

Policy on Fermilab Events

1. Purpose

The purpose of this policy is to outline the requirements for all Fermilab events and define the appropriate usage of FRA facilities (or its associated resources) for on-site events.

2. Scope

This policy applies to all public and non-public Fermilab-organized events (on-site, off-site, or virtual), with or without the use of FRA Discretionary Funds, Contract or DOE funds or registration fee-based events. This includes conferences, workshops, VIP visits, tours, natural area visitors, schools, conventions, expositions, symposiums, seminars, exhibitions and Defined Formal Meetings (defined below). Guidelines for public tours, lectures, colloquia, art performance visitors, and natural area visitors can be found in the Guidelines for Public Events and Natural Events document.

3. Applicability

This policy applies to all FRA Employees, Users, Visitors, Authorized Guests, and Subcontractors.

4. Effective Date and Date Reviewed/Updated

This policy went into effect on October 1, 2020.

5. Policy

In order to be hosted (oversight/organized and managed) by Fermilab, all Events must meet one of the below criteria:

- [Highlight the Fermilab vision;](#)
- [Support the Fermilab mission;](#)
- Foster science, technology, engineering, and/or math education; or
- Other community outreach if preapproved by the General Counsel's office; see Guidelines for Public Access for Events and Public Areas for additional details.

All Events must comply with and include the below requirements:

- Approval by Division/Section Head or Chief;
- Approval by the Foreign Visits and Assignments Office (in coordination with Export Control Office, when applicable);
- Assignment of escorts by the event organizer to visitors when/if accessing non-public areas (on-site events only); and
- Awareness of the Policy and Procedure on Access to Fermilab (on-site events only) requirements by attendees.

All public and non-public Events must comply with the additional requirements below:

- Use of an Indico site for attendee registration form and fees (when applicable);
- Registration for Arts and Lecture Series events through the Arts and Lectures series registration process and day-of registration for walk in public attendees
- Colloquium attendee's registration walk in registration for public attendees
- Registration of all University and school site visit and tour participants that attend Fermilab organized visits (EPE and EDI) or tours in the Fermilab Event Portal
- Development of a budget for costing events (money to be spent on the event) should be uploaded in the Fermilab Events Portal if applicable
- Provide estimates from vendors and subcontractors for budgeting purposes. Organizer must upload to the Fermilab Events Portal
- Provide agenda and final attendee list, where applicable. Organizer must upload to the Fermilab Events Portal.
- Use of Event badges at on-site events by all registered attendees when applicable.
- Notice to attendees of safety procedures for the building and radiation area restrictions, where applicable.
- Under the provisions of the Fermilab liquor license, alcoholic beverages must be purchased through Fermilab's Food Services.
- Dispensing of alcoholic beverages at Fermilab requires certified servers.
- Except with special permission, events at which alcoholic beverages are available will be limited to four hours and will end promptly at the approved hour. Site Security will remind the sponsor thirty (30) minutes before the approved closing hour, but it is the sponsor's responsibility to get all participants to leave in an orderly and prompt manner.

Failure to comply with the requirements of this policy may result in reduced funds or lack of reimbursement for incurred charges, or the inability to host, organize future events.

Non-authorized entry is punishable under federal and state law, including 18 USC §1752.

6. Definitions

Conferences:

"Conference" is defined in the Federal Travel Regulation as "[a] meeting, retreat, seminar, symposium or event that involves attendee travel. The term 'conference' also applies to training activities that are conferences under 5 C.F.R 410.404" However it is noted the definition is only a starting point and will be evaluated against the June 2015 DOE document. What constitutes a conference for the purpose of this guidance is a fact-based determination based on an evaluation of the criteria established and approved by the Conference Office.

Additional Indicia of Conferences:

Conferences subject to this guidance are also often referred to by names other than "conference." Other common terms used include conventions, expositions, symposiums, seminars, workshops, or exhibitions. They typically involve topical matters of interest to, and the participation of,

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multiple agencies and/or nongovernmental participations. Indicia of a formal conference often include but are not limited to registration, registration fees, a published substantive agenda, and scheduled speakers, or discussion panels. Individual events may qualify as conferences without meeting all the indicia listed above but will generally meet some of them. Please note that some training events may qualify as conferences for the purposes of this guidance, particularly if they take place in a hotel or conference center.

