

DOE Conference Data Reporting Guidelines

Revised Date: February 23, 2017

IMPORTANT NOTE: ATLAS meetings held at CERN or a collaborating Institute are currently **NOT** considered a conference and are classified as exempt (this may change).

I. Conference Data Reporting

- 1) As required by DOE, anticipated conference attendance for each Fiscal Year (FY) (domestic and foreign) must be submitted at the data call requested three times a year: September for January-April projections, January for May-August projections, and May for September-December projections. Conference projections should be entered on the “*conference management excel spreadsheet*” for submission to the Program Office (Suzanne Junk, suzanne.junk@bnl.gov) who will then compile and submit the data to BNL Conference Management Office.

DOE will set a “**lockout date**” in the database for each conference, after which no additional attendees/costs will be accepted. The lockout date will be no less than 60 days from the last day of the early registration. That means ***all conference attendance will need to be reported to the BNL Conference Management Office no later than 75 days prior to the start date of a conference.***

The following is DOE’s definition of a conference:

"Conference" is a meeting, retreat, seminar, symposium, or event that involves attendee travel. Other terms that may be used is conventions, expositions, workshops, or exhibitions. These events typically involve multiple agencies or non-DOE participations/support, have a registration, registration fees, a published agenda, and scheduled speakers, or discussion panels.

Exemptions apply when events fully meet the definition and intent of the criteria as listed below, that they should not be considered to be conferences (Lab approval is required prior to the event). Even where an event is considered exempt from this guidance, organizations are expected to continue to apply strict scrutiny to DOE's participation to ensure the best use of government funds and adherence with not only all applicable laws and policy, but the underlying spirit or principles, including ensuring that only personnel attend events that have a mission-essential need to do so, that expenses be kept to a minimum, and that participation in any associated social events be limited and restrained to the greatest degree practicable to avoid the appearance of impropriety.

- a. Meetings necessary to carry out statutory oversight functions. This exemption would include activities such as investigations, inspections, audits, or non-conference planning site visits.*
- b. Meetings to consider internal agency business matters held in Federal facilities. This exemption would include activities such as meetings that take place as part of an organization's regular course of business, do not exhibit indicia of a formal conference as outlined above, and take place in a Federal facility.*
- c. Bi-lateral and multi-lateral international cooperation engagements that do not exhibit indicia of a formal conference as outlined above that are focused on diplomatic relations.*

- d. Formal classroom training which does not exhibit indicia of a formal conference as outlined above.*
 - e. Meetings such as Advisory Committee and Federal Advisory Committee meetings, Solicitation/Funding Opportunity Announcement Review Board meetings, peer review/objective review panel meetings, evaluation panel/board meetings, and program kick-off and review meetings.*
- 2) According to the DOE “Updated Guidance on Conference-related Activities and Spending” dated August 17, 2015, there are DOE funding limits on travel such as total aggregate expenses incurred for a conference (i.e. at the agency level) and should be less than \$100k, otherwise DOE approval is required. Individual offices may therefore be asked to scale back or reject participation in a particular conference.