



DEPARTMENT OF JUSTICE—SPONSORED CONFERENCE REQUEST AND REPORT

COPS OFFICE INSTRUCTIONS AND STEP DESCRIPTIONS

Instructions for “Conference Request and Report” Form (EXTERNAL)

1. Cooperative agreement and contract recipients submit the conference request and report forms to the appropriate COPS Office conference Inbox.
 - Requests: COPS.Conferencecosts@cops.usdoj.gov.
 - Complete sections A-J, sheet A, and sheet B.
 - Reports: COPS.Conferencecosts@cops.usdoj.gov.
 - If the total cost of the conference is more than \$20,000, then a conference report must be submitted.
 - Complete sections A and B.
 - Use the completed conference request form that was approved, which will have some of the information pre-populated.
 - Provide additional information (Cells in white only)
 - Reports are due no more than 45 days after the last day of the event.
2. An internal COPS Office tracking number will be assigned to a completed conference request form, and the cooperative agreement recipient will be notified that their request has been received and is being processed.
3. Please submit the conference request at least 90 calendar days prior to the date on which you need to know if your conference has been approved or denied.
4. If the conference will cost more than \$100,000, please submit the conference request at least 120 days prior to the date on which you need to know if your request has been approved.

Line item instructions for completing the form:

| Steps | Step Title | Description |
|---|---|---|
| Component Use Only: Completed by COPS Office Program Assistant | | |
| N/A | COPS Office tracking number | Input the unique identifier provided by the COPS Office conference administrator. This number can be used to track the status of the event. |
| N/A | Cooperative agreement recipient or contractor | Input the name of the organization hosting the event. |
| N/A | Coop. agreement or contract contact’s name | Input the name of the conference host’s point of contact. |
| N/A | Contact phone number & email address | Input contact information of the conference host’s point of contact. |



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| Section A. General Conference Information: To be completed by Cooperative Agreement/Contract Recipient | | |
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| 1 | Name of requestor | Input the name of the COPS Office staff member responsible for overseeing the event. Note: This is typically the program manager. For contracts, it may be the contracting officer’s representative (COR). |
| 2 | Component name (drop down) | Select “COPS” from the drop-down menu. |
| 3 | Is this submission for a conference request or report? (drop down) | Select “Request” from drop-down menu if you are submitting a request. Select “Report” from drop-down menu if you are submitting a report for a conference costing more than \$20K. |
| 4 | JMD tracking # (report only) | Leave blank. |
| 5 | If this is a re-submission of a previously disapproved conference, indicate original tracking number | If applicable, input original tracking number. |
| 6 | Official title of the conference (no abbreviations) | Input the title of the conference, training, meeting, etc. |



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| 7 | <p>Is this a blanket request? (drop down)</p> <p>If “Yes,” skip A9–13, A16 and sections E, C, and E1.</p> <p>If “No,” skip A8.</p> | <p>Select “Yes” or “No” from the drop down menu.</p> <p>Note: Approval may be requested for more than one conference at a time if the name and purpose of each event are the same and if the conferences occur during the same federal fiscal year. Locations and dates of the conferences must be identified (if known). Reporting for these events (if necessary) should be done on an individual basis.</p> <p>If the locations and number of attendees will vary, it is recommended that estimated costs be based on the most expensive location and the estimated number of attendees be based on the smallest number of attendees. This will ensure that all events are within caps.</p> |
| 8 | <p>If this is a blanket request, indicate the number of occurrences this fiscal year, locations, and dates</p> | <p>If applicable, input number of occurrences, all known locations, and all known dates.</p> |
| 9 | <p>Conference start date</p> | <p>Input the first day of activities for the conference.</p> <p>Note: If the conference will be preceded or followed by a smaller meeting (e.g., faculty meeting), two separate conference request forms must be submitted. Therefore, enter the start and end dates for each event on separate forms.</p> |
| 10 | <p>Conference end date</p> | <p>Input last day of activities for the conference.</p> |
| 11 | <p>Location: country (drop down)</p> | <p>Select country from the drop-down menu.</p> |



