# Conferences and Meetings

Tri-University Research Administration Conference

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# Introduction

Conference and Meeting grants can be difficult to manage—Federal oversight of the nuanced budget categories requires a high-level of detail to ensure a successful proposal. This session is intended to examine the expense categories commonly associated with Conference and Meeting grants, from proposal preparation to post-award management.

We will focus on federal sponsor rather than non-federal, as non-federal sponsors place fewer restrictions on allowable expenses.

**Objectives:**

- Participants will gain an understanding of allowable costs for conferences and meetings
- Participants will be introduced to categorizing conference costs within a proposal
- Participants will learn about program income, inclusion requirements in a proposal and accounting methodologies

# Conferences and Meetings are a bit different right now…

We will be presenting information based on a non-pandemic environment. Please note that due to COVID-19, many additional guidelines are in place for the various federal sponsors.


Relocated to Zoom

# What is a Conference/Meeting Grant?

Uniform Guidance: [§ 200.432 Conferences](#):

A conference is defined as a meeting, retreat, seminar, symposium, workshop or event whose primary purpose is the dissemination of technical information beyond the [non-Federal entity](#) and is necessary and reasonable for successful performance under the [Federal award](#). Allowable conference costs paid by the [non-Federal entity](#) as a sponsor or host of the conference may include rental of facilities, speakers' fees, costs of meals and refreshments, local transportation, and other items incidental to such conferences unless further restricted by the terms and conditions of the [Federal award](#). As needed, the costs of identifying, but not providing, locally available dependent-care resources are allowable. Conference hosts/sponsors must exercise discretion and judgment in ensuring that conference costs are appropriate, necessary and managed in a manner that minimizes costs to the [Federal award](#). The [Federal awarding agency](#) may authorize exceptions where appropriate for programs including Indian tribes, children, and the elderly.

Pre-Award

# Step 1: Carefully review the Program Announcement



The Program Announcement (often called RFP, RFA, FAO) will typically list the specific requirements for submission, including what can and cannot be included in the grant. It is <u>always</u> a good idea to carefully review this before preparing your proposal.

However, in some cases, the program announcement might not provide a lot of information outside of what to address in the project narrative—for example, we will look at NSF 21-541.

# Example: NSF 21-541

Here we have the Proposal Preparation Instructions—this section includes a lot of what the sponsor is looking for in the descriptive sections of the proposal, such as the project narrative… but what about budget information?

## A. Proposal Preparation Instructions

**Full Proposal Preparation Instructions**: Proposers may opt to submit proposals in response to this Program Solicitation via FastLane or Grants.gov.

- Full proposals submitted via FastLane: Proposals submitted in response to this program solicitation should be prepared and submitted in accordance with the general guidelines contained in the *NSF Proposal & Award Policies & Procedures Guide* (PAPPG). The complete text of the PAPPG is available electronically on the NSF website at: https://www.nsf.gov/publications/pub_summ.jsp?ods_key=pappg. Paper copies of the PAPPG may be obtained from the NSF Publications Clearinghouse, telephone (703) 292-8134 or by e-mail from nsfpubs@nsf.gov. Proposers are reminded to identify this program solicitation number in the program solicitation block on the NSF Cover Sheet For Proposal to the National Science Foundation. Compliance with this requirement is critical to determining the relevant proposal processing guidelines. Failure to submit this information may delay processing.
- Full proposals submitted via Grants.gov: Proposals submitted in response to this program solicitation via Grants.gov should be prepared and submitted in accordance with the *NSF Grants.gov Application Guide: A Guide for the Preparation and Submission of NSF Applications via Grants.gov*. The complete text of the *NSF Grants.gov Application Guide* is available on the Grants.gov website and on the NSF website at: (https://www.nsf.gov/publications/pub_summ.jsp?ods_key=grantsgovguide). To obtain copies of the Application Guide and Application Forms Package, click on the Apply tab on the Grants.gov site, then click on the Apply Step 1: Download a Grant Application Package and Application Instructions link and enter the funding opportunity number, (the program solicitation number without the NSF prefix) and press the Download Package button. Paper copies of the Grants.gov Application Guide also may be obtained from the NSF Publications Clearinghouse, telephone (703) 292-8134 or by e-mail from nsfpubs@nsf.gov.

In determining which method to utilize in the electronic preparation and submission of the proposal, please note the following:

Collaborative Proposals. All collaborative proposals submitted as separate submissions from multiple organizations must be submitted via FastLane. PAPPG Chapter II.D.3 provides additional information on collaborative proposals.

See PAPPG Chapter II.E.7 for guidance on the required sections of a Conference proposal submitted to NSF.

In the proposal preparation module in FastLane or Grants.gov, select **"Conference"** as the **proposal type**.

This solicitation contains information that supplements the PAPPG or NSF Grants.gov Application Guide proposal preparation guidelines. **In addition to** the requirements listed in **PAPPG, Chapter II.E.7**, investigators are directed to pay particular attention to the contents of **DMS Priorities** in Section II and the **Additional Review Criteria** in Section VI.A below. Proposals that do not provide the necessary information will be returned without review.

