



**DEPARTMENT OF DEFENSE  
EDUCATION ACTIVITY**

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ARLINGTON, VIRGINIA 22203-1635

Procurement Division

DoDEA Administrative Instruction 8000.5  
April 14, 2005

**DEPARTMENT OF DEFENSE EDUCATION ACTIVITY  
ADMINISTRATIVE INSTRUCTION**

**SUBJECT: Fiscal Responsibility in Containing Conference Costs**

- References: (a) DoDEA Policy Memorandum, "Fiscal Responsibility in Containing Conference Costs," March 19, 2002 (hereby canceled)  
(b) Secretary of Defense Memorandum, "Fiscal Responsibility in Containing Conference Costs," November 29, 2001  
(c) Office of Management and Budget Bulletin No. 93-11, "Fiscal Responsibility and Reducing Perquisites," April 19, 1993  
(d) Joint Federal Travel Regulations, Volume 2, "Department of Defense Civilian Personnel," current edition

**1. REISSUANCE AND PURPOSE**

This Administrative Instruction:

- 1.1. Replaces reference (a).
- 1.2. Updates policy and responsibilities regarding the Department of Defense Education Activity (DoDEA) procedures for processing conference actions in accordance with references (b) and (c).
- 1.3. Establishes DoDEA procedures for conference requests and approvals.

**2. APPLICABILITY**

This Administrative Instruction applies to the Office of the Director, Department of Defense Education Activity; the Director, Domestic Dependent Elementary and Secondary Schools, and Department of Defense Dependent Schools, Cuba (DDESS/DoDDS-Cuba); the Director, Department of Defense Dependents Schools, Europe (DoDDS-E); the Director, Department of Defense Dependents Schools, Pacific, and Domestic Dependent Elementary and Secondary Schools, Guam (DoDDS-P/DDESS-Guam); and all DoDEA District Superintendents, School Principals, Teachers, and Support Staff.

### 3. DEFINITIONS

3.1. Conference. A meeting, retreat, seminar, symposium, training, or event that involves employee travel outside the normal duty station.

3.2. Conference Coordinator. The primary point of contact or the program manager in charge who plans and coordinates the conference.

3.3. Conference Costs. All costs paid by the government for a conference to include speakers and contractors. Such costs include, but are not limited to, travel to and from the conference, including ground transportation, lodging, meals and incidental costs, meeting room and audiovisual costs, registration fees, speaker fees, other related administration fees, and the cost of the employees' time spent at the conference.

### 4. POLICY

It is DoDEA policy that:

4.1. The Department of Defense Education Activity, as a Department of Defense Field Activity, shall select conference sites that ensure conference costs are kept to a minimum and that exercise strict fiscal responsibility.

4.2. In accordance with references (b), (c), and (d); any individual wanting to hold a conference shall submit the conference memorandum to the appropriate Director or Associate Director for approval.

### 5. RESPONSIBILITIES

5.1. The Director, Department of Defense Education Activity, as the Head of the Contracting Activity, shall exercise authority, direction, and control over the Chief, Procurement Division, Department of Defense Education Activity.

5.2. The Chief, Procurement Division, Department of Defense Education Activity, shall:

5.2.1. Develop overall program policy.

5.2.2. Ensure effective management controls are in place.

5.3. The Comptroller, Department of Defense Education Activity, shall:

5.3.1. Ensure the program manager or other requirements official has followed the procedures established within this document.

5.3.2. Verify and certify that funds are available and appropriate for the procurement action.

5.4. The Director, Domestic Dependent Elementary and Secondary Schools, and Department of Defense Dependent Schools, Cuba (DDESS/DoDDS-Cuba); the Director, Department of Defense Dependents Schools, Europe (DoDDS-E); the Director, Department of Defense Dependents Schools, Pacific, and Domestic Dependent Elementary and Secondary Schools, Guam (DoDDS-P/DDESS-Guam) shall:

5.4.1. Review all requests for conferences submitted by the DoDEA Conference Coordinator to ensure that the conference costs are kept to a minimum, appropriate rationale is used in the selection of the conference site, agency attendance is limited to the minimum number of essential people, and travel expenses are appropriately considered.

5.4.2. Review documentation to ensure alternate conference sites are considered and the rationale demonstrates and ensures that the chosen site is the most cost effective conference site available.

5.5. The DoDEA Conference Coordinator shall:

5.5.1. Submit a written memorandum to the appropriate Director or Associate Director for approval. The memorandum shall include the following:

5.5.1.1. Provide market research that documents the location of the conference sites to include a cost analysis evaluation of the prospective conference sites (required only if costs are expected to exceed \$2,500). The market research shall include:

5.5.1.1.1. Describe the proposed conference.

5.5.1.1.2. Explain how the conference supports the DoDEA mission.

5.5.1.1.3. Determine the number of attendees necessary to meet mission requirements.

5.5.1.2. Verify that expenses are in accordance with reference (d) (i.e., conferences cannot be held in locations that would exceed normal per diem rates).

5.5.2. Provide the following documents to a DoDEA contracting officer for further action:

5.5.2.1. A requisition.

5.5.2.2. An approved conference memorandum.

5.5.2.3. A performance work statement.

5.5.2.4. An independent government cost estimate.

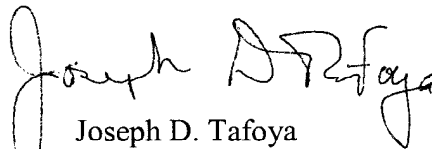
5.6. The DoDEA Contracting Officer shall:

5.6.1. Award a contract when the DoDEA procurement office receives a copy of the requisition, approved conference memorandum, performance work statement, and independent government cost estimate.

5.6.2. Ensure that the contract file includes all support documentation; including a cost analysis that indicates alternative conference sites were considered.

## 6. EFFECTIVE DATE

This Administrative Instruction is effective immediately.



Joseph D. Tafoya  
Director