



UNITED STATES MARINE CORPS
MARINE CORPS INSTALLATIONS COMMAND
3000 MARINE CORPS PENTAGON
WASHINGTON, DC 20350-3000

IN REPLY REFER TO:
7000
G-8

JUN 24 2014

MARINE CORPS INSTALLATIONS POLICY LETTER 3-14

From: Commander, Marine Corps Installations Command (MCICOM)
To: Distribution List

Subj: GUIDANCE FOR CONFERENCE REQUEST AND APPROVAL

Ref: (a) OMB Memo dtd 11 May 2012
(b) USN Delegation of Conference Approval Authority
Dtd 2 Oct 2012
(c) DCMO DoD Conference Guidance dtd 6 Nov 2013

Encl: (1) Instructions for Requesting Approval to Host a
Conference
(2) Instructions to Request Attendance at a Non-DoD
Hosted Conference (2014-05-15)
(3) Required Reporting Templates

1. Situation. On 11 May 2012, reference (a) was issued to promote further efficiency and cost consciousness in the Federal government's operations. The Office of Management and Budget (OMB) requirements were later codified in law in March 2013, through Public Law Number 113-6 (P.L. 113-6), "Consolidated and Further Continuing Appropriations Act, 2013." The current fiscal environment demands all MCICOM leaders critically examine every aspect of the business enterprise to improve effectiveness and to drive down the cost of business operations.

2. Mission. Establish clear and concise procedures and policy for hosting and attending conferences in order to comply with the established references and to facilitate prudent management of appropriated resources.

3. Execution

a. Commander's Intent and Concept of Operations.

(1) Commander's Intent. MCICOM commanders and staff at all levels will ensure resources are responsibly managed when executing conferences sponsored by MCICOM and when authorizing MCICOM personnel to attend conferences hosted by others. Commanders will assess necessity and cost when conferences are

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recommended as a method to achieve a particular mission critical objective. It is not the intent of this policy to negatively impact operations critical to the day-to-day execution of our national security mission, but rather to provide command oversight to ensure we are operating prudently and within established authorities.

(2) Concept of Operations. References (b) and (c) established the Department of Defense (DoD) and Department of the Navy (DoN) conference approval authorities. To date, no authority has been given to the Marine Corps for conference approval, therefore all conference requests for hosting and attending must be routed to the DoN for approval. The MCICOM Assistant Chief of Staff (AC/S) G-8 has been designated as the conference manager for MCICOM. All subordinate commands will designate a representative on their staff as a conference manager for coordination purposes. All conference requests will be routed through the conference manager for review, prior to being routed through the chain of command for endorsement and consideration. All conference requests will be endorsed by the first General Officer in the chain of command prior to being routed to COMMCICOM, via the AC/S G-8, for approval and forwarding.

b. Coordinating Instructions

(1) Conference Requests. All conference requests will be submitted by e-mail to the MCICOM conference manager in accordance with the applicable instructions contained within the enclosures of this policy. Timeliness of submission is critical in approval of a conference request. All requests are endorsed by COMMCICOM, forwarded to HQMC Administration and Management Division, Programs and Resources, and Director of Marine Corps Staff (DMCS) via MCATS prior to being submitted to the DoN, Assistant for Administration (DoN/AA) for review. Therefore, requests should be submitted to AC/S G-8 at least 6 weeks prior to the registration of or the start date of the conference, whichever is earlier. Requests submitted inside this window may not be reviewed and approved prior to the conference and these late requests may be denied due to insufficient processing time.

(a) Hosting. When it is determined only a conference will suffice to accomplish official business, MCICOM leaders must ensure that all conferences comply with law, regulation, and policy. Refer to reference (c) to see the definition of a conference and which expense items must be identified in your total cost, as well as, the exemptions which

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may apply to the event you are considering conducting. Enclosure (1) must be completed by the command or directorate requesting approval for the conference.

(b) Attending. It is the responsibility of each command and staff directorate to prepare the package requesting approval for attendance at a conference hosted by non-DoD entities and deemed mission critical. The conference manager will aid the staff in determining if an event should be classified as a conference, as defined by reference (c). Refer to reference (c) for the definition of a conference and which expense items must be identified in your total cost, as well as, the exemptions which may apply to the event you are inquiring about. Currently, only DMCS can make the determination on an event exemption status, commands are not authorized to make this determination. Once the event has been identified as a conference, the command or directorate requesting attendance must complete enclosure (2), and route through the chain of command via e-mail to the AC/S G-8 for appropriate action and follow-on consideration. Commands that are sending attendees to a DoD-hosted conference may rely on the approval obtained by the conference host.

