

CONFERENCE PLANNING, EXECUTION, REPORTING, AND OVERSIGHT

1. **REASON FOR ISSUE:** This handbook prescribes the policies, roles and responsibilities, and major requirements for Administration and Staff Office implementation of conference planning, execution, reporting, and oversight within the Department of Veterans Affairs (VA) as set forth in Directive 0632, Conference Planning, Execution, Reporting, and Oversight.
2. **SUMMARY OF CONTENTS:** This handbook outlines the principles, policies, and other key elements necessary to facilitate the implementation of VA-sponsored and co-sponsored conferences throughout VA.
3. **RESPONSIBLE OFFICE:** The Office of Management (004), Corporate Travel Reporting Office (CTRO).
4. **RELATED DIRECTIVE:** VA Directive 0632, Conference Planning, Execution, Reporting, and Oversight.
5. **RESCISSION:** None

CERTIFIED BY

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BY DIRECTION OF THE SECRETARY OF VETERANS AFFAIRS

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AND OVERSIGHT**

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1. PURPOSE AND SCOPE

a. This handbook provides guidance on planning, approving, and reporting all VA-sponsored and co-sponsored conferences to ensure compliance with applicable Federal laws, regulations and policies; to ensure cost-effective conferences; and to mitigate the risk of inappropriate spending. Attendance at conferences must be for accomplishing VA's mission and for training. Conference requests must provide strong justification to support the need for a face-to-face event. This justification must identify tangible changes that may be implemented as a result of the conference that could not be achieved by implementing an alternative or more cost effective strategy (i.e. virtual meeting). Potential outcomes may include special processes, decisions, and/or skills that may be developed or gained to overcome current or future challenges VA faces.

b. A conference is defined as a meeting, retreat, seminar, symposium, or event that involves attendee travel. The term conference also applies to training activities that are considered to be conferences under 5 CFR 410.404. The guidance in this handbook is applicable for VA-sponsored or co-sponsored conferences: 1) costing \$20,000 or greater; or 2) with 50 or more conference attendees, 1 or more of whom is a VA employee. For both conditions below, a Conference Certifying Official (CCO) and a Responsible Conference Executive (RCE), SES or SES equivalent, must be appointed:

(1) For VA-sponsored or co-sponsored conferences costing \$20,000 or greater all processes outlined in this handbook must be followed.

(2) For VA-sponsored or co-sponsored conferences costing less than \$20,000 with 50 or more conference attendees, 1 or more of whom is a VA employee, the CCO and RCE must only complete the CCO and RCE appointment (Appendix B) and Final Conference Report (Appendix C).

c. This handbook applies to all VA employees except the VA Office of Inspector General (OIG). VA must comply with Public Law (P.L.) 112-154, Sec. 707, "Quarterly reports to Congress on Conferences Sponsored by the Department," P.L. 113-6, Sec. 517 and Sec. 3003, "Consolidated and Further Continuing Appropriations Act, 2013," P.L. 113-46, Sec. 119, "Continuing Appropriations Act, 2014," and Office of Management and Budget (OMB) M-12-12, "Promoting Efficient Spending to Support Agency Operations," dated May 11, 2012. VA OIG will comply with OMB requirements and Congressional reporting requests.

2. AUTHORITIES

This handbook is governed by public law, regulations and policies, including:

a. [P.L. 112-154 "Honoring America's Veterans and Caring for Camp Lejeune Families Act of 2012," Sec. 707](#) (38 United States Code (U.S.C.) Sec. 517 effective October 1, 2012), which requires quarterly reports to Congress on conferences sponsored by the Department.

- b. [P.L. 113-6 “Consolidated and Further Continuing Appropriations Act, 2013,” Sec. 517](#), which prohibits a Federal department or agency from using 2013 continuing appropriations funds to send more than 50 of its employees stationed within the U.S. to any single conference occurring outside the U.S.
- c. [P.L. 113-6 “Consolidated and Further Continuing Appropriations Act, 2013,” Sec. 3003](#), which requires submission of annual reports to the Inspector General regarding the costs and contracting procedures related to each conference held by an agency during fiscal year 2013, for which the cost was more than \$100,000, and within 15 days of the date of a conference for which the cost was more than \$20,000.
- d. [P.L. 113-46 “Continuing Appropriations Act, 2014,” Sec. 119](#), Section 3003 of division G of P.L. 113–6 shall be applied to funds appropriated by this joint resolution by substituting “fiscal year 2014” for “fiscal year 2013” each place it appears.
- e. [38 U.S.C. Sec. 7471, “Designation of Regional Medical Education Centers.”](#)
- f. [5 CFR 410.404, “Determining if a conference is a training activity.”](#)
- g. [Federal Travel Regulation \(FTR\) Part 301-74, “Conference Planning.”](#)
- h. [OMB Memorandum M-12-12 \(citing FTR 300-3.1 and 301-74.2\), “Promoting Efficient Spending to Support Agency Operations.”](#)
- i. [OMB Memorandum M-11-35, “Eliminating Excess Conference Spending and Promoting Efficiency in Government.”](#)
- j. [VA Financial Policies and Procedures, Volume II – Chapter 4, “Awards, Ceremonies, Food or Refreshments, Gifts or Mementos.”](#)
- k. [VA Financial Policies and Procedures, Volume XIV – Chapter 1, “Travel Administration.”](#)
- l. [VA Financial Policies and Procedures, Volume XIV – Chapter 2, “Travel Per Diem.”](#)
- m. [VA Financial Policies and Procedures, Volume XIV – Chapter 3, “Transportation Expenses.”](#)
- n. [VA Financial Policies and Procedures, Volume XIV – Chapter 10, “Conference Planning.”](#)
- o. [VA Financial Policies and Procedures, Volume XVI – Chapter 1, “Government Purchase Card.”](#)
- p. [VA Financial Policies and Procedures, Volume XVI – Chapter 2, “Government Travel Charge Card Program.”](#)

q. [VA Directive 6300, "Records and Information Management,"](#) and [VA Handbook 6300.1, "Records Management Procedures."](#)

3. DEFINITIONS

a. **Conference.** A meeting, retreat, seminar, symposium or event that involves attendee travel, and training activities that are considered to be conferences under 5 CFR 410.404. See 41 CFR Sec. 300-3.1.

b. **Conference Expenses.** All conference costs paid by the Government, whether paid directly by agencies or reimbursed by agencies to travelers or others associated with the conference, not including funds paid under Federal grants to grantees. Conference expenses include any associated authorized travel and per diem expenses, hire of rooms for official business, audiovisual and other equipment usage, light refreshments, registration fees, ground transportation, and other expenses as defined by the FTR. All outlays for conference preparation and planning should be included, but not the Federal employee time involved in conference preparation. See 41 CFR Sec. 301-74.2. Conference expenses should not include any fees or revenue received by the agency through the conference and should not include costs to ensure the safety of Government officials who are attending.

c. **Federal facility.** Property or building space owned, leased, or substantially controlled by the Federal Government or the government of the District of Columbia.

d. **Non-Federal facility.** Any facility that is not a Federal facility. State and local facilities are considered "non-Federal facilities." For further clarification see 5 U.S.C. 4101(6).

e. **Waiver.** The agency head's approval in writing that identifies the exceptional circumstances which necessitates exceeding the \$500,000 threshold of net expenses for an agency-sponsored and co-sponsored conference.

4. ROLES AND RESPONSIBILITIES

a. **The Office of Management (OM)** is responsible for overseeing VA conference policies and reporting.

b. **Corporate Travel Reporting Office (CTRO) is responsible for**

(1) Supporting and facilitating review and approval of annual conference concept plans and Conference Packages (CP) by the Secretary (SECVA), Deputy Secretary (DEPSECVA), and Chief of Staff (COSVA). These levels of approval are covered in the table in paragraph 5.b.

(2) Ensuring each CP submission costing \$100,000 or greater, contains all applicable information (as identified on the forms), and that required justifications are thoroughly developed and documented.

(3) Providing guidance and assistance to the Administrations and Staff Offices for event execution to ensure compliance with applicable laws, regulations, and policies.

(4) Tracking conferences costing \$20,000 or greater; to ensure Post-Conference Certification Forms and Final Conference Reports are documented and archived; and tracking conferences costing less than \$20,000 with 50 or more conference attendees, 1 or more of whom is a VA employee, to ensure Final Conference Reports are documented and archived.

(5) Consolidating Congressionally-mandated reports, based on applicable public law.

(6) Reporting annually on the VA official Web site, as prescribed by OMB Memorandum M-12-12.

(7) Verifying an SES or SES equivalent CCO and RCE are appointed for each VA-sponsored or co-sponsored conference costing \$20,000 or greater; or costing less than \$20,000 with 50 or more conference attendees, 1 or more of whom is a VA employee.

(8) Responding to queries from Administrations and Staff Offices.

(9) Coordinating VA's four-phased conference process, as defined in paragraph 5.d.

(10) Ensuring VA conference policies and procedures are compliant with current laws and regulations.