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| 12 | Location: state/territory/possession (drop down) | Select the state, territory, or possession from the drop-down menu. |
| 13 | Location: city | Input the location city. |
| 14 | Justification that the conference is essential to accomplishing core mission | Input justification. Note: The space is limited to 255 characters; therefore, please be as brief and persuasive as possible. While the meeting may have been approved during the application process, that is not sufficient justification, as circumstances and priorities change over time. |
| 15 | Funding appropriation symbol | Input the grant / cooperative agreement award or contract number supporting the event. |
| 16 | Facility name (specific) | Input the specific facility name (e.g., Sheraton Uptown, Courtyard Marriott, or Jackson Federal Building). |
| 17 | Facility type (drop down) | Select “Federal” or “Non-Federal” from the drop-down menu. |
| 18 | Cooperative agreement (Y/N) (drop down) | Select “Yes” or “No” from the drop down menu to indicate if the conference is being supported by an OVW cooperative agreement. |
| 19 | Reporting period (required when reporting actuals) (drop down) | If request: Leave blank. If report: Select the federal fiscal year quarter in which the event will occur: Q1 (Oct 1 – Dec 31), Q2 (Jan 1 – March 31), Q3 (Apr 1 – June 30), or Q4 (July 1 – Sept 30). |



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Note: Estimates on the number of attendees should be calculate based on historical data, current grantee interest, and other empirical factors that might drive attendance up or down (e.g., cuts in state budgets).

While we recognize that these are estimates, award recipients who consistently over-estimate the number of attendees may be required to provide additional justification and documentation for future requests. Recipients are encouraged to under-estimate to avoid exceeding the caps and potentially needing to cover excess costs with non-COPS Office funds.

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| 20 | Number of DOJ federal attendees | Input the number of anticipated attendees who are U.S. Department of Justice (DOJ) employees. (Please consult your COPS Office program manager.) |
| 21 | Number of other federal attendees | Input the number of attendees who are federal employees but who do <u>not</u> work for the DOJ. (Please consult your COPS Office program manager.) |
| 22 | Number of non-federal attendees | Input the number of attendees who are not federal employees. |
| 23 | Total number of attendees (auto-populates) | Leave blank, as this box will auto-populate from the previous three boxes. |
| 24 | Total number of attendees whose travel expenses are paid for by the DOJ | <p>Input the number of attendees who will travel to this event on a DOJ-issued travel authorization or through the cooperative agreement or contract supporting this event. (Please consult your COPS Office program manager as needed.) Also include any DOJ local staff because local travel expenses may be incurred.</p> <p>Note: In most cases, this will be the same as the figure in box 20 plus the number of staff and consultants paid for by the host organization. This count should also include any local staff attending the event who may incur local travel expenses (taxi, subway, etc.). Box 24 cannot be less than Box 20.</p> |
| 25 | Total cost (auto-populates from entries below) | Leave blank, as this box will auto-populate. |
| 26 | Predominately internal event held at a non-federal facility (Y/N) (auto-populates) | Leave blank, as this box will auto-populate. |



