

Planning Conferences Using Federal Funds

BEFORE THE CONFERENCE

- Review your approved budget, budget justification, agency guidelines and award terms and conditions to determine which conference expenses are allowable on your award. Some federal agencies place additional restrictions on meals and refreshments that are more stringent than the Uniform Guidance.
- Communicate with your [SPA accountant](#) that you will be using sponsored funds to host your conference/workshop.
- If you are working with ISU Conference Planning & Management, make sure they understand which conference expenses will be paid with sponsored funds and discuss which expenses are allowable on each funding source utilized, as well as the parameters of that allowance.
- Identify an account that will be used to cover expenses not covered by your sponsored funds. This could be a departmental account, incentive account or ISU Foundation account. Please make sure you have an account eligible to pay for the expenses that cannot be charged to the sponsored account.

Travel Reimbursement

- It is recommended that you use Travel and Transport to book flights for international travelers. If this is not possible and you are reimbursing the travel expenses for international travelers, make sure they understand the importance of booking [flights that qualify under the Fly America Act](#).
- Make sure that all non-ISU employees who will be submitting travel reimbursements understand Iowa State University's [non-employee travel reimbursement guidelines](#) **prior** to the conference. Note that non-employee travel expenditures usually **do** require receipts, even if the expenditure is under \$75.00.
- Best practice recommendation: Develop a reimbursement template to send to attendees (both ISU and non-ISU staff) prior to the event, along with instructions for how to submit the reimbursement request after the conference.

Registration/Other Revenue Streams

- If you are charging a registration fee, it will need to be tracked separately as [program income](#) and deposited as revenue into your sponsored account.
- Some conferences are jointly funded using sponsorships and grant funds. Visit with both your SPA Accountant and ISU Conference Planning & Management for strategies to manage and correctly account for both.
- Maintain a list of registrants who actually attend the conference.
- Review the award terms and conditions and talk to your SPA accountant to understand how the program income needs to be treated.



Participant Support Costs

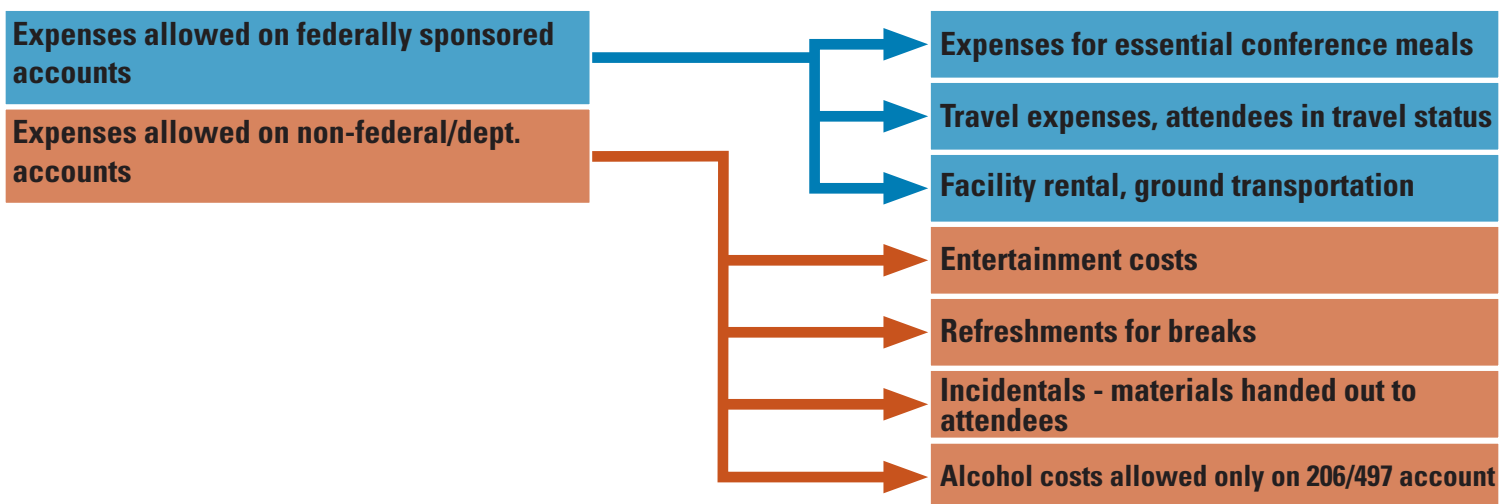
Participant Support Costs (PSC) are direct costs paid to or on behalf of participants or trainees, who are not ISU employees, for their participation in meetings, conferences, symposia, workshops or other training projects. They are usually associated with programs such as Research Experiences for Teachers (RET) or Research Experiences for Undergraduates (REU).

- If your approved sponsored budget includes participant support costs, review your approved budget justification and the ISU Participant Support Costs Guidance to determine if any of the conference costs should be charged as [participant support costs](#).
- Communicate this to your conference coordinator and SPA accountant.

AFTER THE CONFERENCE

- Contact attendees who have travel expenses to be reimbursed and remind them to submit these for reimbursement. The recommended timeframe is within 15 days.
- Review expense summaries from vendors for accuracy and to ensure the required level of detail is provided to support the expenditures.
- Work with vendors/ISU conference services to match conference expenses to the correct account for billing.
- Reimbursement of non-ISU travel expenses should be completed with a [Simple Disbursement voucher](#) in KFS; reimbursement of travel expenses of ISU employees should be done using [the Employee Reimbursement module in Access Plus](#)

Sample Designation of Costs:



Sources:

- [Uniform Guidance on conferences](#)
- [ISU policy on participant support costs](#)
- [Overview of ISU Travel Allowances](#)
- [ISU Conference Planning and Management](#)
- [Iowa State Allowability Guide](#)