1. Currently, DON/AA primarily approves requests to attend non-DoD conferences when USMC personnel are in an active role (speaker, panelist, etc.), earning continuing education credits for work-related credentialing certifications, receiving an award, or can attend at no cost to the government (i.e., costs are 100% gifted). MCICOM personnel MAY be approved to attend if compelling justification is provided. Accordingly, a separate bullet should be added to the DMCS Action Memo in order to make this information very clear to DON/AA.

2. All conference attendance must be deemed mission critical and stated as such in the General Officer endorsement. In general, an activity is mission critical if the commander determines that delaying or not performing it would result in the potential failure of the organization to accomplish its assigned missions, functions, and tasks.

(2) Exemptions. Refer to reference (c) for a complete listing. The following are highlighted as specific MCICOM examples due to the amount of command attention. It should be noted, an event is not categorized based on why an attendee is going to it, but the forum in which it is being offered.

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1. Conference approval for formal classroom training. The training exemption is for formal classroom training, which means it is a standardized, recurring type of training, not presentations provided at a conference.

2. Meetings to consider internal agency business matters. This exemption would include activities such as meetings that take place as part of an organization's regular course of daily business (e.g. operational assessment groups, installation boards, training aboard an installation concerning installation matter, etc.).

(3) Conference Alternatives. Prior to submitting a conference request for hosting or attending, it must be confirmed that attendance at said conference is mission critical, cost effective and alternative means of delivering the relevant information have been considered.

(4) Reporting Requirements. Quarterly reporting will include all USMC hosted conferences and attendance at all non-DoD conferences, regardless of cost, to include conferences when there is no cost to the government for local attendees. The quarterly reports, enclosure (3), will be due by the 5th day of the month following the end of a fiscal quarter (January, April, July, and October). All reports will be submitted via the SharePoint site listed below.

(5) No Cost to the DoD. Approval is not required for conferences that have no cost to the DoD, including no cost for attendee travel, in accordance with this guidance. This includes instances when all costs are paid for by a non-DoD entity in accordance with DoD gift acceptance rules.

4. Administration and Logistics

a. The point of contact for this policy is the MCICOM Resource Evaluation and Analysis office.

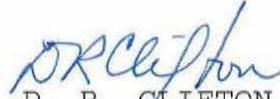
b. All documentation, as well as conference approval request status, will be available to conference managers on the MCICOM SharePoint site at:
<https://il.usmc.mil/org/IL/MCICOM/G8/REA/Conferences/SitePages/Home.aspx>

5. Command and Signal

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a. Command. This policy is applicable to all personnel, civil service and non-appropriated fund, within MCICOM, its various commands and subcommands.

b. Signal. This Policy Letter is effective the date signed.


D. R. CLIFTON
By direction

DISTRIBUTION: C

INSTRUCTIONS FOR REQUESTING APPROVAL TO HOST A CONFERENCE

1. **Purpose:** Provide Marine Corps specific guidance and ensure conference requests are standardized, submitted, and approved in accordance with ref (a).
2. **Background:** Marine Corps commands must exercise strict fiscal responsibility for planning and conducting Marine Corps sponsored conferences. When it is determined that only a conference will suffice to accomplish official business, Marine Corps leaders must ensure that all conferences comply with law, regulation, and policy. The goal is to reduce total costs and eliminate waste in conference planning and execution.
3. **Conference Request:** Conference requests will be submitted by standard naval letter through the chain of command to the appropriate approval authority described in reference (a). Commands are required to use the conference request template provided in this document. Conference request guidance can be found [here](#). To access the website, users must have an eHQMC portal account. eHQMC portal accounts may be requested [here](#).
4. **Calculating Total Conference Costs:** All costs required by reference (b) are still valid and must be included in conference request enclosure (3). However, conference sponsors must also include the manpower costs associated with planning and hosting the conference. For example, if the command estimates that one Major (O-4) will spend a total of 8 days planning and hosting the conference, using the [Office of the Secretary of Defense Cost Tool](#), the estimated cost calculated from inputting the data into Box 6 would be \$4,995.69.. Additionally, in all cases, individuals using the Cost Tool shall input "N/A" in Box 8, Total Event Cost Recovery, and use one unit with a unit value of \$0.00. After completing all the required information, click on "Save & Display Results." Include this document as enclosure (2) in your conference request package. Total costs will include but are not limited to: travel, per diem, local transit (rental car, taxi, shuttle), manpower to plan and host the conference, room rental, audiovisual, speaker/honorarium fees, contractor support, printing, and information technology. The Marine Corps does not authorize activities to charge a conference fee in order to offset the cost of holding a conference or to reimburse the appropriation from which the conference is funded. Marine Corps activities that sponsor a conference must fund all costs from its unit operating budget. As a general rule, appropriated funds are not authorized to purchase food and beverages.
5. **After Action Reporting:** Upon completion of a conference, the sponsor must provide a Fiscal After Action Report (FAAR) verifying the actual number of conference attendees and update conference expenditures. Specific reporting requirements will be provided in separate guidance.
6. **Audit:** Commands shall maintain three years of historical conference approval documentation in anticipation of an Auditor General of the Navy audit.