All proposals for conferences, workshops, or related activities **must**:

- Offer a strong scientific reason for the proposed activity;
- Distinguish the planned project from other conferences and activities, particularly from recent or similar activities;
- Justify, if appropriate, how well any prior NSF support was used in preliminary or precursor activities;
- Devote substantial funds to support participation by individuals who do not have other federal support, or who are students, post-doctoral scholars, or from under-represented groups;
- Describe plans to recruit and involve a diversity of participants, both individuals and institutions;
- Describe plans for disseminating results of the activity.

Note that these criteria permit a conference to coincide with a personal or community anniversary or an occasion honoring an individual's contributions, but such a coincidence is not a scientific reason and thus will not satisfy this requirement. Also note that dissemination plans may include proceedings, web sites, special articles in various publications, special issues of journals, or special talks/presentations to students. Such steps broaden the impact of the activity. If funding for a "year n+1" NSF-funded conference is being requested, proposals should document how effective the previous "n" years of support were used and justify the impact of another year of funding.

This required information should be detailed enough to answer the following questions:

- What is the purpose of this activity? How is it different from others?
- What is the scientific focus? Why is this topic timely and important?
- How will the activity or conference be structured? Be specific.
- Who will be involved? If there is an organizing committee, who are its members? If there is a management team, who are its members? If multiple institutions are involved, what is the overall management plan? Who are the planned senior participants (e.g., invited speakers, session directors)? How will participants be recruited and chosen? If appropriate, how will the activity be widely advertised, so that broad participation can be achieved? What steps will be taken to ensure diversity (women, minorities, persons with disabilities; institutional; geographical; and other aspects of diversity)?
- Where and when will the activity be held? What facilities will be used?
- What steps will be taken to disseminate the results of the activity?

# Example:
# NSF 21-541

Obviously, not a lot of information is being provided here.

It is also important to have sponsor-specific guides available to fully understand what to include in the proposal, especially when it comes to budgeting.

**B. Budgetary Information**

**Cost Sharing:**

Cost sharing is not required under this solicitation.

# Sponsor Guidelines:

These are essential tools for proposal development, often including more nuanced information regarding that should be included in the application, and what is allowable per the specific sponsor.

- NSF: PAPPG

- NIH: GPS and NIH Application Guide

- USDA/NIFA: NIFA Grants.gov Application Guide

- FDA

# Still have questions?

Solicitations and Guidelines can be difficult to navigate, and even more difficult to understand. Be sure to reach out to your internal and external support systems if you are unsure about something:

- Department Research Administrator/Business Official

- Sponsored Projects/Centralized Office for Sponsored Research

- Program Official, or PO, is the sponsor point-of-contact, typically listed in the solicitation and program website.

# Step 2: Plan Accordingly

Contracts/awards can take time—make sure to plan time appropriately. NSF indicates that a proposal should be submitted <u>at least</u> a year in advanced of the scheduled date.

With Conferences/Meetings, there are additional things that should be taken into consideration outside of the mandated proposal due dates and start date:

- Announcement of the Conference/Meeting

- Registration Periods

- Travel

- Food Services

- Optics of Location

It is important that you work with your business offices and centralized sponsored research office to ensure institutional guidelines are followed when planning. Be sure you are utilizing appropriate departments/requirements when planning these components of the project.

# Uniform Guidance:
# Suggested Guidance for Conference Planning

Uniform Guidance provides extensive guidelines when it comes to planning for your conference/meeting project. Be sure to consult [41 CFR Appendix E to Chapter 301 – Suggested Guidance for Conference Planning](#).

Within these guidelines, specifics on the following are provided to get you started:

- Planning Committee – operational group significantly contributing to the success/needs for the conference.

- Milestone Schedule – listing of project milestones to include each major step.

- Specification Sheet – identify essential elements and determine costs.

- Budgeting – decide how the conference expenses will be paid, and through what sources of funding.

This comprehensive guide also touches on topics of location, facilities, food & refreshments, announcements/invitations, and much more… Be sure to utilize this guide!

# Step 3: Budgeting



Federal sponsors have very specific allowances when it comes to budgeting for Conferences/Meetings. In this section we will cover some of the basics of allowable vs. unallowable costs.

# Alcohol



Uniform Guidance is clear on the inclusion of Alcoholic beverages: federal funds <u>cannot</u> be used to purchase alcohol.

**§ 200.423 Alcoholic beverages**.

Costs of alcoholic beverages are unallowable.

# Entertainment



Similar to Alcohol, Entertainment is generally not allowed. However, Uniform Guidance does provide more instruction on when costs related to entertainment may be allowable:

## § 200.438 Entertainment costs.

Costs of entertainment, including amusement, diversion, and social activities and any associated costs are unallowable, except where specific costs that might otherwise be considered entertainment have a programmatic purpose and are authorized either in the approved budget for the Federal award or with prior written approval of the Federal awarding agency.

# Lobbying



The use of federal funds for lobbying is never an allowable expense.

### § 200.450 Lobbying.

**(a)** The cost of certain influencing activities associated with obtaining grants, contracts, or cooperative agreements, or loans is an unallowable cost …

**(b)** Executive lobbying costs. Costs incurred in attempting to improperly influence either directly or indirectly, an employee or officer of the executive branch of the Federal Government to give consideration or to act regarding a Federal award or a regulatory matter are unallowable…

# Room Rental and A/V Equipment



Room/Meeting Space and A/V Equipment rental is an allowable, and necessary cost associated with Conference and Meeting Grants.

