact for conferences, oversee the administrative and technical details of conferences and process conference requests requiring TRADOC or DA approval. The name and contact information of this individual must be provided to the TRADOC DCS, G-3/5/7 PAR Directorate and updated annually or as it changes. These individuals will be given access to the conference request folders on AKO and be responsible for reviewing and submitting all conference requests for their organization.

b. Afteraction Reports. On a semiannual basis, TRADOC must document and report to the Secretary of the Army Office of the Administrative Assistant all conferences held during each reporting period. To accurately produce the semiannual report, the conference sponsor must forward an afteraction report to the TRADOC PAR Directorate within 30 days after the completion of the conference. **Use template at enclosure 8.**

8. Approval Authorities.

a. The Administrative Assistant to the Secretary of the Army is the approval authority for all Army conferences that meet either of the following criteria:

(1) Total conference costs (**as detailed in enclosure 3**) are greater than or equal to \$500,000; or

(2) The conference is held in conjunction with a non-Federal entity (NFE) with the following exceptions:

(a) Conferences held in conjunction with representatives from foreign governments or international organizations are excluded, unless they meet the threshold in paragraph 8a(1); and

(b) Conferences in which an NFE is competitively awarded a contract to support a conference sponsored or funded by an Army command, organization or activity is excluded unless they meet the threshold in paragraph 8a(1).

b. For conferences with total conference costs between \$100,000 and \$499,999, that are not held in conjunction with a NFE as defined in paragraph 9, the approval authority is the Commanding General, TRADOC. For conferences with total conference costs of \$99,999 or less that are not held in conjunction with a NFE, the approval authority is the DCG/CoS, TRADOC.

9. Non-Federal Entities.

a. **Statutory Authority.** Certain conferences and events sponsored by NFEs have statutory authority that authorizes specified DA support to these conferences and events. This policy does not apply to these conferences and events; see the JER and DoD Instruction 5410.19 (Public Affairs Community Relations Policy Implementation). For example, 10 U.S.C. § 2558 authorizes logistical and administrative support to certain national military associations for their annual national convention or conference. This support is limited to the following organizations and only for their annual national meeting, conference, or convention:

- (1) Adjutants General Association of the United States
- (2) Association of the United States Army
- (3) Enlisted Association of the National Guard of the United States
- (4) National Guard Association of the United States
- (5) Non-Commissioned Officers Association of the United States of America
- (6) Reserve Officers Association of the United States

b. **Co-sponsorship.** On occasion, an Army command or organization may co-sponsor an event with an NFE. The Army is a co-sponsor of an event when that command or organization is one of the organizations that develops the substantive aspects of the event or provides substantial logistical support for the event. All co-sponsorship agreements must be reviewed by the sponsor's ethics advisor and forwarded to the Army General Counsel or his delegate for approval in accordance with the JER. Further, in accordance with paragraph 8a(2), the Administrative Assistant to the Secretary of the Army is the sole approver of co-sponsored conferences with NFEs.

- (1) DA personnel may not endorse the NFE co-sponsor(s) or its activities.
- (2) DA personnel may not show preferential treatment to similarly situated NFEs that have a demonstrable interest in the subject matter of the conference.
- (3) There must be no appearance that the NFE co-sponsor's role in or support of the conference will improperly influence DA personnel in other official matters the NFE may have an interest in.
- (4) The conference cannot be developed as a profit-making endeavor for the NFE co-sponsor(s), including any vendor exhibition.
- (5) When a TRADOC 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 comingle fees collected from non-federal and Army attendees will comply with the provisions implementing 10 U.S.C. § 2262. If a graduated conference fee structure is used, no group will bear an unreasonable burden of the costs.

c. TRADOC Conferences Held in Conjunction With NFE Events. Generally, the competition requirements of the JFTR/JTR as executed via the geographic and venue/facility selection criteria make it difficult to plan for concurrent or sequential but separate Army and NFE conferences. Those rare circumstances where this is permissible and practical require HQDA approval just as a co-sponsorship would. Additionally:

(1) TRADOC and NFE events will be separate and distinct events and will not be comingled. All Army activities, including awards ceremonies, outbriefings, or in-progress reviews, will be held as part of the TRADOC conference and will not be scheduled so that Army personnel must attend events hosted by an NFE. For example, TRADOC conference activities will not bookend an NFE event.

(2) The TRADOC conference will not be scheduled with a view to accommodating or benefitting the NFE. DA personnel will not endorse conferences sponsored by an NFE nor will DA personnel participate in NFE fundraising events, unless authorized under the JER or other applicable ethics standards.

(3) Holding a TRADOC conference at the same location as an NFE event does not relieve the Army conference sponsor of the requirement to comply with applicable laws, regulations, and policies, including the provisions of this policy.

