



**DEPARTMENT OF THE NAVY**

BUREAU OF MEDICINE AND SURGERY

2300 E STREET NW

WASHINGTON DC 20372-5300

IN REPLY REFER TO

**BUMEDINST 5050.7**

**BUMED-NMMPTEC**

**8 JUN 2007**

**BUMED INSTRUCTION 5050.7**

**From:** Chief, Bureau of Medicine and Surgery

**To:** Ships and Stations Having Medical Department Personnel

**Subj:** POLICY AND PROCEDURES CONCERNING SPONSORING CONFERENCES INVOLVING EXPENDITURE OF NAVY TEMPORARY ADDITIONAL DUTY FUNDS

**Ref:** (a) OPNAVINST 5050.24F  
(b) BUMEDINST 5050.6  
(c) Joint Federal Travel Regulations, Chapter 2, Part G  
(d) Joint Travel Regulations, Chapter 4, Part S

**Encl:** (1) Sample Request for Conference

1. **Purpose.** To provide policy and procedures for sponsoring conferences involving expenditure of temporary additional duty funds per reference (a). For the purpose of this instruction, "conferences" include professional updates and training symposia. Excluded are classes normally sponsored by Navy Medicine Manpower, Personnel, Training and Education Command (MPT&E) and subordinate commands, guidance provided in reference (b). The objectives of controlling conference approvals are to ensure the optimum use of funds to achieve desired results, observance of CNO policy, compliance with security and legal requirements and ensure expected results are commensurate with financial expenditures.

2. **Background.** Conferences provide a forum for the exchange of ideas and information which could not readily be accomplished through other means. Conferences require careful planning to minimize total cost to the Navy and to ensure that security and legal requirements are properly addressed. Conferences are not appropriate if the subject matter can be transmitted by directive, telephone, video teleconference, or other means without significant reduction of effectiveness.

3. **Policy**

a. Approval authority as defined in paragraph 5 below shall restrict conferences involving expenditure of temporary additional duty funds to those absolutely essential to meet mission requirements and will ensure any potential security or legal issues are addressed in advance as outlined in reference (a).

b. Commands proposing annual conferences are required to include the proposal in the Command's annual budgeting plan prior to submitting to the approving authority.

c. All requests for conferences shall be submitted to the approval authority no later than 120 days prior to conference start date using the format in enclosure (1). Commands shall take no action (i.e., hotel block room reservations, meeting room reservations, caterers, etc.) to commit or obligate the government in any way prior to approval. Commands shall ensure sufficient processing time for a request that will preclude interference with conference deadlines (speaker arrangement, reservations, etc.).

d. All requests must be in compliance with references (c) and (d).

e. Use of locations that would require actual expenses that exceed normal per diem rates is not authorized.

f. Conferences involving government civilian participation shall be scheduled in order to minimize travel outside of normal work hours.

g. Conferences during which classified information may be disseminated shall be limited to appropriately cleared personnel and locations.

4. Authority and Procedures. BUMED-sponsored conference approval authority and procedures are as set forth below:

a. Chief, Bureau of Medicine and Surgery per reference (a) delegates approval of BUMED sponsored conferences as follows:

(1) Conferences not exceeding \$5,000 in total costs: Echelon 3, 4, and 5 Commanders, Commanding Officers and Officers-in-Charge have the authority to approve all conferences that are related to their area of operation which do not exceed \$5,000.00 to include travel and per diem for all attendees regardless of payor;

(2) Conferences exceeding \$5,000 but not exceeding \$30,000 in total cost: Commanders of the Navy Medicine Regions have the authority to approve all conferences related to their area of operation which do not exceed \$30,000 to include travel and per diem for all attendees regardless of payor. For conferences where total estimated temporary additional duty travel costs exceed \$5,000, the approval authority must be prepared to provide conference cost information to the CNO upon request;

(3) Conferences exceeding \$30,000 in total costs: BUMED/M8, is delegated the authority to approve all conferences exceeding \$30,000 to include travel and per diem for all attendees regardless of payor, except for the Surgeon General's Annual Conference. All conferences exceeding \$50,000 must submit additional justification

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to M8 along with the conference package. For conferences where total estimated temporary additional duty travel costs exceed \$5,000, the approval authority must be prepared to provide conference cost information to the CNO upon request.

b. Commands requesting conference approval must do so in the format provided in enclosure (1). All conferences must be requested in accordance with this instruction and other applicable regulations and are subject to funding constraints. All submitted requests will include a site cost comparison as required by references (c) and (d).

5. Control. Commands are required to maintain all cost information associated with an approved conference including estimated temporary additional duty travel costs for all attendees. By 31 October of each year, commands shall provide an annual summary for the preceding year of all conferences, their locations, and their costs to BUMED M8.

6. Sample Format. Enclosure (1) is available in Word at the Forms tab on the Directives Web site at: <http://navymedicine.med.navy.mil/>.



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SAMPLE REQUEST AND JUSTIFICATION TO SPONSOR A CONFERENCE

From: (Requesting Command)  
To: (Approval Authority)  
Via: (Regional Commander)

Subj: REQUEST APPROVAL TO SPONSOR A CONFERENCE

1. Request approval to sponsor the following conference:
  - a. Name of conference.
  - b. Dates of conference.
  - c. Location.
  - d. Specific goals (How does the conference relate to accomplishment of the assigned mission?).
  - e. Conference objective (Is it clear and attainable?).
  - f. Conference justification (Is this the most cost-effective and efficient means of accomplishing the objective? Have all less costly alternatives been considered (include site cost comparison)? If a recurring conference, is the requirement still valid or frequency of event considered?).
  - g. Presenters (Will the presentations be balanced in terms of point of view and professional expertise as well as professional development through participation?).
  - h. Target audience.
  - i. Attendees (What is the total number? What activities will be represented? Is there compelling rationale for multiple attendees from one activity? Are there any non-Federal participants or attendees? If so, what is their relationship to the Federal government and have all regulations governing their participation been observed, including legal review?).
  - j. Proposed agenda (Has it been minimized to the number of dates needed to meet the objective? When civilian attendance is required, has the agenda been formulated to minimize travel outside of normal work hours?).

k. Estimated total Navy cost: (Did the decision on site selection, attendees, and use of facilities take into account associated resource costs?).

(1) Travel

(2) Per Diem

(3) Lodging

(4) Administrative costs

(5) Other (specify)

(6) Total costs

2. Point of contact information including phone number and e-mail address.

Signature Block