CONFERENCE REQUEST TEMPLATE

Command Letter Head

From: (Requestor)
To: Staff Director, Headquarters Marine Corps
Via: (1) Administration and Resources Management
(2) Programs and Resources Department
(3) Counsel for the Commandant

Subj: CONFERENCE APPROVAL REQUEST FOR (NAME OF CONFERENCE)

Ref: (a) DSD memo of 29 Sep 2012
(b) UNSECNAV memo of 2 Oct 2012
(c) ASN(FM&C) Budget Guidance Memo BG 13-1D of 7 Jun 2013
(d) JER
(e) JFTR

Encl: (1) Conference Agenda
(2) Event hosting cost estimate (from OSD website)
(3) Total Cost comparison (will include three potential locations if more than 30 attendees in TAD status)

1. In accordance with the references, the subject conference approval is submitted for approval. The following conference information is provided:

Conference Sponsor:

Conference Dates: (do not include travel days)

Frequency of Conference: (quarterly, semiannually, etc. and last dates held)

Estimated number of attendees: (# of attendees in TAD status, # of local attendees)

Conference location: (include both facility and city, state)

Total cost: (should match total provided in enclosures (2) & (3))

Conference point of contact: (name of USMC POC and phone number)

2. Purpose. Provide a statement of the conference's purpose, the mission requirements, and how the conference is suited to meet mission requirements. Explain the expected conference end-state.

3. "Execution of this event is mission critical." (*Sentence must appear exactly as written. Additionally, provide explanation why attendance is mission critical, citing any applicable references, statutes, and/or stating licensure or accreditation requirements*).

4. Non-Federal Entity Support. If the conference is being held in conjunction with or in co-sponsorship with a non-federal entity, include an ethics review from command legal counsel and, if required, the associated co-sponsorship agreement.

Enclosure (1)

5. Length/Frequency of Conference. Justify conference length and why it must be held at the prescribed frequency (e.g., semi-annual, quarterly, or annual).

6. Number of Attendees. Identify number of attendees by organization and physical location in enclosure (3). Show the number of attendees in TAD and local status (no TAD). Provide a justification detailing how the number of attendees is the minimum required to achieve conference mission.

7. Cost Analysis. Use OSD cost tool at: (https://www.cape.osd.mil/costguidance/CostOfHostingEvent/HostingEventWorksheet_PROD.asp). Attach a print out of results in enclosure (2). Provide total cost of the conference in enclosure(3). Also, provide cost comparison for three geographic sites if there are more than 30 attendees in TAD status in enclosure (3). Discuss other options considered (teleconferencing, video conferencing, or train-the-trainer) and why they were not acceptable. Include any cost savings strategies compared to previous conferences. Discuss efforts to reduce audio/visual equipment rental and support costs.

8. Location. Military installations or Government-owned or leased space must receive first consideration. Explain all efforts to first secure military or Government space and why military or Government space is unavailable or unsuitable.

a. A minimum of three geographic sites should be considered for conferences with 30 or more attendees in a TAD status. (see enclosure (3)). Provide an analysis of the three sites to include any overriding operational reason why the conference must be held in the selected city.

b. Confirm that the conference sponsor considered: (1) availability of rooms at established government per diem rates; (2) travel distance for the majority of attendees; (3) Travel costs including local travel, ground transportation, use of rental cars; (4) consideration of lower, off-season hotel rates and their willingness to exempt taxes for lodging.

