

VA Financial Policies and Procedures
Conference Planning

CHAPTER 10

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1001 OVERVIEW

This chapter establishes the Department of Veterans Affairs (VA) financial policies and procedures relating to conference planning. The purpose of this chapter is to emphasize the need to plan conferences, including any associated travel. As defined by the Federal Travel Regulation (FTR), a conference may include a meeting, retreat, seminar, symposium or event that involves attendee travel.¹

This chapter implements and supplements those portions of the FTR pertaining to Temporary Duty Travel (TDY). The FTR is the Federal Government regulation that implements statutory requirements and Executive Branch policies for travel by Federal civilian employees and others authorized to travel at Government expense (41 Code of Federal Regulations (C.F.R.), Chapters 300 through 304).

This chapter provides guidance on:

- General Rules – Section 100201.
- Conference Lodging Allowance – Section 100202.
- Meals and Incidental Expenses (MIE) When Attending a Conference – Section 100203.
- Light Refreshments at Conferences – Section 100204.
- Legal and Technical Review -- Section 100205.

Refer to [Appendix A](#) for applicable FTR references for various subjects covered in this chapter.

1002 POLICIES

100201 GENERAL RULES.

A. Agency Responsibility. VA approving officials will limit the authorization and payment of travel expenses to those that are necessary to accomplish the purpose of the conference. All conference travel will be performed in the most economical and effective manner and in accordance with the FTR and VA's internal travel policy guidelines.

B. VA will hold conference events at the most cost-effective location, considering such factors as per diem, transportation, and rental of conference rooms. A cost comparison of at least three geographically diverse viable cities must be conducted to ensure that the conference will be held in the most economical location and the objectives of the conference will be achieved. However, no cost comparison is required if more than 50 percent of the participants are from the location decided upon for the conference. A contracting officer may be used to assist in finding the most cost-effective conference facility. Refer to [Appendix B, Conference Planning Considerations](#), for recommended

¹ Training activities may also be considered as determined by 5 C.F.R. 410.404.

guidance along with other factors to be considered when a conference is being developed.

C. VA will analyze estimated conference expenditures for different locations to determine which location would provide the overall best value to the Government. The organization responsible for planning the conference will ensure the standards to determine the best value are met. To determine expenditures, the conference planning committee will:

- Exercise strict fiscal responsibility by selecting conference sites that minimize conference administrative costs, conference attendees' travel costs, and conference attendees' time costs (e.g., choose the site that provides the best value to the Government);
- Cost compare the size, scope, and location of the proposed conference;
- Maximize the use of Government-owned or Government-provided conference facilities as much as possible;
- Identify opportunities to reduce costs in selecting a particular conference location and facility (e.g., the possible availability of more competitive rates during the off-season at a site, or the option of using complimentary hotel rooms that may be offered by the lodging facility as discounts to the overall price of the conference); and
- Maintain written documentation of the alternatives considered and the selection rationale used.

D. If VA provides meals or light refreshments at the conference, the applicable MIE will be effected as follows:

- The appropriate MIE rate is deducted when meals are furnished.
- The MIE rate is not deducted when light refreshments are furnished.

Refer to Section 100204 Meals and Incidental Expenses on p. 5.

E. Site Selection.

1. In determining the best conference site in the interest of the Government, VA will exercise strict fiscal responsibility to determine the best value. VA will ensure the following when selecting a site for a conference:

- a. Management oversight is performed during the conference planning process;
- b. Alternatives to a conference, such as teleconferencing, are considered before any firm commitment is made on a physical location;

c. Agency representation is limited to the minimum number of attendees determined necessary to accomplish the purpose of the conference; and

d. Cities and venues are evaluated based on the various factors as outlined in [Appendix C, Venue Evaluation Factors](#), such as:

- Size and quality of services and accommodations to meet the needs of the required number of participants;
- Available funding impacts, including per diem and travel costs for participants;
- Logistical considerations, including proximity to a major airport; and
- Prior experience with hosting complex and large conferences.

2. After all proposals are evaluated, the contracting officer will determine which hotel provides the best value to the Government. VA will maintain written documentation of the evaluation criteria and the selection rationale used when there are 30 or more attendees at a conference. VA will consider at least three sites. These records must be kept on file and made available for inspection by the Office of the Inspector General or other interested parties, if requested. Refer to [Appendix D, Sample Cost Estimate of Venue](#), and [Appendix E, Site Cost Comparison Chart](#), for determining which venue provides the best value to the VA.

3. For conferences held within Washington, DC., Statute 40 U.S.C. 8141 states that “A contract shall not be made for the rent of a building, or part of a building, to be used for the purposes of the Federal Government in the District of Columbia until Congress enacts an appropriation for the rent.” The statute does not prohibit the procurement of short-term conference facilities. The General Services Administration (GSA) construed the procurement of short-term conference facilities as a service contract rather than a rental contract. However, VA may not directly procure lodging facilities in the District of Columbia for attendees of the conference. The lodging facilities must be procured by the individual employee based on the per diem entitlements.