### § 200.465 Rental costs of real property and equipment.

**(a)** Subject to the limitations described in paragraphs (b) through (d) of this section, rental costs are allowable to the extent that the rates are reasonable in light of such factors as: rental costs of comparable property, if any; market conditions in the area; alternatives available; and the type, life expectancy, condition, and value of the property leased. Rental arrangements should be reviewed periodically to determine if circumstances have changed and other options are available.

Take into account, however, that these costs need to be reasonable, as compared to market value/conditions of the area.

# Speaker Fees



As outlined in § 200.432 Conferences, speaker fees are an allowable expense.

Remember, speakers are not participants, and in general, should not be budgeted as participant support. NSF provides further guidance on this distinction:

if the primary purpose of the individual's attendance at the conference is learning and receiving training as a participant, then the costs may be included under participant support. If the primary purpose is to speak or assist with management of the conference, then such costs should be budgeted in appropriate categories other than participant support.

Be sure to check your institutional policy regarding payment mechanisms for speakers.

# Employee payroll/travel expenses/per diem



Budgeting personnel, travel, and per diem costs for employees of the receiving institute is an essential expense for conference grants, and generally allowable.

Be sure to review sponsor-specific guidelines for an understanding on the expectations regarding personnel effort.

Remember: Planning is essential for budgeting—given location-specific travel expenses, it is important to plan certain aspects of the Conference prior to submission to ensure expenses are reasonable and realistic.

# Participant Support Costs



Participant Support Costs are generally allowable on Conference and Meeting Grants, however, these costs are typically heavily scrutinized by Federal sponsors, and should be budgeted carefully. Defined in § 200.1 - Definitions as:

*Participant support costs* means direct costs for items such as stipends or subsistence allowances, travel allowances, and registration fees paid to or on behalf of participants or trainees (but not employees) in connection with conferences, or training projects.

**Participant Support Costs**
Direct costs for items such as stipends or subsistence allowances, travel allowances, and registration fees paid to or on behalf of participants or trainees (but not employees) in connection with conferences. Such allowances must be reasonable, in conformance with the policy of the proposing organization and limited to the days of attendance at the conference plus the actual travel time required to reach the conference location. Where meals or lodgings are furnished without charge or at a nominal cost (e.g., as part of the registration fee), the per diem or subsistence allowance should be correspondingly reduced. Although local participants may participate in conference meals and coffee breaks, funds may not be proposed to pay per diem or similar expenses for local participants in the conference.

**Not Participant Support Costs**
Speakers and trainers generally are not considered participants. However, if the primary purpose of the individual's attendance at the conference is learning and receiving training as a participant, then the costs may be included under participant support. If the primary purpose is to speak or assist with management of the conference, then such costs should be budgeted in appropriate categories other than participant support.

Venue rental fees, catering costs, supplies, etc. that will be secured through a service agreement/contract

Employees of the university hosting the conference

# Food – check with specific sponsor regulations



Food-related expenses associated with a conference are allowable when:

- The event at which the meal expenses are incurred meets definition of a "conference"
- are an integral and necessary part of the conference (e.g., working meals where business is transacted)
- The expenses are paid by the university as the sponsor or host of the event

Note: NSF does not allow the use of federal funds for meal/coffee breaks for intramural meetings (labs, departments, centers).

# Dependent Care – check with sponsor regulations



As needed, the costs of identifying, but not providing, locally available dependent care resources may be included.

# Checking the FAQs—what do you think?

**Is it allowable for a person whose travel costs are being paid with Federal grant funds to attend a conference in Washington, DC, and lobby members of Congress while in town?**

To the extent that a portion of time at a conference is spent on lobbying activities, costs associated with the lobbying, including transportation to and from Washington, DC, lodging, and per diem, <u>may not</u> be charged to the Federal grant. For example, if a meeting or conference lasts for two days and a visit to lobby a member of Congress requires an additional day of travel, 1/3 of all costs involved in attending the meeting or conference, including travel to and from Washington, DC, may not be charged to the grant.
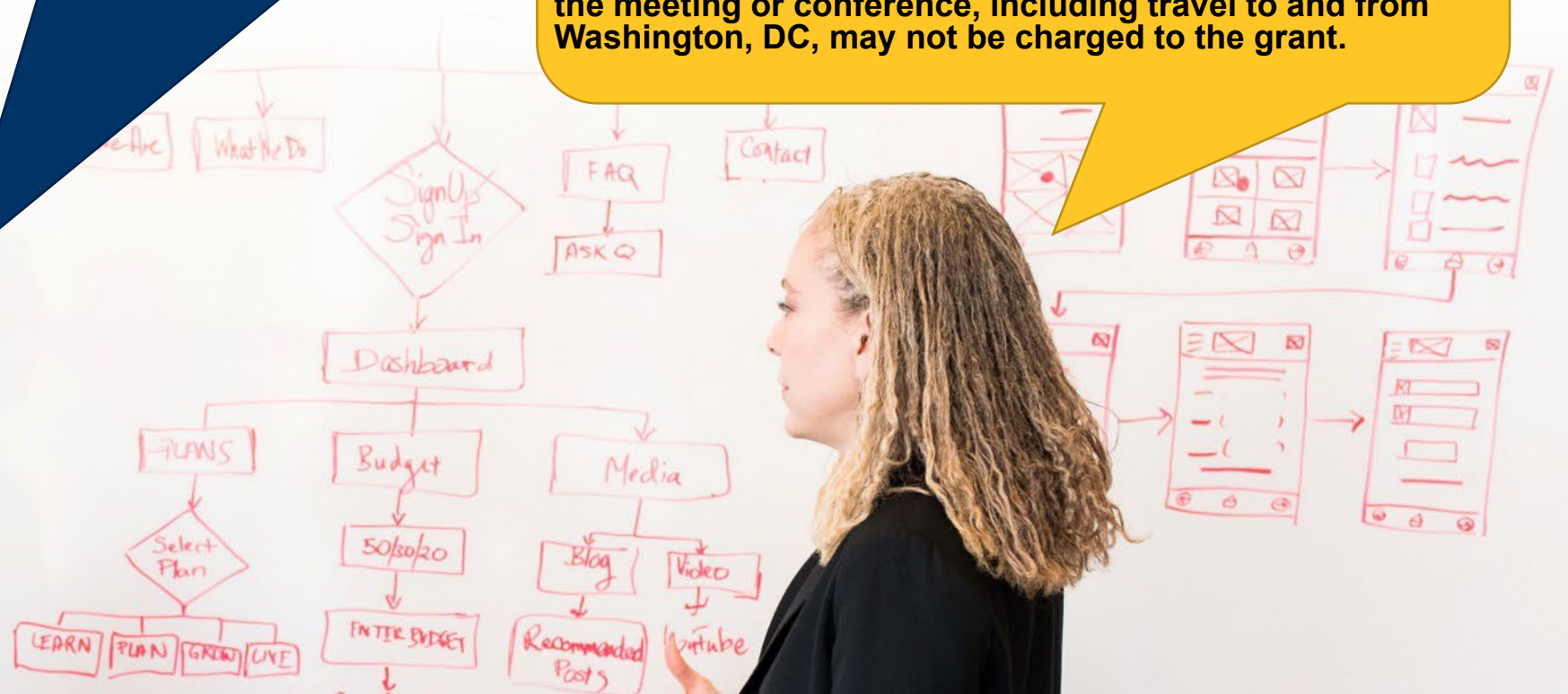
# Checking the FAQs—what do you think?

Are costs such as room rental fees, catering, supplies, etc. related to an NSF-sponsored conference considered participant support costs?

No, the participant support cost line in the NSF budget should not be used for such costs.

# Program Income at the Pre-award Stage:



Program Income is typical for Conference and Meeting Grants—typically, this comes in the form of registration fees. Per Uniform Guidance § 200.307 Program Income:

> Non-Federal entities are encouraged to earn income to defray program costs where appropriate.

At the proposal stage, it is important to understand how to record expected Program Income when submitting a Proposal.

Note that, although the actual amount of income cannot be truly known, you should estimate the expected amount of program income when submitting your proposal. Consider registration fee amounts and the number of expected participants when developing your budget.

**For NIH and NIFA Grants, Program Income is recorded in two places:**

The SF424 cover page, field 15.d. is reserved for the "Estimated Program Income."

Additionally, the PHS 398 Cover Page Supplement has a field for Program Income, #2.

Note, in the Cover Page Supplement, you are expected to identify the Budget Period, Anticipated Amount ($), and Sources of income.
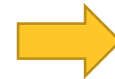
### 15. ESTIMATED PROJECT FUNDING

| | |
|---|---|
| a. Total Federal Funds Requested* | $0.00 |
| b. Total Non-Federal Funds* | $0.00 |
| c. Total Federal & Non-Federal Funds* | $0.00 |
| d. Estimated Program Income* | $0.00 |

2. *Program Income Section

*Is program income anticipated during the periods for which the grant support is requested?

○ Yes    ○ No

If you checked "yes" above (indicating that program income is anticipated), then use the format below to reflect the amount and source(s). Otherwise, leave this section blank.

*Budget Period    *Anticipated Amount ($)    *Source(s)

**Other Federal Sponsors may require an SF-424A.**

This form also has a location for program income, located at the bottom of Section B.

Be sure to include the expected program income amount here, and that it is associated with the correct grant program function or activity.

**SECTION B - BUDGET CATEGORIES**

| 6. Object Class Categories | GRANT PROGRAM, FUNCTION OR ACTIVITY | | | | Total (5) |
|---|---|---|---|---|---|
| | (1) | (2) | (3) | (4) | |
| a. Personnel | $ | $ | $ | $ | $ |
| b. Fringe Benefits | | | | | |
| c. Travel | | | | | |
| d. Equipment | | | | | |
| e. Supplies | | | | | |
| f. Contractual | | | | | |
| g. Construction | | | | | |
| h. Other | | | | | |
| i. Total Direct Charges (sum of 6a-6h) | | | | | $ |
| j. Indirect Charges | | | | | $ |
| k. TOTALS (sum of 6i and 6j) | $ | $ | $ | $ | $ |
| | | | | | |
| 7. Program Income | $ | $ | $ | $ | $ |

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Standard Form 424A (Rev. 7- 97)
Prescribed by OMB (Circular A -102) Page 1A

Post-award

Congratulations!

You're having a conference!

# Step 1: Carefully review the award terms and conditions

Review the award document, the FOA, the sponsor's award management guide, and the awarded budget.

Look for any requirements that are specific to the award, for what kind of reports have to be submitted (programmatic and financial), and reporting deadlines before making conference arrangements.

# Example: NIH Scientific Conferences (R13 and U13)

NIH expects conference grant recipients to provide attendees an environment free from discrimination and harassment, sexual or otherwise.

## A Note about Conference Grant Awards

As stated in NOT-OD-15-152, Civil Rights Protections in NIH-Supported Research, Programs, Conferences and Other Activities, consistent with existing federal civil rights laws, it is expected that organizers of NIH-supported conferences and scientific meetings take steps to maintain a safe and respectful environment for all attendees by providing an environment free from discrimination and harassment, sexual or otherwise. It is expected that organizers of NIH-supported conferences employ strategies that seek to prevent or mitigate the effects of discrimination and harassment, sexual and otherwise. Examples of strategies include but are not limited to:

- Establishing a conference code of conduct with clearly stated expectations of behavior, systems of reporting, and procedures for addressing inappropriate behavior. The code of conduct and reporting mechanisms should be clear and accessible to all meeting attendees.
- Providing resources to support individuals who report incidents of harassment, including:
  - personnel trained in advocacy and counseling,
  - referrals to legal or health care resources,
  - procedures for ensuring the safety of all conference attendees, up to and including removing a perpetrator from the conference, and
  - conducting conference climate surveys specifically related to sexual harassment and professional misconduct.

As a part of the Terms and Conditions of a Conference Grant or Cooperative Agreement Award, awardees should ensure that all conference material (promotional materials, agenda, publications on internet sites) includes an acknowledgement of NIH grant support. A disclaimer stating the following should also be included where appropriate:

"Funding for this conference was made possible [in part] by [insert grant number] from [insert IC name]. The views expressed in written conference materials or publications and by speakers and moderators do not necessarily reflect the official policies of the Department of Health and Human Services; nor does mention of trade names, commercial practices, or organizations imply endorsement by the U.S. Government."

Be sure you know whether you have a **grant**, **cooperative agreement**, or **contract** because sponsors can have different requirements for each of them.

# Example: Department of Justice

The Department of Justice requires prior written approval for conferences funded by cooperative agreements and contracts but not for grants and no-cost videoconferences or webinars. An approved award budget for a cooperative agreement or contract is not prior approval.

Department of Justice-Sponsored Conference
Request and Report

A *RED* cell indicates that your entry exceeds the DOJ meal threshold AND cannot be submitted unless within the meal threshold.
A *YELLOW* cell indicates that your entry exceeds the DOJ threshold, and additional justification must be provided.
A *GREY* box indicates that no entry is required.

**JMD FINANCE STAFF USE ONLY:**

| | |
|---|---|
| JMD Tracking Number | |
| Date Received | |

**COMPONENT USE ONLY:**

| | | | | | | |
|---|---|---|---|---|---|---|
| Component Internal Tracking Number *(Optional)* : | Federal Use Only | | | | | |
| CA/Contract Number | | | | | | |
| CA/Contract Recipient | | | | CA/Contract PoC Name | | |
| CA/Contract PoC Phone | | | | CA/Contract PoC Email | | |
| | Request Cost per Attendee | #DIV/0! | Actual Cost per Attendee | | OJP Average Cost per Attendee | DOJ Average Cost per Attendee |

**A. GENERAL CONFERENCE INFORMATION:**

| | |
|---|---|
| 1. Name of Requestor | |
| 2. Component Name *(Drop Down)* | OJP – Office of Justice Programs |
| 3. Is this submission for a conference request or report? *(Drop Down)* | Conference Request |
| 4. JMD Tracking # *(Report Only)* | |
| 5. If this is a Re-Submission of a previously disapproved conference, indicate original JMD Tracking | |
| 6. Official Title of the Conference *(No Abbreviations)* | |
| 7. Is this a blanket request? (Y/N) *(Drop Down) If "YES" Skip A9–13, A16 and Sections C,D & E1. If "NO" Skip* | No |
| 8. If this is a Blanket Request, indicate for each: 1) Number of occurrences this fiscal year, 2) | |
| 9. Conference Start Date | |
| 10. Conference End Date | |
| 11. Location: Country *(Drop Down)* | |
| 12. Location: State / Territory / Possession *(Drop Down)* | |
| 13. Location: City | |
| 14. Justification that conference is essential to accomplishing core mission | |
| 15. Funding Appropriation Symbol | |
| 16. Facility Name *(Specific)* | |
| 17. Facility Type (Federal/Non-Federal) | |
| 18. Cooperative Agreement (Y/N) | |

| SUBMISSION FORM | Sheet A | Certification | Internal Communication | Facility Comparison | Job Aid |
|---|---|---|---|---|---|

# Step 2: Make purchases, contract for goods and services, monitor expenses

Review expenses as they're incurred to be sure expenditures are allowable under the terms and conditions of the award and are within the period of performance.

