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Bulletin

Title: Conference Planning Overview

Number: 05.212.0

Date: May 2, 2005

Originating Office: Acquisition and Property Division,
Policy Branch, AFM/ARS

Distribution: CSREES, ERS, NASS, and ARS

This Bulletin provides an overview of the tools needed to effectively procure conference services.

1. Introduction

As with any requirement for goods and services, it is imperative that a complete and proper procurement request be submitted to the appropriate contracting office in order to process the requirement in an efficient manner. When preparing a requirement for conference planning, there are specific objectives that must be met in order to have an effective and meaningful event. Effective planning is vital to the overall success of the conference.

2. Policy

In accordance with the authority set forth in 41 CFR Part 301-74, the following must be accomplished when planning a conference:

- a. Minimize all conference costs, including administrative costs, attendees' travel costs, and conference attendees time costs;
- b. Maximize the use of Government owned or Government provided conference facilities as much as possible;
- c. Identify opportunities to reduce costs in selecting the site, such as holding the conference during the off-season, if a hotel offers seasonal rates; and,
- d. Ensure the conference planner/committee does not receive any promotional benefits or materials as a result of booking the conference.

3. Guidance/Procedures

Getting Started

Depending on the size, type and intended effect of the conference, planning for a conference should begin at least 1 year in advance. Typically, a planning committee should be assembled. This group contributes to the conference's overall success and ability to reflect the needs of both the Agency and the attendees. At a minimum, the committee should:

- Establish a set of objectives and milestones;
- Develop a theme;
- Make recommendations for location, agenda, dates, and logistics, e.g. schedule, exhibits, speakers, etc.;
- Serve as liaison between planners and participants; and,
- Participate in evaluation and follow-up.

Advance Approval Requirements for Offsite Meetings Exceeding \$25,000.

The Secretary of Agriculture issued an “advance” approval requirement, on a quarterly basis, for all offsite meetings where cost is expected to exceed \$25,000. Approval must be obtained from the Agency Administrator.

In accordance with REE Bulletin Number 96-301, the Agency Administrator, through the Chief, Travel and Relocation Services Branch, Financial Management Division (FMD), ARS, must receive a “summary of planned events” 60 days in advance of the quarter in which the event will occur. In order to meet the Departmental due dates for proposed meetings, the site selection and cost comparison, along with a completed detailed cost analysis (Form AD-1110), must be completed and forwarded to FMD 70 days prior to the quarter in which the event will take place.

Conference Requirements and Site Selection

All expenses that will be paid by the Government should be evaluated when planning a conference, including authorized travel and per diem expenses. Emphasis is on the lowest overall cost to the Government. When selecting a site, consider using Government-owned facilities; colleges or universities; convention centers; conference centers, or, as typically used, hotels.

When preparing a cost comparison, the following items, at a minimum, must be evaluated for each potential facility:

- a. Conference dates desired;
- b. Number of attendees expected;
- c. Number of lodging rooms required (at the established per diem rates);
- d. Meeting Room/Breakout Room requirements, including the number, size and duration required;
- e. Audiovisual and other equipment needs;
- f. Computer and telephone access fees;
- g. Light refreshments; and,
- h. Registration fees.

Any certifications or agreements required by the facilities that are committing Government funds must be reviewed and signed by a Contracting Officer (CO).

A member of the planning committee should visit each site that will be considered for the conference. Although it is desirable to obtain lodging within the established per diem rate, it is not always possible to do so. In negotiating lodging rates with the potential facilities, you may

exceed the lodging portion of the per diem rate by up to 25 percent under 41 CFR 301-74.8 and 41 CFR 301-74.9.

Meals/Light Refreshments

Generally, you cannot use appropriated funds to pay for meals for employees at their official duty stations. However, employees on Temporary Duty travel may be served meals but must reduce their per diem reimbursement request by an amount established in the Federal travel regulations for those meals provided at Government expense. Agencies sponsoring a conference may provide light refreshments to Agency employees in travel status attending an official conference. Examples of light refreshments for morning, afternoon or evening breaks include, but are not limited to, coffee, tea, milk, soft drinks, donuts, bagels, fruit, pretzels, cookies, chips, or muffins.

