



PROCEDURE 110.3-1D

Title:	EVENT MANAGEMENT
Owner:	Kimberly Yavorsky, Office of Public Affairs Coordination
Approving Official:	David J. Anna, Director, Office of Public Affairs Coordination {signature} <u>/s/ David J. Anna</u>
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Cancellation:	Procedure 110.3-1C, Event Management
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1. **PURPOSE**

- a. To establish requirements and responsibilities with respect to managing conferences/workshops/meetings and VIP visits to the National Energy Technology Laboratory (NETL), Office of Public Affairs Coordination (OPAC).

2. **APPLICABILITY**

- a. This procedure applies to all NETL conferences, workshops, meetings, and VIP visits.

3. **PROCEDURE**

Please refer to Attachment 1 for the following procedures. These procedures can also be found on the Office of Public Affairs Coordination (Events and Conferences) Intranet page.

a. **Pre-Conference Activities**

- (1) Step 1 — Contact NETL’s event manager (12 months out).
- (2) Step 2 — Meeting to discuss details of event and determine if exhibit/display is required.
- (3) Step 3 — Cost estimate prepared by NETL event manager and sent to requestor. Requestor to transfer funds to OPAC to cover expenses.
- (4) Step 4 — NETL event manager to complete request for conference approval while requestor develops mailing list.
- (5) Step 5 — Requestor to develop draft agenda and send to NETL event manager. Graphics will develop draft agenda.
- (6) Step 6 — Post announcement on Internet; send e-mail to Goldmine database announcing meeting.

b. **Post-Conference Activities**

- (1) Step A-1 — NETL event management staff collect papers/abstracts to post on Internet.
- (2) Step A-2 — NETL event management works with multi-media team to produce CD ROM.

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c. Quality Control

- (1) This quality of process is the responsibility of the Office of Public Affairs Coordination and will be updated on an as-needed basis or when there is a change in DOE Order 110.3.

4. **RESPONSIBILITIES**

a. Requestor

- (1) Provides the necessary information to the event manager to ensure that the event is properly planned and executed.

b. Event Manager

- (1) Collects the necessary information, manages the logistics of the event, completes the necessary documents, and is responsible for follow-up activities after the event is concluded.

5. **TRAINING**

- a. There are no specific training requirements for this procedure.

6. **RECORD CONTROL**

- a. All documentation created under this procedure is the responsibility of the event manager. These records will be retained according to DOE Administrative Records Schedule 16, Items 8d(1)(a) and 8d(2)(a). Item 8d(1) - Sponsor's files including, but not limited to, plan, announcements, invitations, agenda, paper presented, summaries, evaluations, and related reports maintained by the office, division, field site, or contractor responsible for coordinating the conference/convention. Permanent. Cutoff files after conference. Transfer to NARA 20 years after cutoff [N1-434-01-8, Item 8d (1)(a)]. Item 8d(2) - Sponsor's files including, but not limited to, plans, announcements, invitations, agenda, papers presented, summaries, evaluations, and related reports maintained by the office, division, field sites, or contractor responsible for coordinating the conference/convention. Cutoff files after conference. Destroy when 10 years old [N1-434-01-8, Item 8d (2)(a)]. This includes:

- (1) Request for conference approval.
- (2) List of attendees.
- (3) Agenda.

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(4) CD.

(5) Any other materials handed out at the event.

b. Documentation related to the specific event is the responsibility of the requestor.

7. **REQUIREMENTS**

a. DOE Order 110.3, [Conference Management](#).

8. **REFERENCES**

a. None.

9. **DEFINITIONS**

a. Event Manager — NETL federal point of contact responsible for overseeing the event.

b. GPO — Government Printing Office.

c. Requestor — NETL employee requesting the services of event management.

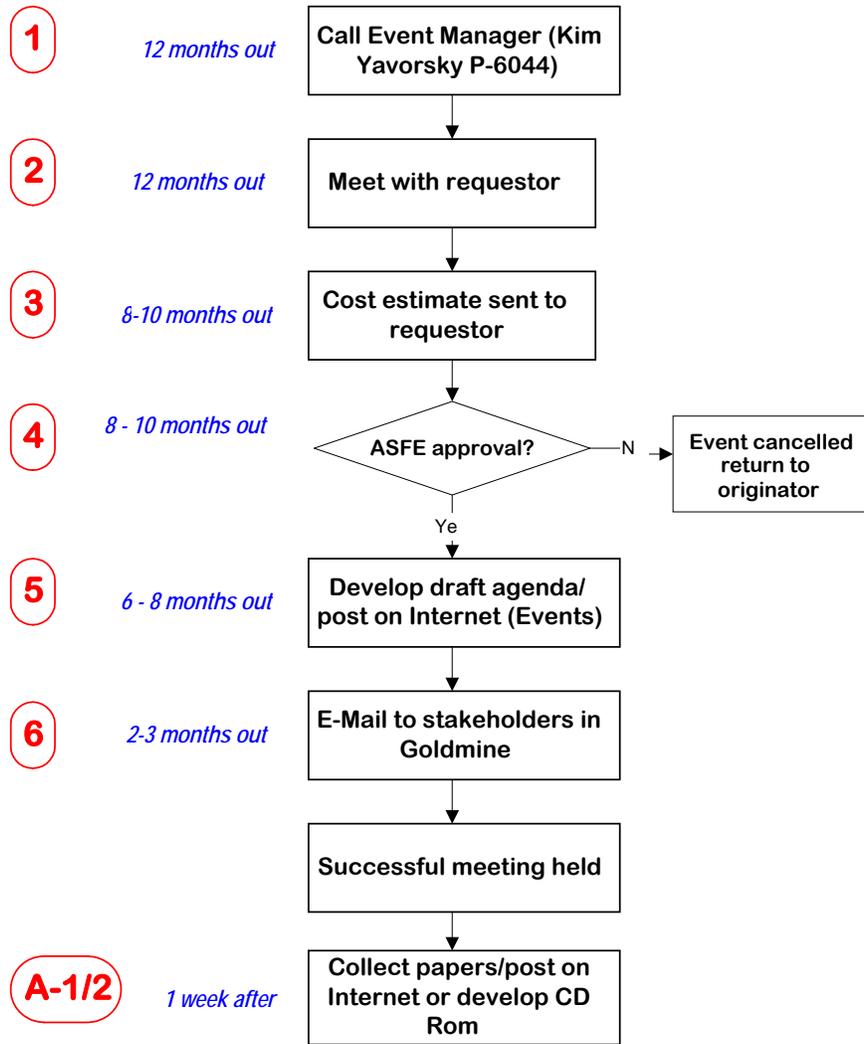
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10. **REVISION HISTORY**

VERSION	DATE	SUMMARY OF CHANGES
Original	4/18/02	To establish requirements and responsibilities with respect to managing conferences/workshops/meetings and VIP visits to the National Energy Technology Laboratory (NETL).
A	8/27/02	These revisions were needed because of new requirements from the ASFE.
B	12/20/02	This revision is needed to update the concurrence chain for conference concurrence packages.
C	12/18/03	This revision is needed to remove unnecessary information and to show organizational changes.
D	2/3/09	The procedure has been put into the new directives format.

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EVENT MANAGEMENT PROCESS FLOW SHEET



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