Events: Conferences, DOE reviews, meetings, school visits, workshops, tours, art performances, or colloquia that include non-Fermilab or non-DOE personnel. Meetings between Fermilab personnel (FRA Employees, subcontractors, or users) or with DOE are not considered events. Users attending particular events are considered “local attendees” for Travel and accounting purposes. Events are considered either public or non-public.

Public Events are those that:

- include public information that is protected by statute, regulation, or DOE policy;
- are held in locations that are accessible to the general public as defined by Fermilab’s Site Security Plan; and
- are available for attendance by the general public.

Escort: A trained individual who is accountable for the daily activities of a visitor for the duration of a planned visit. Escorts are required to accompany any persons at the lab who are accessing non-public areas and do not have a Fermilab badge.

Event Organizers, and Committees: FRA Employees, Users, and Subcontractors

Fermilab Personnel: FRA Employees, FRA subcontractors, and Users

Defined Formal Meetings: Defined Formal Meetings subject to this Policy are: official sessions of full collaboration meetings where Fermilab is the host of the collaboration or the meeting is held at the Fermilab site (such as quarterly, annual meetings not weekly, monthly meetings), VIP visits (organized by the Director’s Office), and annual/bi-annual meetings with international funding agencies.

7. Responsibilities

Director’s Office COO, is responsible for ensuring this policy is current and there is effective and consistent implementation and compliance with this policy.

FRA Employees and Users are responsible for complying with this policy when planning events and supporting all processes associated with this policy.

FRA Employees are considered the Organizers of an event. Users may be assigned as Organizers however an FRA Employee will be considered the main contact that shall seek approval for the User from the Division Head/Chief and or the CRO.

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Fermilab's Foreign Visits and Assignments (FVA) Office is responsible for determining whether an event is public or non-public, and ensuring non-public events are in compliance with DOE UFVA requirements.

Fermilab's Conference Office is responsible for ensuring Events are in compliance with rules and regulations regarding DOE defined conferences and costing of allowable and unallowable spending as well as FRA funding appropriation.

Fermilab Education and Public Engagement Office is responsible for ensuring that Educational Tours are entered into the Event Portal. Visitors for Arts and Lectures, Art Gallery, standing Public Tours and Lederman Science Center adhere to registration guidelines that are overseen by the EPE office and are set forth in the Guidelines for Public Access for Events and Public Areas.

Event Organizers, and Committees are responsible for ensuring public events adhere to the requirements highlighted in this policy. FRA Employees and/or Users that have a preplanned Event must ensure:

- Event is approved and submitted in Fermilab Event Portal
- Public are not allowed to access non-public areas
- Event participants have been informed of safety procedures
- Visitors must have proper badging requirements

8. Authorities

[Policy on Access to Fermilab](#)

[Procedure on Access to Fermilab](#)

[DOE O 142.3 – Unclassified Foreign Visits and Assignments Program](#)

[Fermilab Policy on Export Control](#)

[DOE Updated Guidance on Conference-Related Activities and Spending](#)

[Fermilab Site Security Plan](#)

9. Owner

The Chief of Staff is the owner of this policy.

10. Review Cycle

This policy shall be reviewed every year.

11. Communication Plan

The requirements of this policy will be communicated by the Office of the Director and provided to all event organizers. This policy will be available online in the Fermilab policy database. The Office of the Director provides training to all FRA employees and Fermilab users who request the use of FRA funds for DOE-defined conferences, workshops, meetings, and events in the way of in-person training, written instructions, and a future ITNA training class.

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Relevant Procedures and Forms

Policy for Conference Office

Guidelines for Public Visitors

Guidelines for Fermilab VIP Visits

[Policy for Use of FRA Discretionary Funds](#)

[Guidelines for Use of FRA Discretionary Funds](#)

[Event Approval System Procedure](#)