(4) NFEs may not provide services, facilities or support to a TRADOC conference unless such support has been acquired through normal acquisition procedures or the event is a cosponsored event.

(5) DA logistical support, in the nature of DA personnel serving as speakers or panelists at conferences or other events sponsored by an NFE, will be kept to a minimum and must comply with the JER, chapter 3, section 2 (Official Participation in Non-Federal Entities). DA will support events where only a limited number of DOD participants will appear on the same program. In such cases, the event must provide the best way to disseminate Army information, although speakers and panelists must take care to safeguard and prevent dissemination of Army procurement, technological, classified and non-public information. NFE conferences or events at which the majority of speakers are Army officials or other Army personnel are considered co-sponsored conferences and must be approved in accordance with paragraph 8a(2).

10. Other Considerations.

a. Conference Fees. Title 10 U.S.C. § 2262 allows DA to collect fees in advance of a conference, either directly or by using a contractor, from individuals and commercial participants attending DA-sponsored conferences. Such fees may only be used to offset reasonable and allowable costs because fiscal limitations on the expenditure of appropriated funds for conference expenses apply to the use of collected fees.

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

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

(3) In accordance with DoD 7000.14-R, Volume 12, chapter 32, all organizations are required to report the collection of conference fees. Conference sponsors should, therefore, contact their resource managers for further instructions.

b. Spouse Travel. As a general rule, spouses may not accompany DA military or civilian personnel on official business at Government expense. In addition, blanket requests for Government-funded spouse travel generally are not sufficient, nor acceptable. Commands must be able to demonstrate the requirement and benefit for each proposed spouse attendee. Approval authority for spouse travel is DCG/CoS, TRADOC. Requests will be submitted to HQ TRADOC using the template at enclosure ~~B~~. Policy for spouse travel is in DA Directive 2007-01 (Policy for Travel by Department of the Army Officials), 25 Jan 07.

c. Branch or Warfighter Functional Conferences. These events, typically described as branch or functional seminars, symposiums, or commander's conferences, should not be conducted more than once per fiscal year. Detailed NFEs guidance described in paragraph 9 merits particular attention when planning these events. Commanders/commandants must ensure conference focus remains on Army-relevant branch or CoE business and that NFE organizations affiliated with any branch are not involved in a manner that violates this guidance.

d. Individuals Not Employed by the Government Participating in a DA-Sponsored Conference. When a DA conference sponsor determines that it is in the best interest of the Government to request an individual who is not employed by the Government, only intermittently employed by the Government as a consultant, or expert in accordance with 5 U.S.C. § 5703, or serving without pay to lecture, instruct, or give a demonstration or presentation, the individual may be reimbursed travel and travel-related expenses. In such cases, however, an invitational travel authorization must be issued in accordance with the JFTR/JTR, and travel must be arranged through a (Government contracted) commercial travel office/travel management center. An invitational travel authorization

is not authorized for an individual merely to attend a conference sponsored by DA or an NFE. Support contractors may not make travel arrangements for such individuals, unless arrangements are made through an authorized commercial travel office/travel management center in accordance with the JFTR/JTR. Support contractors may not pay the travel expenses of such individuals and then be reimbursed these costs.

e. Contractor Travel. Government contractor travel costs are governed by the rules in the Federal Acquisition Regulations. For these reasons, a contractor is not eligible for an invitational travel authorization in the execution of a contract.

f. Official Representation Funds. Any official representation funds requested to purchase meals or refreshments for authorized guests, such as congressional delegations or foreign dignitaries, must be approved under separate memorandum in accordance with AR 37-47 (Representation Funds of the Secretary of the Army).

11. The provisions of this policy are effective immediately. The TRADOC proponent for this policy is the TRADOC DCS, G-3/5/7 PAR Directorate. The HQDA proponent for this policy is the Administrative Assistant to the Secretary of the Army.

9 Encls

1. Conference request template
2. CAPE
3. Conference CBA format
4. Venue Proposal template
5. Conference agenda
6. CATA guidance
7. PMR calculations
8. Post-event report
9. Conference savings template

Encl 1

YOUR OFFICIAL LETTERHEAD

(office symbol)

(date signed)

MEMORANDUM THRU (if applicable)

FOR (Approval Authority in accordance with Army Directive 2011-10)

SUBJECT: Request Approval to (Sponsor or Co-sponsor) the (insert name of event), (dates)

