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|  <b>Fermilab</b> |   | <b>Science Management System Processes and Procedures</b> |
| <b>Procedure Number/Name</b><br>Planning for Conference Participation Procedure                   |   | <b>Original Date:</b><br>03/23/2017                       |
| <b>Written by:</b><br>T.I. Meyer  | <b>Reviewed and Updated By:</b><br>T.I. Meyer | <b>Date:</b><br>07/03/2017                                |

## Revision History

| Author     | Description of Change             | Revision Date |
|------------|-----------------------------------|---------------|
| T.I. Meyer | Revisions and prepare for release | 07/03/2017    |

## PURPOSE OF THIS PROCEDURE

The purpose of this procedure is to standardize the planning process for Fermilab participation in scientific conferences considering aspects such as travel, budget, promoting scientific collaboration and communication, laboratory reputation, fairness, and career-path development.

This procedure does not replace or supplant any of the existing Conference Travel policies or procedures. It simply describes how Fermilab consistently addresses levels of participation in conferences and how to deal with major conferences held locally.

## MATERIALS/PRE-REQUISITES NEEDED

To apply this process, the following is needed:

- Conference information (location, timing, scope)
- Designated “Chief” owner of participation in the conference with an understanding of purpose, prestige, and relevance of the conference to Fermilab programs
- Relevant budget information
- Understanding of how the subject conference fits in the context of other conference opportunities

## REFERENCES

- [Complete Guide to Official Fermilab Travel](#) esp. section on Conference Travel
- [Fermilab Conference Travel Database](#)

## DEFINITIONS

**Signature conference** – a prestigious scientific conference in an area of Fermilab’s strategic focus that is organized by the global community with a competitive, peer-review process for selecting invited and contributed talks and/or posters. (The DOE consideration of \$100,000 total cost is a separate issue.)

**Remote conference** – a conference that takes place more than 50 miles from Fermilab.

**Local conference** – a conference that takes place within 50 miles of Fermilab.

## **RESPONSIBILITIES**

- COO is responsible for overall coordination.
- The designated Chief is responsible for Fermilab participation in each major, scientific conference.
- The Travel Office is responsible for the Conference Management Tool, travel planning and costing, and providing timely status reports to the relevant decision makers.
- Travelers (conference participants) are responsible for timely registration, travel planning, and following all procedures and policies with integrity.

## **DETAILED PROCEDURE(S)**

This procedure addresses three different aspects of planning for Fermilab participation in conferences.

### **PREVIEW THE FISCAL YEAR**

At the beginning of the fiscal year, the COO will engage the Chiefs to identify the signature conferences for the coming year where Fermilab participation will be important (see Definitions above) and/or the number of Fermilab participants will exceed five.

A Chief will be designated as steward for signature conference. The designated Chief will talk with colleagues to obtain a general headcount estimate for Fermilab interest in attending the conference.

In general, participants giving oral presentations (either invited or contributed) will receive priority, followed by contributed posters and session conveners. Participation on the international organizing committee is not normally a compelling rationale on its own. Emerging leaders will also be given priority as tool for career development and professional networking. Fairness and sharing of conferences opportunities are important consideration as is the diversity of Fermilab participants.

### **PARTICIPATING IN REMOTE CONFERENCES**

For remote conferences, the COO will work with the Travel Office and past records to develop a target headcount for each conference and communicate this back to each designated Chief. The target headcount will be communicated to the Travel Office for use in the Conference Database.

Potential participants in the conference will be invited to submit their travel plans. The COO and Travel Office will monitor the “fill up” and then contact the designated Chief when the Fermilab delegation is 80% full to ensure final disposition is fair and appropriate.

### **PARTICIPATING IN LOCAL CONFERENCES**

When signature conferences are held in the Chicagoland area, it offers an opportunity for Fermilab staff to participate and experience the networking, information exchange, and

collaborative aspects of these conferences. Criteria for participation are generally relaxed and for some, this opportunity may be a very rare occasion to experience a signature conference.

Participation in local, signature conferences is encouraged by Fermilab by:

- Making the opportunity well known to relevant staff;
- Potentially organizing Fermilab-supported mass transit to and from the venue; and
- Collaboration between Divisions and the Directorate to cover registration fees, especially one-day registrations, for many Fermilab staff.

In exchange for this enterprise-level encouragement and to be responsible with taxpayer funds, Fermilab adopts the following guidelines for local conferences:

- Meal and incidental per-diem expenses are not generally reimbursed by the lab;
- If the conference organizers arrange mass transit options, individual transportation expenses are not generally reimbursed; and
- Overnight lodging and expenses are not reimbursable except when approved by the CFO, such as for staff participating in conference execution and having long, back-to-back work days where travel to/from the conference venue might post a safety risk.