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Meeting and Conference Expenses

This Meeting and Conference Expenses policy provides guidance for staff of the American Physical Society (APS) when organizing meetings and conferences (meetings) that will be paid for, all or in part, by federal grants. This policy interprets the [Code of Federal Regulations](#),¹ which requires staff to exercise discretion and judgment in ensuring that conference costs are appropriate, necessary and managed in a manner that minimizes costs to the Federal award.

1.0 MEETING BUDGET

Program staff with budgetary authority will develop detailed budgets for APS-hosted meetings to limit spending to the amount approved in the grant budget.

1.1 ALLOWABLE MEETING EXPENSES

Allowable meeting expenses include but are not limited to:

- Facility rental.
- Speaker fees.
- Meals and refreshments (must be working meals with a written agenda).
- Local transportation.
- Participant support costs including lodging and travel.

1.2 UNALLOWABLE MEETING EXPENSES

There are a number of costs that are considered unallowable and cannot be charged against federal grants. They include but are not limited to:

- Alcoholic beverages.
- Food and beverage expenses that may be perceived as extravagant (gourmet snacks and desserts, for example).
- Swag and giveaways.
- Travel and other expenses for dependents.
- Costs of entertainment.
- Meals that do not have a written agenda.
- Unallowable travel expenses, as described in the APS Grant Travel & Expense Report.

Contact the APS Accounting Manager with any questions regarding allowability of meeting expenses, or consult the *American Physical Society Federal Grant Procedures*.

2.0 PLANNING AND LOGISTICS

Program staff should work with the Meetings department, when appropriate, for assistance with logistics including (but not limited to) identifying meeting locations and negotiating contracts; coordinating catering, room setup, AV and signage; and serving as a point of contact with the conference venue.

Planning should begin at least 18 months prior to meeting or conference and should begin as far in advance as possible to minimize costs.

3.0 VENUE

When possible, staff should consider the feasibility of hosting meetings onsite at the American Center for Physics to minimize spending of grant funds. If it is determined that the success of a particular meeting will be greater at an alternate site, Meetings staff will obtain bids from multiple venues (in accordance with the APS procurement policy)—such as hotels, conference centers, and academic institutions—to identify the most cost-effective option that will contribute to the overall success of the meeting.

The following should be considered when selecting a venue:

- Reasonable access for attendees.
 - Proximity to airport hubs and public transportation.
 - Central location for target audience to help ensure maximum participation.
 - Proximity of venue to lodging if meeting will be held a location other than a hotel.
- Cost of lodging for attendees.
- Catering expenses.
- Other meeting costs including room rental, AV, service charges and taxes.
- Travel expenses for APS staff and invited participants.

4.0 CATERING

Staff must make every effort to ensure all meal costs charged to federal grants are allowable and reasonable. When food and beverages will be provided by the venue, APS staff should inform the events manager at the venue of APS budget restrictions and request a custom menu aligned with the budget.

- Basic food and beverage items should be selected as necessary for the sustenance of meeting attendees. Meal expenses per participant should be guided by [GSA per diem rates](#). Staff may consider funding sources other than federal grants for catering expenses that exceed GSA per diem rates.
- Alternative food and beverage items may be provided to accommodate participants with dietary restrictions.
- Any food or menu options that may be perceived as extravagant (gourmet snacks and desserts, for example) should be avoided. Direct any questions regarding allowed food and beverage expenses to the APS Accounting Manager.
- Meals paid for with grant funds must be working meals with a written agenda. Meals for networking purposes only or without a working agenda may be charged to an APS account not connected with grant funds.
- Alcoholic beverages are unallowable expenses for grant funds. Alcoholic beverages may be charged to an internal APS account with permission of the department director.

5.0 LODGING

Every effort should be made to negotiate sleeping room rates in accordance with [GSA per diem rates](#), which vary according to zip code. If the success of an event depends critically on holding it at a venue where the GSA per diem rate for lodging cannot be met, then every effort should be made to minimize the room rate and a written explanation kept on file to document the rationale.

Consult the APS Grant Travel & Expense Report for allowable and unallowable expenses associated with lodging.

6.0 TRAVEL

For travel arrangements and reimbursement, refer to the *Grant Travel & Expense Report* and the *Travel & Expense Reimbursement* policy.

7.0 AUDIOVISUAL

Every effort should be made to minimize audiovisual expenses while meeting program objectives.

- Where practical, APS LCD projectors or projectors borrowed from another organization should be used to minimize expense.
- Internet access should not be provided to participants unless necessary for achieving program goals.

8.0 MEETING MATERIALS

Care should be taken to minimize publication/printing expenses and other materials and preparation costs as outlined in the APS procurement policy.

ⁱ “§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. See also §§200.438 Entertainment costs, 200.456 Participant support costs, 200.474 Travel costs, and 200.475 Trustees.”

US Government Printing Office (2015). General Provisions for Selected Items of Cost. *In Electronic Code of Federal Regulations*. Retrieved from [http://www.ecfr.gov/cgi-bin/text-idx?SID=94d206b79962194b1417065f5a0842da&mc=true&node=pt2.1.200&rgn=div5 -
sg2.1.200_1419.sg16](http://www.ecfr.gov/cgi-bin/text-idx?SID=94d206b79962194b1417065f5a0842da&mc=true&node=pt2.1.200&rgn=div5-
sg2.1.200_1419.sg16)

APPENDIX L

American Physical Society

**INVOICE PROCESSING & PAYMENT
FOR SUB-AWARDS & CONTRACTS**

POLICY AND PROCEDURES

September 22, 2015