1. Event. (Insert name of sponsoring proponent) requests approval to conduct the (insert name of conference), (insert dates of conference), at (insert the location of the conference).
2. Purpose and Justification. Explain why the conference is being held; include any applicable regulations or directives. If the conference is being cosponsored, include a full explanation of what is being provided and exchanged. If the conference is in conjunction with a non-Federal entity, additional requirements apply (refer to Army Directive 2011-20, paragraph 9).
3. Cost Benefit Analysis. Explain the benefits of holding the conference. Explain why lower cost alternatives such as teleconferencing, video conferencing or Web conferencing are not feasible and include any cost savings features from previous conferences. For any conference requiring travel, include a certifying statement that the objectives of the conference cannot be satisfactorily accomplished less expensively by correspondence, teleconferencing, Web-based communications or other appropriate means. Enclose a copy of your CBA.
4. Analysis for Location Selection. Military installations or Government-owned or leased space must be considered first. Clearly demonstrate efforts to first secure military or Government space. For conferences with 30 or more attendees, state the three geographic locations surveyed and provide the rationale for the selected location. (For example, you should demonstrate where the majority of your attendees are traveling from and why the geographic location is most cost-effective.) Then clearly identify the three venues considered, including costs and any other factors used in the selection. If using commercial space within the National Capital Region (NCR), you must request approval from Washington Headquarters Services, Defense Facility Directorate, Space Policy and Acquisition Division and include the division's approval as an enclosure to the conference request.
5. Attendees. Provide information on your expected attendees (for example, all general officers in the medical profession on the East Coast). Include what measures have

OFFICE SYMBOL

SUBJECT: Request Approval to (Sponsor or Co-sponsor) the (insert name of event), (dates)

been taken to discipline attendance to ensure the minimum number of attendees. Then, complete the following chart for your expected attendance.

Number of military attendees	
Number of DA civilian attendees	
Number of contractor attendees	
Number of all other attendees (describe status and role in conference – statutory volunteers, etc.)	
Number of foreign government attendees	
GRAND TOTAL	
Of the attendees:	
Number of local attendees (i.e., those not on TDY orders – usually traveling from within the local commuting area)	
Number of Army-funded attendees (either centrally or command-funded).	
Number of spouses traveling at Government expense (additional approval required)	

6. Security. Provide contact information for the security office handling this conference. State the classification of the conference and certify that the procedures outlined in AR 380-5 (Department of the Army Information Security Program) have been followed, if applicable. If any personnel from a foreign government are attending or if any classified information will be discussed, certify that coordination has been done with the Office of the Deputy Chief of Staff, G-2 (DAMI). You must enclose a conference security assessment, including threat and vulnerability assessments for the conference facility site and any specific security requirements for the conference facility, with your conference request. If the facility has not been selected at the time of the request, include as much information as is known.

7. Funding and Contracts. Clearly explain how the conference is funded. Explain who is paying for all costs associated with the event and what funding source they are using (e.g., regular Operation and Maintenance, Army; official representation funds (ORF); registration or exhibit fees; or any other Government agency funds). Include funding from both the conference proponent and attendees' organizations. For example, state

OFFICE SYMBOL

SUBJECT: Request Approval to (Sponsor or Co-sponsor) the (insert name of event), (dates)

whether attendees' organizations are funding travel and reimbursable registration fees. (A full explanation of registration fees should be included in paragraph 10.) If applicable, state the amount of ORF being requested and the date the ORF packet was submitted or will be submitted in accordance with AR 37-47 (Representation Funds of the Secretary of the Army). If the contract vehicle is known, include details. Enclose with your request any vendor proposal documents that will be relevant to decisionmaking.

8. Meals and Incidental Expenses. State whether any meals will be provided at Government expense in lieu of per diem. State the cost of each meal (including gratuity and applicable taxes) per person. (For example, each day attendees will be provided breakfast, lunch and dinner at the following costs: B = \$#/person, L = \$#/person, D = \$#/person OR conference attendees will be provided lunch each day at \$#/person). If a Government-furnished meal is provided, the proportional meal rate (PMR) applies to military personnel and DA civilians for each day meals are furnished. Further, you must demonstrate that the cost of the Government-furnished meals plus the PMR does not exceed the per diem for the locale. If meal breaks are worked into the agenda and attendees will purchase all meals with their provided per diem or optional nonreimbursable registration fee, please indicate "No Government-furnished meals." In the "Estimated Cost" table in paragraph 12, you will need to show the calculations of meals and incidental expenses (M&IE) and Government-furnished meals to make sure attendees are given the proper M&IE rate. Travelers are authorized 75 percent of M&IE on their departure and return dates (that is, travel days).

9. Refreshments. Refreshments are a personal expense and will not be provided at Government expense. Conference planners may offer attendees the opportunity to purchase refreshments as a personal expense not reimbursable by the Government. On rare occasions refreshments are both non-segregable (not identifiable as a separate charge in the facility costs) and non-negotiable (that is, the facility will not reduce the cost of the venue if refreshments are refused). However, this situation is rare, and by signing the conference request, the submitting official is attesting to the fact that the refreshments are non-segregable and nonnegotiable. Any refreshments provided must be specifically addressed in the written legal review submitted with the conference request.