# Look before you leap!

Allowable costs with caveats to watch out for:

- Conference services
- Consultant services
- Equipment rental
- Meals
- Coffee breaks
- Publication costs
- Speaker fees
- Supplies
- Travel
- Conference venues

# Step 3: Manage program income

**Uniform Guidance: §200.80   Program income**

Program income is gross income generated by a funded activity. This may happen for a conference if registration fees to attend are charged.

Pro tips for managing program income:

• Spend program income before spending grant funds.

• If a cost is allowable under the program award, then it is allowable to use program income for that cost.
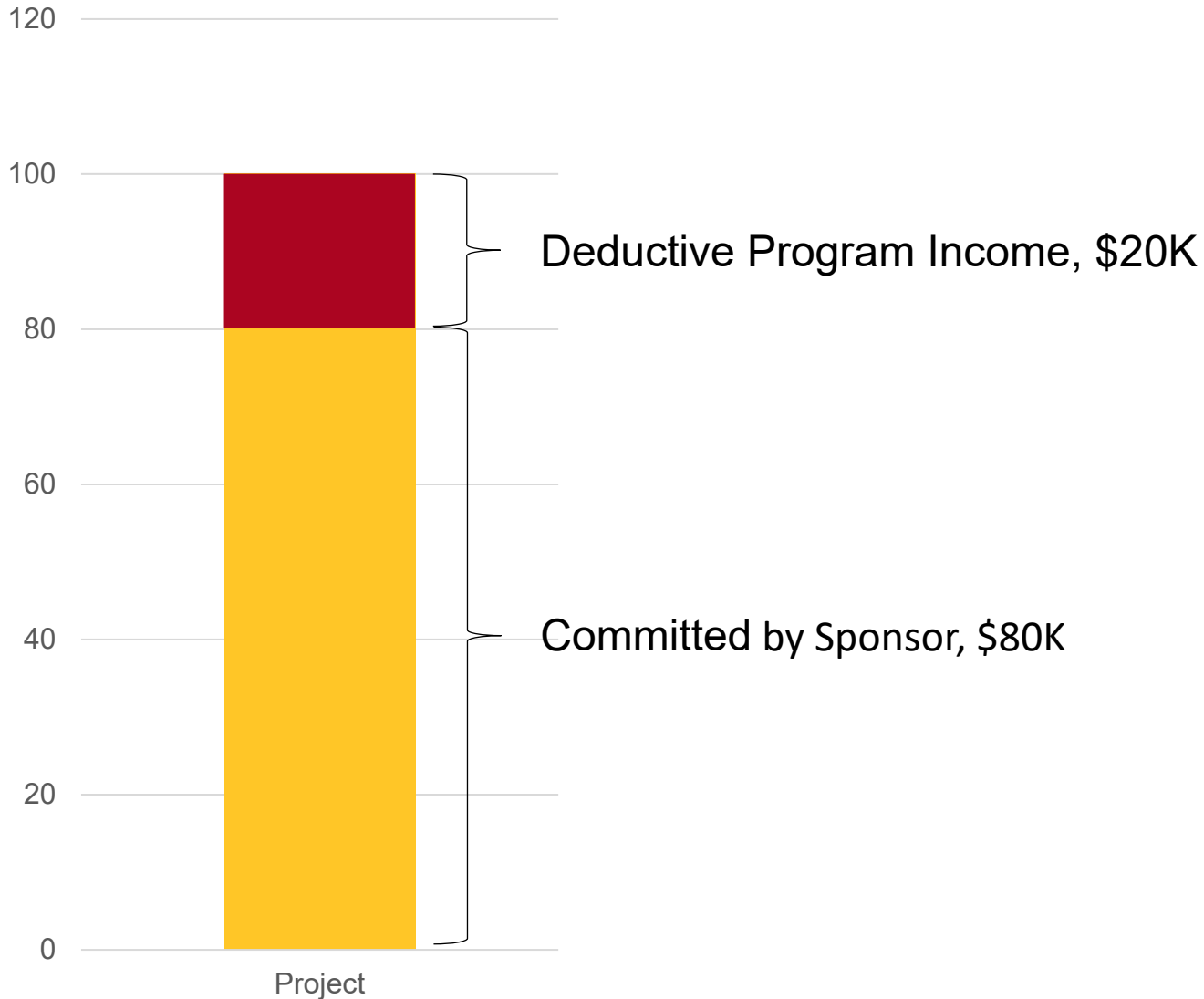
Program Income

Additive Program Income, $20K

Committed by Sponsor, $100K

Project
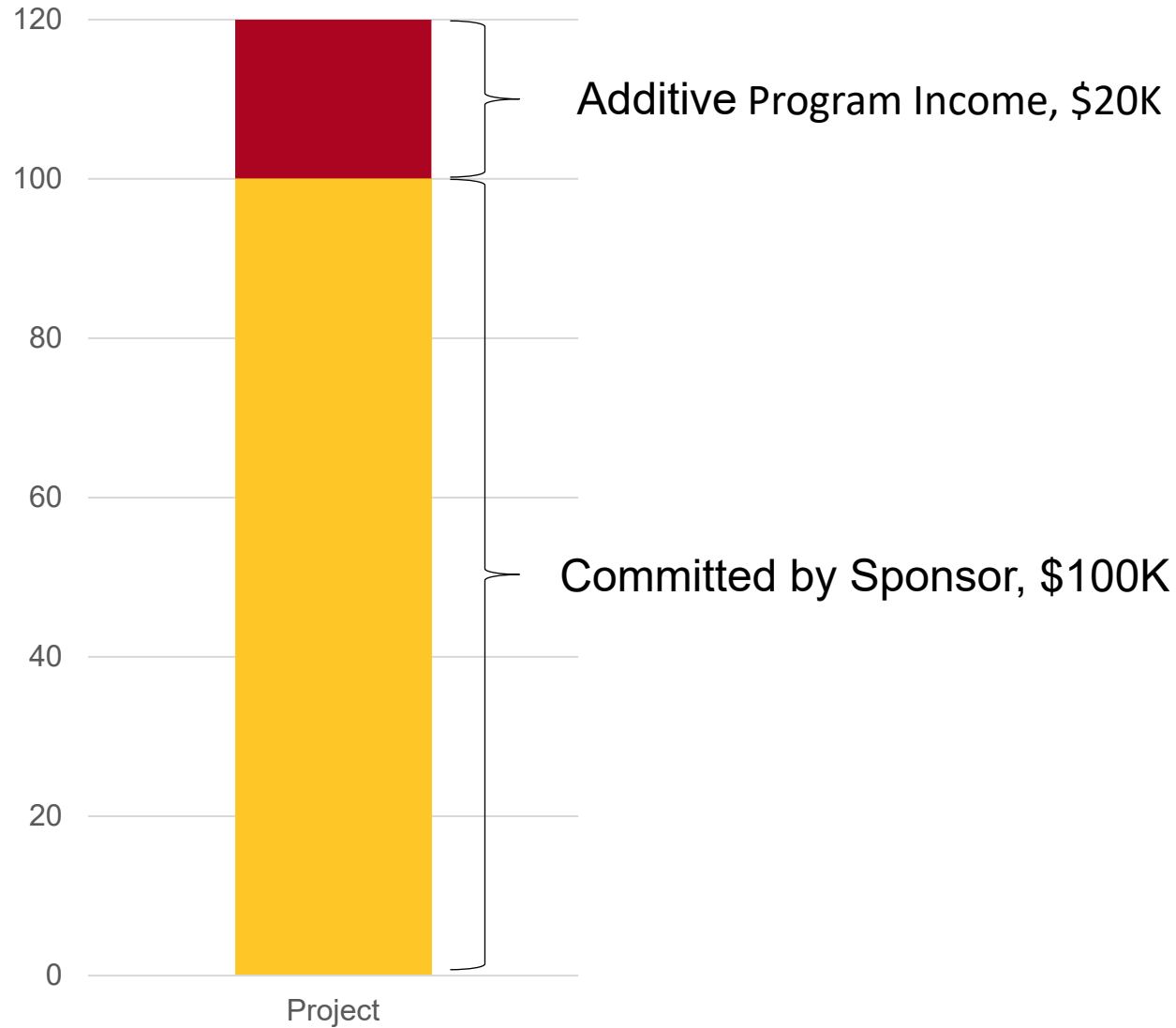
Funds Committed by Sponsor

**Additive:**
Program Income funds are added to award funds, increasing the amount available to accomplish the objectives.

In this instance, the sponsor commits $100K, and $20K of Program Income adds to this amount, giving the PI authority to spend a total of $120K.

**Program Income**

Deductive Program Income, $20K

Committed by Sponsor, $80K

Project

■ Funds Committed by Sponsor

# **Deductive**:

Total funds available remain the same and funds generated are deducted from the financial commitment of the sponsor.

In this instance, the award amount is $100K, and $20K of Program Income is reduced from the sponsor's portion, giving the PI authority to spend a total of $100K, and reducing sponsor commitment to $80K.

# Matching:

Program Income funds are used to finance the non-sponsor share (mandatory or committed cost share).



Program Income

- Committed by Sponsor, $100K
- Funds Committed by University, $10K
- Matching Program Income, $20K

Funds Committed by Sponsor
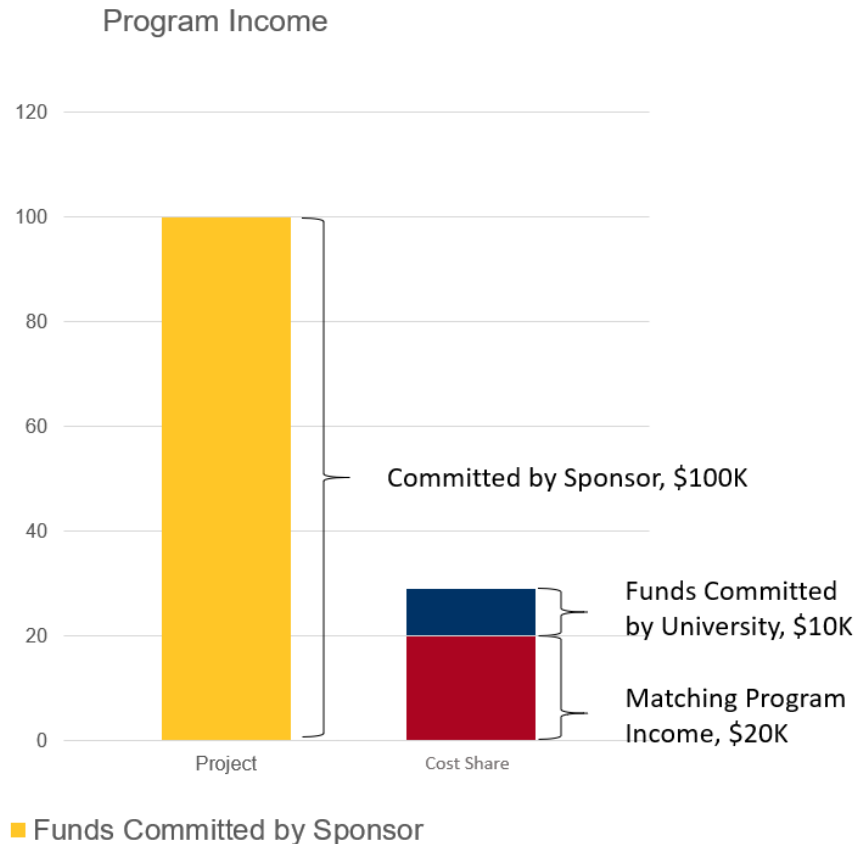
# Add/Deduct:

A portion of Program Income, specified by the sponsor, is added to award funds increasing the amount available, while the remaining Program Income is deducted from the sponsor's financial commitment.



Program Income

- Additive Program Income, $10K
- Deductive Program Income, $10K
- Committed by Sponsor, $90K

Funds Committed by Sponsor
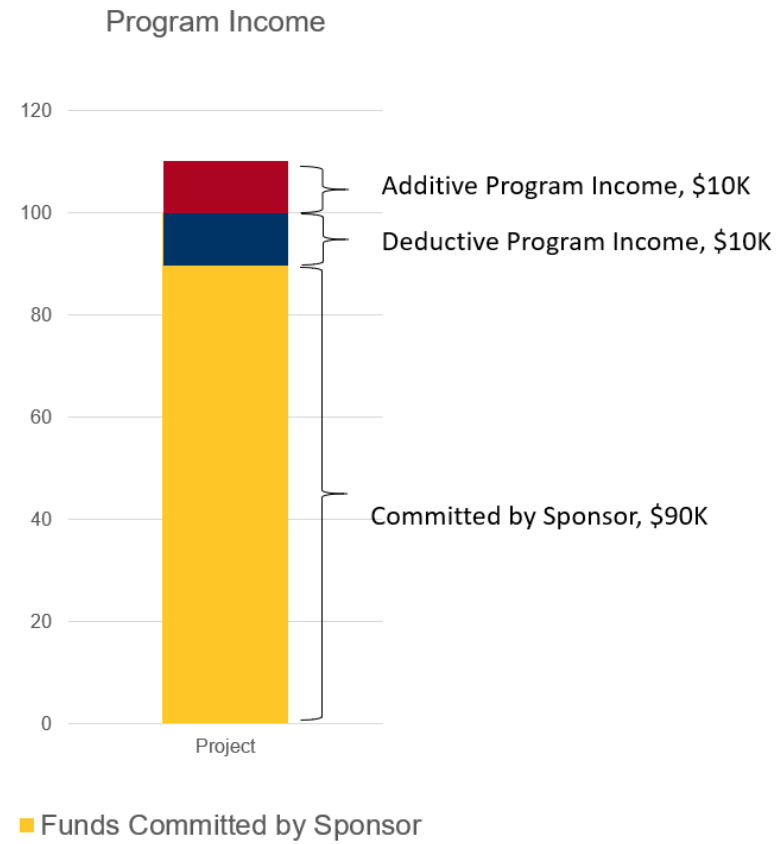
# Step 4: Documentation and recordkeeping

Keep full documented justification for expenses to demonstrate how they are necessary to meet the goals and objectives of the award.

Documentation shows evidence of compliance with funder requirements in the event of an audit.

## Sponsored Projects Records Retention Table

| Record Type | Record Custodian | | | Sponsor Type | Sponsored Retention Period |
|---|---|---|---|---|---|
| | Principal Investigator | Unit | Research Operations | | |
| Sponsored research records: Lab notebooks, research data, technical reports, et al. | X | | | All | Governed by 'the standards of a faculty member's respective discipline'; must minimally meet requirement for sponsor type if award-specific |
| Sponsored award purchasing card transaction records | | X | | All | 5 Years after submission of the final project financial report |
| Sponsored award records (other than agreements, modifications, and purchasing card transactions) directly associated with unique sponsored awards. [1] | | X | X | Federal | 3 Years after the date of submission of the final expenditure report or, for awards that are renewed quarterly or annually, 3 years from the date of submission of the quarterly or annual financial report |
| | | | | State | 5 Years after award end date |
| | | | | Other (Non-Federal, Non-State) | 3 Years after award end date |
| Sponsored research records not directly associated with unique sponsored awards, i.e., records not individually identifiable with a single award[2] | | X | X | N/A | 3 Years after fiscal year created or received |
| Sponsored award agreements and modifications | | | X | All | 33 Years after award end date |

Keep all records, paper and/or electronic, for as long as required by the sponsor and institution.

"…conferences…are critical. They are how we make new professional connections, and share ideas, and we come away with new energy and enthusiasm for our work."

*Sethuraman "Panch" Panchanathan, Director, National Science Foundation*

**Tri-University**
Research
Administration
Conference