4. This paragraph applies to “conference appropriateness” in terms of public perception. VA will not automatically rule out any particular location as a meeting site. However, it is the responsibility of those who approve meeting sites and attendance at meetings to avoid the impression that Federal funds are being used inappropriately. Accordingly, meeting sponsors will not hold meetings at resort areas to which the general public is attracted because of recreational facilities, unless that area is the location which provides the best value for the purpose of the meeting in terms of program needs and cost factors. Refer to [Appendix F, VA Conference and Travel Request Form](#), for additional information.

100202 CONFERENCE LODGING ALLOWANCE.

A. VA Approving Officials may approve a Conference Lodging Allowance (CLA) for qualifying conferences. A qualifying conference is one that involves 30 or more attendees, over half of who are in travel status. VA may approve a maximum allowance of up to 25 percent greater than the GSA lodging allowance for the locality per diem rate.

B. Travelers are approved to use the CLA when a Federal agency that sponsors or co-sponsors a conference has authorized the CLA. The sponsoring agencies will notify all attendees, either through advertisements or application forms, that the CLA has been approved for the conference. Attendees must attach this notification to their travel vouchers.

C. Approving Officials may approve a traveler attending a conference that is not sponsored by a Federal agency, to receive CLA. The traveler will attach a statement signed by the approving official stating that the CLA had been approved for the conference.

Note: VA may not pay travel expenses of non-Government persons to attend a conference unless those persons will be providing a service to the Government, or their attendance is necessary to conduct the meeting, make presentations, etc.

100203 MEALS AND INCIDENTAL EXPENSES (MIE) WHEN ATTENDING A CONFERENCE.

A. If a meal is furnished by the Government while attending a conference, the employee is responsible for ensuring the appropriate meal deduction is made from the MIE on the travel authorization. Refer to Volume XIV, Chapter 2, *Travel Per Diem*, for additional information on the MIE rates for meals.

B. VA will not exceed 150 percent of the locality MIE rate per meal when providing travelers meals at a conference (including any hotel service costs). For example, if dinner will be provided in a locality with a \$49.00 per day MIE rate, the dinner rate in the locality is \$24.00 per dinner. Therefore, the cost of the dinner provided at the conference cannot exceed \$36.00 (\$24.00 x 150 percent) per person. All VA employees attending the conference must ensure that the provided meal is deducted from their claimed MIE. In the above example, the employee would deduct the locality dinner amount from the claimed MIE for the provided meal.

100204 LIGHT REFRESHMENTS AT CONFERENCES.

VA may provide light refreshments at conferences that have been approved by the delegated approving official. The expense for light refreshments may not exceed 30 percent of the MIE rate per day per attendee. Light refreshments or complimentary snacks are not deducted from the MIE. With very limited exceptions, refreshments are

to be provided only to Federal employees when most of the attendees are in travel status. Refer to Volume II, Chapter 4, *Awards, Ceremonies, Food and Refreshments, Gifts or Mementos*, for additional information on refreshments at conferences.

100205 LEGAL AND TECHNICAL REVIEW.

Per the Office of Acquisition and Logistics, all proposed contracts for conferences, where VA's commitment, expenditure and liability combined exceed \$25,000, require legal and technical review prior to signature by a VA contracting officer. Refer to OAMM Information Letter IL 049-02-12, Legal and Technical Review of Proposed Contracts for Conferences, dated July 30, 2002, in paragraph 100306.

1003 AUTHORITY AND REFERENCES

[100301 5 U.S.C. 4109 Government Employees Training Act \(GETA\)](#)

[100302 5 U.S.C. 5707 Travel, Transportation and Subsistence](#)

[100303 40 U.S.C. 8141 Public Buildings, Grounds, and Parks in the District of Columbia](#)

[100304 41 C.F.R. Chapters 300-304, Federal Travel Regulations \(FTR\)](#)

[100305 OFP Publications Library](#)

[100306 OAMM Information Letter IL 049-02-12, Legal and Technical Review of Proposed Contracts for Conferences.](#)

1004 ROLES AND RESPONSIBILITIES

100401 The Assistant Secretary for Management/Chief Financial Officer (ASM/CFO) oversees all financial management activities relating to the Department's programs and operations, as required by the Chief Financial Officers Act of 1990 and 38 U.S.C. 309. Specific responsibilities include the direction, management and provision of policy guidance and oversight of VA's financial management personnel, activities and operations. The CFO establishes financial policy inclusive of travel, systems and operating procedures for all VA financial entities and provides guidance on all aspects of financial management. The Deputy Assistant Secretary (DAS) for Finance may authorize actual expense greater than 150 percent up to 300 percent for VACO Staff Office employees.

