MEMORANDUM

Date: June 1, 2015

To: NIH Executive Officers
               NIH Acquisition Community
               NIH Grants Management Community
               NIH Project Officers
               Intramural and Extramural Administrative Management Committee Chairs

From: Deputy Director for Management, NIH
               Deputy Director for Extramural Research, NIH

Subject: NIH Policy on Promoting Efficient Spending: Use of Appropriated Funds for
               Conferences a Meeting Space, Food, Promotional Items, and Printing and
               Publications

The purpose of this memo is to revise and replace the subject policy, NIH Policy on Promoting
Efficient Spending: Use of Appropriated Funds for Conferences and Meeting Space, Food,
Promotional Items, and Printing and Publications, dated May 20, 2015. The policy is
revised to address the following:

- Clarification of the implementation date for the revised policy. The implementation date
  will be June 15, 2015.

- Section 1.3. B. Conferences Funded through Grants and Cooperative Agreements –
  addressing lead Institute and Centers (ICs) for conference grants when funded by two or
  more NIH ICs.

- Section 1.3. C. Attendance at Conferences Hosted by Other Organizations or Federal
  Agencies (Non-NIH Conferences) - clarifying the process for attendance/travel to events
  on the Exemptions List (Exhibit 1 to the policy).

- Section 1.3. C. 3. Quarterly data calls for approval of non-NIH hosted conference
  attendance have ended. Input of rolling requests for non-NIH hosted conference
  attendance approvals will cover a period of one year starting October 1, 2015.

- Section 1.3. C. 3. As use of the SharePoint site for rolling attendance begins, ICs are
  cautioned to use historic figures as a guide when requesting attendance approvals. It is
  recognized that there may be extenuating circumstances where the attendance will
  increase; these increases should be limited to 25% over past attendance.

Requests for approval to attend non-NIH hosted conferences during the transition to the new OFM Travel SharePoint Site will be processed as follows:

- Until June 15, 2015, ICs will continue to use the current process to seek approval to attend non-NIH hosted conferences.

- After June 15, 2015, the OFM Travel SharePoint site will be available to enter all requests for attendance at non-NIH hosted conferences which start on or after October 1, 2015

- Between June 15, 2015 and September 30, 2015, ICs will use the OFM Travel SharePoint site for additional attendance requests that were not included in the earlier data-call for the fourth quarter of FY2015 (July to September Conferences).

In addition to the policy revisions, the Office of Management will:

- Develop and implement training/communication for the new non-NIH hosted conference attendance process.

- Prepare a PowerPoint presentation on the new NIH policy to further assist in the understanding of the new policy.

- Work with the Executive Officers (EOs) to utilize the EO SharePoint site for sharing Question and Answers and Frequently Asked Questions with the community.

- Work with the ICs on reviewing an existing NIH IC system for the NIH-hosted conference process that would be employed NIH-wide.

The revised policy is attached.

/s/   /s/
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Colleen Barros   Sally Rockey, Ph.D.

Attachments:
NIH Policy on Promoting Efficient Spending
Attachment A NIH Conference or Conference Grant Request and Approval Form
Attachment B NIH Conference Request for Waiver Form
Attachment D Promotional Item Approval Form
Attachment E Report on NIH Hosted Conferences in Excess of $20,000 Spreadsheet
Attachment F Annual Report on NIH Hosted Conferences in Excess of $100,000 Spreadsheet
Attachment G Exemption Determination - Template