9. Lodging and Meals. As a general rule, appropriated funds are not authorized to purchase food and beverages. If meals are being provided at government expense in lieu of per diem provide the following:

(a) A justification for using appropriated funds to purchase food and beverages, with local legal endorsement.

(b) The cost of each meal being provided.

(c) Whether meals are contracted separately.

(d) Whether the appropriate proportional meal rate (PMR) has been used (for additional information on PMR, go to <http://www.defensetravel.dod.mil/site/faqpropmeal.cfm>).

(e) Whether the cost of government-furnished meals plus the PMR exceeds the per diem rate for the location.

(f) Whether each traveler will receive notice to ensure travelers correctly annotate their travel orders to not allow full per diem.

10. If spousal travel is required for the event, provide a detailed justification for the spousal travel, to include the purpose of travel, an agenda of spousal events, and an estimate of the total costs associated with the spousal travel.

11. Honorariums or Speaker Fees. State whether honorariums or speaker fees will be paid and costs per speaker. DoD guidance caps speaker fees at \$2,000 per speaker. Any exceptions must be approved by the next higher organizational echelon or command. Attach a copy of the approval.

12. Security Assessment. Provide threat and vulnerability assessments for the conference facility site and any specific security requirements for the conference facility.

By submitting this conference request, I hereby attest to the accuracy of the information in the request, including the necessity for the conference, the cost-benefit analysis, and the cost estimates.

I understand that:

- All conference related contracts must be signed by a warranted contracting officer or, when authorized a government purchase cardholder.
- A government employee will not commit the government to the use of any facility, sign any agreement or otherwise obligate the government for conference facilities or support before approval of the conference by the conference approval authority.
- Lodging and meals for local attendees is not authorized.

NAME

Enclosure (1)

Enclosure (1) Conference Agenda

The agenda should list all planned speakers, programs, ceremonies and other activities. The agenda should provide planned or proposed locations for each event. If break-out sessions are planned, the agenda should explain the purpose and objectives of each session.

*** Unofficial functions, such as socials and ice-breakers paid by attendees out-of-pocket should not be included as part of the conference request. ***

Note: Additional events should not be considered if they result in the extension of conference attendees in TDY status or delay the attendees' return to their duty stations.

Enclosure (2) Event hosting cost estimate document from the OSD website tool. Tool is accessible at: https://www.cape.osd.mil/costguidance/CostOfHostingEvent/HostingEventWorksheet_PROD.asp - This template needs to be revised and this sample is an older version. The current version looks different. Include both pages.

Preparation of this event cost the Department of Defense a total of approximately \$9,195.19.

Generated on 20111117

RefID: 0-CD702CD

1. Event Title					
Marine Corps Conference Example					
2. Event Date			2b. Duration		
2012-01-17			4		
3. Event Location					
Country:		State:		City:	
UNITED STATES		CALIFORNIA		Camp Pendleton, CA	
4. Name of Organization(s) Sponsoring Event					
Insert your command name here					
5. Total Event Activities Itemized Costs:					
Item	Units	Unit Amount	Estimated Cost		
Audio/Visual (AV) support	1	\$1,000.00	\$1,000.00		
Facilities Room Rentals	2	\$750.00	\$1,500.00		
Internet connection	10	\$30.00	\$300.00		
Speaker Fee	1	\$500.00	\$500.00		
			Subtotal: \$3,300.00		
6. Total Event Government Manpower Costs:					
Oversight/Activity	Description	Grade	Manpower	Qualifier	Estimated Cost
Event Execution	Planning and hosting conference time	O-4	8	Days	\$4,995.69
					Subtotal: \$4,995.69
7. Cost of Government Travel Expenses Incurred while Planning the Event:					
Trip Description	Units	Unit Amount	Travel Cost		
Flight	1	\$456.00	\$456.00		
Lodging	2	\$133.00	\$266.00		
Meals and Incidental expenses	2.5	\$71.00	\$177.50		
			Subtotal: \$899.50		
8. Total Event Cost Recovery:					
Recovery Description	Units	Unit Amount	Recovery Amount		
N/A	1	\$0.00	\$0.00		
			Subtotal: \$0.00		
9. Will this cost estimate data be required on a recurring basis? Yes					
9b. Enter the frequency of this recurring: Annual					

To access the Cost Estimate again, use the following URL:
https://www.cape.osd.mil/costguidance/costofhostingevent/hostingeventworksheet_prod.asp?cn=0-CD702CD

