



# Defense Logistics Agency **INSTRUCTION**

DLAI 7600.01

Effective Date April 12, 2017

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Accountable Office: DLAHQ, Director's Staff Group, (DC)

**SUBJECT:** Defense Logistics Agency (DLA) Conference Approval Process.

**References:** Refer to Enclosure 1.

1. **PURPOSE:** This instruction establishes policy and controls, assigns responsibilities, and prescribes procedures for preparing, processing, and approving requests for attending non-Department of Defense (DoD) conferences, and hosting DoD conferences in accordance with (IAW) DoD Conference Guidance (Reference (a)).

2. **APPLICABILITY:** This Instruction applies to all DLA activities.

3. **DEFINITIONS:** See Glossary.

4. **POLICY:** It is DLA policy to:

a. Comply with conference approval processes in References (a) through (i).

Subsequent guidance required for DoD/DLA travel identified but not limited to those listed in Enclosure 1 governs this process.

b. Adhere to the Defense Travel Management Office (DTMO) categorization that all costs of attending a conference are travel costs. This includes registration fees for non-training conferences. Therefore, this clarifies Directive-Type Memorandum (DTM) 13-001, Government Purchase Card (GPC) (Reference (b)), for payment of conference fees and approval procedures for non-training conferences.

c. Evaluate all expenses to minimize cost to the U.S. taxpayer to the extent practicable. The potential benefit the event brings to DLA should exceed the conference cost.

5. RESPONSIBILITIES: See Enclosure 2.

6. PROCEDURES: See Enclosure 3.

7. INFORMATION REQUIREMENTS

a. Use the Defense Travel System (DTS) to seek and approve attendance at non-DLA hosted conferences.

b. DLA Activities hosting or co-hosting a conference must complete a Cost Assessment & Program Evaluations (CAPE) cost estimate sheet showing accurate and comprehensive associated resource cost requirements. See Enclosure 3 for CAPE submission and actual cost reporting instructions.

c. DLAHQ Directors, PLFA Commanders and DLA General Counsel will submit monthly reports of all conference approvals to the Office of the Director. See enclosure 3 for reporting instructions.

8. INTERNAL CONTROLS: See Enclosure 3.

9. RELEASEABILITY: RESTRICTED. This instruction is approved for use by DLA employees only and is available on the Internet from the DLA Issuances Internet Website.

10. EXPIRATION DATE: We will reissue or cancel this Instruction by the fifth anniversary of its publication date. If not, it will automatically expire effective April 12, 2027.

For

William M. Bowers  
Director, DLA Strategic Plans and Policy

Enclosure(s)

Enclosure 1 – References

Enclosure 2 – Responsibilities

Enclosure 3 – Procedures

Glossary

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ENCLOSURE 1REFERENCES

- (a) Deputy Chief Management Officer Guidance, DoD Conference Guidance, Version 4.0, June 26, 2016.<sup>1</sup>
- (b) Directive-Type Memorandum (DTM) 13-001, Government Purchase Card Issuance, December 13, 2013
- (c) Federal Travel Regulation (FTR), Part 301-74, Conference Planning
- (d) Office of Management and Budget (OMB) Memorandum M-12-12, Promoting Efficient Spending to Support Agency Operations, May 11, 2012.<sup>2</sup>
- (e) DoD Cost Guidance Portal: Attending a Conference Guidance Document October 1, 2015.<sup>3</sup>
- (f) DoD Cost Guidance Portal: Cost of Hosting An Event Guidance Document October 1, 2015.<sup>4</sup>
- (g) Director, DLA Finance Memorandum, Senior Leader Travel Policy, April 29, 2013.<sup>5</sup>
- (h) Joint Federal Travel Regulations (JFTR), Volume 1 and 2, Uniformed Service Members, Department of Defense Civilian Personnel September 1, 2013.<sup>6</sup>
- (i) DoD 5500.7-R, Joint Ethics Regulation (JER), August 30, 1993.<sup>7</sup>