A registration fee generally covers all direct expenditures of Agency funds needed for the conference, including meals and light refreshments, if appropriate. Anything directly related to the conference, except alcoholic beverages, can be included in the fee. See 41 CFR 301-74 Appendix E for additional guidance.

Submitting the Procurement Request

When submitting your request for conference services to the contracting office, you must consider at least three sources for the conference. The Procurement Request should include a complete requirement's list. In order to ensure that each source is bidding on identical services, the list will be submitted to each source to formulate their pricing information. The Site Comparison Chart (Exhibit 1) should be used to obtain pricing information and should be submitted with your procurement request. A CO will then evaluate and negotiate with the suggested sources to determine the lowest overall cost to the Government. If the estimate for the conference facility exceeds \$25,000, the services must be advertised in the Federal Business Opportunities Web site for 15 days, and for services between \$10,000 and \$25,000, a 10-day public notice is required.

4. CHECKLIST

- Begin planning for the conference at least 1 year in advance.
- Assemble a planning committee.
- Ensure that each facility is provided with a complete list of conference needs in order to obtain accurate pricing information.

- For conferences expected to exceed \$25,000, obtain required approvals from the Agency Administrators, through FMD, 70 days in advance. Include the Site Cost Comparison Chart.
- Ensure regulations for meals/light refreshments are followed.
- Clarify in advance the appropriate per diem reduction(s) of meal allowance(s) for TDY travel.
- Communicate with the contracting office on any requests for signatures regarding certifications or room commitments from the facility. Only a Contracting Officer can commit Government funds.
- For conferences expected to exceed \$2,500, but are below \$25,000, obtain pricing information from at least three facilities that would meet your needs using the Site Cost Comparison Chart. The lowest overall cost to the Government will prevail.
- For conferences expected to exceed \$25,000, quotations will be solicited from the Federal Business Opportunities Web site.
- Submit a completed AD-700, along with the Site Cost Comparison Chart, from three facilities and any necessary approvals, as appropriate, to the contracting office in a timely manner to ensure all deadlines from the Agency and the facility are met.

LARRY R. CULLUMBER /s/
Director
Acquisition and Property Division

SITE COST COMPARISON CHART

WORKSHOPS / DATES	SITE 1	SITE 2	SITE 3
CITY, STATE			
HOTEL			
CONTACT			
PHONE			
DATE AVAILABILITY	Yes/No	Yes/No	Yes/No
DISABILITY ACCESSIBLE	Yes/No	Yes/No	Yes/No
ESTIMATED COSTS - LODGING, MEETING, AUDIOVISUAL, REFRESHMENTS			
LODGING RATE			
TAXES*			
TOTAL ROOM NIGHTS			
TOTAL LODGING			
MEETING ROOM TOTAL COST			
AUDIOVISUAL AIDS TOTAL COST			
LIGHT REFRESHMENTS			
TOTAL DAYS			
TOTAL LODGING, MEETING, AV, ETC			
ESTIMATED COSTS - AIRFARE AND GROUND TRANSPORTATION			
AIRFARE (Preliminary Estimate)			
AIRPORT TRANSPORTATION			
NO. OF COMMUTING PARTICIPANTS			
TOTAL AIRPORT TRANSPORTATION			
TRAVEL TO & FROM HOME & AIRPORT AND AIRPORT PARKING (Estimated \$60 per attendee)			
TOTAL COST AIR AND GROUND TRANSPORTATION			
TOTAL ESTIMATED COSTS			
TOTAL ESTIMATED COSTS			
SITE RECOMMENDED			

*Please see GSA's State Tax Exemption Forms overview for tax applicability. <http://www.gsa.gov>