Enclosure (3) Total Cost calculation and comparison for three potential locations if more than 30 attendees in TAD status

	Camp Pendleton	Camp Lejeune	Quantico, VA
Local Attendee - No Orders	40	20	20
TAD Attendees	40	60	60
Conference Attendee Total	80	80	80
Conference Costs			
Travel	\$ 20,000	\$ 30,000	\$ 27,000
Meals and Incidental Expenses	\$ 12,780	\$ 12,420	\$ 15,120
Lodging	\$ 21,280	\$ 18,480	\$ 13,440
Local Transit	\$ 3,600	\$ 5,625	\$ 6,750
Event Hosting Cost estimate (from OSD Tool)	\$ 9,195	\$ 9,195	\$ 9,195
Total Cost	\$ 66,855	\$ 75,720	\$ 71,505

Local Attendees		TAD Attendees	
MCAS Miramar	5	II MEF	10
MCB Camp Pendleton	15	MCB Camp Lejeune	10
MCRD San Diego	5	SYSCOM	5
MCAS Pendleton	5	HQMC	15
I MEF	10		
Total	40		40

Option 1: Officers Club at MCB Camp Pendleton, CA

Travel: Develop flight cost estimates from GSA city pair website for main departure locations

Meals and Incidentals: \$71/day

Lodging: \$133/day

Local Transit: develop estimate with rental cars, shuttles, gas, etc.

Option 2: Officers Club at MCB Camp Lejeune, NC

Travel: Develop flight cost estimates from GSA city pair website for main departure locations

Meals and Incidentals: \$46/day

Lodging: \$77/day

Local Transit: estimate with rental cars, shuttles, gas, etc.

Option 3: Marine Corps University at MCB Quantico, VA

Travel: Develop flight cost estimates from GSA city pair website for main departure locations

Meals and Incidentals: \$56/day

Lodging: \$88/day

Local Transit: estimate with rental cars, shuttles, gas, etc.

Instructions to Request Attendance at a non-DoD Conference

The DON has not delegated conference approval authority to the Marine Corps or the Navy. Accordingly, ALL conference requests must be submitted to the DON for approval. DON/AA is the approval authority for attendance at non-DoD conferences when the total cost to the DON is less than \$100K. UNSECNAV is the approval authority for attendance at non-DoD conferences when the total cost to the DON exceeds \$100K.

1. Every USMC command/organization intending to send attendees to a non-DoD conference is tasked to prepare a package to request approval. The request must include all USMC personnel that need to attend the conference and associated costs. DON/AA has been clear that unless a potential attendee has an active role in a conference or earning continuing education credits for specified work-related credentialing certifications, we generally cannot simply attend a conference. The conference request memo must explain (1) why all the identified participants need to attend, (2) what is their role, (3) why an organization needs to send X number - can't they share info upon return? The consolidation of requests from multiple commands/organizations may be tasked to the command with the largest number of attendees. A request is required for USMC personnel attending a conference only for the purpose of accepting an award, even if they are not participating in the rest of the conference.

2. Approval package should contain:

a) Forwarding memo highlighting:

(1) how costs have been minimized

(2) is the conference mission critical and/or fulfills license and certification requirements

- activities are mission critical if the Commander determines that delaying or not performing it would result in the potential failure of the organization to accomplish its assigned missions, functions and tasks (MFTs)

(3) *memo must be signed or endorsed by a General Officer*

b) Conference Brief Sheet - i.e., Department of the Navy - "Attendance At" Conference Request

c) Attendees by Name - details purpose for attendance and costs per person.

d) Transportation Analysis - required if rental cars are being requested.

e) Conference Agenda - from the conference website. If none is available at the time the request is being prepared, it should be stated in the memo.

f) Route Sheet - provide an HQMC Route Sheet (5211) to AR, P&R, Staff Director and initialed by command leadership or a local Route Sheet for non-HQMC Commands.

g) Action Memo from the Staff Director (formerly DMCS) to DON/AA. A Word version of this memo must be one of the attachments in MCATS. A separate bullet should explain the role/purpose for attendance. This is not an enclosure to the forwarding memo.

h) If SECNAV pre-approval is required, an additional Action Memo from the Staff Director to DON/AA is required. A Word version of this memo must be one of the attachments in MCATS.