10. Fees. State whether a conference registration fee or exhibitor (vendor) fee will be collected; state the amount of the fee being collected for each person or vendor, and list all expenses and costs covered by the fee. Collection of fees must be conducted as permitted by applicable law, regulation and policy. Any conference or exhibit fee must be explicitly addressed in the written legal review submitted with the conference

OFFICE SYMBOL

SUBJECT: Request Approval to (Sponsor or Co-sponsor) the (insert name of event), (dates)

request. Please ensure that you refer to the policy document for additional requirements governing fees.

11. Honorariums or Speaker Fees. State whether or not honorariums or speaker fees will be paid and the cost paid for each speaker. In general, fees are limited to \$2,000 per person, but refer to your command policy and/or DOD 7000.14-R, Volume 10, chapter 12, paragraph 1208 (Payments of Fees for Guest Speakers, Lecturers, and Panelists) for more information.

12. Estimated Costs. State the estimated costs for all expenses listed in the table and show all calculations; examples of appropriate remarks and calculations are provided. Costs should include any Army funds to be expended, whether by the conference proponent or attendees' commands or organizations. Enclose a copy of the CAPE worksheet.

Expense	Estimated Cost	Any Applicable Remarks
Lodging costs for attendees		(Hotel rate) x (# nights) x (# of attendees on TDY) = \$____. Use the per diem lodging rate to show whether the lodging is within per diem. If the # of nights per attendee varies (e.g., support staff arrives early), show the calculations.
M&IE costs for attendees		<p>FIRST & LAST DAY OF TRAVEL: (M&IE rate) x 75% x (2 travel days) x (# of attendees on TDY) = \$____</p> <p>CONFERENCE DAYS (w/ no Government-furnished meals): (M&IE rate) x (# full conference days) x (# of attendees on TDY) = \$____.</p> <p>CONFERENCE DAYS (with Government-furnished meals): (PMR) x (# days with Government-furnished meals) x (# of attendees on TDY) = \$____.</p> <p>NOTE: PMR is used for any days the Government provides one or two meals; if it provides three meals, only incidentals are allowable. See the PMR Computation Table at enclosure 4 for more information on PMR and</p>

OFFICE SYMBOL

SUBJECT: Request Approval to (Sponsor or Co-sponsor) the (insert name of event), (dates)

Expense	Estimated Cost	Any Applicable Remarks
		allowable per diem.
Government-furnished meals		<p>List each meal separately.</p> <p>(Cost per meal) x (# of attendees authorized Government-furnished meal) = \$_____</p> <p>NOTE: Local attendees (those not in TDY status) are not authorized to be provided meals at government expense. The amount of PMR plus the cost of the Government-furnished meal(s) may not exceed per diem.</p>
Travel costs for attendees		(Average price of plane ticket) x (# of attendees) and/or POV reimbursement or other travel methods.
Meeting space rental costs		Include all costs associated with facility rental space per proposals. If the facility is in the NCR, include the statement "WHS approval has been included with this request."
Audiovisual costs		Include any audiovisual cost estimates (screens, microphones, etc.)
Fees for guest speakers, lecturers, or panelists		Include cost for each speaker, travel costs, or any other costs associated with speakers. Include approval of honorarium if \$2,000 limitation is exceeded.
Printing or reproduction costs		Reproduction costs for handouts.
Standard supplies		Name tags, pens, paper, folders
Security costs		If applicable, as recommended by the appropriate security office.
Other specific costs such as van rental, telephone fees, computer fees		For example, van needed to transport supplies to venue.
Contracted facilitator or coordination cost		Include the contract or requisition # if known. Include description of what it covers and estimated costs.

OFFICE SYMBOL

SUBJECT: Request Approval to (Sponsor or Co-sponsor) the (insert name of event), (dates)

Expense	Estimated Cost	Any Applicable Remarks
Personnel and associated costs		Provide estimated military/DA civilian personnel costs associated with coordinating, preparing and executing conference. Include any lodging or transportation required to plan and execute the conference (i.e., site visits). Do NOT include the personnel costs (salaries and benefits) of those attending the conference, other than support staff. For assistance with personnel rates and calculations, refer to https://www.cape.osd.mil/costguidance/ .
GRAND TOTAL	\$	

13. Point of Contact. (Provide organization contact information: name, phone number, email address.)

(reviewing official signature block)

NOTE: The following encls MUST accompany this request in the following order:

1. Cost Assessment & Program Evaluation (CAPE)
2. Cost Benefit Analysis (CBA)
3. Conference agenda
4. CATA (Security review)
5. Sub-command Legal Review
6. Conference Savings
7. Venue Proposals (if any)/Site Selection if using off-post facilities
8. WHS approval (for those using commercial space in the NCR)

Encl 2

This email, and any files transmitted with it, may contain proprietary or competition sensitive information and is intended solely for the use of Department of Defense to whom addressed. Unauthorized disclosure may result in civil or criminal penalties. If you are not the named addressee you should not disseminate, distribute or copy this email. In addition, if you are not the intended recipient you are notified that disclosing, copying, distributing or taking any action in reliance on the contents of this information is strictly prohibited. If you have received this email in error please notify the Cost Guidance Support Group at cost.guidance.support@osd.mil immediately and delete this e-mail from your system.

Preparation of this event cost the Department of Defense a total of approximately \$15,915.77.

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RefID: B-269F315

1. Event Title

CONF. NAME

2. Event Date

YYYY-MM-DD

2b. Duration

DAYS

3. Event Location

Country: State: City:

4. Name of Organization(s) Sponsoring Event

5. Total Event Activities Itemized Costs:

Item	Units	Unit Amount	Estimated Cost
Writing Competition Awards	8	\$300.00	\$2,400.00
Web Hosting Support	1	\$8,000.00	\$8,000.00
Transportation Costs	4	\$800.00	\$3,200.00
Proceedings Publication Costs	500	\$16.50	\$8,250.00
Honoraria	4	\$1,000.00	\$4,000.00
Guest Accommodations	45	\$75.00	\$3,375.00
Gifts	5	\$50.00	\$250.00
Facilities	2	\$500.00	\$1,000.00
Event Supplies	100	\$10.00	\$1,000.00
Catering	125	\$115.00	\$14,375.00
Audio/Visual (AV) support	4	\$500.00	\$2,000.00
Subtotal:			\$47,850.00

6. Total Event Government Manpower Costs:

Oversight/Activity	Description	Grade	Manpower	Qualifier	Estimated Cost
Government Oversight	Project Officer	O-4	60	Hours	\$4,667.75
Event Execution	Project Officer	O-4	4	Days	\$2,497.85
Event Execution	A/V support	GS-9	4	Days	\$900.17
Subtotal:					\$8,065.77

7. Cost of Government Travel Expenses Incurred while Planning the Event:

Trip Description	Units	Unit Amount	Travel Cost
n/a	1	\$0.00	\$0.00
Subtotal:			\$0.00

8. Total Event Cost Recovery:

Recovery Description	Units	Unit Amount	Recovery Amount
Contribution	1	\$40,000.00	\$40,000.00
Subtotal:			\$40,000.00

web site

EP 12

9. Will this cost estimate data be required on a recurring basis? Yes

9b. Enter the frequency of this recurring: annual

To access the Cost Estimate again, use the following URL:

https://www.cape.osd.mil/costguidance/costofhostingevent/hostingeventworksheet_prod.asp?cn=B_269F315

Encl 3



*COA # and Title (need one for each COA)

<p>Costs:</p> <p>List/summarize the major costs of the proposed COA.</p>	<p>Benefits (Advantages):</p> <p>Include both quantifiable and non-quantifiable benefits. Ex. Cost reduction, cost avoidance, productivity improvements, support to warfight, morale</p>
<p>Disadvantages:</p> <p>List or describe the quantifiable and/or non-quantifiable disadvantages and risks associated with the COA.</p>	<p>2nd and 3rd Order Effects</p> <p>This block will include a discussion of 2nd and 3rd order effects arising from the COA. Costs and benefits not included in the above blocks on this slide should be discussed here.</p>

* COA examples are: 1) Host Conference, 2) Conduct by VTC, 3) Alternate Location, 4) Not Have Conference



COA Cost Comparison

Cost Analysis (\$)				
	COA 1 (Conference)	COA 2 (VTC)	COA 3 (Alternate Location)	COA 4 (No Conference)
** Personnel Hours				0.00
Personnel Costs				\$0
TDY Costs				\$0
Travel Costs				\$0
Conference Fee				\$0
Food				\$0
Audio Visual				\$0
Other				\$0
Total				\$0

** This is an example of items. The list of items should be the same as "OSD Worksheet for Event Cost Calculator" Event Activities Itemized Costs. For COA 1, use the totals that are calculated from this worksheet. Use the DOD website at <https://www.cape.osd.mil/costguidance/> and attach to CBA.