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| Competitive Contracting Section: To be completed by Cooperative Agreement or Contract Recipient for Conference Reports Only | | |
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| 27 | Were federal procurement regulations followed as appropriate? (drop down) (conference reports only) | If request: N/A. If report: If contract, select answer from drop-down menu. Cooperative agreement recipients should select "N/A Cooperative Agreement." |
| 28 | Were all market research documents used in conference planning decisions retained? (drop down) (conference reports only) | If Request: N/A. If Report: Select the appropriate answer from drop-down menu. |
| Section B. Total Conference Costs: To be completed by Cooperative Agreement or Contract Recipient | | |
| <p>Cooperative agreement and contract staff members who are not attending the conference should not have any compensation costs included for time spent working on tasks not related to the conference. Only time for presenting/facilitating and logistical and programmatic planning related to the event should be included on the form. The COPS Office encourages technical assistance (TA) providers to partner with one another in the development and delivery of training and technical assistance. To ensure that the full cost of each conference is captured, it is imperative that each TA provider hosting the conference provide their individual estimate.</p> | | |
| 1 | Conference meeting space (including rooms for break-out sessions) | Input estimated direct and indirect costs for conference meeting space. |
| 2 | Audio-visual (AV) equipment and services | Input estimated direct and indirect costs for AV equipment. Note: This includes microphones, projectors, screens, speakers, and related set up fees and surcharges . If using your own AV equipment, confirm AV equipment is compatible with the facility's AV environment prior to signing the contract. |



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| 3 | Printing and distribution | Input estimated direct and indirect costs for printing and distribution. This should include the cost of shipping materials to and from the event site. |
| 4 | Meals provided by the DOJ: a. Breakfast b. Lunch c. Dinner | Input estimated direct and indirect costs of meals that will be provided as part of the official program and not through meals and incidental expenses (M&IE) reimbursement. Note: These are typically “working meals,” which require prior approval. The cost for meals must be within the calculated threshold, which is configured in section D. Meals provided by the DOJ do not include M&IE reimbursement or meals that will be covered through matching funds, funds provided to the grantee through an award from another federal agency, or meals covered by program income (such as a registration fee). Very few circumstances qualify for such approval. |
| 5 | Refreshments provided by the DOJ | Input estimated direct and indirect costs for refreshments. Refreshments are generally prohibited. However, in those rare circumstances in which refreshments are necessary, additional DOJ (DAG) approval is required. Such approval requires additional processing time. |



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| 6 | Meals and incidental expenses (M&IE) for attendees | <p>Input estimated direct and indirect costs for M&IE for all attendees whose M&IE expenses will be reimbursed by the host's cooperative agreement or contract.</p> <p>If meals are provided, the M&IE reimbursed should be deducted accordingly (i.e., if 1 day conference in a certain location amounts to \$69 per day for M&IE but a lunch is being provided, the M&IE reimbursement must be reduced by \$17, down to \$52).</p> <p>*Travel days are based on 75% of the GSA M&IE rate, regardless of the number of hours it takes to travel.</p> <p>Note: Local staff travel requests—DOJ policy does not permit M&IE reimbursement for local staff whose TDY/office is within 50 miles of the event facility. DOJ policy does permit lodging reimbursement with justification. Lodging reimbursement justification in this circumstance must be submitted prior to the event to the COPS Office for waiver consideration. If a waiver is granted, the waiver applies only for lodging costs and only for those employees identified in the waiver request. It does not apply to M&IE expenses. It is the award recipients' responsibility to provide the justification at the time of the request.</p> |
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| 7 | Lodging | <p>Input estimated direct and indirect costs for lodging, including taxes for all attendees whose lodging expenses will be reimbursed by the host’s cooperative agreement or contract.</p> <p>(On sheet A, please delineate between the lodging rate and the lodging tax.)</p> <p>Note: Local staff travel requests—DOJ policy does not permit M&IE reimbursement for local staff whose TDY/office is within 50 miles of the event facility. DOJ policy does permit lodging reimbursement with justification. Lodging reimbursement justification in this circumstance must be submitted prior to the event to the COPS Office for waiver consideration. If a waiver is granted, the waiver applies only for lodging costs and only for those employees identified in the waiver request. It does not apply to M&IE expenses. It is the award recipients’ responsibility to provide the justification at the time of the request.</p> |
| 8 | Common carrier transportation | <p>Input estimated direct and indirect costs for common carrier transportation (airfare, train, and long distance bus fare / long distance mileage) that will be reimbursed by the host’s cooperative agreement or contract.</p> <p>Note: Search engines should be used to estimate the most recent fares.</p> |



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| 9 | Local transportation | <p>Input estimated direct and indirect costs for local transportation (the amount expended to travel from the airport to the hotel and other local travel) necessary for the event.</p> <p>This should include reimbursement to attendees as well as organized group transportation such as shuttle buses. This also includes any local staff attending the event and who may incur local travel expenses (taxi, subway, etc.).</p> <p>Note: Local travel is defined as within 50 miles of the TDY/office and the event facility.</p> |
| 10 | Conference planner – logistical | <p>Input estimated direct and indirect costs for logistical conference planners.</p> <p>Note: Logistical conference planners perform the logistical planning necessary to hold a conference, which may include recommending venues, advertising, setting the stage and AV equipment, securing hotel rooms, interacting with caterers, and other non-programmatic functions. These can be determined by hourly rates or actual set contracts. These costs must be estimated and tracked regardless of whether the logistical planning is conducted by internal staff or an external planner. If another COPS Office cooperative agreement or contract will provide this service, those estimated costs must still be entered here and noted on sheet A.</p> <p>Executive management’s time on logistical planning should be limited to ensure cost effectiveness.</p> |



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| 11 | Conference planner - programmatic | <p>Input estimated direct and indirect costs for programmatic conference planners.</p> <p>Programmatic planners develop the conference agenda, content, and written materials. They may also identify and provide appropriate subject matter experts and conference participants. Programmatic planning is the primary purpose of most COPS Office training and technical assistance cooperative agreements that include holding conferences.</p> <p>Note: Programmatic planning costs may be quite small, but it is very unlikely that these costs would ever be zero. Costs can be determined by hourly rates or actual set contracts. Please contact the COPS Office if you need additional guidance on what to include when calculating these costs.</p> |
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| 12 | Conference trainer/ instructor/ presenter / facilitator | <p>Input estimated costs for trainers, instructors, presenters, facilitators, or anyone who will be considered faculty at the conference. This includes TA provider staff serving as faculty.</p> <p>Do not include travel, lodging, and M&IE expenses in this category. Those should be reflected in the previous general categories for travel, lodging, and M&IE. You should include compensation for travel on prep days if being processed. The COPS Office encourages the use of a lower consultant rate for travel days, and the number of travel days should be based on the distance between the traveler’s home office and the event.</p> |
| 13 | Other costs (itemize below) | Input estimated direct and indirect costs for other factors that contribute directly to the total cost of the conference, such as interpreters and other accessibility supports. |
| 14 | Total conference cost | Leave blank, as this section will auto-populate. |



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Section C. Meals & Refreshments Threshold Calculator:

To be completed by Cooperative Agreement or Contract Recipient

Request: Input the per diem rates for the applicable locations. Select the values from the drop-down menu. Only one box should be selected. Complete this part before starting section D.

1. Continental U.S. M&IE: Use GSA per diem rates.
The appropriate M&IE rates can be found at "Per Diem Rates [Overview]," GSA.gov,
<http://www.gsa.gov/portal/category/21287>.
2. Hawaii, Alaska, U.S. Territories & Possessions M&IE: Use the U.S. Department of Defense per diem rates. The appropriate M&IE rates can be found at "Per Diem Rates Query," Defense Travel Management Office, DoD Center for Travel Excellence,
<http://www.defensetravel.dod.mil/site/perdiemCalc.cfm>.
3. Foreign Country M&IE: Use the U.S. Department of State per diem rates.
The appropriate M&IE rates can be found at "Foreign Per Diem Rates," Office of Allowances, U.S. Department of State,
http://aoprals.state.gov/content.asp?content_id=184&menu_id=78.

Report: N/A



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Section D. Meals:

To be completed by Cooperative Agreement or Contract Recipient

Request: Input the number of times a certain meal is provided. For example, if the event is a three-day conference with 100 attendees and you are requesting permission to provide on the second day a working lunch that will be paid for by cooperative agreement funds, enter 1, not 100. The number of attendees will be auto-populated from a previous section in the request form. After entering data, a threshold will calculate automatically in the last column. Meal costs should not exceed the thresholds that are generated. If the threshold is exceeded, additional justification will be required, and the conference request, even if less than \$100,000, will have to be submitted for additional DOJ official approval.

1. Breakfast
2. Lunch
3. Dinner

Report: N/A

Section E. Other Thresholds Calculator: Auto-Populated

Request: This section is designed to help determine the thresholds allowable for a particular conference or event. This section is generated automatically. Do not enter additional data, as it is merely for your reference. These thresholds should be considered outside caps, and every effort should be made to come in well under these caps, particularly when requesting permission to provide meals.

1. Conference space, and AV equipment and services: \$25 per person, per day
2. Logistical conference planner: \$50 per person, max = \$8,750.
3. Programmatic conference planner: \$200 per person, max = \$35,000.

Report: N/A



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Section F. Justification if submitting Conference Request Form with Estimated Costs Over the Threshold: To be completed by Cooperative Agreement or Contract Recipient

Request: Input the justification, if applicable.

If any of the boxes in this section are white, this indicates that an explanation is required for that specific conference cost category. No justification is required if the cells remain dark gray.

Note: If any of the cells turn red, that means the cost is over the threshold and additional approval is required which may delay approval of the request.

1. Conference space, and AV equipment and services
2. Refreshments
3. Logistical conference planner
4. Programmatic conference planner

Report: N/A

Section G. Justification Required for Conferences with Meals: To be completed by Cooperative Agreement or Contract Recipient

Request: Input the justification for the government-provided meals, if applicable.

Report: N/A



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Section H. Justification for Non-Federal Facility (complete if cells turn white) Drop Down:

To be completed by Cooperative Agreement or Contract Recipient

Request: Select one of the options from the drop-down menu.

Report: N/A

Section I. Facilities Considered:

To be completed by Cooperative Agreement or Contract Recipient

Request: Input information on venues and facilities that were considered for selection, both federal and non-federal.

Note: If a cost for meeting space is included, a minimum of three venues of similar type, quality, and location should be considered and listed. Federal facilities should be considered where reasonable, available, and accessible to non-federal attendees. In the first line of this section, the total estimated cost will be auto-populated because this facility was selected. For the subsequent lines, indicate the name, facility type, total estimated cost of the entire conference (not just the meeting space cost), select "No" for the selected question, and then the reason for non-use.

Report: N/A

Section J. Estimated Attendee Information:

To be completed by Cooperative Agreement or Contract Recipient

Request: Input information about where the attendees are coming from, the organizations, and the number of expected attendees.

Note: For many COPS Office cooperative agreements, the bulk of attendees can be classified as "law enforcement organizations" coming from "nationwide" locations.

Report: N/A



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Additional Information

Agenda

An agenda must be submitted with the request and may be in draft form. The agenda will be used to assess the reasonableness of the event, and it must, at a minimum, include topics to be addressed and start and end times for each day.

Sheets A–D. Conference Questions, Justification, and Expense Calculation Sections

Expense justification

This section should include the cost and detailed information about how costs were estimated. This includes the rates for meeting space, AV equipment, printing, M&IE (per diem rate, number of days, and number of people included in the calculation), lodging (per diem rate, number of days, and number of people included in the calculation), transportation (airfare only), local transportation (mileage, rental cars, cabs, and parking), and logistical and programmatic planning (rates and hours).

Note:

- A change in the purpose or event title or any other substantial change that causes the cost to increase by 10% or more or causes the event to exceed one or more thresholds or \$100,000 overall must be re-submitted for approval prior to the event, and the full review process will start from the beginning.
- A change in the event's date, length, location, or number of estimated attendees requires approval of the COPS Office program manager and COPS Office conference administrator. A revised conference request form must be submitted. This should take no longer than one week.