3. **MCATS:** ALL requests must be submitted to HQMC via MCATS as a DOCUMENT to **AR**. Other HQMC reviewers will be added to MCATS by AR. A MCATS TASK will be returned, because DMCS is not tasked via this system.

a) Subject line should include title of conference and dates, i.e., "Request to attend the National Navy Officers Association Leadership and Professional Development Training Conference, 16-18 July 2013". The title should be directly from the conference website.

b) Modified requests do not have to be resubmitted via MCATS. They can be emailed directly to the analyst requesting correction.

4. **Approval Authority:** Since the DON has not delegated conference approval authority to the Marine Corps, all requests to attend a non-DoD conference must be forwarded to the DON for approval. There is no dollar threshold. Once the HQMC review is complete, the Staff Director will forward the conference request package to DON/AA for appropriate approval. If personnel from both Navy and Marine Corps are attending the same non-DoD conference, DON/AA will generally consolidate the data for a single DON request.

5. **No cost to the government:** For a non-DoD conference where there is absolutely no cost to the government, a formal conference request is not required. This means no USMC personnel will request reimbursement for mileage, parking, metro, etc. and there is no funding provided by another DoD entity. However, an MFR should be prepared to document participation in a non-DoD conference where there is no cost to the government. The MFR should provide title of the conference, dates (not to include travel days), location, statement indicating it is mission critical or is required for certification/licensure, purpose, the numbers of attendees, estimated, etc., be chopped by a GO/SES, and retained centrally by the Command Conference Manager or POC (for HQMC Staff Agencies). Commands sending personnel to such a conference will need to include attendance in the quarterly conference reports.

a. **EXCEPTION:** Conferences partially or fully funded through gifts must be submitted to the DON for approval. Both the gift offer and gift acceptance letters should be included in the package. The total cost of the gift(s) should be clearly annotated and subtracted from the overall cost of the conference.

6. **Timeline:** Begin developing the conference request as early as possible to allow appropriate staffing. At a minimum, conference requests should be submitted to HQMC (AR) 4 weeks in advance of when you need the approval. Remember, approval is required before any obligations are made to attend the conference. The 4 weeks lead time provides 2 weeks for HQMC and 2 weeks for DON/AA to process the request. *Requests submitted with less than 3 weeks before the start of the conference may be denied because there is not enough time to process it.*

***** Requests requiring SECNAV approval must be submitted to AR 120 days prior to the first day of travel to the conference. This complies with the SECNAV requirement for 90 day notification plus 2 weeks for DON/AA to process plus 2**

*weeks for HQMC to process the request. An additional Action Memo is required to request SECNAV pre-approval. ****

SECNAV approval is required for the following:

- 1) Conferences hosted by DON which are estimated to cost more than \$500,000
- 2) Conferences hosted by NFEs, which DON personnel attend, where costs to DON exceed \$100K

**** It is incumbent upon each command to determine if DON-wide participation will exceed \$100K. This includes accounting for the Secretariat and USMC participants. ****

7. **Reporting:** All conferences which exceed \$20K (hosting or attending) must be reported to OSD. Commands requesting conference approval with estimates exceeding \$20K must report the actual number of attendees to AR (Lynette Rollerson) within 15 calendar days following conclusion of the conference.

8. Refer to the USMC Conference Workspace for each conference request because the conference review and approval process and templates are updated periodically, as the process continues to mature.

COMMAND LETTERHEAD
(TEMPLATE FOR ATTENDANCE AT NON-DOD HOSTED CONFERENCES)

5050
DD MMM YY

From: (Official Title of Submitting Command)
To: Staff Director, Headquarters Marine Corps
Via: (1) Administrative and Resources Department
(2) Deputy Commandant, Programs and Resources

Subj: REQUEST TO ATTEND (COMPLETE NAME OF CONFERENCE AND ASSOCIATED CONFERENCE DATES) [ALL CAPS] *[Use title from conference website]*

Ref: (a) DSD Memorandum, Implementation of Conference Oversight Requirements and Delegation of Conference Approval Authority, 29 Sept 2012
(b) USN memo, Delegation of Conference Approval Authority, 2 Oct 2012
(c) ASN(FM&C) Budget Guidance memo BG13-3B, 25 Mar 2014
(d) JTR/JFTR
(e) DoD 5500.07-R, Joint Ethics Regulations