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<sup>1</sup> See URL: <http://dcmo.defense.gov/>

<sup>2</sup> See URL: <http://dcmo.defense.gov/>

<sup>3</sup> See URL: <https://www.cape.osd.mil/costguidance/>

<sup>4</sup> See URL: <https://www.cape.osd.mil/costguidance/>

<sup>5</sup> See URL: <http://hqc.dla.mil/>

<sup>6</sup> See URL: <http://www.defensetravel.dod.mil/>

<sup>7</sup> See URL: <http://www.dtic.mil/>

ENCLOSURE 2  
RESPONSIBILITIES

1. DIRECTOR, DLA (D). The DLA D must:
  - a. Approve requests to host or co-host conferences whose total cost to the Department of Defense (DOD) is between \$100,001 and \$500,000.
  - b. Approve conference attendance requests for employees at non-DoD conferences when the total cost to the Agency is between \$100,001 and \$500,000.
  - c. Ensure compliance with all applicable laws and policy in making written approvals, and will seek and document with legal counsel before approvals.
  - d. Report yearly conferences the Agency hosts, where the total expenses associated with the conference exceed \$100,000.
  - e. Conduct continuing reporting for DOD hosted conferences when the total conference expenses associated with each conference exceed \$20,000.
2. CHIEF OF STAFF, DLA (DC), UNDER THE AUTHORITY, DIRECTION, AND CONTROL OF THE DIRECTOR, DLA. The DC must:
  - a. Develop policies and procedures for the effective and proper control over hosting DLA-sponsored conferences.
  - b. Oversee coordination of D Code conferences to ensure compliance with references and confirm that conferences provide mission value for the cost and are the most economical alternative to minimize or reduce costs.
  - c. Ensure effective organizational oversight and controls are in place so:
    - (1) Requests to attend Conferences comply with this Instruction.
    - (2) Review expenses on the annual budgets for travel, travel and per diem, conference related fees including conference expenses in accordance with 41 CFR 301-74.2 Conference Guidance 4.0 Section V. Determination of Conference Cost. Provide managers with financial authority access to support effective monitoring and fiscally prudent decisions.
  - d. Coordinate with agency central points of contact to resolve issues and speed up the process.
  - e. Report the number and cost of approved conferences hosted during the preceding fiscal year where the net cost for each conference exceeds \$500,000 to the DLA Director. In addition,

provide reporting information on DLA's conference attendance and hosting costs and approvals when requested by OUSD(AT&L).

f. Approve requests from the D Codes to host or co-host conferences whose total cost to DOD is \$100,000 or less.

g. Approve attendance requests for D Code employees at conferences hosted by non-DOD activities when the total cost of attendance for DLA is \$100,000 or less. This may be further delegated as follows:

(1) For conferences with a cost of \$5,000 or more per attendee, approval authority may be delegated to O-6/GS-15 (or equivalent) with TDY/TAD approval authority.

(2) For conferences with a cost of less than \$5,000 per attendee, approval authority may be delegated to O-5/GS-14 (or equivalent) with TDY/TAD approval authority.

h. For non-DOD hosted conferences, notify the Director's Staff Group via email ([DLAHQ.OfficeoftheDirector@dla.mil](mailto:DLAHQ.OfficeoftheDirector@dla.mil)) as soon as the approving official reasonably believes that more than 10 DOD employees under his or her authority will attend the conference or the total cost will exceed \$20,000.

i. By the fifth business day of each month, submit to the Office of the Director a consolidated report of conferences approved for the Director's Staff during the prior month (for example, The February report should identify conferences [both hosted and non-hosted] approved between January 1-31). Submit reports IAW the template in appendix (1) to enclosure (3).

j. For all conferences the organization hosts, certify the actual costs via attestation memorandum submitted to the Office of the Director by 15 business days after the last day of the event [see appendix (2) of enclosure (3) for a sample]. Ensure the accuracy of all costs and justify excessive costs in writing.

k. Determine whether an activity listed below is exempt and should not be considered a conference even if it meets the general definition of a conference.

