PER DIEM, TRAVEL AND TRANSPORTATION ALLOWANCE COMMITTEE
HOFFMAN BUILDING 1, ROOM 836
2461 EISENHOWER AVENUE, ALEXANDRIA, VA 22331-1300

PDTATAC/sab

7 March 2000

JOINT DETERMINATION 65-99
CIVILIAN TRAVEL DETERMINATION 57-99

TO: SEE DISTRIBUTION

SUBJECT: MAP Item 65-99/CAP Item 57-99 – Conference Planning

The Committee Chair has approved the attached changes to the Joint Federal Travel Regulations, Vol 1, (JFTR), made in MAP Item 65-99, and Joint Travel Regulations, Vol 2, (JTR), made in CAP Item 57-99, for publication. These changes are scheduled to appear in JFTR printed change number 162, and JTR printed change number 416, dated 1 June 2000. These determinations are an advance notice of the changes to the JFTR/JTR. You are requested to disseminate these determinations to the appropriate offices within your Service. These determinations are effective 7 March 2000.

//Approved 3/14/00//

S. W. Westbrook
Director

Attachments:
As stated

Hard Copy Distribution:
MAP Item file
CAP Item file

E-Mail Distribution:
MAP & CAP Members
T&T Branch
Paul Joyce
Barbara Delisa
John Argodale
Kay Anderson-Hager
Nancy Murphy
Jim Harte
HRSIC
GSBCA Judges

SYNOPSIS: The attached items rewrite JFTR, Part G, Conference Planning; and JTR, Part S, Conference Planning.

S. Brumbaugh: *SAB 03/13/00*

W. B. Tirrell, Sr. *WBT 03/14/00*

PART G: CONFERENCE PLANNING

U2550 GENERAL

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

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

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

D. Definitions

1. Conference: A meeting, retreat, seminar, symposium or event that involves attendee travel. The term also applies to training activities that are conferences under 5 CFR 410.404.

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

a. attendee's travel costs (i.e., travel to and from the conference, ground transportation, lodging, meals and incidental costs),

b. attendee's time costs (i.e., the cost of attendee's time spent at the conference and traveling to and from the conference),

c. meeting room and audiovisual costs,

d. registration fees,

e. speaker fees,

f. conference-related administrative fees, and

g. similar costs.

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

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

E. Actions Required. When planning a conference DoD Agencies must:

1. Determine which conference expenditures provide the greatest advantage to the Government, by

   a. ensuring appropriate management oversight of the conference planning process,

   b. performing cost comparisons of the size, scope, and location,

   c. determining if a Government facility is available at a lesser rate,

   d. considering conference alternatives, e.g., teleconferencing,

   e. maintaining written documentation of the alternatives considered and the selection rationale used, and

   f. minimizing cost by exercising strict fiscal responsibility in determining the best site.

2. minimize the conference administrative costs,

3. minimize the attendees' travel costs,

4. minimize the attendees' time costs,

5. use Government-owned or Government provided facilities as much as possible,

6. identify ways to save costs in selecting a particular conference site (e.g., lower rates during the off-season), and

7. develop and establish internal policies that ensure these standards are met.

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

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

1. travel and per diem expenses,

2. rent of rooms for official business,

3. usage of audiovisual and other equipment,

4. computer and telephone access fees,

5. light refreshments (excludes alcoholic beverages),

6. printing,

7. registration fees,

8. ground transportation, and

9. attendees' travel and time cost.

G. Cost Comparisons. When planning a conference, DoD Agencies must do cost comparisons to ensure the greatest benefit to the Government. Cost comparisons include:

1. determination of adequacy of lodging at the established per diem rate,

2. overall convenience,

3. fees,

4. meeting space availability,

5. equipment availability, e.g., audiovisual, fax,

6. commuting or travel distance of most attendees, and

7. other conference expenses.

H. Conference Site Selection

1. Documentation. DoD Agencies must maintain a record of the cost of each alternative conference site considered for each conference sponsored or funded. A minimum of three sites must be considered for the conference and the documentation must be available for inspection by the Office of the Inspector General or other interested parties.

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

3. Conducted in the District of Columbia. The following special rules apply when the conference site is in the District of Columbia:

a. Lodging facilities may not be directly procured in the District of Columbia without specific authorization and appropriation from Congress (40 U.S.C. §34), and

b. any short-term conference meeting space obtained in the District of Columbia must be procured under 41 CFR 101-17.101-4.

***NOTE**: The rules in a and b do not prohibit payment of per diem to a traveler authorized to obtain lodging in the District of Columbia while performing official business travel.*

I. Requirements for Attendance, Sponsoring or Funding a Conference at a Place of Public Accommodation

1. Attendance at a conference must be authorized by an official designated through the Secretarial Process.

2. Sponsoring or funding a conference by a DoD Agency at a place of public accommodations must be authorized by an official designated through the Secretarial Process.

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

J. Advertisement or Application Form for Conference Attendance. Any advertisement or application for attendance at a conference sponsored or funded by a DoD Agency must include:

1. notice that attendees must use FEMA-approved place of public accommodation unless a waiver has been issued as indicated in subpar. I, item 3, and

2. notice of the prohibition of use of non FEMA-approved places of public accommodation to all non-Federal entities, e.g., contractors, to which the DoD Agency provides Federal funds.

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

1. limit the Agency's representation to the minimum number of attendees necessary to accomplish the Agency's mission; and

2. provide for the consideration of travel expenses when selecting attendees.

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

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

1. is not an actual expense allowance,

2. may not be used if the lodging rate exceeds the established lodging allowance by more than 25 per cent, and

3. may not be used concurrently with the actual expense method of reimbursement.

N. Conference Lodging Allowance Authorization. The Conference Lodging Allowance authorizes reimbursement of up to a 25 percent increase (rounded to the next highest dollar) in the lodging portion of the per diem allowance under the Conference Lodging Allowance method. It is a separate method of per diem reimbursement and is not an actual expense reimbursement. A Federal traveler, attending a conference, is authorized the use of the Conference Lodging Allowance when the traveler is:

1. notified by the conference sponsor that the Conference Lodging Allowance is necessary; or

2. authorized or approved by the traveler's agency.

Note: If the Conference Lodging Allowance is inadequate, see JFTR, Chapter, 4, Part C, for actual expense reimbursement authorization procedures.

O. Conference M&IE Rate

1. Light Refreshments. If light refreshments are furnished they are a separate administrative expense for the DoD component concerned; consequently, there is no deduction of the attendees' M&IE allowance required.

2. Meals Included in Registration Fee. If meals are furnished and included in the registration fee the proportional meal rate applies for each day meals are furnished.

PART S: CONFERENCE PLANNING (FTR PART 301-74)

C4950 GENERAL

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

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d. registration fees,

e. speaker fees,

f. conference-related administrative fees, and

g. similar costs.

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

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

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   b. performing cost comparisons of the size, scope, and location,

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   d. considering conference alternatives, e.g., teleconferencing,

   e. maintaining written documentation of the alternatives considered and the selection rationale used, and

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5. use Government-owned or Government provided facilities as much as possible,

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

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

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2. rent of rooms for official business,

3. usage of audiovisual and other equipment,

4. computer and telephone access fees,

5. light refreshments (excludes alcoholic beverages),

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8. ground transportation, and

9. attendees' travel and time cost.

G. Cost Comparisons. When planning a conference, DoD Agencies must do cost comparisons to ensure the greatest benefit to the Government. Cost comparisons include:

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2. overall convenience,

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5. equipment availability, e.g., audiovisual, fax,

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a. Lodging facilities may not be directly procured in the District of Columbia without specific authorization and appropriation from Congress (40 U.S.C. §34), and

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

J. Advertisement or Application Form for Conference Attendance. Any advertisement or application for attendance at a conference sponsored or funded by a DoD Agency must include:

1. notice that attendees must use FEMA-approved places of public accommodation unless a waiver has been issued as indicated in subpar. F, item 3, and

2. notice of the prohibition of use of non FEMA-approved places of public accommodation to all non-Federal entities, e.g., contractors, to which the DoD Agency provides Federal funds.

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

1. limit the Agency's representation to the minimum number of attendees necessary to accomplish the Agency's mission; and

2. provide for the consideration of travel expenses when selecting attendees.

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1. is not an actual expense allowance,

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1. notified by the conference sponsor that the Conference Lodging Allowance is necessary; or

2. authorized or approved by the traveler's agency.

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

O. Conference M&IE Rate

1. Light Refreshments. If light refreshments are furnished they are a separate administrative expense for the DoD Agency concerned; consequently, there is no deduction of the attendees' M&IE allowance required.

2. Meals Included in Registration Fee. If meals are furnished and included in the registration fee the proportional meal rate applies for each day meals are furnished.