(11) Assisting with responses to Congressional and Freedom of Information Act inquiries.

c. **Under Secretaries, Assistant Secretaries, and Other Key Officials** are responsible for ensuring appropriate due diligence is performed; that the business case

for the event justifies the venue; and the use of VA resources (funds, time, and people) is appropriate. Additionally, the Under Secretary, Assistant Secretary and Other Key Officials are responsible for ensuring the CCO, the RCE, and all other planning personnel have taken the required training (i.e., purchase card training [TMS ID#5863] and travel card training [TMS ID#5508]) and adhered to published guidance. This authority may not be re-delegated.

d. **The Office of Acquisition, Logistics, and Construction (OALC)** is responsible for VA's conference procurement activities through the Heads of Contracting Activity (HCA). The appropriate HCA is responsible for appointing a Contracting Officer (CO).

(1) The CO will appoint the Contracting Officer's Representative (COR).

(2) Only properly warranted COs can issue orders or make modifications to existing conference contracts and must complete any necessary modifications promptly. Modifications shall be made only when appropriate and within the overall spending limits identified in the event's approved CP.

e. **The CCO** is responsible for:

(1) The conference under his or her purview. As the CCO, he or she must review and certify all conferences are in compliance with regulations and policy. Conferences are defined as VA-sponsored or co-sponsored conferences where costs to VA are \$20,000 or greater, or costing less than \$20,000 with 50 or more conference attendees, 1 or more of whom is a VA employee. Certification is accomplished by completing the Conference Certification Form prior to final review by the appropriate Under Secretary, Assistant Secretary, or Other Key Official.

(2) Ensuring that employees and supervisors involved in conference planning complete all mandatory and applicable training. This training includes mandatory annual VA-approved ethics training. Purchase card training (TMS ID#5863) and travel card training (TMS ID#5508) are also required for cardholders and approvers, as described in [VA Financial Policy, Volume XVI, Chapter 1](#) and [VA Financial Policy, Volume XVI, Chapter 2](#).

f. **The RCE** is responsible for:

(1) Developing the CP, executing conference activities, and reporting timely and accurately. The RCE must adhere to all applicable statutes, regulations, and policies when executing the approved conference. The RCE must exercise due diligence during the execution and reporting stages of each conference. Within 15 days of the conclusion of a conference costing \$20,000 or greater, the RCE must complete and submit a Post-Conference Certification Form. Within 30 days of conference conclusion, the RCE must also complete the Final Conference Report for conferences costing \$20,000 or greater, or conferences costing less than \$20,000, with 50 or more attendees, 1 or more of whom is a VA employee.

(2) Ensuring that employees and supervisors involved in conference planning complete all mandatory and applicable training. This training includes mandatory annual VA-approved ethics training. Purchase card training (TMS ID#5863) and travel card training (TMS ID#5508) are also required for cardholders, as described in [VA Financial Policy, Volume XVI, Chapter 1](#) and [VA Financial Policy, Volume XVI, Chapter 2](#).

(3) Nominating a qualified COR.

5. CONFERENCE PROCESS

The conference process includes four phases: Concept, Development, Execution, and Reporting.

a. **Planning.** See VA Financial Policies and Procedures, Volume XIV – Chapter 10, “Conference Planning,” for conference planning considerations.

b. **Approval Authorities.** Approval authorities vary depending on the expected cost of the conference. The table below describes the approval authorities based on the thresholds.

Costs to VA	Certification	Review	1 st Level Recommendation	2 nd Level Review and Recommendation	Approval
< \$20K and < 50 attendees	Senior Executive	Senior Executive	Not required	Not required	Senior Executive
< \$20K but ≥ 50 attendees, including 1+ from VA	Conference Certifying Official (CCO)	Senior Executive	Not required	Not required	Senior Executive
\$20K ≤ x ≤ \$100K	CCO	Under/Asst. Secretary or EQV	Not required	Not required	Under/Asst. Secretary or EQV
\$100K < x ≤ \$500K	CCO	Under/Asst. Secretary or EQV	Under/Asst. Secretary or EQV	COSVA	DEPSECVA
> \$500K	CCO	Under/Asst. Secretary or EQV	Under/Asst. Secretary or EQV	COSVA and DEPSECVA	SECVA (waiver)

If expected or actual costs are \$20,000 or greater, the CCO and RCE must complete all four phases of the conference process. For conferences costing less than \$20,000 with 50 or more attendees, 1 or more of whom is a VA employee, the CCO and RCE must complete the CCO and RCE appointment (Appendix B) and the Final Conference Report (Appendix C).

c. **Oversight and Responsibility**

VA is committed to accurately tracking conference expenditures and ensuring appropriate internal controls.

(1) The CCO and RCE must ensure the proper approvals for each conference are received, costs are recorded, and total expenditures do not exceed the approved CP.

(2) Under Secretaries, Assistant Secretaries, and Other Key Officials must ensure their budget officers are fully integrated into the decision process during all four phases to ensure fiscal discipline.

(3) Deviations of five percent above the approved conference budget must be reapproved by the appropriate approval authority (see paragraph 5.b. above) if the revised amount exceeds the original approval authority's threshold. Other substantial changes (see paragraph 5.2.d.), such as location change or lower than planned conference attendance, must also be reapproved by the appropriate authority.

(4) The RCE must complete the Post-Conference Certification Form and the Final Conference Report, as applicable.

d. **Conference.** A conference includes four phases: Concept, Development, Execution, and Reporting. Sections 5.1. through 5.4. provide details.

(1) **Concept Phase:** The first phase of the conference process. In this phase the Administration or Staff Office submits the annual request to the COSVA for approval.

(2) **Development Phase:** The second phase of the conference process begins after concept approval. The CCO and RCE are appointed in writing during this phase. By signing on the CCO or RCE Designation Form in the CP, the SES accepts all responsibilities as set forth in this handbook. This phase includes preparation, routing, and approval of the CP. It also includes the development of the business case and guidance for planning and execution of the conference, and certification by the CCO.

(3) **Execution Phase:** The third phase of the conference process. This phase covers the period when the CCO and RCE execute the conference as described in the approved CP. The CCO and RCE must execute the conference in accordance with applicable regulations and policies.

(4) **Reporting Phase:** The fourth phase of the conference process. This phase covers the period after the conference takes place. The CCO and RCE prepare the applicable reports. These reports document the full conference cost and that the conference was executed in accordance with applicable regulations and policies.

5.1 CONCEPT PHASE REQUIREMENTS

a. The Under Secretaries, Assistant Secretaries, and Other Key Officials must submit a concept plan to CTRO annually by May 15th for COSVA approval by July 1st. The Chief of Staff's written approval is required before the development phase can begin.

b. The concept plan will include the title of the conference, estimated time frame, total estimated cost of the conference, total estimated number of attendees, and a detailed justification (include purpose) for the conference. See Appendix A: Annual Conference Concept Plan.

5.2. DEVELOPMENT PHASE REQUIREMENTS

a. **Once the COSVA** approves the concept plan, the conference process enters the Development Phase. The CCO and RCE are appointed and are now authorized to start the CP.

b. **Conference Package (CP).** The RCE develops the CP and completes all required forms. Electronically captured and digitally verified signatures are acceptable on all CP and reporting forms. See Appendix B for the CP required forms. The CCO must certify the CP and route to CTRO as required by this handbook.

(1) In addition to Appendix B, the CP can be found at <http://vaww.trainingevents.va.gov/>.

(2) The RCE must obtain prior written approval for each VA-sponsored or co-sponsored conference costing \$20,000 or more paid for with VA funds, or conferences costing less than \$20,000 with 50 or more conference attendees, 1 or more of whom is a VA employee. See Approval Authorities, paragraph 5.b.

(3) Supporting calculations must be included in the CP.

(4) As a general rule, the CP must be submitted no later than 60 calendar days prior to the conference. The CP submission must be timely.

(5) The detailed spend plan must be a thorough cost estimate. The RCE must ensure cost estimates are reasonable.

c. **Waiver Requirements.** The SECVA must approve in writing, waivers for all conferences costing \$500,000 or greater. The waiver request is part of the CP.

d. **Variiances.** Substantial variances in approved cost or scope must be resubmitted to the appropriate approval authority with a justification as soon as identified. Substantial change to budget or cost is defined as a change of five percent or more in costs. Substantial change includes any change to scope (such as a lower number of attendees). Increases in scope that result in an increase in budget of five percent or

more would be handled as part of an approval to increase the budget. Once the conference is completed and final costs are determined, variances in cost or scope must be justified as part of the financial report. Deviations of five percent above the approved conference budget must be reapproved by the appropriate approval authority (see paragraph 5.b. above).

e. **Cost Comparisons.** Cost comparisons are required for the overall conference costs. VA Financial Policies and Procedures, Volume XIV – Chapter 10, “Conference Planning,” describes the requirements for cost comparisons.

f. **Federal or No-Cost Facilities Preferred.** The conference planner must make every effort to use no-cost facilities, including available governmental facilities, to the extent practical. When grants are used for funding, non-Federal facilities may be used, although Federal facilities are preferred if feasible.

g. **Non-Federal Facilities.** If no Federal facility is available, or the Federal facility would be more costly, or otherwise does not meet the requirements of the event, a planner may use a non-Federal facility. The RCE must approve the justification for the use of a non-Federal facility.

h. **Perception Considerations.** Non-Federal locations or facilities should only be used when they are the most cost-effective option (e.g., when the majority of attendees live in that location), as shown by a documented cost-comparison. The CCO and RCE should be cognizant of the scrutiny given to Federally-funded conferences and the need to avoid the perception of using taxpayer money for lavish or wasteful events. Special care should be taken when considering holding a conference in a location or facility that is:

- (1) Outside of the 48 contiguous United States and the District of Columbia;
- (2) Known for gambling; or
- (3) Considered a tourist attraction or resort location.

Special care should be taken when considering outside organizations’ co-sponsorship of activities that will occur during a VA-sponsored conference. Conference planners should consult with the Office of General Counsel (OGC) for advice on outside organizations’ sponsorship.

Special care must be taken when considering offering meals. Conference planners should consult with OGC for advice on meals and must be sure to address in travel instructions.

i. **In-house Versus Contracted Planning Support Services.** Under Secretaries, Assistant Secretaries, and Other Key Officials may obtain conference planning services either through their own staff and resources, or through contracted

external conference planners. Minimizing costs must be a critical consideration in this decision. For market research, VA has awarded mandatory Blanket Purchase Agreements (BPAs).

j. **Meals and Incidental Expenses (M&IE) when Attending a Conference.** Travelers must follow M&IE policy as contained in VA Financial Policies and Procedures, Volume XIV – Chapter 1, “Travel Administration,” Chapter 2, “Travel Per Diem,” and Chapter 10, “Conference Planning.”

k. **Lodging.** See VA Financial Policies and Procedures, Volume XIV – Chapter 1, “Travel Administration,” Chapter 2, “Travel Per Diem,” and Chapter 10, “Conference Planning.”

l. **Transportation.** See VA Financial Policies and Procedures, Volume XIV – Chapter 1, “Travel Administration,” Chapter 3, “Transportation Expenses,” and Chapter 10, Conference Planning.”

m. **Printing.** Every effort should be made to provide event materials to participants electronically or via print-on-demand services/options. Printed materials should minimize paper usage (printing on both sides) and minimize higher cost options (black and white versus color printing) where possible.

n. **Entertainment.** Entertainment is not allowed. See VA Financial Policies and Procedures, Volume XIV – Chapter 1, “Travel Administration,” Chapter 2, “Travel Per Diem.”

o. **Gifts/Trinkets/Memorabilia/Commemorative Items/Stuff We All Get.** Trinkets (items such as hats, mugs, portfolios, t-shirts, coins, gift bags, etc., regardless of whether they include the event name or VA logo) must not be purchased with VA funds as giveaways for conferences. Basic supplies that are necessary for use during the event (e.g., folders, name tags) may be purchased. See VA Financial Policies and Procedures Volume II – Chapter 4, “Awards, Ceremonies, Food or Refreshments, Gifts or Mementos.” Conference planners should consult with OGC for advice on outside organizations’ sponsorship.

5.3 EXECUTION PHASE REQUIREMENTS

a. **The Execution Phase** covers the period after the event has been approved and developed, and the organization is executing the plan.

(1) Internal supervisory controls must be put into place to oversee the execution of the conference, including a system of checks and balances.

(2) The CCO and RCE must ensure the conference complies with all applicable statutes, regulations, and policies. A warranted CO will be responsible for the acquisition of services and supplies over \$3,000 to ensure acquisitions in support of conferences are

planned and managed in accordance with applicable regulations. The RCE must identify and clearly communicate all conference requirements to the CO. The COR must inspect and accept or reject all deliverables.

(3) In addition to market research during the development phase, VA has awarded mandatory BPAs for event planning and support services (ESS). For conference planning and support, VA developed a comprehensive Customer Ordering Guide to assist VA offices in preparing required documentation to order ESS. The ESS Customer Ordering Guide is available at <http://www.va.gov/officeofacquisitionoperations/customers/resources.asp>. Warranted COs may place orders against these BPAs by following the electronic contract management system procedures detailed in the guide.

(4) Sound financial management must be exercised throughout the conference process. The event must be executed within the constraints of the approved CP, and all substantive changes to scope or cost must be reapproved, including overall costs that exceed five percent of the approved conference budget.

(5) All VA employees and contractors involved in executing the conference must have received mandatory ethics training. Purchase card holder training, as well as VA travel card holder training, must be up to date for VA employees, as appropriate.

b. Mandatory RCE Actions

(1) Establishes internal supervisory controls for oversight of the execution of the event, including checks and balances.

(2) Ensures adherence to all applicable statutes, regulations, and policies.

(3) During the Execution Phase, requests the responsible HCA assign a CO to the conference.

(4) Nominates a well-qualified COR for CO appointment.

(5) Determines appropriate on-site conference support before, during, and after conference. These individuals are identified by name and the designation must be provided to these travelers for inclusion in their travel receipts.

(6) Ensures all employees involved with the conference have received mandatory ethics training.

(7) Ensures all employees involved with the event have received purchase cardholder training, and VA travel cardholder training, as appropriate.

(8) Ensures all employees involved with the conference are informed of prohibitions against soliciting or receiving any gifts or gratuities from outside entities. See VA

Financial Policies and Procedures Volume XIV – Chapter 9 “Non-Federal Source Funding (Donated Travel).” Conference planners should consult with OGC for advice.

(9) Ensures the CO or government purchase cardholder makes all purchases within the limits of his or her authority, and only authorized contracting personnel make commitments or changes that affect price, quality, quantity, delivery or other terms and conditions of a contract.

(10) Serves as the senior official on-site during the execution of the conference. However, the RCE may nominate an appropriate qualified person to serve as designated manager and provide that person with adequate time, training, and oversight to ensure that he or she is able to successfully perform the tasks required. The RCE will designate and authorize such individual(s) in writing prior to the commitment of any conference funds. The standardized memorandum template for designation is posted on the CTRO intranet site: <http://vaww.trainingevents.va.gov/>. Ultimately, all responsibility remains with the RCE.

(11) Ensures the event is executed within the constraints of the conference CP, and seeks re-approval for substantial changes to the scope (including number of employees) or cost of the event. See paragraph 5.2.d. regarding substantial change.

(12) Ensures due diligence is exercised during the execution stage of a conference (e.g., requiring prior approval of any conference-related expenditure, including any use of purchase cards).

(13) Ensures VA does not solicit lodging accommodation upgrades as part of contracts. The CO must obtain a technical and legal review of all proposed contracts with hotels or similar facilities for conferences where VA's cost may exceed \$25,000. The RCE must also ensure that no conference incurs expenditures for the use of entertainment (videos, music, etc.), motivational speakers, the purchase of promotional items, or embossing or otherwise imprinting the name of the organization or event on any supplies, mementos, or other handouts.

(14) Ensures that no purchase is made without appropriate approvals. The CO determines the best vehicle for purchases above \$3,000 (contract modification, new contract, etc.). For purchases below \$3,000, the RCE will designate a purchase cardholder to perform the transactions and ensure the cardholder's approving official is aware of the designation and has all required documentation prior to approving transactions. The purchase cardholder must have RCE approval prior to purchase. See VA Financial Policy, Volume XVI, Chapter 1, “Government Purchase Card,” regarding the approving official's responsibility to certify all transactions made by cardholders and ensure applicable documentation is maintained for 6 years and 3 months.

(15) Issues instructions to travelers (ITT) to all conference attendees to provide guidance on compliance with the FTR. This includes VA's travel policy requirement not to incur hotel taxes in states that offer tax exemption to the Government, and reduced per diem for meals that are provided by the Government or other conference sponsors. The

ITT will also include the requirement for travelers and approving officials to include a cost comparison when choosing to use a privately-owned vehicle instead of a Government contracted mode of transportation.

c. **Site Visits**

(1) Site visits may be authorized only when information cannot be obtained by other means. The RCE must approve all site visits.

(2) When using a contract for conference planning support services, site visits must be recommended by the CO and approved by the RCE.

(3) The use of any site visit should be limited to situations where all other reasonable alternatives such as internet searches, phone conversations, and teleconferencing have proven insufficient with the proposed event site vendors. All approved site visits will minimize days of travel and travelers.

d. **Contracts.** Successful contractors must receive a fully-executed contract prior to beginning work on all conferences. Additionally, no hotel or venue, or audio-visual contracts may be entered into before CP approval has been obtained in writing from the appropriate approval authority. Documentation of the CP must accompany the purchase request for all such contract actions. For contracted conference planning support, VA has awarded mandatory BPAs for use by VA COs. See section 5.3.a(3).

e. **Contract Legal and Technical Review Requirements.** In accordance with [OALC Information Letter \(IL-049-02-12\)](#), "Legal and Technical Review of Proposed Contracts for Conferences," 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 CO.

f. **Contingencies.** As last minute requirements may arise, the RCE must work closely with the CO and COR to ensure VA funds are spent in the most reasonable and efficient manner possible.

g. **Handling Reimbursements and Over or Under Payments.** For reimbursements, the CO and COR will reconcile payments against the contract terms and conditions. In the event VA has overpaid or underpaid, requests for corrective action will be the responsibility of the COR to initiate through the CO.

h. **Price Negotiation Memorandum.** The CO will ensure negotiations are conducted and documented in accordance with Federal Acquisition Regulations.

5.4 REPORTING PHASE REQUIREMENTS

a. **The Reporting Phase** begins at the conclusion of the conference. The RCE will ensure that the conference was executed in accordance with applicable regulations and

policies. The Post-Conference Certification Form and Final Conference Report to identify planned-versus-actual cost, including justifications for significant differences, must be completed for conferences costing \$20,000 or greater. The Final Conference Report will be completed for conferences costing less than \$20,000, with 50 or more attendees 1 or more of whom is a VA employee. The RCE will track and report conference attendance and spending in accordance with applicable laws, regulations, and policies.

Costs to VA	Statutory Reporting (yes/no)	Frequency of Statutory Reporting	Reported to	Time Frame for Statutory Reporting	OMB Required Public Posting ² (yes/no)	Frequency of OMB Posting Requirement	Time Frame for OMB Posting Requirement
≥ \$20K or ≥ 50 attend, including 1+ from VA ¹	Yes	Quarterly	Congress	NLT 30 days after the end of the quarter ¹	No	Posting not required	Posting not required
> \$20K ³	Yes	As it occurred	Inspector General	15 days of the date of a conference ³	No	Posting not required	Posting not required
> \$100K ^{2,3}	Yes	Annually	Inspector General	NLT 30 days after the end of the calendar year ²	Yes	Annually	January 31
Any cost for > 50 employees at any single conference outside the U.S. and such attendance is important to the national interest ⁴	Yes	As it occurred	Congress	5 days in advance ⁴	No	Posting not required	Posting not required

¹ Public Law (P.L.) 112-154 Sec.707

² Office of Management and Budget (OMB) Memorandum (M-12-12) dated May 11, 2012 (include SECVA waiver for > \$500K)

³ P.L. 113-6 Sec. 3003 and P.L. 113-46 Sec. 119 (no statutory time frame requirement for report > \$100K)

⁴ P.L. 113-6 Sec. 517 (except for VA employees stationed in the Philippines)

b. **Under Secretaries, Assistant Secretaries, and Other Key Officials** must ensure the accuracy of each conference report with the CCO and RCE.

c. **Reports to Congress.** Not later than 30 days after the end of each fiscal quarter, VA will provide a quarterly report on conferences that are VA-sponsored or co-sponsored and are:

(1) Estimated to cost \$20,000 or greater; or

(2) Cost less than \$20,000 and are attended by 50 or more individuals, 1 or more of whom is a VA employee.

Reports to Congress shall include total estimated costs to VA for conferences occurring during the fiscal quarter in which the report is submitted, and an accounting of the final costs to VA of each conference occurring during the previous fiscal quarter. This includes the following types of costs:

(1) per diem payments;

(2) miscellaneous and incidental expenses (M&IE, part of per diem);

- (3) lodging (part of per diem);
- (4) transportation and parking;
- (5) other travel expenses;
- (6) refreshments (food and beverage);
- (7) rental of halls, auditoriums, or other spaces;
- (8) rental of equipment and services (audio visual);
- (9) entertainment (although permitted by law, this is prohibited by VA policy);
- (10) contractors' support; and
- (11) brochures or other printed media and distribution.

d. **Reports on the VA Web site.** To comply with OMB Memorandum M-12-12, VA will report, through its Web site, on each conference sponsored by the Department during the prior fiscal year where U.S. Government appropriated funds were expended in excess of \$100,000. The report shall include:

- (1) the total conference expenses incurred by the agency for the conference;
- (2) the location of the conference;
- (3) the date of the conference;
- (4) a brief explanation regarding how the conference advanced the mission of the Department; and
- (5) the total number of individuals whose travel expenses or other conference expenses were paid by the Department.

In addition, the Web site will include the SECVA's waiver identifying the exceptional circumstances for any instances where VA sponsored conference net expenses exceeded \$500,000.

Finally, the Web site shall include information about the net conference expenses for the fiscal year incurred by VA as well as general report about conference activities throughout the year.

e. **Reports to Inspector General.** To comply with P.L. 113-6, "Consolidated and Further Continuing Appropriations Act, 2013," and P.L. 113-46, "Continuing Appropriations Act, 2014," personnel from VA's Office of the Inspector General (OIG) will have access to view information about conferences that have been completed.

(1) VA will report to OIG within 15 days of the date of a conference for conferences costing \$20,000 or greater. The report requires the date, location, and number of employees attending the conference. See Appendix C: Post-Conference Reporting. The RCE must complete and submit this report in accordance with the instructions on the form within 15 days of the conference.

(2) VA will submit an annual report to the OIG for conferences over \$100,000. The report will include:

- (a) a description of its purpose;
- (b) the number of participants attending;
- (c) a detailed statement of the costs to VA, including:
 - 1. food and beverages;
 - 2. audio-visual equipment and services;
 - 3. employee or contractor travel to and from the conference; and
 - 4. discussion of method used to determine which costs relate to the conference; and
- (d) a description of the contracting procedures used, including:
 - 1. whether contracts were awarded on a competitive basis; and
 - 2. a discussion of any cost comparison conducted by the departmental component or office in evaluating potential contractors for the conference.

7. APPENDIX B. STANDARD CONFERENCE PACKAGE

 Department of Veterans Affairs		CONFERENCE PACKAGE (CP) CHECKLIST <i>Conference Planning, Execution and Oversight</i>	
REQUIRED DOCUMENTS FOR CONFERENCE PACKAGE			
ORDER OF TABBED DOCUMENTS	CHECKLIST		
		CONFERENCE PACKAGE (CP) CHECKLIST AND GUIDANCE	
	COVER PAGE	STRATEGIC COMMUNICATION REVIEW <i>(current form found on http://www.travel@events.va.gov/)</i>	
	SUMMARY SHEET	CONCURRENCE AND SUMMARY SHEET <i>(found on http://www.travel@events.va.gov/)</i>	
1	SAMPLE MEMORANDUM - OR - SAMPLE MEMORANDUM	CONFERENCE REQUEST SAMPLE MEMORANDUM - OR - SAMPLE WAIVER REQUEST MEMORANDUM <i>(if total conference costs exceed \$500K)</i>	
2	VA FORM 10008E	CONFERENCE RESPONSIBILITY DESIGNATIONS	
3	VA FORM 10008D	CONFERENCE CERTIFICATION FORM	
4	VA FORM 10008B	SITE COST COMPARISON CHART	
5	VA FORM 10008A	CONFERENCE COST ESTIMATE	

The documents described above are exclusively for assembling the Conference Package; these documents will expedite the review and approval of your package. Use the Conference Package Checklist to correctly index and tab all applicable enclosures before submitting your packet to the Corporate Travel and Reporting Office (CTRO) for conferences exceeding \$100K.

NOTE: Forms/documents not listed above or those unique to specific Administrations/Staff Offices should be excluded from the packet.

CONFERENCE PACKAGE GUIDELINES

Instructions: All conference documents are described below. All Conference Packages **must be tabbed using numbers or letters before submitting** to the Corporate Travel and Reporting Office (CTRO) to expedite the review and approval process.

REQUIRED Conference Documents: (<http://vaww4.va.gov/vaforms/>)

Checklist – Conference (CP) Checklist and guidance - (VA Form 10008f)

This required form is used to check (✓) off the content of the Conference Package. This is a helpful way to ensure the appropriate documents are included and tabbed correctly. It is placed on the inside left hand side of the red folder underneath the Concurrence and Summary Sheet.

Cover Page - Strategic Communication Review

This required form is used as the cover page for the Conference Package to detail the key points of the conference. This form can be obtained from <http://vaww.trainingevents.va.gov/>. See below for specific requirements for completing Strategic Communications Review Form. This form is required for every CP submitted from the requesting administration/staff office.

Name of Originator - Enter the name of a person that will serve as a contact for the event. Applicable names include line and supervisory/managerial staff able to provide event details to CTRO if needed. Please include a contact number in this block.

Date - Enter the date the packet was completed for submission. All CPs are logged into CTRO by the date of receipt to ensure a timely review process.

Name of Executive Secretary Staff - This block is optional, if used enter the name and the contact number of the executive secretary staff.

Subject - Enter the name or title of the conference only (no further description is needed). Routing - Check each box of the approval authorities relative to the approval authority threshold.

Key Points - Enter three (3) key points in the block. Use the detailed CP1 (memo) to extract and briefly state each point (maximum 3 points). Click on "Key Points" for additional details on the intent of this block.

Executive Summary - Enter a high-level summary of the event; this summary has three (3) parts. List and underline each part, e.g. Purpose, Discussion, & Recommendation. This block links to the *Purpose* and *Business Case Analysis* in the CP1. Click on "Executive Summary" for additional details on the intent of this block.

Concurrence and Summary Sheet

This required form is used as the concurrence sheet to ensure that all appropriate offices have reviewed and concur with the CP. This form can be obtained from <http://vaww.trainingevents.va.gov/>.

CP 1 - Conference Request - (Use either the Sample Memorandum or the Sample Waiver)

This required form is used by staff members planning a conference. For conferences below \$500K, use the Sample Memorandum. For conferences above \$500K, use the Sample Waiver.

CP 2 - Conference Responsibility Designations - (VA Form 10008e)

This form is used by the Administrations and Staff Offices to designate the Conference Certifying Official (CCO) (required) and Responsible Conference Executive (RCE) (required).

- a. Conference Certifying Official (CCO) - designated by an SES to certify conference planning was conducted in accordance with all applicable statutes, regulations, and policies where the cost of the training event costs \$20K or greater or costing less than \$20,000 with 50 or more conference attendees, 1 or more of whom is a VA employee.
- b. Responsible Conference Executive (RCE) - designated by an SES to ensure adherence to all applicable statutes, regulations, and policies, where the cost of the training event costs \$20K or greater or costing less than \$20,000 with 50 or more conference attendees, 1 or more of whom is a VA employee.

CP 3 - Conference Certification Form - (VA Form 10008d)

This required form is used by the Certifying Conference Official (CCO) to certify that the conference planning was conducted in accordance with all applicable statutes, regulations, and policies where the cost of the training event exceeds \$20K or greater or costing less than \$20,000 with 50 or more conference attendees, 1 or more of whom is a VA employee.

CP 4 - Site Cost Comparison Chart – (VA Form 10008b)

This required form is used by the Administrations and Staff Offices to compare three (3) Conference sites using the total estimated costs for lodging, meeting, audiovisual, refreshments, airfare, and ground transportation.

CP 5 - Conference Cost Estimate – (VA Form 10008a)

This required form is used by the Administrations and Staff Offices to estimate the total cost of the conference. These costs include any hotel cancellation fee, meeting room rental, refreshments, miscellaneous, AV equipment, and all additional fees. This form is used by the RCE throughout Conference execution to ensure estimated costs are not exceeded by 5% or more without justification.

CP Preparation TIPS:

- Calculations must be easy to follow throughout the packet. Double-check all totals for accuracy.
- Go to the CTRO Web site at <http://vaww.trainingevents.va.gov/> for the correct Conference Package forms to use.
- Signatures and dates must be on the CP forms where indicated.

 Department of Veterans Affairs		STRATEGIC COMMUNICATION REVIEW			
NAME OF ORIGINATOR		VAID NO.	DATE	DATE DUE	
NAME OF EXECUTIVE SECRETARY STAFF		SUBJECT			
ROUTING		INITIALS	DATE	COMMENTS	
<input type="checkbox"/> EXEC SEC					
<input type="checkbox"/> COSVA					
<input type="checkbox"/> DEPSECVA					
<input type="checkbox"/> SECVA					
KEY POINTS					Key Points Instruction
▶					
▶					
▶					
CONCURRENCE					
EXECUTIVE SUMMARY					Executive Summary Instruction
Purpose - Discussion - Recommendation					
FOR OFFICE OF THE SECRETARY USE ONLY					
SPECIAL HANDLING INSTRUCTIONS		DATE OF INCOMING	DATE VA RECEIVED	DATE OF INTERIM	DATE RECEIVED IN 0018
<input type="checkbox"/> RUSH <input type="checkbox"/> DATE DOCUMENT FOR <input type="checkbox"/> NOTARIZE					

VA FORM
OCT 2011 **0907**

Department of Veterans Affairs		CONCURRENCE AND SUMMARY SHEET				
SUBJECT				NAME OF ADDRESSEE (For Correspondence Only)		
TO BE COMPLETED BY EXECUTIVE SECRETARIAT (001B)						
REMARKS			CONTROL NO.		NAME OF REVIEWER	
CONCURRENCES - TO BE DETERMINED BY THE ORIGINATING OFFICE						
CONCURRENCE REQUIRED	TITLE OR ORGANIZATIONAL ELEMENT	MAIL ROUTING SYMBOL	DATE IN	SIGNATURES		DATE OUT
				CONCURRENCE	NONCONCURRENCE	
	VETERANS HEALTH ADMINISTRATION	10				
	VETERANS BENEFITS ADMINISTRATION	20				
	NATIONAL CEMETERY ADMINISTRATION	40				
	OFFICE OF INSPECTOR GENERAL	50				
	OFFICE OF PUBLIC AND INTERGOVERNMENTAL AFFAIRS	002				
	OFFICE OF ACQUISITION, LOGISTICS & CONSTRUCTION	003				
	OFFICE OF MANAGEMENT	004				
	OFFICE OF INFORMATION AND TECHNOLOGY	005				
	OFFICE OF HUMAN RESOURCES AND ADMINISTRATION	006				
	OFFICE OF OPERATIONS SECURITY AND PREPAREDNESS	007				
	OFFICE OF POLICY AND PLANNING	008				
	OFFICE OF CONGRESSIONAL AND LEGISLATIVE AFFAIRS	009				
	BOARD OF VETERANS' APPEALS	01				
	OFFICE OF THE GENERAL COUNSEL	02				
	VETERANS SERVICE ORGANIZATION LIAISON	00C				
	OFFICE OF SMALL AND DISADVANTAGED BUSINESS UTILIZATION	00SB				
	WHITE HOUSE LIAISON	WHL				
NAME OF AUTHORIZED SIGNER			SIGNATURE OF INITIATING KEY OFFICIAL OR AUTHORIZED SIGNER		DATE	

CP-1 CONFERENCE REQUEST MEMORANDUM

Sample Memorandum

Department of
Veterans Affairs

Date: Month/Day/Year

From: Under, Deputy, or Assistant Secretary

Subj: Request Approval to Implement _____ Conference

To: Chief of Staff

1. In accordance with existing Department of Veterans Affairs Conference policies and guidelines, and all applicable statutes and regulations, the Office of _____ requests your approval to implement _____ conference in fiscal year (FY) 20____.

2. **Purpose:** A brief statement explaining why the event is necessary.

3. **Goals and Objectives:** State the expected goals and objectives of the event and how the session is an enabler to the Administration's mission.

4. **Justification:** The proposal details the reasons that a face to face meeting is required to accomplish the goals and objectives. It overcomes the presumption that a face to face meeting is not necessary. All alternative means have been considered and are determined to be insufficient for achieving the stated purpose, goals and objectives. (See Appendix F of VA Financial Policies and Procedures Conference Planning, Vol XIV, Chapter 10, Nov 2011).

5. **Business Case Analysis:** Describe the detailed business case analysis that was conducted to shape the proposal and explain the proposed costs, travel, locations, attendees, duration, agenda, and training that were reviewed to ensure that all appropriate measures were taken to reduce the total cost of the event. Summarize the conclusions of the business case analysis and the basis for those conclusions. Describe alternatives that were considered and why they were not accepted. (See Appendix D and E of VA Financial Policies and Procedures Conference Planning, Vol XIV, Chapter 10, Nov 2011).

6. The proposed dates and location are:

Date	POTENTIAL LOCATION
Jan 1 – Jan 4, 2014	City and State

Subj: Request Approval to Implement _____ Conference

7. The overall proposed cost estimate is provided below:

	Number of VA Employees	Number of Support Staff	Non-Travel Cost	Travel Cost	Contractor Support	Total Cost	Cost per Participant
Training Event Title	XXXX	XX	\$X,XXX	\$X,XXX	\$XX,XXX	\$XX,XXX	\$X,XXX

8. I am available at (202) XXX-XXXX should you wish to further discuss this proposed _____ training event.

Under/Assistant Secretary or Equivalent Signature

Date

Approve / Disapprove

Jose D. Riojes
Chief of Staff

Date

CP-1 SECVA CONFERENCE APPROVAL WAIVER

Sample Memorandum

**Department of
Veterans Affairs**

Date: Month/Day/Year

From: Under, Deputy, or Assistant Secretary

Subj: Request Waiver For _____ Conference

Thru: Chief of Staff

To: Secretary

1. In accordance with existing Department of Veterans Affairs Conference policies and guidelines, and all applicable statutes and regulations, the Office of _____ requests your waiver to implement _____ conference in fiscal year (FY) 20____.

2. Purpose: A brief statement explaining why the event is necessary.

3. Goals and Objectives: State the expected goals and objectives of the event and how the session is an enabler to the Administration's mission.

4. Justification: The proposal details the reasons that a face to face meeting is required to accomplish the goals and objectives. It overcomes the presumption that a face to face meeting is not necessary. All alternative means have been considered and are determined to be insufficient for achieving the stated purpose, goals and objectives. (See Appendix F of VA Financial Policies and Procedures Conference Planning, Vol XIV, Chapter 10, Nov 2011).

5. Business Case Analysis: Describe the detailed business case analysis that was conducted to shape the proposal and explain the proposed costs, travel, locations, attendees, duration, agenda, and training that were reviewed to ensure that all appropriate measures were taken to reduce the total cost of the event. Summarize the conclusions of the business case analysis and the basis for those conclusions. Describe alternatives that were considered and why they were not accepted. (See Appendix D and E of VA Financial Policies and Procedures Conference Planning, Vol XIV, Chapter 10, Nov 2011).

6. The proposed dates and location are:

DATE	POTENTIAL LOCATION
Jan 1 – Jan 4, 2014	City and State

Subj: Request Waiver For _____ Conference

7. The overall proposed per event cost estimate is provided below:

	Number of VA employees	Number of Support Staff	Non-Travel Cost	Travel Cost	Contractor Support	Total Cost	Cost per Participant
Training Event Title	XXXX	XX	\$X,XXX	\$X,XXX	\$XX,XXX	\$XX,XXX	\$X,XXX

8. I am available at (202) XXX-XXXX should you wish to further discuss this proposed _____ training event.

Under/Assistant Secretary or Equivalent Signature

Date

Recommend: Approve / Disapprove

Jose D. Riojas
Chief of Staff

Date

Approve / Disapprove

Eric K. Shinseki
Secretary

Date

CP-2 CONFERENCE RESPONSIBILITY DESIGNATIONS

 Department of Veterans Affairs		CONFERENCE RESPONSIBILITY DESIGNATION	
<p>_____, is designated as the Conference Certifying Official (CCO) for _____.</p> <p>_____. The designee shall be familiar with the regulations and policy related to the conduct of conferences, training, and meetings. As the CCO for _____, he/she shall review and certify all conferences, where the costs to VA are \$20,000 or greater, or costing less than \$20,000 with 50 or more conference attendees, 1 or more of whom is a VA employee as proposed by the organization as being in compliance with regulations and policy, using the Conference Certification Form, prior to final review by the appropriate Under Secretary, Assistant Secretary, or other Senior Leader, as required by VA and OMB policy. In exercising this authority, the CCO is to observe and comply with all applicable regulations, policies, and procedures in performing the required responsibilities. The effective date of this designation is _____.</p>			
CCO SIGNATURE	TITLE	DATE	
_____	_____	_____	
APPROVED BY (<i>Print name</i>)	SIGNATURE		
_____	_____		
TITLE	_____		DATE
_____	_____		_____
<p>_____, is designated as the Responsible Conference Executive (RCE) for _____.</p> <p>_____, a conference proposed by _____.</p> <p>The designee's responsibilities are to ensure adherence to all applicable statutes, regulations, and policies when executing the approved conferences costing \$20,000 or greater, or conferences costing less than \$20,000, with 50 or more attendees, 1 or more of whom is a VA employee. The RCE will upload the Post Conference Certification Form to the established SharePoint within 15 days of the conclusion of the conference and ensure that the Final Conference Report is conducted within 30 days of the completion of the conference. In exercising this authority, the RCE is to observe and comply with all applicable regulations, policies, and procedures in performing the required responsibilities. The effective date of this designation is _____.</p>			
RCE SIGNATURE	TITLE	DATE	
_____	_____	_____	
APPROVED BY (<i>Print name</i>)	SIGNATURE		
_____	_____		
TITLE	_____		DATE
_____	_____		_____

VA FORM 10008e
JAN 2014

CP-3 CONFERENCE CERTIFICATION FORM

 Department of Veterans Affairs		CONFERENCE CERTIFICATION FORM	
<p>The CCO shall be a Senior Executive or SES equivalent familiar with the regulations and policy related to the conduct of conferences. All proposals to conduct conferences, where the costs to VA exceed \$20,000 must be reviewed and certified as being in compliance with regulations and policy by the CCO of the organization proposing to conduct the conference. As the Conference Certifying Official for _____, I hereby certify that I have reviewed the documentation for this proposed conference. It meets the criteria established by all applicable statutes and regulations, as well as OMB and VA policy.</p>			
CONFERENCE TITLE		LEAD ADMINISTRATION OR STAFF OFFICE	
DATES OF CONFERENCE		NUMBER OF DAYS	LOCATION OF CONFERENCE
NUMBER OF ATTENDEES	POINT OF CONTACT NAME	POINT OF CONTACT EMAIL	ESTIMATED TOTAL COST
CONFERENCE CERTIFYING OFFICIAL (CCO) (Must be SES or SES Equivalent)			
NAME	EMAIL	PHONE	LOCATION
RESPONSIBLE CONFERENCE EXECUTIVE (RCE) (Must be SES or SES Equivalent)			
NAME	EMAIL	PHONE	LOCATION
PLEASE INDICATE: WILL SECVA, DEPSEC, COSVA, OR OTHER SENIOR VA OR ADMINISTRATION OFFICIALS ATTEND OR PARTICIPATE IN THE CONFERENCE? <input type="checkbox"/> YES <input type="checkbox"/> NO			
IF "YES", NAME(S) AND TITLE(S): <div style="border: 1px solid black; height: 150px; width: 100%;"></div>			
I CERTIFY THE FOLLOWING:			CCO INITIALS
The proposal clearly states the purpose, goals, and objectives of the conference and how it enables VA to better accomplish its mission.			
The proposal overcomes the presumption that a face-to-face meeting is not necessary to achieve the purpose, goals, and objectives of the conference. (All alternative means, i.e. remote collaboration tools, were explored and a determination that such alternatives are insufficient for achieving the stated purpose, goals, and objectives are documented).			
The proposal provides a detailed business case analysis for the related conference and travel investment, which includes all anticipated costs.			
The duration, location, and attendees of this conference are appropriate.			
All presentations, demonstrations, and programs paid for from VA funds are necessary, appropriate, and cost effective.			
The proposal precludes the use of entertainment (videos, music, motivational speakers, etc.) paid for with VA funds.			
The provision of food and light refreshments at the conference is in strict compliance with policy and regulations.			
The proposal precludes the purchase of SWAG ("Stuff We All Get") or promotional items intended for VA employees.			
The proposal provides that attendees will be informed that they may not claim per diem for any meals provided to them at government expense.			
The proposal has procedures to ensure that all actual conference costs are captured and recorded and reported immediately after the conference.			
The proposal provides for the RCE uploading the Post-Conference Certification Form to the sharepoint within 15 days to ensure reporting requirements to the OIG are met. (See Post-Certification Form for uploading instructions.)			
The proposal provides for completion of a Final Conference Report within 30 days.			
SIGNATURE OF CCO		DATE	

CP-4 SITE COST COMPARISON CHART

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

Department of Veterans Affairs		SITE COST COMPARISON CHART					
WORKSHOP DATES		SITE 1		SITE 2		SITE 3	
START	END						
CITY/STATE							
HOTEL							
CONTACT							
PHONE							
DATE AVAILABILITY		<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> YES	<input type="checkbox"/> NO
DISABILITY ACCESSIBLE		<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> YES	<input type="checkbox"/> NO
ESTIMATED COSTS - LODGING, MEETING, AUDIOVISUAL, REFRESHMENTS							
LODGING RATE <i>(Flat rate only)</i>							
TOTAL ROOM NIGHTS							
NUMBER OF ATTENDEES REQUIRING LODGING							
TOTAL LODGING							
TOTAL MEETING ROOM COSTS							
TOTAL AUDIO VISUAL COSTS							
TOTAL LIGHT REFRESHMENTS							
ESTIMATED COSTS/TOTAL ESTIMATED COSTS							
ESTIMATED COSTS - AIRFARE AND GROUND TRANSPORTATION							
AIRFARE <i>(Preliminary Estimate)</i>							
AIRPORT TRANSPORTATION							
NUMBER OF ATTENDEES REQUIRING TRANSPORTATION <i>(Local or TDI)</i>							
TOTAL AIRPORT TRANSPORTATION							
TRAVEL TO AND FROM HOME & AIRPORT AND AIRPORT PARKING <i>(estimated total per week \$)</i>							
TOTAL ESTIMATED TRANSPORTATION COSTS							
MISCELLANEOUS							
MISCELLANEOUS 1:							
MISCELLANEOUS 2:							
MISCELLANEOUS 3:							
TOTAL ESTIMATED MISCELLANEOUS COSTS							
TOTAL ESTIMATED COSTS							
GRAND TOTAL							
SITE RECOMMENDED							
ADDITIONAL COMMENTS OR COSTS							

NOTE: Refer to GSA's State Tax Exemption Forms overview for tax applicability at the following Website: <http://www.gsa.gov>

CTRO VA Form Guidance

10008b – SITE COST COMPARISON CHART

The **10008b** – Site Cost Comparison Chart (CP4) form must be completed to ensure compliance with policy regarding VA-sponsored or co-sponsored conferences. This market research helps ensure the most reasonable and cost efficient location is selected.

General Event Information - Enter all requested information for each of the three (3) sites required, e.g. city/state, hotel name, contact name and phone number. If a hotel with available dates/disability access is not found in a geographic location, a different geographic location must be explored.

Estimated Costs - (Lodging, Meeting, Audiovisual, Refreshments)

The purpose of these categories is to identify total estimated costs. When totaling, be sure to multiply lodging rate by the total number of nights and attendees. If refreshments are given as a per person/per break estimate, multiply by as appropriate to ensure the total light refreshments represents the total estimated cost for the conference.

Estimated Costs - Airfare and Ground Transportation

The purpose of these categories is to identify the total estimated costs for airfare and ground transportation. Be sure to account for local travel costs versus TDY by identifying the number of travelers in each category. When determining travel to and from Home & Airport & Airport Parking, take into consideration the multiple options available to travelers: taxi, public transportation, drop off/pick up, and parking at the airport.

Miscellaneous

Identify any other costs not previously accounted for. Provide details regarding these costs in the Additional Comments or Costs section.

TOTAL ESTIMATED COSTS

GRAND TOTAL: Should include all estimated costs

SITE RECOMMENDED: Choose the geographical location most efficient per the comparisons

ADDITIONAL COMMENTS OR CONSIDERATIONS

Include any details, considerations, or costs not documented above. Also, identify any necessary calculation figures not readily identifiable.

CP-5 CONFERENCE COST ESTIMATE

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

Department of Veterans Affairs		CONFERENCE COST ESTIMATE		
NAME OF CONFERENCE		CITY/STATE OF EVENT (Selected in VA Form 10008b)		DATE OF ESTIMATE
ESTIMATED COSTS - TRAVELER/ATTENDEES				
	# OF ATTENDEES RECEIVING	# OF DAYS (if applicable)	COST PER DAY/UNIT	TOTAL
PER DIEM				
MEALS & INCIDENTAL EXPENSES				
LODGING				
LODGING TAX (Only if applicable)				
TRANSPORTATION AND PARKING				
OTHER (Identify specifics in Additional Comments)				
TOTAL ESTIMATED TRAVELER/ATTENDEE COST				
ESTIMATED COSTS - FACILITY				
				TOTAL
FOOD/BEVERAGE (Light refreshments only - see instructions)				
ROOM RENTAL				
A/V EQUIPMENT				
MISCELLANEOUS (Identify specifics in Additional Comments)				
TOTAL ESTIMATED FACILITY COSTS				
ESTIMATED COSTS - CONTRACTOR SUPPORT				
				TOTAL
CONTRACTOR SUPPORT (minus travel costs)				
CONTRACTOR TRAVEL COSTS (To include transportation and parking)				
# OF CONTRACTORS ATTENDING:				
TOTAL ESTIMATED CONTRACTOR COSTS				
ESTIMATED COSTS - TRAINING/OTHER MATERIALS				
				TOTAL
BROCHURES/PRINTED MEDIA				
OTHER (Identify specifics in Additional Comments)				
TOTAL TRAINING/OTHER MATERIALS				
ESTIMATED COSTS - MISCELLANEOUS				
				TOTAL
MISCELLANEOUS (Identify specifics in Additional Comments)				
TOTAL MISCELLANEOUS				
TOTAL ESTIMATED COSTS				
GRAND TOTAL				
CANCELLATION FEES				
	CONTRACTORS	\$		
	FACILITY	\$		
	OTHER (Identify specifics in Additional Comments)	\$		
	TOTAL	\$		
BUDGET REVIEW				
THIS CONFERENCE IS A NEW REQUIREMENT?		IS THIS CONFERENCE BUDGETED FOR THE CURRENT FISCAL YEAR?		
<input type="checkbox"/> YES <input type="checkbox"/> NO		<input type="checkbox"/> YES <input type="checkbox"/> NO		
ENTER LINE OF ACCOUNTING/BOB USED FOR FUNDING				
BUDGET OFFICE FUNDS CERTIFICATION: I CERTIFY THE FUNDING IS AVAILABLE FOR THIS EVENT.				
SIGNATURE		TITLE		DATE
ADDITIONAL COMMENTS OR CONSIDERATIONS				
I CERTIFY THESE ESTIMATES ARE REASONABLE AND REPRESENT A COMPLETE ESTIMATE OF EXPECTED CONFERENCE COSTS.				
RCE CERTIFICATION SIGNATURE				

CTRO VA Form Guidance

10008a – CONFERENCE/TRAINING EVENT COST ESTIMATE

The 10008a – Conference Cost Estimate (Tab 5) form must be completed to ensure compliance with policy regarding VA-sponsored or co-sponsored conferences. This detailed spend plan helps ensure a complete and reasonable cost estimation during the development phase of the Conference Process.

General Information - Enter the conference name, city/state of event (selected in VA Form 10008a) and the date the estimate is completed.

ESTIMATED COSTS - TRAVELERS/ATTENDEES

Per Diem: Per Diem includes M&IE and Lodging. Identify the number of attendees receiving per diem, the number of days lodging will be provided, and the total per diem for one day in the geographic location (using gsa.gov). Multiply each of these to identify total.

Meals & Incidental Expenses (M&IE) : Breakout just the M&IE portion of Per Diem. Meals & Incidental Expenses (M&IE): To determine the M&IE estimate for the conference use the following steps:

- 1) Determine the GSA authorized M&IE rate for the geographic location for the conference.
- 2) Determine the length of the conference in days. If applicable, add 1 day before the conference and 1 day after the conference for travel. All travel days are reimbursed at 75 percent of M&IE. If a day is considered a partial conference day and a travel day M&IE reimbursement for that day should be calculated at 75 percent of M&IE.
- 3) Determine the number of VA funded travelers attending the conference.
- 4) To calculate the M&IE estimate:
 - a) Multiply the number of travel days by the number of VA funded travelers attending the conference.
 - b) Multiply the total from Line 4a by 75 percent of M&IE. This is the estimated M&IE for travel days for the conference.
 - c) Multiply the number of conference days by the number of VA funded travelers attending the conference.
 - d) Multiply the total from Line 4c by 100 percent of M&IE. This is the estimated M&IE for conference days for the conference.
 - e) Add the totals from Line 4b and Line 4d. This is the total estimated M&IE for the conference.

Example: Five day conference with 100 attendees in Chicago. M&IE for Chicago is \$71.

Step 1 - M&IE rate for Chicago is \$71.

Step 2 - Conference is 3 full days – Tuesday, Wednesday and Thursday. Travel days are Monday and Friday.

Step 3- 100 VA funded travelers are attending the conference.

Step 4:

Line 4a - 2 x 100 = 200

Line 4b- 200 x .75 (\$71) = \$10,650

Line 4c - 3 x 100 = 300

Line 4d - 300 x 71 = \$21,300

Lodging: Breakout just the Lodging portion of Per Diem

Lodging Tax (if applicable): Visit gsa.gov to determine if the location offers tax exemption. If not, identify the tax rate and multiply it by Total Lodging to get the estimated tax.

Transportation and Parking: Identify all transportation and parking costs (i.e. airfare, POV, airport parking, any hotel parking, rental car (if allowed), transportation to/from hotel and airport, etc.). Identify a reasonable cost estimate for each category based on the number of conference attendees. Enter the reasonable cost estimate.

Other: Identify all other traveler/attendee costs (i.e. baggage, ATM, etc.) and include a reasonable estimate based on the number of attendees

Total Estimated Traveler and Attendee Costs: Add the totals for Per Diem, Lodging Tax, Transportation and Parking, and Other.

ESTIMATED COSTS - FACILITY

Food/Beverage: Only light refreshments (usually a morning and afternoon break per day) should be included in this block. Multiply the number of VA attendees by the number of breaks per day; then multiply by the cost per person per break; then multiply by the number of days.

Please refer to VA Handbook 063X regarding providing meals at a conference. If a decision to provide meals is made, document in the Additional Comments or Considerations below the costs, opinion from OGC, and include the costs in the "Total Estimated Facility Costs" section of this form.

Room Rental: Identify how many rooms will be needed for the conference, how many days for each, and a reasonable rate estimate to determine total estimated room rental costs. These costs include all halls, auditoriums, and other spaces excluding lodging

Audio/Visual Costs: Reasonably estimate audio/visual costs after considering all needs (i.e. LCD projectors, computers, screen, microphones, telephones, sound system, internet access, etc.) These costs include all equipment rentals

TOTAL ESTIMATED FACILITY COSTS: Add the totals for Food/Beverage, Room Rental, and Audio/Visual Costs

Estimated Costs - Contractor Support

Contractor Support: Reasonably estimate all contractor support costs (i.e. registration, course development, surveys, testing, speakers, trainers, etc.) but exclude any travel costs in this total

Contractor Travel: Reasonably estimate all contractor travel costs (i.e. any planning trips, attendance at conference, etc.)

TOTAL ESTIMATED CONTRACTOR COSTS: Add the totals for Contractor Support and Contractor Travel

Estimated Costs - TRAINING/OTHER MATERIALS

Brochures/Printed Media: Consider all printing needs (i.e. brochures, signage, agendas, course material, certifications, etc.) and reasonably estimate costs

Other: Identify any other training/materials needs (i.e. supplies) and reasonably estimate costs. Provide justification and specifics in the Additional Comments or Considerations section.

TOTAL TRAINING/OTHER MATERIALS: Add the totals for Brochures/Printed Media and Other.

Estimated Costs - MISCELLANEOUS

Miscellaneous: Reasonably estimate any other costs (i.e. shipping) that have not been accounted for elsewhere in the detailed cost estimate. Identify the specifics in the Additional Comments or Considerations section

Total Estimated Costs

Grand Total: Add the Total Estimated Per Diem, Total Estimated Transportation Costs, Total Estimated Facility Costs, Total Estimated Contractor Costs, Total Training/Other Materials, and Total Miscellaneous. This is the estimated cost of the conference, or budget. Note: If estimated costs are exceeded by more than 5% or take the cost of the conference to a different approval level (see pg. XX of Handbook), additional approval and justification is required.

Cancellation Fees

Break down any fees associated if the Conference is cancelled. These will include: Contractor, Facility, Other and then add up for a total cost of cancellation.

Budget Review

Enter YES or NO: Is this conference a new requirement

Enter YES or NO: Is this conference budgeted for the current Fiscal Year?

Line of Accounting/BOC used for Funding: Enter as appropriate

Additional Comments or Considerations

Include any details, considerations, or costs not documented above. Also, identify any necessary supporting calculations/numbers that are not readily identifiable above.

8. APPENDIX C. POST-CONFERENCE REPORTING

 Department of Veterans Affairs		RESPONSIBLE CONFERENCE EXECUTIVE (RCE) POST-CONFERENCE CERTIFICATION FORM	
		Must be completed and submitted to: https://vaww.fscollaboration.fsc.va.gov/CTRO/SitePages/Home.aspx no later than 15 DAYS after final day of conference <i>Conference Planning, Execution and Oversight</i>	
CONFERENCE TITLE <i>(Must match title provided in Conference Packet and Final Conference Report)</i> <div style="background-color: #e0e0ff; height: 20px; width: 100%;"></div>			
START DATE OF CONFERENCE <div style="background-color: #e0e0ff; height: 20px; width: 100%;"></div>	END DATE OF CONFERENCE <div style="background-color: #e0e0ff; height: 20px; width: 100%;"></div>	LOCATION OF CONFERENCE <div style="background-color: #e0e0ff; height: 20px; width: 100%;"></div>	NUMBER OF VA EMPLOYEES ATTENDING CONFERENCE <div style="background-color: #e0e0ff; height: 20px; width: 100%;"></div>
SIGNATURE OF RESPONSIBLE CONFERENCE EXECUTIVE (RCE) <div style="background-color: #e0e0ff; height: 20px; width: 100%;"></div>			DATE <div style="background-color: #e0e0ff; height: 20px; width: 100%;"></div>
<p>Note: This form serves to document all of the required information needed to comply with P.L. 113-6 § 3003 and P.L. 113-46 § 119. Specifically, the VA must report all the following information on all conferences greater than \$20,000 to the OIG within 15 days of the conference. Information required is: Dates of Conference, Location of Conference, and the Number of Employees attending the conference.</p>			

VA FORM **10089b**
JAN 2014

Department of Veterans Affairs		FINAL CONFERENCE REPORT			
<i>NOTE: Due to CTRO, no later than 30 days following the conference.</i>					
ADMINISTRATION/STAFF OFFICE			CONFERENCE TITLE		
CONFERENCE PURPOSE			LOCATION OF CONFERENCE		
CONFERENCE START DATE	CONFERENCE END DATE	NUMBER OF PARTICIPANTS			
		VA EMPLOYEES	CONTRACTORS	ALL OTHER ATTENDEES	TOTAL
BRIEF EXPLANATION ON HOW THE CONFERENCE ADVANCED THE MISSION OF THE AGENCY (Ref: OMB 12-12)					
1. WAS THE POST-CONFERENCE CERTIFICATION FORM UPLOADED TO THE SHAREPOINT WITHIN 15 DAYS AFTER FINAL DAY OF CONFERENCE? (Must attach a copy to this form)				<input type="checkbox"/> YES <input type="checkbox"/> NO	DATE UPLOADED
2A. WAS SPENDING FOR THIS CONFERENCE WITHIN AN ESTABLISHED BUDGET AND CLEARLY ACCOUNTED FOR?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
2B. DID THE SCOPE (i.e. number of attendees) CHANGE SUBSTANTIALLY FROM APPROVED CP? (If yes, provide description and justification)				<input type="checkbox"/> YES <input type="checkbox"/> NO	
3A. WAS ANY CONTRACTOR SUPPORT USED? (Ref PL 113-6/46)				<input type="checkbox"/> YES <input type="checkbox"/> NO	
3B. WERE CONTRACTS AWARDED COMPETITIVELY? (Ref PL 113-6/46)				<input type="checkbox"/> YES <input type="checkbox"/> NO	
3C. PROVIDE A DESCRIPTION OF THE CONTRACTING PROCEDURES THAT WERE USED:					
3D. LIST COST COMPARISON FACTORS USED TO EVALUATE POTENTIAL CONTRACTORS: (Ref PL 113-6/46)					
		COSTS	ESTIMATED COSTS	ACTUAL COSTS	
REIMBURSABLE EMPLOYEE TRAVEL COSTS	MEALS AND INCIDENTAL EXPENSES				
	LODGING				
	TOTAL PER DIEM				
	TRANSPORTATION AND PARKING				
	OTHER TRAVELER EXPENSES (i.e. ATM, baggage, etc.)				
	TOTAL EMPLOYEE TRAVEL COSTS				
	TOTAL CONTRACTOR TRAVEL COSTS				
FACILITY COSTS	FOOD AND BEVERAGE				
	ROOM RENTAL (halls, auditoriums, etc.)				
	A.V. EQUIPMENT AND SERVICES				
ALL OTHER COSTS	ALL OTHER CONTRACTOR COSTS (Excluding contractor travel)				
	BROCHURES/PRINTED MEDIA				
	ENTERTAINMENT				
	OTHER (if audited, the BCE will be required to provide additional details on these costs)				
GRAND TOTAL COSTS					
COST VARIANCE (attach justification and approval dates for any variance 5% and over)					
I certify to the best of my knowledge that the above information is correct and I used the methodology listed below to gather the required information and have followed the instructions for completing this form. Further, I understand if the conference is audited I am responsible for releasing all related documentation.					
The methodology used to determine costs related to this conference was:			3. Contact the Contracting Officer to:		
1. Compile a list of all conference attendees:			a. Identify all costs incurred via a contract vehicle.		
a. Identify whether they are employees, contractors, or other attendees.			b. Ensure the costs are broken out into the following categories:		
b. Provide the list to the VA travel office (Austin) to:			i. food and beverage		
2. Pull all VA sponsored travel costs broken out into the following categories:			ii. room rental		
a. M&IE			iii. A/V equipment and services		
b. Lodging			iv. Contractor travel costs not incurred via VA-sponsored travel		
c. Total Per Diem			v. Other contractor costs		
d. Transportation and Parking			4. Contact purchase card holders who made purchases in connection with the conference.		
e. Other Traveler Expenses			a. Identify the specifics for each charge		
f. Total Employee Travel Costs			b. Determine reporting category related the cost (i.e. brochures/printed media, shipping, etc.)		
RESPONSIBLE CONFERENCE EXECUTIVE SIGNATURE		TITLE	PHONE NUMBER		

VA FORM 10089a
JAN 2014

INSTRUCTIONS
(Provided to ensure consistent reporting across conferences): Limit comments to 250 characters

Offices and Administrations: Identify the Office or Administration Sponsoring the Conference

Conference Title: Enter Conference Title

Conference Purpose: Enter the purpose of the Conference

Location: Enter the Location of the City and State where the Conference took place

Conference Start/End Dates: Actual Start and End date of the conference

VA employees, contractors, and all other attendees: Other attendees are any other participants who attend the conference

Total: This must include every person at the conference. This includes VA employees, contractors and all other attendees Ref PL 113-6/46 & OMB M-12-12

Brief Explanation on How the Conference Advanced the Mission of the Agency: State the expected goals and objectives of the Conference and why it supports the Administration's/Staff's mission. It should explain why a face to face meeting is required.

1. Was the Post-Conference Certification Form uploaded to the sharepoint within 15 days? Enter Yes or No and attach a copy of the form to the packet

2a. Was Spending for this Conference within an Established Budget and clearly accounted for? Enter Yes or No

2b. Did the scope (i.e. # of attendees) change substantially from Approved CP? If yes, provide description and justification. Enter Yes or No and provide any necessary description and justification

3a. Was any Contractor Support used? Enter Yes or No

3b. Were Contracts Awarded Competitively? Enter Yes or No

3c. Provide a Description of the Contractor Procedures that were Used. Describe the Contractor Procedures Used

3d. List Comparison factors used to evaluate Potential Contractors: Enter the correct information in the adjacent block.

Meals & Incidental Expenses: Includes just the M&IE portion of Per Diem. This total to be reported in compliance with P.L. 112-154 as "Per Diem" since the law requires reporting of Lodging separately. Not separating Lodging from this total for this reporting would result in a "double counting" of Lodging expenses.

Lodging: Includes just the Lodging portion of Per Diem. This total to be reported in compliance with P.L. 112-154 as "Lodging" since the law requires reporting of both "Per Diem" and "Lodging". Reporting M&IE as "Per Diem" for this report prevents the "double counting" of Lodging expenses.

Per Diem: Includes Meals & Incidental Expenses and Lodging for all attendees except contractors. All other traveler related expenses (except Transportation and Parking) is reported on the "Other" line.

Transportation and Parking: Includes all airfare, POV, airport parking, any hotel parking, rental cars (if allowed), transportation to/from hotel and airport for all Employee travel. This total reported in compliance with P.L. 112-154 as "Transportation and Parking".

Other Travel Expenses: All other costs related to travel that an employee can be reimbursed for – to include ATM, baggage, lodging tax (if applicable), gas for rental cars (if applicable), etc. These costs are not reported separately for any required reported but must be captured to identify total conference costs. Do not include any contractor travel expenses.

Total Employee Travel Costs: Includes all reimbursable travel costs (Per Diem, Lodging, Transportation and Parking, and Other Travel Costs). This total to be reported in compliance with P.L. 113-6/113-46 as "Employee Travel".

Food and Beverage: Includes all costs for Food and Beverage (to include refreshments). This total reported in compliance with both P.L. 112-154 and P.L. 113-6/113-46.

Room Rental: Includes all halls, auditoriums, or other spaces (excluding lodging). This total to be reported in compliance with P.L. 112-154.

A/V Equipment and Services: Includes all equipment rental. This total to be reported in compliance with P.L. 112-154 as "Rental of equipment" and with P.L. 113-6/113-46 as "Visual, digital, video, or audio services". Reporting all A/V Equipment and Services in one category ensures the reporting intent of both laws is met while recognizing that sometimes contracts do not separate the price of equipment rental from services.

Contractor Support: Total Contractor Support includes all contractor support costs including travel. This total reported in compliance with P.L. 112-154. Total Contractor Travel only (all reimbursable travel costs) reported in compliance with P.L. 113-6/113-46.

Brochures/Printed Media: Includes all brochures/printed media to include agendas, signage, training materials, certifications, etc. This total reported in compliance with P.L. 112-154.

Entertainment: Any entertainment expenses. Note: VA is required to report entertainment expenses per P.L. 112-154; however, VA policy does not allow any entertainment expenses for conferences.

Other: Be sure to capture all other costs not required to be reported separately including any miscellaneous facility or other costs to ensure that Total Costs reported are complete and accurate.