OFFSITE MEETING AND EVENT PLANNING PROCESS

The following DMR (Department Meeting Request) process applies to offsite business meetings in North America. For the purposes of this process, a meeting or event is defined as follows:

- A pre-planned gathering of **10 or more** people at an **offsite** venue
- Contract requirement for meeting space, catering, AV package or hotel room block
- Attendees traveling to the meeting/event by Air or Car (where mileage qualifies for expense)

When one or more of the above criteria is met, a DMR form must be submitted for review and approval. VP/GM level approval is required until further notice.

Objective:

To manage all business essential meeting & event planning and provide Corporate Services oversight, coordination and support for offsite meetings of 10 or more:
- Company events or conferences
- Departmental meetings
- Trainings
- Workshops

Benefits:
- Competitive negotiations through one source allows for consistent service to all depts, while containing costs and leveraging vendor relationships
- DMR form provides a unique ID for tracking and reporting on all meeting/event associated spend
- Payment processing through Concur provides one source for consolidated reporting
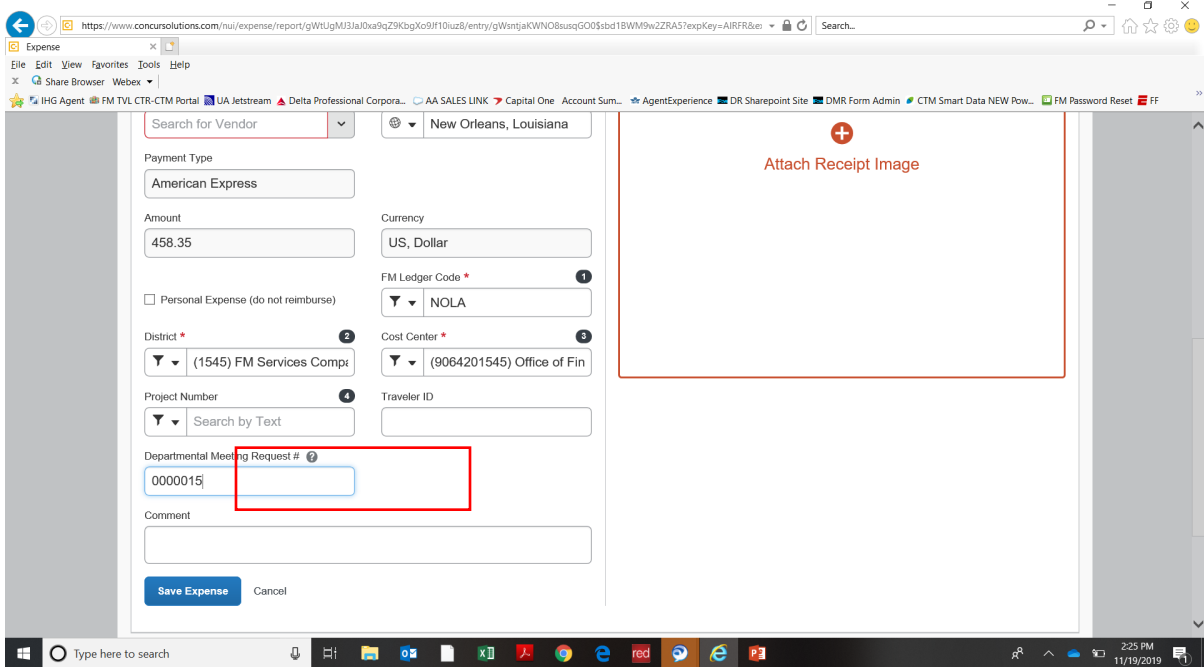- Reporting from DMR tool allows for visibility, budget planning and coordination for future meeting dates

Meeting Request Form:
- Links to the DMR form can be found within this document as well as on T&E SharePoint and FM Travel Center (under Travel Policy)
- Unique ID# beginning with DMR should be included with the invitation to attendees
- Attendees will be asked to provide the DMR# when confirming travel as well as filing expenses. Only the DMR# should be included in Concur, not the name of the meeting.
- The form will automatically launch notification of your request to the first Director level in your department, as well as VP level and the Travel Center.

Process:
1. DMR form is submitted
2. Admin Services receives DMR and confirms VP/GM level approval
3. Admin Services contacts admin/employee to review meeting requirements, location, venues and services needed
4. Sourcing – Admin Services reaches out to vendors to negotiate and obtain appropriate quotes
5. Review – Admin Services and admin/employee review options and decide on vendor/services to move forward with
6. Contracting – Vendor sends contract to Admin Services for review of terms and signature
7. Payment – Required deposit is charged to Admin Services Meeting AX (reconciliation via Concur)

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8. Planning – Admin/employee sends email invitation to attendees with details and DMR #; plans meeting with vendor; reaches out to Admin Services for support as necessary, depending on size of the meeting/event

9. Wrap Up – Final invoice is sent to Admin Services for review and approval. Final payment is charged to Admin Services Meeting AX (reconciliation via Concur)

10. Expense reports filed by attendees via Concur with reference to the DMR #