Cost & Benefits Comparison

	COA 1 (Conference)	COA 2 (VTC)	COA 3 (Alternate location)
Total Cost	Highest cost	Medium cost	
Benefits (Quantifiable)		Less time away from work, no travel or TDY costs	
Benefits (Non-quantifiable)	Face to face interaction gets more accomplished, supports warfight, everyone on board with decisions	More people can attend	
Disadvantages		Delay time in communication, some communication may get lost/misinterpreted	
Risk Assessment		VTC connections may be dropped, wasting time to get it reconnected	

•Please note: these are strictly examples. Fill in as much information as you have available. Refer to https://copp.army.mil/portal/page/portal/Cost_Performance_Portal/CBA_Enablers/US%20Army%20CBA%20Guide%20V2%20as%20of%2008apr2011.docx for examples. Pages 59 (benefits), 67 (risk)

Encl 4

VENUE PROPOSAL

	VENUE 1	VENUE 2	VENUE 3
Event Name			
Dates of Event			
Total Number of Attendees			
Facility Name			
Per Diem Expenses	\$0.00	\$0.00	\$0.00
Travel Costs (Incl local trvl & grnd transportation)	\$0.00	\$0.00	\$0.00
Off-Season Rates	\$0.00	\$0.00	\$0.00
Peak-Season Rates	\$0.00	\$0.00	\$0.00
Venue Cost (Per Day)	\$0.00	\$0.00	\$0.00
Audio-Visual Costs	\$0.00	\$0.00	\$0.00
Parking Costs (Per vehicle)	\$0.00	\$0.00	\$0.00
Participate in Lodging Success Program			
On Natl List of Approved Accommodations			
Exempt Taxes for Lodging			
Distance to nearest major airport			
Free Shuttle Service Available			
Total Number of Rooms Required	0	0	0
Number of Available Rooms at Per Diem Rate	0	0	0

Encl 5

CONFERENCE NAME AGENDA

<u>TIME</u>	<u>EVENT / TOPIC</u>	<u>LOCATION</u>
1800 – 2100	Icebreaker/No Host Social XX Aug (Travel Day)	XXXXXXXXXXXX
0545 – 0715	Regimental Run	XXXXXXXXXXXX
0845 – 0915	Continental Breakfast	XXXXXXXXXXXX
0930 – 0940	Welcome / Intro / Admin notes	XXXXXXXXXXXX
0940 – 1100	State of the Corps	XXXXXXXXXXXX
1100 – 1130	HRC Update	XXXXXXXXXXXX
1130 – 1230	Working Lunch	XXXXXXXXXXXX
1230 – 1600	Breakout Sessions	XXXXXXXXXXXX
***** For each Breakout Session, please list the objective you wish to accomplish.		
1730 – 2100	Regimental Picnic	XXXXXXXXXXXX
0700 – 0900	Breakout Sessions Back –Briefs (GO/SES and SR ENL) xx Aug (Travel Day)	XXXXXXXXXXXX
***** SYMPOSIUM ENDS *****		
0930 - 1030	Warrior Recognition Ceremony	XXXXXXXXXXXX
1045 – 1115	Fallen Hero Ceremony	XXXXXXXXXXXX
***** SYMPOSIUM ENDS *****		
Attendance at the following events is in a non TDY status (at own expense)		

Encl 6

SECURITY AND FORCE PROTECTION AT TRADOC CONFERENCES

1. This section establishes policy for security at TRADOC-sponsored conferences, symposia, seminars, and large meetings (25 or more attendees). It does not govern conferences scheduled for training purposes if held at a Government training facility or a continental United States (CONUS) military installation or training as part of a DA or DOD-recognized program of instruction scheduled through an official HQDA training office. Meetings sponsored by organizations which, by the very nature of their missions, must conduct meetings away from their duty stations are also exempt from these requirements. Examples of such groups include auditors, inspectors general, and the Army Reserve Forces Policy Committee.

2. The policies and procedures in this section apply to any conference sponsored by TRADOC, whether the conference is conducted by a TRADOC staff agency, directorate, or a major subordinate command. Physical security of conference participants and the protection of classified information will be a consideration in selecting a conference location.

a. The degree of known or suspected threat to a conference or conference participants and the current force protection condition (FPCON) in the conference location area determine the physical and administrative security measures required to protect individuals and classified information.

b. The following conference sites are listed from most secure to least secure:

(1) Military installation.

(2) DOD-cleared Government or contractor facility where public access can be controlled.

(3) Non-DOD cleared Government or civilian facility with a security force.

(4) Government or civilian facility with no security force.

c. All conferences involving classified information will be held only at a secure location on U.S. Army or other U.S. Government installations, or at a cleared U.S. contractor facility. Provisions of AR 380-5, paragraph 5, must be adhered to. Location waiver requests must be received by HQ, TRADOC, not later than 120 days before the planned conference date. Such requests may, depending on the circumstances of the conference, require approval by HQDA. Requests for waiver must be justified and held to an absolute minimum.

d. If an unclassified conference is held at a facility which lacks a professional security guard force, the sponsoring agency should contract for a civilian security force.