100402 Under Secretaries, Assistant Secretaries, Chief Financial Officers, Finance Officers, Chiefs of Finance Activities, Chief Accountants and other key officials are responsible for ensuring compliance with the policies and procedures set forth in this chapter and will designate one or more persons to answer questions pertaining to the preparation of temporary duty travel and permanent change of station authorities and

vouchers. Under Secretaries and the Chairman of the Board of Veterans' Appeals may authorize actual expense greater than 150 percent up to 300 percent for travelers under their jurisdiction.²

100403 The Office of Financial Policy (OFP) under the CFO's direction, provides Departmentwide financial policy and guidance. OFP is responsible for developing, coordinating, issuing, evaluating and reviewing VA's financial policies, to include those that impact financial systems, and procedures for compliance with all financial laws and regulations.

100404 Approving officials will:

- A. Authorize only that official travel for travelers under their jurisdiction in advance of the travel.
- B. Determine if the travel is essential for the purpose of carrying out the mission of VA.
- C. Ensure all travel is authorized and performed consistent with the FTR (41 C.F.R. 301-304), VA travel policy, and any other agency-specific guidance relating to travel issues.
- D. Ensure adequate funds are available before authorizing travel.
- E. Ensure all travel is performed in the most economical and effective manner.
- F. Ensure VA's E-Government Travel System (ETS) is used to prepare, process, approve, and route travel authorizations and vouchers for official temporary duty travel, including the requirement to use the ETS for making reservations.
- G. Examine expense reports to ensure the justification, supporting documentation and receipts are attached to ensure that travel expenses for which reimbursement is claimed was performed as authorized and that split-pay was used to pay for all authorized expenses made to the card.
- H. May authorize actual expense up to 150 percent of the per diem rate for travelers under their jurisdiction.
- I. Ensure travelers under their jurisdiction complete vendorizing forms to receive travel payments electronically, file expense reports with electronically attached receipts, and comply with the travel card program guidelines.

100405 Travelers will:

² Under Secretaries may delegate this authority to the Veterans Integrated Service Network (VISN), Memorial Service Network (MSN) or Area Offices.

- A. Be knowledgeable of the FTR, VA travel policy, and any other agency-specific guidance relating to travel issues.
- B. Minimize costs of official travel by exercising the same care in incurring expenses that a prudent person would exercise if traveling on personal business and expending personal funds. Excess costs, circuitous routes, delays, or luxury accommodations and services unnecessary or unjustified in the performance of official business are not acceptable under this standard. Travelers will be responsible for excess costs and any additional expenses incurred for personal preference for convenience.
- C. Ensure travel is authorized by the approving official prior to departure.
- D. Arrange travel using VA's ETS, including reservations for transportation, lodging, and rental cars.
- E. Cancel transportation and lodging reservations timely.
- F. Claim and obtain, where applicable, exemptions of tax imposed on hotel accommodations in locations listed in the Federal Acquisition Service's (FAS) GSA SmartPay Website. Only certificates issued by the locality granting the exemption may be used.
- G. Submit claim for reimbursement of expenses within 5 business days upon return to the official station, except that travelers in an extended travel status will submit expense reports currently, i.e., at least once a month in which the travel period exceeds 30 days. Local expense reports may be submitted monthly or quarterly.
- H. Liquidate travel advances.
- I. Comply with VA's Travel Charge Card Program guidance contained in Volume XVI, Chapter 2, *Travel Charge Card*.

1005 PROCEDURES

Procedural and other guidance to assist the traveler can be found either in Section 1002, POLICIES, or in the following appendices:

- [Appendix A: Federal Travel Regulation References](#)
- [Appendix B: Conference Planning Considerations](#)
- [Appendix C: Venue Evaluation Factors](#)
- [Appendix D: Sample Venue Cost Estimate](#)
- [Appendix E: Site Cost Comparison Chart](#)

- [Appendix F: VA Conference and Travel Request Form](#)

1006 DEFINITIONS

100601 Conference. A prearranged meeting for consultation or exchange of information or discussion (especially one with a formal agenda).

100602 Conference Lodging Allowance (CLA). A predetermined maximum allowance up to 25 percent greater than the GSA lodging allowance for a specific locality's per diem rate.

100603 Employee. An appointed officer or employee of an agency, including a special Government employee. This definition also includes an individual employed intermittently in the Government service as an expert or consultant and paid on a daily when-actually-employed (WAE) basis, and an individual serving without pay or at a \$1 a year (also referred to as "invitational traveler").

100604 Federal Travel Regulation (FTR). The FTR implements statutory requirements and Executive branch policies for travel by Federal civilian employees and others authorized to travel at Government expense.

100605 Online Booking Engine (OBE). An Internet based system that permits travelers to make their own reservations for transportation (e.g., air, rail, and car rental) and lodging.

100606 Per Diem. The per diem allowance is a daily payment instead of actual expenses for lodging, meals, and related incidental expenses. The per diem allowance is distinguished from transportation expenses and other miscellaneous travel expenses.

100607 Retreat. A town hall type meeting for government employees to review progress and challenges in implementing government/departmental policies, engaging their staff in discussing various aspects of said government or departmental activities. Retreats are often held off site or away from the normal duty station or office. Such a facility usually offers participants the opportunity to socialize to a greater extent than they otherwise would in the office, and to personalize relationships and gain greater appreciation of each other.