Encl: (1) Conference Brief Sheet - Attendance at Non-DoD Hosted Conference Only
(2) Attendees by Name
(3) Conference Agenda
(4) Transportation Analysis *(required if requesting rental cars)*

1. In accordance with the references, this request to attend the subject conference is submitted for your endorsement. The following conference information is provided:

- a. Conference Host:
- b. Conference Dates: *[Do not include travel days]*
- c. Conference Location: *[Include venue, city, state]*
- d. Estimated Number of Attendees: *[Total #, # TAD, # local]*
- e. Total Cost: *[From encl (1)]*
- f. Cost per person for this event: *[Total cost/Total attendees]*
- g. Cost per person, per day: *[Calculate this value based only upon the length of the conference, do not include travel days.]*

2. Purpose. Provide a statement of the conference's purpose, and how the conference is suited to meet mission requirements. *Explain the expected conference end-state.*

Enclosure (3)

Subj: REQUEST TO ATTEND (COMPLETE NAME OF CONFERENCE AND ASSOCIATED CONFERENCE DATES) [ALL CAPS]

3. "Attendance at this event is mission critical." (Sentence must appear exactly as written. Additionally, provide explanation why attendance is mission critical, citing any applicable references, statutes, and/or stating licensure or accreditation requirements. Specify if attendee(s) is/are presenting, a panel member, chair, award recipient, etc. List name of certification and why the CEUs cannot be obtained in another manner.)

4. "All cost reduction measures have been implemented." (Sentence must appear exactly as written. Cite all examples of cost reduction efforts, i.e. "Costs were reduced by having attendee drive POV (\$310 round-trip) versus flying from Point A to Point B (\$598), which would also require a rental car." State specifically if any or all costs will be offset by a gift of travel, grant, endowment, reimbursement by an outside agency or group, etc. Clearly state the final total cost to the DoD. If this is a recurring event, include total cost from previous year and demonstrate cost reductions, i.e. due to a decrease in numbers, venue change, etc., in keeping with direction to reduce costs by 30% from 2012-2013).

- If \$3,000 per person and/or \$600 per person per day are exceeded, include a detailed explanation of the costs
- If spouse travel and/or Invitational Travel Orders (ITOs) will be requested, discuss here with total number of spouses and total cost for ITOs.

5. "I certify that participation in this conference will significantly advance the Department of the Navy's mission, and that the associated expenses and activities comply with all applicable travel, conference, and acquisition regulations." (Sentence must appear exactly as written).

6. For any questions, please contact (Provide your command POC with phone number and email).

I. M. GENERAL
(GO Signature; if there is no GO at the local level, the first GO in the chain of command should sign an endorsement memo)

DEPARTMENT OF THE NAVY - "ATTENDANCE AT" CONFERENCE REQUEST

Non-DoD Hosted Conferences

1	Organization submitting request		
2	POC for attendance at this conference		
3	Name of Conference		
4	Dates of Conference		
5	Travel Dates for Attendees		
6	City and State		
7	Venue Name		
8	Conference Host/Sponsor (NFE or non-DoD agency only)		
9	Conference Website URL		
10	Agenda: Is there anything in the agenda that would create an unfavorable perception?		
11	Total # of Attendees from your organization		
12	# of local attendees		
13	# of attendees in TAD status		
14	# of attendees who will need to arrive early for conference setup		
15	Conference Fee Amount (per person)		
16	Are meals provided as part of the conference fee? Identify which meals		
17	# of attendees paying the conference fee		
18	Lodging rate for city & state		
19	Meals rate for city & state		
20	Incidentals rate for city & state		
21	Purpose of the Conference		
22	Describe the value to the organization and how it advances the DON mission		
23	What is the impact if this is disapproved?		
24	Describe the target DON audience for this conference/who the DON attendees represent		
25	Costs	Amount	Notes
A	Airfare		
B	Baggage Fee charges		
C	Car Rental		
D	Parking Costs (airport, hotel)		
E	Taxi		
F	Trains		
G	Buses		
H	Mileage (local)		
I	Mileage (non-local)		
J	Lodging		
K	Lodging Tax		
L	Incidentals		
M	Visas		
N	Internet access		
O	Phone charges		
P	Meals		
Q	Registration Fees		
R	Materials (books, tools, etc.)		
S	Event fees		
T	Contractor fees		
U	Booth Space Rental		
V	Booth Shipping		
W	Advertisements		
X	Speaker Fees		
	Grand Total	0	

Local Transportation Analysis for [Conference Name]

Cost Rollup

\$ 1,470.00	Rental Car Cost
\$ 1,631.70	Government Van Cost
\$ 2,530.50	Taxi-Only Cost
N/A	Leased Van Cost
N/A	Airport/Hotel Shuttle Cost

Rental Car Analysis

Assumption 1: Attendee from Norfolk will be driving and reimbursed for miles on POV Methodology: use estimates and cost breakout based upon previous cost estimate within approval package for rental car and associated expenses

\$ 210.00	Cost for (1) Attendee POV mileage reimbursement (from Norfolk)
\$ 1,260.00	Cost for (6) Attendees Rental Cars and Associated Expenses
\$ 1,470.00	Total Cost For Rental Car Expenses (and (1) POV reimbursement)

Government Van Use Analysis

Assumption 1: 12 passenger van and driver available for use by parent support command (Henderson Hall) for transporting personnel from/to hotel and conference location Assumption 2: Flight arrival/departure times and airport locations (BWI/Reagan/Dulles) are unique (certain due to attendees commands approval of a DTS request requiring selection of lowest cost flight to the metro area within a window timeframe and not a specific airport at a narrow time window); this will require taxi transportation to/from airport for all attendees.

Methodology: Utilize taxi transportation costs from taxi analysis (below) for airport arrival/departure transportation and use \$0.56/mile (2014 IRS business mileage reimbursement rate which includes fuel, wear & tear, etc.)

\$ 1,480.50	Airport to Meeting Location Cost (Both Ways/ All Attendees)
\$ 151.20	Cost Of (5) Daily Round Trips From Motor Pool to Meeting Location (27mi)
\$ 33.60	Cost of (5) Round Trips Between Lodging & Meeting
\$ 1,631.70	Total Cost for Gov Van

Taxi-Only Analysis

Assumption 1: Flight arrival/departure times and airport locations (BWI/Reagan/Dulles) are unique (certain due to attendees commands approval of a DTS request requiring selection of lowest cost flight to the metro area within a window timeframe and not a specific airport at a narrow time window); this will require individual taxi transportation to/from airport for all attendees as flights are not booked nor should they be booked to conform to taxi sharing as flight cost differential between arrival departure times is likely greater than taxi sharing savings (some flights are trans-Atlantic and trans-Pacific flights and fares associated between arrival/departure times vary considerably)

Assumption 2: Attendees will use BWI/Reagan/Dulles airports and will be staying at a hotel or government lodging within 6 miles distance from BOQ to meeting location) Methodology: use mean distance (42.3mi) from BWI/Reagan/Dulles to meeting location for calculating airport transportation and use \$2.50/mile for taxi fare calculation (industry standard)

\$ 1,480.50	Airport to Meeting Location Cost (Both Ways/ All Attendees)
\$ 1,050.00	5 Days of Lodging to Meeting Transportation Cost
\$ 2,530.50	Total Cost for Taxi Transport

Passenger Van Leasing Analysis

Finding 1: Not feasible (approving authority will not grant approval for van rental due to government vans being available)

Hotel Shuttle Use Analysis

Finding 1: Not feasible (no hotel shuttles specific to Jacobs Center within the local area)



DEPARTMENT OF THE NAVY
HEADQUARTERS UNITED STATES MARINE CORPS
3000 MARINE CORPS PENTAGON
WASHINGTON, DC 20350-3000

IN REPLY REFER TO:

ACTION MEMO

FOR: DEPARTMENT OF THE NAVY/ASSISTANT FOR ADMINISTRATION

FROM: Major General Michael R. Regner, Staff Director

SUBJECT: Conference Approval Request to Attend [*or Host, as appropriate*] the Society for International Affairs Summer Conference, 15-17 July 2013

- Request approval to attend the Society for International Affairs Summer Conference. This is a non-Department of Defense sponsored conference. Marine Corps attendance is considered mission essential as it relates to export control laws, regulations and policies that are critical to safeguard U.S. technology.
- Mr. Jones will provide instruction and will also be part of a panel during this conference.
- Details about the conference and justification for attendance are contained in the request at Tab A.

RECOMMENDATION: Approve Marine Corps Systems Command attendance at the Society for International Affairs Summer Conference.

Approve _____ Disapprove _____

COORDINATION: None.

Attachments:

As stated

Prepared by: Name, Command, Phone number [*this should be the Command Conference POC*]

Enclosure (3)