3. Responsibilities.

E. H. H.

a. TRADOC G-3/5/7, Command Provost Marshal Directorate (CPMD), is responsible for monitoring threat conditions worldwide and for recommending appropriate measures to safeguard personnel. All requests regarding threat assessments, security augmentation, and explosive detector dog sweeps must be coordinated with the Special Event Security Manager (SESM), Force Protection Division who will:

(1) Review the request with respect to the site and provide information on force protection or personnel protection considerations, to include AT awareness materials and handouts.

(2) Assist in completion of the request for Criminal Activity Threat Assessment (CATA) and forward request to HQDA for consideration. **Requests for CATA must be received by G-3/5/7, CPMD, NLT 100 days prior to the start date of the event to allow for appropriate processing time at TRADOC and HQDA.**

(3) Coordinate the request for explosive detector dog support, physical security assessment and security augmentation with the responsible agency IAW AR5-9.

(4) Assist the conference proponent in ensuring that contract(s) for conference facilities include security and food and water protection.

(5) Notify the sponsoring agency through the Conference Proponent Security Officer (CPSO) of threat condition changes and make recommendations as necessary.

b. The conference proponent will assign a CPSO who will:

(1) Complete request for CATA **NLT 100 days prior to the event start date. See TAB A in this section.**

(2) Complete an appropriate Force Protection and Security Plan. Evaluation of physical security considerations and recommendation for security measures appropriate for the level of threat should be completed in coordination with the appropriate provost marshal jurisdiction in accordance with AR 5-9, and be based upon recommendations of the CATA.

(3) Assign personnel to control access at the conference through visual recognition or conference-specific identification badge.

c. Use of military personnel in support of security operations. The conference proponent must comply with DoDI 5525.5.

d. A list of typical activities associated with conferences both on and off federal reservations can be found at **TAB B of this section.**

TAB A (CATA REQUEST FORM)
REQUEST FOR CRIMINAL ACTIVITY THREAT ASSESSMENT

The following information is required to facilitate CID completing threat assessments of proposed conference sites. Please replace the italicized areas with pertinent information and fill in the blanks following questions.

WHAT: *Name or theme of event/conference*

WHEN: *Inclusive dates of event*

WHERE: *Facility (e.g., hotel) city, state*

During what period will they actually occupy the hotel? _____

Will all out of town attendees be billeted at the hotel? _____

If not, what other hotels are being used? _____

Will specific off-site facilities (health clubs, restaurants, parks, etc.) be recommended to participants? _____

If so, which ones? _____

Will any of the event activities be off-site (group tours, dinners, meetings, etc.)? _____

WHO: Who is sponsoring the event?

Senior person and organization hosting event

How many total attendees are expected? _____

What senior DOD and civilian leaders/dignitaries are expected/requested to participate?

Will any foreign nations be represented (speakers or attendees)? _____

If so, which nations, and, if known, identity of representatives? _____

How will attendees arrive for the conference (e.g., local airports, rental cars, POV, buses, etc.)? _____

WHY: *Purpose of event*

Is any portion classified? _____

Is the conference being publicized outside DOD? _____

If so, in what public media (Web site, newspapers, trade journals, etc.)? _____

Are any controversial subjects or speakers on the agenda that might result in negative media coverage or demonstrations? _____

What is the conference format, e.g., single session, multiple breakout sessions, spouse participation, etc? _____

OTHER ADMINISTRATIVE DETAILS:

Has this event been conducted in the past (when and where)? _____

If so, were there any criminal acts or security/threat incidents reported? _____

Will access to the conference area be controlled? How? _____

Who will do the vulnerability assessment for the event? _____

Please provide an agenda (final or draft) for the conference, to include a list of speakers?

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POINTS OF CONTACT:

Army Protocol/Conference Proponent POC: *Provide name and phone number.*

Conference Proponent Security Officer: *Usually the person filling out this form.*
Please provide an alternate POC for your office if possible.