100608 Routine meeting. A formal or informal arranged gathering for a predetermined purpose; in a meeting, two or more people come together for the purpose of discussing a (usually) predetermined topic such as business or community event planning.

100609 Seminar. A lecture or presentation delivered to an audience on a particular topic or set of topics that are educational in nature. It is usually held for groups of 10-50 individuals. A seminar is frequently held at a hotel meeting space or within an office conference room. It is also known as a conference.

100610 Symposium. A meeting of a number of experts in a particular field at which papers are presented by specialists on particular subjects and discussed with a view to making recommendations concerning the problems under discussion.

100611 Training. An activity leading to skilled behavior. Training also refers to the acquisition of knowledge, skills, and competencies as a result of the teaching of vocational or practical skills and information that relate to specific useful competencies.

100612 Traveler. An individual as defined by the FTR who is authorized to perform official Government travel.

100613 Workshop. A series of educational and work sessions. Small groups of people meet together over a short period of time to concentrate on a defined area of concern. Purposes for workshops may vary; examples include Informing, Problem solving, and Training. Typically a workshop has two components: technical in which one presents theory in lectures and readings, and in which one would do a project, produce a product, or write a paper.

1007 RESCISSIONS

100701 Travel Policy 03-05, Clarification of Providing Light Refreshments at Government Sponsored Conferences.

1008 QUESTIONS

Questions concerning these financial policies and procedures should be directed as follows:

VHA	VHA CFO Accounting Policy (10A3A) (Outlook)
VBA	VAVBAWAS/CO/FINREP (Outlook)
All Others	Office of Financial Business Operations Office of Financial Policy Travel Policy (Outlook)

APPENDIX A: FEDERAL TRAVEL REGULATION REFERENCES

Chapter References	FTR References	Subject Descriptions
100201	301-74.1	Agency Responsibilities
100202B	301-74.3 and 301-74.19	Site Selection
100202C	301-74.17	Conference Held in DC
100203	301-74.7	Conference Lodging Allowance
100204A	301-74.21	MIE When Attending a Conference
100205	301-74.11	Light Refreshment at Conferences

APPENDIX B: CONFERENCE PLANNING CONSIDERATIONS

ACTIVITY	CONSIDERATIONS
A. General	Depending on the size, types, and intended effect of the conference, start planning a minimum of 1 year in advance. Designate a planner and a planning committee.
B. Planning Committee	<p>Functions of a planning committee generally include, but are not limited to, the following:</p> <ul style="list-style-type: none"> • Establishing a set of objectives; • Developing a theme; • Making recommendations for location, agenda, dates, and logistics (e.g., schedule, exhibits, and speakers); • Making suggestions on potential attendees; • Serving as a communication link between planners and participants; and • Evaluation and follow-up.
C. Milestone Schedule	<p>Develop a milestone schedule, essential to conference planning, by working backward from the start date of the conference, including each major step. Examples include:</p> <ul style="list-style-type: none"> • Planning committee meetings • Mailing list preparation • Invitation letters • Designation of speakers • Sending speaker confirmation letters • Confirmation with site selection official • Agenda preparation • Preparation of a specification sheet (see below) • Location and date selection • Exhibits • Budget • Printing requirements • Signage • Conference information packages • Scheduling a photographer (if planned) • Use of the agency seal and conference logo • Disability and accessibility requirements • Planning of meals and refreshments, if appropriate • Establish completion dates for each major step • Update and revise the schedule as needed

ACTIVITY	CONSIDERATIONS
D. Specification Sheet	
<ul style="list-style-type: none"> • Essential Elements 	<p>Identification of essential elements of a conference, which typically include, but are not limited to:</p> <ul style="list-style-type: none"> • Sleeping rooms and on-site food services. It is generally best to estimate on the low side for the number of sleeping rooms and meals to be prepared. Unless there is only limited available space, facilities are usually prepared to increase the number of sleeping rooms and meals; however, they discourage—and in some cases penalize—the agency if the sleeping room and meal guarantees are not met. • Meeting rooms • Exhibit facilities • Audiovisual equipment and support services • Miscellaneous support services • Sleeping rooms with amenities, such as Internet access, data ports, conference calling, and voice mail.
<ul style="list-style-type: none"> • Cost Determination: 	<ul style="list-style-type: none"> • Procurement. Bring the contracting officer into the process early. All agreements and decisions should be written and agreed to by the agency contracting officer before being sent to the facility. • Government Per Diem Rates. The Government per diem rate applies to Federal attendees. Applying it to non-Federal attendees is at the discretion of the property and conference negotiator. • Registration Fee. Generally, the registration fee covers all direct expenditures of agency funds for planning and organizing a conference, such as meeting room accommodations, meals, light refreshments (if appropriate), speaker fees, publications, and materials. Anything directly relating to the conference, except liquor, can be included in the fee. To estimate the registration fee, divide the proposed budget by the estimated number of attendees.
E. Budgeting	<p>Decide how the conference expenses (other than sleeping room accommodations and individual meals) will be paid—for example, by the attendee from a training or registration fee, or directly by the agency.</p>