(1) 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:

a. The meeting is directly tied to language in a statute, government-wide regulation, or DoD regulation.

b. 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.

c. 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.

(2) 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:

a. The host is the Department, the event is held in a Department facility, only local travel is involved, and the attendees are solely government personnel; or

b. The meeting is a regular and recurring part of the employee’s job description or job duties.

(3) 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.

(4) Bi-lateral and multi-lateral 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.

(5) Formal classroom training. This exemption would include activities such as regular courses of instruction and 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 the exemption. For instance, if the annual meeting of Organization X has sessions that are comprised of formal classroom training, but the remainder of the meeting is not formal classroom training, the event as a whole does not fall within the scope of the exemption. Some indicia of formal classroom training are:

a. The sole purpose is training, as opposed to networking, sharing best practices, or other similar purposes;

b. Continuing education credit is available for all event sessions other than meals;

c. The event is held in a facility regularly used for training such as a university classroom and not a hotel conference center. However, even if an event is held in a hotel conference center and all event sessions other than meals consist of classroom training, the event may qualify under the exemption. While location is not determinative, there should be special scrutiny if the training is held at a resort or other location; or

d. 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.

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

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

(8) Meetings of advisory committees subject to DoD Instruction 5105.04m 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.

3. DLA GENERAL COUNSEL (DG). DG must:

a. Coordinate on all requests for hosting and attending conferences with a total cost over \$100,000.

b. Advise DLA HQ and PLFA Directors and Commanders in conference planning as needed.

4. THE DIRECTOR'S STAFF GROUP, UNDER THE AUTHORITY, CONTROL, DIRECTION OF THE DC. The Director's Staff Group must:

a. Establish and manage the DLA Conference Oversight Program, to include Conference Approval Processes and maintain oversight and management controls for all Agency conferences.

b. Ensure Agency compliance with the policy and procedures contained in this Instruction and the applicable DoD policies.

c. Mediate conference impasses between DLAHQ and PLFA Directors and Commanders in regards to conference designation and attendance.

d. Respond to queries about conference management and administration, as well as help the HQ and PLFA Directors and Commanders fulfill their responsibilities to host DLA conferences.

e. Serve as the official record keeper for DLA conferences. Oversee, maintain, and keep supporting documentation that makes up the official record of developing and hosting these conferences.

f. Coordinate with J1 to provide DLA Conference Program training, when necessary.

g. Ensure the Agency complies with Deputy Chief Management Officer (DCMO) thresholds in references.



h. Report to DCMO and OUSD(AT&L) DLA-hosted and co-hosted conferences over \$20,000.

5. DIRECTOR, DLA LOGISTICS OPERATIONS (J3). The Director, J3 must appoint the Foreign Visit Coordinator in J31 to serve as the point of contact for DLA staff on foreign national visitors to DLA locations for DLA-hosted conference attendance.

6. DIRECTOR, DLA ACQUISITIONS (J7). The Director, J7 must:

a. Coordinate on large dollar conferences where a more economical means to acquire services for the event may be practicable.

b. Advise the Director's Staff Group and action officers of acquisition policy, processes, procedures, and responsibilities for contracts associated with DLA-hosted conferences and the proper use of payment if under the J7 purview.

7. DIRECTOR, DLA FINANCE (J8). The Director J8 must:

a. Coordinate on all conferences that exceeds \$100,000 to ensure compliance with financial policy and procedures.

b. Advise the Director's Staff Group and action officers of financial policy, processes, procedures, and responsibilities for DLA-hosted conferences.

8. DIRECTOR, DLA HUMAN RESOURCES (J1). The Director J1 must ensure DLA does not process requests for conferences on the SF182 with partial payment (i.e.; registration fees) via GPC, if events are regular conferences. Registration fees must be paid on the individual Government Travel Card (GTC).

9. DIRECTOR, DLA PUBLIC AFFAIRS (DP). The Director DP must process DLA Form 1923 in coordination with DLA Intelligence; Security Pre-Publication Review Request for Release of DLA Information, Nov 2013 for conference attendees requesting to present/speak at a venue open to the public.

10. DIRECTOR, DLA INTELLIGENCE (DI). The Director, DI must:

a. Coordinate on DLA-hosted conferences that involve access to classified information and/or foreign national attendees to ensure compliance with security requirements. For non-DLA conferences, the host is responsible for ensuring compliance with security requirements.

b. Advise action officers on security policy, processes, procedures, and responsibilities for conferences.

c. Process DLA Form 1923 in coordination with DLA Public Affairs; Security Pre-Publication Review Request for Release of DLA Information, Nov 2013 for conference

attendees requesting to present or speak at a place open to the public.

11. DLAHQ DIRECTORS, PLFA COMMANDERS and DLA GENERAL COUNSEL. The Directors, Commanders, and General Counsel must:

a. Approve requests for respective Directorate/PLFA to host or co-host conferences whose total cost to DOD is \$100,000 or less.

b. Approve attendance requests for Directorate/PLFA employees at conferences hosted by non-DOD entities when the total cost of attendance is \$100,000 or less. Delegation of this authority is permissible under the following circumstances:

(1) For conferences with a cost of \$5,000 or more per attendee, Directors and Commanders may delegate approval authority to O-6/GS-15 (or equivalent) with TDY/TAD approval authority.

(2) For conferences with a cost of less than \$5,000 per attendee, Directors and Commanders may delegate approval authority to O-5/GS-14 (or equivalent) with TDY/TAD approval authority.

c. Ensure compliance with references and that conference attendance provides:

(1) Value

(2) The most economical alternative to minimize or reduce costs. Where the situation is the latter, ensure disclosure of the total conference costs.

d. Coordinate with the DLA Director before considering hosting a conference that costs over \$100,000.

e. Oversee coordination on activity-hosted conferences ensuring compliance with references and confirming that the conference provides mission value for associated cost, and use of the most economical option to minimize or reduce costs.

f. For non-DOD hosted conferences, notify the Director's Staff Group via email ([DLAHQ.OfficeoftheDirector@dla.mil](mailto:DLAHQ.OfficeoftheDirector@dla.mil)) as soon as the approving official reasonably believes that more than 10 DOD employees under his or her authority will attend the conference or the total cost will exceed \$20,000.

g. By the fifth business day of each month, submit to the Office of the Director a consolidated report of conferences approved by the respective Directorate or PLFA during the prior month (for example, the February report should identify conferences [both hosted and non-hosted] approved between January 1-31). Submit the report IAW the template in appendix (1) of enclosure (3).

h. For all conferences, the organization hosts, certify the actual costs via attestation memorandum submitted to the Office of the Director by 15 business days after the last day of the event [see appendix (2) of enclosure (3) for a sample]. Ensure the accuracy of all costs and excessive costs are justified in writing.

i. Determine whether an activity listed below is exempt and should not be considered a conference even if it meets the general definition of a conference.

(1) 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:

a. The meeting is directly tied to language in a statute, government-wide regulation, or DoD regulation.

b. 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.

c. 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.

(2) 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:

a. The host is the Department, the event is held in a Department facility, only local travel is involved, and the attendees are solely government personnel; or

b. The meeting is a regular and recurring part of the employee’s job description or job duties.

(3) 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.

(4) Bi-lateral and multi-lateral 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.

(5) Formal classroom training. This exemption would include activities such as regular courses of instruction and 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 the exemption. For instance, if the annual meeting of Organization X has sessions that are comprised of formal classroom training, but the remainder of the meeting is not formal classroom training, the event as a whole does not fall within the scope of the exemption. Some indicia of formal classroom training are:

a. The sole purpose is training, as opposed to networking, sharing best practices, or other similar purposes;

b. Continuing education credit is available for all event sessions other than meals;

c. The event is held in a facility regularly used for training such as a university classroom and not a hotel conference center. However, even if an event is held in a hotel conference center and all event sessions other than meals consist of classroom training, the event may qualify under the exemption. While location is not determinative, there should be special scrutiny if the training is held at a resort or other location; or

d. 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.

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

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

(8) Meetings of advisory committees subject to DoD Instruction 5105.04m 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.

ENCLOSURE 3

PROCEDURES

1. APPROVAL AUTHORITY THRESHOLDS.

a. Approval Authority Thresholds for conference attendance follow:

**Table 1 –Approval Thresholds**

Conference Type	Threshold (Total Cost)	Approval Authority	DLA Suggested Timeline	
DLA Hosted or Co-Hosted	> \$500K	USD/AT&L	6 Months	
	>\$100K - \$500K	DLA HQ Director	3 Months	
	<= \$100K	J Code Director/PLFA Commander/DLA Chief of Staff (D Codes)	3 Months	
DLA Personnel Attending non-DOD Hosted Event	>\$500K	USD/AT&L	6 Months	
	>\$100K - \$500K	DLA Director	1 Month	
	<= \$100K	J Code Director/PLFA Commander/DLA Chief of Staff (D Codes), delegable as follows:		10 Business Days
		Total cost of \$5,000 or more for each attendee	O-6/GS-15 (or equivalent) with TDY/TAD approval authority	
Total cost of less than \$5,000 per attendee	O-5/GS-14 (or equivalent) with TDY/TAD approval authority			

b. These thresholds are all *conference costs excluding manpower*. See the Glossary and reference (a) for Conference Costs definition. The Director’s Staff Group will ensure the Agency does not breach any of the thresholds listed in Table 1. Each activity must follow the methods and principles on the Cost Guidance Portal<sup>8</sup> to estimate costs for attending or hosting a conference. DLAHQ requires conference requests to meet the following criteria.

2. DETERMINING CONFERENCE COSTS

a. Establish cost using the DTS Portal for Meals/Per Diem. If you are awaiting final travel approval before creating your travel authorization/orders in DTS, Per Diem and Mileage Rates

<sup>8</sup> See URL: <https://www.cape.osd.mil/CostGuidance/>

are accessible through the U.S. General Services Administration (GSA) Website.

- b. Consider all travel related expenses for the cost estimate, i.e., tolls, baggage fees, registration fees, rental car, parking, gas, etc.
- c. Find more information and guidance on which costs to include in calculating conference costs in reference (a) and the Glossary.

### 3. ATTENDANCE AT CONFERENCES HOSTED BY OTHER ENTITIES (DOD OR NON-DOD)

#### a. **APPROVAL:**

(1) Record conference attendance requests and approvals in DTS. Cost Assessment Program Estimates (CAPEs) are not required.

(2) Complete these steps in DTS to ensure accurate tracking of conference expenses:

- Select “Conference Attendance” from the “Trip Purpose” dropdown menu.
- In the “Trip Description” field, provide the following information:
  1. Conference Name
  2. Dates Attending
  3. Location
  4. Organization Hosting the Conference
  5. Indicate if this is a DOD Hosted or Co-Hosted Conference

(3) When approving the conference, the approving official should certify that all information is accurate and complete to the best of their ability, and provide the proper information in the “Trip Description” field. Try to remove any cost for meals or heavy refreshments with the conference. If this is not possible, separate meals and heavy refreshments from the conference cost, and the approving official should ensure the requester reduces their per diem by the cost of the meals.

(4) The DLA Director must approve in writing attendance at conferences hosted by non-DoD entities in which the total cost *to the Agency* is more than \$100,000. The Director’s Staff Group will work with DLAHQ Directorates/PLFA Commanders, and General Counsel to receive the DLA Director’s written approval on high cost conferences. Further guidance is in Paragraph 5 below.

#### b. **REPORTING REQUIREMENTS-**

(1) Email the Director’s Staff Group (DLAHQ.OfficeoftheDirector@dla.mil) whenever the approving official decides more than 10 DOD employees under his or her authority will attend the conference or the total cost will exceed \$20,000.

(2) DLAHQ Directorates/PLFAs/General Counsel/DLA Chief of Staff- Submit a consolidated monthly report of all conference approvals to the Director's Staff Group ([DLAHQ.OfficeoftheDirector@dla.mil](mailto:DLAHQ.OfficeoftheDirector@dla.mil)) by the fifth of each month. The format for this report is in appendix (1) to enclosure (3).

(3) Attestation Memos are not required.

#### 4. HOSTING AND CO-HOSTING CONFERENCES

a. The thresholds and time lines for hosting or co-hosting conferences are in Table 1 – Approval Thresholds. Any DLA Activity seeking approval to Host or Co-Host an event with a total cost over \$100,000 must coordinate with the Director's Staff Group to obtain DLA Director's approval.

b. When a DLA Component hosts a conference and it appears the total cost to the Department of Defense will exceed \$100,000, the conference host must obtain approval for the conference for the entire Department.

c. Report Foreign Nationals attending a DLA-hosted conference to the Foreign Visit Coordinator in J31 and DLA Intelligence.

d. **APPROVAL.** Requests to host a Conference must meet the following criteria:

(1) Complete a Cost Assessment Program Estimate (CAPE): You must complete a CAPE for DLA-hosted or co-hosted conferences. Complete all blocks on the Event Hosting Cost Estimate found at:

[https://www.cape.osd.mil/costguidance/CostOfHostingEvent/HostingEventWorksheet\\_PROD.asp](https://www.cape.osd.mil/costguidance/CostOfHostingEvent/HostingEventWorksheet_PROD.asp)

(2) Documenting approval:

(a) For hosted conferences with a total cost of \$100,000 or less, the approval authority should certify that all information provided on the CAPE is accurate and complete to the best of their ability. Approval to host the conference shall be documented through a memorandum on organizational letterhead signed by the approval authority.

(b) For hosted conferences requiring DLA Director or above approval (>\$100,000), submit the conference request package via TMT as directed in paragraph 5 below.

e. **REPORTING REQUIREMENTS:**

(1) Send a copy of the CAPE and the approval memorandum to the Director's Support Group ([DLAHQ.OfficeoftheDirector@dla.mil](mailto:DLAHQ.OfficeoftheDirector@dla.mil)).

(2) By 15 business days after the end of the hosted or co-hosted conference, the hosting activity must provide actual costs to the [DLAHQ.OfficeoftheDirector@dla.mil](mailto:DLAHQ.OfficeoftheDirector@dla.mil) via an Attestation Memorandum (Appendix 2 to Enclosure 3). Complete the attestation memorandum on your organization's letterhead.

(3) Additional reporting is necessary when the costs of hosted or co-hosted conferences exceeds \$20,000. The Director's Staff Group will report DLA-hosted conference attendance actual costs to OUSD(AT&L) via the DoD Conference Tool (<https://eitsdext.osd.mil/sites/DoDConferenceTool/Pages/home.aspx>) when required.

## 5. CONFERENCES REQUIRING DLA DIRECTOR'S APPROVAL

a. The DLA Director must approve in writing conferences with a total cost *to the Agency* of more than \$100,000. The Director's Staff Group will work with DLAHQ Directorates/PLFA Commanders/General Counsel to identify high cost conferences and will provide more guidance on a case-by-case basis.

b. Once the J/D Code Director, PLFA Commander or DG has approved attendance, submit the conference request package via TMT by following these steps:

(1) The requesting organization begins a new request and fills out all the required areas for submission to DLAHQ DSG.

(2) The "subject" should read: Conference – [the name of the conference]. Be sure to include the word "Conference in the Subject Line. Press SAVE and annotate your TMT number for your records.

(3) Next, Click "OTHER ACTION"

(4) Next, Click "SUBMIT FOR COORDINATION APPROVAL"

(5) In the "hour glass" search for "conference" and the DSG APPROVAL TEMPLATE"

will appear

(6) Click Ok, and upload documents into the "MY TABS" section.

## 6. PRESENTING OR SPEAKING AT A CONFERENCE

a. If presenting or speaking at a place open to the public, submit the material and request approval form DLA Intelligence and DLA Public Affairs on DLA Form 1923. Submit the conference request with the presenting or speaking material and the approved DLA Form 1923 for final DLA DG (General Counsel) review. If there is no physical material, include a summary of the material. All DLA employees who intend to speak at a non-DoD hosted event must obtain a legal opinion from their ethics counsel before their participation.



**APPENDIX 1 TO ENCLOSURE 3  
MONTHLY CONFERENCE APPROVAL REPORTING TEMPLATE**

Event Date	Event	Event Location	TMT Number	# of Attendees	Host	Est. Cost of Event	Projected Travel Costs	Total Conference Expenses	Approving Authority / Date	Brief Explanation How Conf. Advances Agency Mission	ORG	DoD Hosted	Non-DoD Hosted	DoD Co-Sponsor
09.28.2015 (3 Days)	Capitalware's MQ Technical Conference v2.0.1.5 (MQTC)	Sandusky, OH	20772	1	Capitalware Inc.	\$ 500.00	\$ 985.15	\$ 1,485.15	Mr. John Doe 9/1/2015	Technologies critical to all of the diverse MQ related applications used by DLA and others in DoD are covered	J62		X	
09.28.2015 (3 Days)	NDTA USTRANSCOM Fall Meeting/Expo '15	National Harbor, MD	22827	4	NDTA	\$ 3,015.00	\$ 2,107.00	\$ 5,122.00	Ms. Jane Smith 7/23/2015	Booth Reps	J34	X		

APPENDIX 2 TO ENCLOSURE 3  
ATTESTATION MEMORANDUM EXAMPLE



DEFENSE LOGISTICS AGENCY  
HEADQUARTERS  
8725 JOHN J. KINGMAN ROAD  
FORT BELVOIR, VIRGINIA 22060-6221

Date

MEMORANDUM FOR THE RECORD

SUBJECT: Attestation Memorandum for [NAME OF CONFERENCE]

This memorandum serves as confirmation for all actual costs associated with [NAME OF CONFERENCE] held on [DATE]. Total number of conference attendees was XXX. The total number of DoD-sponsored attendees was YYY. This conference was co-sponsored with AAAAA (as applicable).

Estimated costs were \$XXXX (excluding DoD manpower). Total conference cost to the Department of Defense was \$YYYY. The itemized cost areas were as follows:

Food/Beverage Costs-	\$AAAA
Audio/Visual Costs-	\$BBBB
Pre-Conference Planning Costs-	\$CCCC
DoD Participant and Contractor Travel/TDY costs-	\$DDDD
Other Hosting Costs-	\$EEEE
Less Revenue-	\$FFFF
Total Conference Cost to DoD	\$YYYY

A non-Federal conference planner [was/was not] used in the planning of this conference. A No-Cost Contract [was/was not] utilized. Contracts [were/were not] awarded on a competitive basis.

We hereby attest that actual costs were properly reviewed and validated by our staff based on actual costs submitted. We will maintain the records within the [DIRECTORATE/PLFA NAME].

Point of contact for this action, and custodian for these records is [NAME, CITY, STATE, PHONE NUMBER, DSN, EMAIL]

NAME  
Position  
Organization

## GLOSSARY

### PART I. ABBREVIATIONS AND ACRONYMS

CFR	Code of Federal Regulations
CAPE	Cost Assessment & Program Evaluations
DLA	Defense Logistics Agency
DLAHQ	Defense Logistics Agency Headquarters
DTIC	Defense Technical Information Center
DTMO	Defense Travel Management Office
DTS	Defense Travel System
DoD	Department of Defense
DCMO	Deputy Chief Management Officer
DTM	Directive-Type Memorandum
FTR	Federal Travel Regulation
GSA	General Services Administration
GPC	Government Purchase Card
IAW	In Accordance With
JER	Joint Ethics Regulation
JFTR	Joint Federal Travel Regulation
OMB	Office of Management and Budget
OUSD(AT&L)	Office of the Under Secretary of Defense (Acquisition, Technology and Logistics)
OUSD(P&R)	Office of the Under Secretary of Defense (Personnel and
Readiness) OSD	Office of the Secretary of Defense
TMT	Task Management Tracker

### PART II. DEFINITIONS

**Conference:** The term “conference” is defined in this Issuance as it is in the Federal Travel Regulation (FTR), Joint Federal Travel Regulations (JFTR), and Joint Travel Regulations (JTR) as, “[a] meeting, retreat, seminar, symposium, or event that involves attendee travel. The term ‘conference’ also applies to training activities that are considered conferences under 5 CFR 410.404.”<sup>9</sup> Indicia of a formal conference often include, but are not limited to, registration, registration fees, a published substantive agenda, and scheduled speakers or discussion panels. Events within the local duty location that do not require travel authorization may also qualify as a conference for the purposes of this guidance.

**Conference vice Training:** The term ‘conference’ also applies to training activities considered to be conferences under 5 CFR 410.404, “Determining if a Conference is a Training Activity”. Some training events may qualify as conferences for the purposes of this

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<sup>9</sup> Deputy Chief Management Officer Guidance, DoD Conference Guidance, Version 4.0, June 26, 2016.

Issuance, particularly if they take place in a hotel or conference center. Formal classroom training, however, includes 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. Some indicia of formal classroom training are:

(1) The sole purpose is training, as opposed to networking, sharing best practices, or other similar purposes.

(2) Continuing education credit is available for all event sessions other than meals.

(3) The event is held in a facility regularly used for training such as a university classroom and not a hotel or conference center. However, if an event is held in a hotel or conference center and all event sessions other than meals consist of classroom training, the event may qualify under the exemption. While location is not determinative, there will be special scrutiny if the training is held at a resort or other location.

(4) 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.

**Conference Expenses:** Conference expenses are defined as all direct and indirect conference costs paid by the Department, IAW 41 CFR 301-74.2, whether paid directly by agencies, or reimbursed by agencies to travelers or others associated with the conference. For the purposes of this guidance, conference expenses include, but are not limited to:

(1) Authorized travel and per diem expenses for all DoD-sponsored attendees, including both government and non-government employees

(2) Hire of rooms for official business

(3) Audiovisual and other equipment usage

(4) Computer and telephone access fees

(5) Light refreshments and other food and beverages

(6) Printing

(7) Registration, exhibitor, sponsor, or conference fees for all DoD-sponsored attendees, including both government and non-government employees

(8) Ground transportation and/or parking fees

(9) Outlays for conference preparation and planning

(10) Speaker fees

(11) Administrative expenses

Do not include Federal employee time for conference preparation, attendance, or travel time in route. Also, do not include security costs to ensure the safety of attending government officials in conference expense calculations.

**Virtual Conferences:** Virtual conferences are defined as any remotely accessed conference. DLAHQ approval for virtual conferences is required IAW Enclosure 3, Approval Procedures, only if there is a fee associated with it.