Hotel POC: *Security Manager*

UNCLAS/FOUO

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TAB B (SECURITY PROCEDURES AND FORCE PROTECTION AT TRADOC CONFERENCES)

SECURITY PROCEDURES

PROCEDURE	ON POST CONFERENCE	OFF POST CONFERENCE
Site Selection Threat Assessment	N/A	Request to CPMD as soon as possible
Physical Security Threat Assessment	Conducted by host installation Provost Marshal	Requested by AR 5-9 responsible installation
Criminal Activity Threat Assessment	Provided by host installation Provost Marshal	Requested through CPMD. Request needed at TRADOC 100 days prior to event start date
Request for additional security	Coordinated by CPMD with host installation	Contracted by conference proponent and coordinated by CPMD based upon threat assessments
Request for Explosive Detector Dog Support	Coordinated by CPMD with host installation	Based upon recommendations found in threat assessments, coordinated for by CPMD with AR 5-9 responsible installation
Counter intelligence support	Coordinated by CPMD with host installation and responsible counter intelligence office	Based upon threat, coordinated by CPMD with 902 nd MI Battalion

Encl 7

COMPUTATION EXAMPLES OF PROPORTIONAL MEAL RATE (PMR)

The total amount paid by the Government for meals cannot exceed the locality meal rate. Therefore a conference sponsor must make sure the total amount to be expended for Government-provided meals and reimbursed as PMR is within the locality meal rate. This cost limitation makes it very difficult for a conference planner to provide Government-furnished meals, especially at a commercial establishment, and remain within the locality meal rate. Computations are done on a daily basis.

Example: A conference sponsor is planning to hold a conference at a location where the CONUS rate for meals and incidental expenses (M&IE) is \$46. The \$46 consists of \$41 for meals and \$5 for incidental expenses. The conference sponsor wants to provide breakfast on the 2 full days of temporary duty (TDY) and a dinner on the second day of TDY. The cost of breakfast for each person for each day is \$7. The cost of dinner for each person is \$36.

Part I: Find the PMR

The tool at <http://www.defensetravel.dod.mil/site/perdiemCalc.cfm> provides the necessary information to find the applicable meals rate and PMR. The chart is applicable to this example. Note "Local Meals" is the full per diem rate and "Prop. Meals" is the PMR.

LOCATION (1)	County and/or Other Defined Location (2)	Seasons (Beg-End)	Max Lodging	Local Meals	Prop. Meals	Incidentals	Maximum Per Diem	Effective Date
STANDARD CONUS RATE	STANDARD CONUS RATE	01/01-12/31	77	41	26	5	123	10/01/2010

Part II: Determine How Much the Conference Sponsor May Spend for Meals

Once the PMR is identified, the conference sponsor must determine whether the cost for meals plus the PMR exceeds the meal rate. If the cost for meals plus the PMR exceeds the meal rate, the conference sponsor is unable to contract for meals at the proposed costs. In the example, the meal rate is \$41.

For the first day of TDY, the conference sponsor wants to provide breakfast at a cost of \$7 a person:

Step 1	Find the PMR	\$26
Step 2	Find the local meal rate	\$41
Step 3	Add the cost of breakfast to the PMR	$\$7 + \$26 = \$33$
Step 4	Because the cost of breakfast and the PMR (step 3) is less than the local meal rate (step 2), the conference sponsor may contract for breakfast at this cost.	

For the second day of TDY, the conference sponsor wants to provide each attendee breakfast at a cost of \$7 and also dinner at a cost of \$36:

Step 1	Find the PMR	\$26
Step 2	Find the local meal rate	\$41
Step 3	Add the cost of breakfast and the dinner to the PMR	$\$7 + \$36 + \$26 = \79
Step 4	Because the cost of the breakfast, dinner and the PMR (step 3) exceeds the local meal rate (step 2), the conference sponsor may not contract for dinner at a cost of \$36.	

Encl 8

YOUR OFFICIAL LETTERHEAD

(Office Symbol)

(Date Signed)

MEMORANDUM THRU (If applicable)

FOR (Approval Authority IAW TRADOC TASKORDER EX516772

SUBJECT: Post-event Report

1. The following information is being provided for the (Name of Conference):
 - a. Location of Conference:
 - b. On Government or Military Site: (Yes/No)
 - c. Total Number of Estimated and Actual Attendees:
 - d. Total Number of Estimated and Actual Local attendees:
 - e. Estimated and Actual Cost of Conference:
 - f. Event Start Date (include travel day):
 - g. Event End Date (include travel day):
2. **Actions that will be taken to produce cost savings for the next conference.**
Discuss steps you will take to produce cost savings for this event and for the next event. Include preliminary work that will be done to reduce the duration of your next event. Explain why you need to conduct the event annually/bi-annually. What would the impact be if you changed the frequency of the event. Be specific on the impact, i.e., impacts the warfight and how.
3. **Organization POC.** (Provide name, phone, and e-mail address.)

GO/SES SIGNATURE

Encl 9

ACTIONS TAKEN TO REDUCE COSTS SINCE PREVIOUS CONFERENCE

NAME OF CONFERENCE:

DATES OF CONFERENCE:

COST OF PREVIOUS CONFERENCE:

COST OF CURRENT CONFERENCE:

STEPS TAKEN TO PRODUCE COST SAVINGS:

PRELIMINARY WORK DONE TO REDUCE DURATION OF CONFERENCE: