**From: Frasier, Diane (NIH/OD) [E]   
Sent: Tuesday, February 12, 2013 7:14 PM  
To: List EOFULL-L; ''AMC-MEMBERS@LIST.NIH.GOV' (**[**AMC-MEMBERS@LIST.NIH.GOV**](mailto:AMC-MEMBERS@LIST.NIH.GOV)**)'; Rockey, Sally (NIH/OD) [E]; Hann, Della (NIH/OD) [E]; Bulls, Michelle (NIH/OD) [E]  
Cc: Barros, Colleen (NIH/OD) [E]; D'Ascoli, Nicholas (NIH/OD) [E]  
Subject: RE: Conference Workgroup**

Hello all – below is the e-mail from the Deputy Secretary, Bill Corr announcing the end of the [**moratorium on conferences with contractor support**](http://oamp.od.nih.gov/ContractToolBox/MoratoriumAwrdObligConfSpprt_010913.docx)**.** Please note that the approval process for conference requests remains in place in accordance with NIH guidance, [**NIH Guidance Related to the HHS Policies on Promoting Efficient Spending: Use of Appropriated Funds for Conferences, Conference Grants and Meetings, Food, Promotional Items and Printing and Publications, January 30, 2012**](http://oamp.od.nih.gov/ContractToolBox/NIHImplementGuidDHHSEffSpendPol_15June2012.docx) **and** [**NIH Implementation Guidance for The Department of Health and Human Services (DHHS) Policy on Use of Appropriated Funds for Conferences and Meetings, June 15, 2012**](http://oamp.od.nih.gov/ContractToolBox/NIH_EfficientSpendingPolicy1-30-12final.docx)**.** Conference requests twenty-five thousand dollars and above should be submitted to [EfficientSpendingPolicy@NIH.gov](mailto:EfficientSpendingPolicy@NIH.gov).

Late last year the Deputy Assistant Secretary for the Office of Grants and Acquisition Policy and Accountability (OGAPA) solicited the OPDIVs for volunteers to form a workgroup to address the major items of concern that led to the moratorium.  In the Deputy Secretary’s e-mail, he acknowledges the efforts of the Conference Working Group and provides additional guidance on the following: the types of contracts for conference support; advice regarding audio visual equipment and services and eliminating the practice of accepting complementary services or rooms.  Attached is the document that was briefed to the Deputy Secretary last week.  This document highlights the research, recommendations and next steps for the workgroup.  For all of their efforts, special thanks to our NIH representatives to the OGAPA Conference Working Group, Tim Tosten, Executive Officer, CSR, Mary Armstead, Acting Associate Director, OAMP and Brian Goodger, Associate Director, OLAO.

Questions regarding this matter should be directed to [EfficientSpendingPolicy@NIH.gov](mailto:EfficientSpendingPolicy@NIH.gov?subject=EfficientSpendingPolicy_at_NIH_gov).  Thanks.

From: Corr, Bill (HHS/IOS)   
Sent: Monday, February 11, 2013 11:34 AM  
To: Corr, Bill (HHS/IOS); Clancy, Carolyn M. (AHRQ); Collins, Francis (NIH/OD) [E]; Frieden, Thomas (Tom) (CDC/OD); Greenlee, Kathy (ACL/OA); Hamburg, Margaret A. (FDA); Holland, Ned (HHS/ASA); Howard, Sally (HHS/IOS); Hyde, Pam (SAMHSA/IOA); Roubideaux, Yvette (IHS/HQ); Sheldon, George (ACF); Tavenner, Marilyn (CMS/OA); Wakefield, Mary (HRSA); Benjamin, Regina (HHS/OASH/OSG); Cannistra, Jennifer (OS/IOS); Daulaire, Nils (HHS/OS/OGA); Dioguardi, Paul (HHS/IEA); Esquea, Jim (HHS/ASL); Griswold, Nancy (HHS/OMHA HQ); Hash, Michael (HHS/OHR); Holland, Ned (HHS/ASA); Howard, Sally (HHS/IOS); Koh, Howard (HHS/OASH); Levinson, Dan R (OIG/IO); Lurie, Nicole (HHS/ASPR/IO); McCauley, Mike; Mostashari, Farzad (HHS/ONC); Murray, Ellen (HHS/ASFR); Rodriguez, Leon (HHS/OCR); Salatti, Acacia (HHS/CFBCI); Salcido, Dori (HHS/ASPA); Schultz, William B (HHS/OGC); Tobias, Constance (HHS/DAB)  
Cc: Murray, Ellen (HHS/ASFR); Gunderson, Nancy (HHS/ASFR); Randall, Clarence (HHS/ASFR); LaPan, Jarel (HHS/IOS)  
Subject: Update on Conference planning

Colleagues,

Thank you for your patience during the two month pause on awarding new contracts supporting conferences.  I want to acknowledge the working group members who were able to bring together a wealth of information about how we acquire and use contractor support, conference space, and audio visual services.  They have developed thoughtful recommendations for improvement that will result in some important revisions to our conference policies, additional guidance materials and templates (Conference Tool Kit), and training workshops.

The moratorium is now over but the conference approval process remains in place and OPDIV/STAFFDIVs are expected to continue to track and account for conference spending, especially HHS sponsored conferences over $100,000.  As you begin to develop your conference plans and acquisition strategies, I want to share with you some of the recommendations that you will want to keep in mind and apply now – in advance of the pending guidance:

* In acquiring conference support services:

1. Conduct early planning and market analysis, focusing on the minimum requirements needed to hold an effective conference
2. Consider using the NIH Conference, Administrative, and Travel Services (NIHCATS II) contracts <http://nihcatsii.olao.od.nih.gov/> as HHS’ strategic source
3. Avoid using general program support, technical assistance, scientific or research contractors for the logistical aspects of your conferences
4. Use small businesses and firm-fixed price contracts to the maximum extent practicable

* In selecting and reaching agreements with venues and for A/V services – either directly or through your conference support contractor:

1. Seek advice from the Office of the General Council or Acquisition Policy experts before agreeing to agreements with cancellation fees
2. Do not accept complimentary services or rooms – which may violate our Ethics rules and principles: <http://www.oge.gov/Program-Management/Program-Management-Resources/Ethics-Community/Ethics-Community/>
3. Determine if using an outside source for Audio/Visual (A/V) services represents the best value before using the venue’s A/V services

Thank you again for your support in ensuring that we continue to serve as stewards of public funds as we conduct conferences in support of our collective and individual missions.

Bill

From: Adelman, Rebecca (HHS/IOS) On Behalf Of Corr, Bill (HHS/IOS)  
Sent: Thursday, December 06, 2012 5:58 PM  
To: Clancy, Carolyn M. (AHRQ); Collins, Francis (NIH/OD) [E]; Corr, Bill (HHS/IOS); Frieden, Thomas (Tom) (CDC/OD); Greenlee, Kathy (ACL/OA); Hamburg, Margaret A. (FDA); Holland, Ned (HHS/ASA); Howard, Sally (HHS/IOS); Hyde, Pam (SAMHSA/IOA); Roubideaux, Yvette (IHS/HQ); Sheldon, George (ACF); Tavenner, Marilyn (CMS/OA); Wakefield, Mary (HRSA); ASAIO Staff; Benjamin, Regina (HHS/OASH/OSG); Cannistra, Jennifer (OS/IOS); Corr, Bill (HHS/IOS); Daulaire, Nils (HHS/OS/OGA); Dioguardi, Paul (HHS/IEA); Esquea, Jim (HHS/ASL); Griswold, Nancy (HHS/OMHA HQ); Hash, Michael (HHS/OHR); Holland, Ned (HHS/ASA); Howard, Sally (HHS/IOS); Koh, Howard (HHS/OASH); Levinson, Dan R (OIG/IO); Lurie, Nicole (HHS/ASPR/IO); McCauley, Mike; Mostashari, Farzad (HHS/ONC); Murray, Ellen (HHS/ASFR); Rodriguez, Leon (HHS/OCR); Salatti, Acacia (HHS/CFBCI); Salcido, Dori (HHS/ASPA); Schultz, William B (HHS/OGC); Tobias, Constance (HHS/DAB)  
Cc: Murray, Ellen (HHS/ASFR); Gunderson, Nancy (HHS/ASFR); Randall, Clarence (HHS/ASFR); Adelman, Rebecca (HHS/IOS)  
Subject: Important Update on Conference Spending

Colleagues,

Over the last several months, we have made a determined effort Department-wide to ensure that our spending on conferences, including those held by HHS or attended by HHS employees, directly contributes to our mission and is an effective use of program resources. I want to thank everyone who has devoted time to this important effort.

While we have made significant strides, we have also identified several areas that require additional attention, specifically, how we acquire and use contractor support, conference space, and AV services. We have seen great variation in cost for similar types of expenditures, leading us to believe that as a Department, we can do more to bring down costs.

As we begin our planning for upcoming conferences, we have an opportunity to step back and streamline our process for considering new contractor support. Effective today, in order to improve this process, we are asking divisions to pause for two months on awarding any new contracts supporting conferences, regardless of the dollar threshold.

During this two month moratorium, we will move immediately to bring together a working group with representatives from every division to consider new processes for reviewing and entering into contracts supporting our conferences. For this effort, OPDIV Heads are requested to nominate no more than two representatives and STAFFDIV Heads one representative, from their organization. Your representatives should bring a balanced mix of acquisition expertise, budget, and operational program management in conferences to the workgroup.  Please send the names of your representatives to [nancy.gunderson@hhs.gov](mailto:nancy.gunderson@hhs.gov?subject=Nancy%20gunderson@hhs.gov) and [clarence.randall@hhs.gov](mailto:clarence.randall@hhs.gov?subject=Clarence%20randall@hhs.gov) by Monday, December 10, 2012.

Exceptions to this two month pause may be warranted, and we will review any urgent requests on a case by case basis. Designated senior officials in each OPDIV/STAFFDIV can direct any such requests to the attention of Nancy Gunderson, Deputy Assistant Secretary for the Office of Grants and Acquisition Policy and Accountability. Conference requests that have already been approved may continue to proceed through the procurement process and may continue to be held.  Additionally, conference requests that have already been submitted to the Department for approval will still be given consideration. This moratorium does not apply to requests to attend non-HHS conferences or to HHS Conference grants.

Please share this transmittal memorandum with all appropriate officials within your OPDIV or STAFFDIV. Questions may be addressed to Nancy Gunderson and Clarence Randall.

The conferences that are convened by our Department or attended by our colleagues are a critical part of our work. This short pause in entering into new contracts will enable us to ensure that we are being excellent stewards of our resources.

Thank you for your continued support in this effort,

Bill Corr