ACTIVITY	CONSIDERATIONS
F. Conference Site Selection	Minimize total costs, all factors considered. The following are some significant cost elements.
<ul style="list-style-type: none"> • Geographic Location 	<p>In determining where to locate the conference, consider:</p> <ul style="list-style-type: none"> • The targeted audience • Total costs, including per diem, transportation, and others • Accessibility by car or air • Recreational activities, if deemed necessary • The expense of the desired facility (significant savings can be achieved in off-season periods).
<ul style="list-style-type: none"> • Types of Facilities 	<ul style="list-style-type: none"> • Federal Government. Use Government-owned or Government-provided conference facilities to the maximum extent possible. • Convention centers. Excellent for very large meetings, trade shows, and exhibits; usually located near a large number of hotels. • Conference centers. Dedicated meeting facilities; good for smaller meetings when numerous breakout sessions are planned. • Colleges and universities. Many have good meeting facilities and can offer sleeping accommodations when classes are not in session. • Hotels. Commercial facilities that may be used to meet all conference needs or just the room night needs.
<ul style="list-style-type: none"> • Date Selection 	Book the facility as early as possible to increase the chances of getting the desired date. For reasons of availability and economy, the best months are April, May, September, October, and November. However, pay particular attention to commitments in September or October, due to fiscal year budget considerations.
G. Considerations When Choosing a Site	
<ul style="list-style-type: none"> • Facility 	<ul style="list-style-type: none"> • Is it cost-effective—e.g., are Government rates honored? • Is it safe—e.g., FEMA-approved? • Are there on-site security personnel? • Easily reached from an airport or by car? • Is it clean? • Is it well run—e.g., does the staff seem to be competent and responsive? • Is it laid out in a functional way? • Is it large enough to supply the number of sleeping rooms required?

ACTIVITY	CONSIDERATIONS
	<ul style="list-style-type: none"> • Is it set up to provide necessary conference registration equipment? • Is it accessible for individuals with a disability? • Does the lodging facility have additional mandatory charges (e.g., resort fees, baggage handling fees)? • Does the State recognize Federal tax-exempt certificates for employee lodging?
<ul style="list-style-type: none"> • Parking 	<ul style="list-style-type: none"> • Is it adequate? • Is it close to the facility? • Is it secure and safe? • Is it cost separate?
<ul style="list-style-type: none"> • Sleeping Rooms 	<ul style="list-style-type: none"> • Will the facility make the reservations, or are conference planners responsible for making the reservations for participants? • What are the facility's registration rules? • What are the departure rules?
<ul style="list-style-type: none"> • Functionality of Meeting Rooms 	<ul style="list-style-type: none"> • Is appropriate space available? • What costs are involved? • Is needed equipment available (e.g., for conference registration, faxes, phones, computers, copiers)? Do not rent equipment unless it is absolutely unrealistic for conference organizers to bring their own equipment. • Are rooms designated for agency use for the duration of the conference? • Are there columns that can block views? • Are ceilings high enough for audio-video equipment? • Are rooms suitable for both classroom and/or theatre setups? • Are there windows? Shades? • Are there manually controlled thermostats? • Are rooms handicapped-accessible? • Where are electrical outlets? • Can the rooms be darkened? • Would it be more economical for the agency to bring its own audiovisual equipment? • Does the facility want meeting schedules and room layouts in writing before the conference? • If necessary, can the rooms be entered the evening before for early setup? • Will the facility arrange for room setup if given a layout? • What setup costs are included? • What are the departure rules?

ACTIVITY	CONSIDERATIONS
<ul style="list-style-type: none"> • Exhibits: 	<ul style="list-style-type: none"> • If exhibits are planned, is suitable exhibit space available? • What are the put-up and takedown times? • Are easels available at no cost? • What about pre-delivery and after-conference arrangements? • What costs are involved? • If large exhibits are being brought, determine the location of the loading docks, appropriate entrances, and elevators. • If exhibits are shipped, know where and to whom they are to be sent. • Are there additional handling fees? • Check the hotel policy on posting, size, and appearance of signs.
<p>H. Food and Drink</p>	
<ul style="list-style-type: none"> • Meals 	<ul style="list-style-type: none"> • Generally, appropriated funds may not be used to pay for meals for employees at their official duty stations. • Employees on TDY travel may be served meals but cannot be reimbursed for those provided at government expense. • Clarify in advance the appropriate per diem reduction of meal allowances for TDY travel. • Under the Government Employees Training Act (GETA) at 5 U.S.C. 4104(4), employees may be reimbursed for meals as necessary expenses incident to an authorized training program if a determination has been made that essential training will be conducted during the meal. • Work closely with the hotel to plan quality menus that fit within authorized per diem rates. • Clarify and agree in advance to the number of meal guarantees. • Ensure that gratuities and service charges are added to the cost of each meal, and determine the method of billing to be used (such as a signed guarantee, collected meal tickets, or the actual quantities consumed). • Confirm menus.

ACTIVITY	CONSIDERATIONS
<ul style="list-style-type: none"> • Breaks and Refreshments 	<p>Breaks should last no longer than 30 minutes and take place between meeting sessions.</p> <p>The following should also be considered when planning for refreshments:</p> <ul style="list-style-type: none"> • Keep in mind that not everyone drinks coffee or tea. • Clarify and agree in advance that coffee and pastries, if appropriate, are purchased by the gallon and dozen. • Be conservative with estimates. Seldom do 100 percent of the conference participants attend any one function. • If coffee, soft drinks, and water are not included in the fee, are they available “at cost” to the attendee?
<p>I. Account Reconciliation</p>	<p>It is important to request that the hotel bill be prepared in a logical and chronological sequence, and that backup data accompany the bill. Generally, the hotel will complete its accounting of the conference within no later than 30 days of the conclusion.</p>
<p>J. Notification Announcement and/or Invitations</p>	<p>Announcement of the planned conference should be made as early as possible, even 1 year in advance; invitation letters, 8 weeks in advance. They should include, but are not limited to:</p> <ul style="list-style-type: none"> • A point of contact name and telephone number • A registration form, card, or Internet address (include space for identifying handicapped requirements) • Registration instructions • A registration deadline date • A detailed area map and driving instructions • Information on traffic patterns to avoid rush hour delays • Promotional brochures from the facility • Layout of the facility, including telephone numbers • A breakdown of costs showing any difference from travel versus training object classes, particularly meal costs, so that proper reimbursement can be made • An agenda with a list of speakers and topics • An activity schedule for spouses and guests (all charges or costs attributed to spouses or guests are not reimbursable by the Government and must be borne by the individual attendee) • A sample travel voucher • Notice that conference lodging allowance applies, if applicable.

ACTIVITY	CONSIDERATIONS
K. Confirmations	Conference planners should: <ul style="list-style-type: none"> • Decide on the speakers and the message that should be conveyed, and obtain early commitment(s) in writing. • Confirm conference dates/times/topics/arrival and departure times with speakers and any other special guests at least 30 days in advance. • Conduct a final planning committee meeting to confirm all plans. • Confirm the photographer’s schedule. • Confirm hotel plans at least 1 day in advance.
L. Facility Process	
<ul style="list-style-type: none"> • Check-In and -Out 	Streamline the process: <ul style="list-style-type: none"> • Will the facility need additional personnel? • Is one-stop electronic processing available? • Are luggage storage and shuttle service available? • Arrange parking for any special guests. • Provide signage.
<ul style="list-style-type: none"> • Registration Process 	Registration is generally the attendees’ introduction to the conference. Give it special attention by: <ul style="list-style-type: none"> • Using directional signs • Placing especially attractive or important exhibits nearby • Planning for late arrivals • Using state-of-the-art processing • Investigating the registration capabilities of GSA’s electronic SmartPay System • Providing for handicapped attendees.
<ul style="list-style-type: none"> • Conference Information Package 	Each registrant should receive a conference information package. Used regularly during the conference, the conference information package should be accurate and beneficial, and reflect detailed information on a daily and hourly basis. If time allows, finalize the package and send it to the printer at least 4 weeks in advance of the starting date. The program will be widely used, so print twice as many copies of the program as the number of expected attendees. <p>The information package may contain, for example:</p> <ul style="list-style-type: none"> • A list of everything in the package • A welcome letter

ACTIVITY	CONSIDERATIONS
	<ul style="list-style-type: none"> • A schedule • Workshop agendas • Discussion of exhibits • Panelists' information • Photos and biographies of speakers and special guests • Facility layout and list of services available • Identification of designated smoking areas • Special events • Message center information • Area map • Other pertinent material. <p>Note: Using the agency seal and conference logo may be considered for the conference package. However, the decision to use such items is strictly the judgment of agency officials.</p>
M. Miscellaneous	
<ul style="list-style-type: none"> • Suggested Room Coordination 	<p>Plan ahead to set up the following:</p> <ul style="list-style-type: none"> • Staff room to handle core of activities • Meal functions • Exhibit rooms • Meeting rooms: <ul style="list-style-type: none"> - Theatre or auditorium for lectures - Facing speaker when note-taking is important - Square or U-shaped style for discussion/interaction • Banquet or roundtable for discussion.
<ul style="list-style-type: none"> • Conference Communication Needs 	<p>Plan for:</p> <ul style="list-style-type: none"> • A message center in a central location to handle special announcements and telephone messages • How to reach whomever at all times—use beepers and walkie-talkies • Clear identification of conference staff • Accommodating physically impaired attendees with sign language or other special needs.
<ul style="list-style-type: none"> • Mementos 	<p>Appropriations are not available to purchase memento items for distribution to conference attendees as a remembrance of an event. Two notable exceptions to the memento or gift prohibition are allowable under training and awards. Work closely with appropriate agency officials to make final determinations.</p>

ACTIVITY	CONSIDERATIONS
<ul style="list-style-type: none"> • Resources 	<p>The following resources may be of assistance in planning a conference:</p> <ul style="list-style-type: none"> • An agency contracting officer • Travel Management Centers • Interagency Travel Management Committee members (a forum of agency travel policy managers—for member identification, contact GSA’s administrative or financial office) • State chambers of commerce or visitors bureaus • Local chapters of the Society of Government Meeting Professionals. All Employee Education System (EES) Event Managers are certified by the Society of Government Meeting Professionals (SGMP). • Private industry conference planners.
<ul style="list-style-type: none"> • Conclusion 	<p>Providing these final elements will help wrap up the event smoothly:</p> <ul style="list-style-type: none"> • Questionnaires can provide invaluable feedback about the success of the conference. • Participants should receive training certificates. • Thank-you notes are appropriate for participants, facility personnel, speakers, printers, photographers, and other special contributors. • A summary that acknowledges the conference accomplishments and conveys the information discussed to a wider audience may be an excellent promotional tool.

APPENDIX C: EVALUATION FACTORS

A. Technical Evaluation Factors

1. Meeting Space: Multi-functional, Availability of Space Required, Space as Requested, Quality of Meeting Space.
2. Hotel Services: Full Service Hotel, Fitness Center, Parking, Guestroom Internet, Onsite Restaurants, Shuttle to Local Area, Shuttle to/from Airport.
3. Hotel Quality: Last Renovations/Update, Event Manager Site Visit Observations, Event Manager Feedback, Website.
4. Location: Proximity to--Downtown, Airport, Metro/Light Rail, Restaurants and Outside Activities.
5. Added Values:
 - Complimentary Meeting Space
 - Waived Attrition/Cancellation Fees
 - Complimentary/Discounted AM/PM Breaks
 - Food and Beverage Discounts
 - Meeting Room Internet
 - Discounted Shuttle Service
 - Room Upgrades
 - Discounts to Attendees on Food Outlets
 - Complimentary/Discounted Reception
 - Complimentary Rooms or Credit on Guestroom Revenue to Master Account
 - Discounted Service Charge
 - Parking Price Discounts or Parking Passes

B. Past Performance

- Feedback from other Event Managers
- Commercially Available Reviews
- References

C. Price: Considered only in terms of fair and reasonable

- Lodging Rates (per diem room rates)
- Meeting Room Costs
- Cancellation Fee
- Attrition

D. Other discounts and cost factors

1. The following factors shall be used to evaluate offers:
 - Technical Acceptance
 - Past Performance
 - Price in descending order of importance.
2. Technical is more important than Past Performance.
3. Technical and Past Performance, when combined, are more important than Price.

APPENDIX D: SAMPLE VENUE COST ESTIMATE

VA Form 10008a, <http://vaww4.va.gov/vaforms/> (VA accessible only.)

Estimated Cost for:	Title:	Location:	Date:						
TOTAL PROJECTED HOTEL CANCELLATION FEE Estimate based on our experience with similar sized conferences									
DESCRIPTION	QTY.	Caellation Fee		SUB TOTAL	SERVICE	TOTAL SV	TOTAL	COMMENTS	
Cancellation Fee	1		1	\$ -	0%	\$ -	\$ -		
	0		0	\$ -	0%	\$ -	\$ -		
TOTAL PROJECTED HOTEL CANCELLATION FEE							\$ -		
MEETING ROOM RENTAL									
DESCRIPTION	QTY.	RATE P/D	NO. OF DAYS	SUB TOTAL	SERVICE	TOTAL SV	TOTAL	COMMENTS	
General Session	0	\$ -	0	\$ -	0%	\$ -	\$ -		
Breakout Rooms	0	\$ -	0	\$ -	0%	\$ -	\$ -		
TOTAL ROOM RENTAL							\$ -		
REFRESHMENTS									
DESCRIPTION	QTY.	PER DIEM	NO. OF DAYS	SUB TOTAL	SERVICE	TOTAL SV	TOTAL	COMMENTS	
AM Coffee Break	0	\$ -	5	\$ -	22%	\$ -	\$ -		
PM Coffee Break	0	\$ -	4	\$ -	22%	\$ -	\$ -		
Lunch				\$ -	22%	\$ -	\$ -		
Dinner				\$ -	22%	\$ -	\$ -		
TOTAL REFRESHMENTS				\$ -		\$ -			
MISCELLANEOUS									
DESCRIPTION	QTY.	RATE	NO. OF NIGHT	SUB TOTAL	SERVICE	TOTAL SV	TOTAL	COMMENTS	
Miscellaneous 1	0	\$ -	0	\$ -		\$ -	\$ -		
Miscellaneous 2				\$ -		\$ -	\$ -		
TOTAL MISCELLANEOUS							\$ -		
AV EQUIPMENT RENTAL									
DESCRIPTION	QTY.	RATE P/D	NO. OF DAYS	SUB TOTAL	SERVICE	TOTAL SV	TOTAL	COMMENTS	
LCD Projector	0	\$ 400.00	0	\$ -	22%	\$ -	\$ -		
Laptop Computer	0	\$ 150.00	0	\$ -	22%	\$ -	\$ -		
Screen	0	\$ 50.00	0	\$ -		\$ -	\$ -		
Microphone (Lav/HH)	0	\$ 125.00	0	\$ -	22%	\$ -	\$ -		
Microphone (Table/St)		\$ 35.00	0	\$ -	22%	\$ -	\$ -		
Flipcharts	0	\$ 40.00	0	\$ -	22%	\$ -	\$ -		
Telephone Line			0	\$ -		\$ -	\$ -		
Polycom/Phone Unit		\$ 125.00	0	\$ -		\$ -	\$ -		
Speaker/Sound System		\$ 100.00	0	\$ -		\$ -	\$ -		
Internet		\$ 350.00	0	\$ -	22%	\$ -	\$ -		
DVD Player	0	\$ 150.00	0	\$ -		\$ -	\$ -		
Technician On Duty			0	\$ -		\$ -	\$ -		
Additional AV 1 (Easel)	0	\$ 50.00	0	\$ -	22%	\$ -	\$ -		
Additional AV 2 (Standing Lectern/Podium)	0	\$ 100.00	0	\$ -	22%	\$ -	\$ -		
TOTAL AV EQUIPMENT RENTAL							\$ -		
ADDITIONAL FEES									
DESCRIPTION	QTY.	RATE	NO. OF NIGHT	SUB TOTAL	SERVICE	TOTAL SV	TOTAL	COMMENTS	
Fee 1				\$ -		\$ -	\$ -		
Fee 2				\$ -		\$ -	\$ -		
Fee 3				\$ -		\$ -	\$ -		
TOTAL ADDITIONAL FEES							\$ -		
Estimated TOTAL Meeting COST							\$ -		

APPENDIX E: SITE COST COMPARISON CHART

VA Form 10008b, <http://vaww4.va.gov/vaforms/> (VA accessible only.)

WORKSHOP DATES	SITE 1	SITE 2	SITE 3
City/State			
Hotel			
Contact			
Phone			
Date Availability	Yes/No	Yes/No	Yes/No
Disability Accessible	Yes/No	Yes/No	Yes/No
ESTIMATED COSTS - LODGING, MEETING, AUDIOVISUAL, REFRESHMENTS			
Lodging Rate Taxes			
Total Room Nights			
Total Lodging			
Meeting Room Costs			
Audio Visual Costs			
Light Refreshments			
Total Days			
Total Estimated Costs			
ESTIMATED COSTS - AIRFARE AND GROUND TRANSPORTATION			
Airfare (Preliminary Estimate)			
Airport Transportation			
Number of Commuting Participants			
Total Airport Transportation			
Travel to and from Home and Airport and Airport Parking (estimated total per week \$XXX)			
Total Estimated Costs			
TOTAL ESTMATED COSTS			
Grand Total			
Site Recommended			

NOTE. Refer to GSA's State Tax Exemption Forms overview for tax applicability on GSA's Web site: [State Tax Exemption Forms Overview](#)

APPENDIX F: VA CONFERENCE AND TRAVEL REQUEST FORM

VA Form 10008c, <http://vaww4.va.gov/vaforms/> (VA accessible only.)



**VA Conference and
 Travel Request Form**

ATTACH SUPPLEMENTAL DOCUMENTATION:

- Proposed agenda (*if available*).
- Copies of Venue Evaluation Criteria for each site and Site Cost Comparison Chart.
- Estimated travel/per diem costs for participants

Section 1 – Conference Information		
Event/Activity:		
Proposed City/Location:		
Target Audience:		
Estimated Participants:	Non-VA	Number (VA) Who Must Travel:
Proposed Date of this	Date of Last Similar Event:	
Proposed date of next similar event:		

Section 2 - Description/Justification
Purpose/Objectives:
Describe the linkage of the activity to any (1) Departmental and/or Administration Strategies , Initiatives or (2) Performance Measure(s) :
Expected Performance Outcomes:
Rationale For Selecting Face To Face Activity or Ruling Out Potential Distance Learning Alternatives:

Section 3 – Projected Costs (All VA Costs)		
(A) Estimated Cost Per VA Traveler (.007 Travel) \$ _____	(B) Total VA Travelers	(C) Total VA Traveler Cost (A x B) = \$ _____
(D) .001 (Conference) \$	E) Total Conference Cost (C + D) = \$ _____	

Section 4 – Contact Information		
Client:		
Contact Person:		Title:
Mailing Address:		
City / State / Zip:		
Phone:	Extension:	Fax:
If contact is not listed in VA Outlook, please provide other E-mail address:		

Section 5 - Concurrences			
	Name:		Title:
	Phone:	- Extension:	Fax:
	Name:		Title:
	Phone:	() - Extension:	Fax: () -
Reviewer Comments:			

Section 6 - VA APPROVAL

 APPROVING OFFICIAL

 Date