

# State Procurement Manual

DOA-3449 N(R06/94) Formerly AD-P-12

		Number PRO-D-33
		Effective 12-1-05
Section GENERAL POLICIES	Agencies Affected ALL	Replaces 1-1-97
Title CONFERENCE, MEETING, SEMINAR AND GROUP TRAVEL PLANNING		Page 1 of 8

AUTHORITY: [Wis. Stats.](#) 16.705  
16.71

SCOPE: - planning and purchasing of meeting rooms, air transportation, lodging, food, beverages and related services, ground transportation, audio visual equipment and other requirements for in-state and out-of-state group travel when state funds or funds processed through state/university accounts are used excluding student-funded athletic travel and student-funded recreational travel

- DEFINITIONS:
- I. “Athletic team travel” means university-sponsored Division I, II or III sports teams traveling when state funds or funds processed through state/university accounts are used, excluding official NCAA travel.
  - II. “Commercial carrier” means a passenger airline other than charter or private aircraft.
  - III. “Group travel” means the planning or purchasing of air transportation, lodging, ground transportation, food, beverages and related services, audio visual equipment and/or any other requirements purchased for athletic team, student studies or conferences, meetings, seminars or any other activity when eight or more people are traveling at or around the same time to the same destination to conduct official state business and when state funds or funds processed through state/university accounts are used.
  - IV. “Meeting room” means a room(s) with a door(s) and/or a floor-to-ceiling and wall-to-wall divider(s) utilized by group travel participants for business meetings, breakout sessions and/or meals.
  - V. “Public facility” means a facility owned, leased or operated by the state which includes the University of Wisconsin System and properties owned, leased or operated by municipalities which includes tribal properties.
  - VI. “State agency” means an executive branch agency or the University of Wisconsin System.

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- VII. “Student studies travel” means university-sponsored student study travel abroad for course credit when state funds or funds processed through state/university accounts are used. Travel may or may not include a university faculty and/or staff member.
- VIII “Travel agency” means a traditional or Internet-based travel company licensed to sell commercial carrier tickets.
- IX. “Travel planner” means a state employee(s) planning the group travel and/or the purchasing staff responsible for following purchasing rules for group travel.

**CONTENT:**

- I. Procedure:
- A. The travel planner will define the specifications for group travel including requirements for air transportation, meeting room(s), exhibit and/or reception space; lodging, food, beverages and related services, ground transportation, audio visual equipment and any other requirements. Only authorized state agency purchasing agents will conduct official sealed procurements.
- B. When bundling components for athletic team and student studies travel arrangements, the travel planner will first contact a contracted travel agency for a total cost quotation. The travel planner may also obtain a quote(s) for bundled travel arrangements from a non-contract travel agency. The travel planner is then encouraged to contact minority-owned, women-owned, veteran-owned and/or small travel agencies when obtaining additional quotes. The travel planner will then utilize the lowest total cost provider.
- C. The travel planner may bid each component of the group-travel travel arrangements separately only when the total cost of the components is estimated to be \$25,000 or less.

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- D. The **athletic team** travel planner will first contact a contract travel agency for air transportation whenever a contract exists for athletic team travel.
1. The athletic team travel planner may also obtain a quote(s) for commercial carrier air transportation from a non-contract travel agency or commercial carrier. Employees are encouraged to contact minority-owned, women-owned, veteran-owned and/or small travel agencies when obtaining travel quotes.
  2. When obtaining and comparing quotes, the athletic team travel planner will use consistent requirements for destination and departure date and time requirements.
  3. The athletic team travel planner will utilize the lowest total cost provider from quotes provided through paragraphs D.1. and D.2. above. The athletic team travel planner will include service fees in comparisons to determine the lowest total cost provider.
  4. The athletic team travel planner is required to document all quotes whenever non-contract travel agencies or commercial carriers are used. Documentation may be submitted at the time of purchase via e-mail to [travel.quotes@Wisconsin.gov](mailto:travel.quotes@Wisconsin.gov). Or, if an agency so chooses, it may coordinate the required documentation for the entire agency and send documented quotes on a Department of Administration form template to [travel.quotes@Wisconsin.gov](mailto:travel.quotes@Wisconsin.gov) at the time it reviews the purchasing card report. In such case, the athletic team travel planner will attach another quote(s) to the agency's purchasing card report. One of these two processes will be followed.

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- E. The **student studies** travel planner will first contact a contract travel agency for air transportation whenever a contract exists for student studies travel.
1. The student studies travel planner may also obtain a quote(s) for commercial carrier air transportation from a non-contract travel agency or commercial carrier. Employees are encouraged to contact minority-owned, women-owned, veteran-owned and/or small travel agencies when obtaining travel quotes.
  2. When obtaining and comparing quotes, the student studies travel planner will use consistent requirements for destination and departure date and time requirements.
  3. The student studies travel planner will utilize the lowest total cost provider from quotes provided through paragraphs E.1. and E.2. above. The student studies travel planner will include service fees in comparisons to determine the lowest total cost provider.
  4. The student studies travel planner is required to document all quotes whenever non-contract travel agencies or commercial carriers are used. Documentation may be submitted at the time of purchase via e-mail to [travel.quotes@Wisconsin.gov](mailto:travel.quotes@Wisconsin.gov). Or, if an agency so chooses, it may coordinate the required documentation for the entire agency and send documented quotes on a Department of Administration form template to [travel.quotes@Wisconsin.gov](mailto:travel.quotes@Wisconsin.gov) at the time it reviews the purchasing card report. In such case, the student studies travel planner will attach another quote(s) to the agency's purchasing card report. One of these two processes will be followed.

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- F. The **group-travel** travel planner, other than for athletic team and student studies travel, will work with any vendor(s), following state purchasing rules when planning day or overnight group travel in-state or out-of-state unless utilizing a state contracted hotel. The travel planner is encouraged to contact minority-owned, women-owned, veteran-owned and/or small travel agencies when obtaining travel quotes. [DOA-3130](#) and [DOA-3131](#) may be used to obtain quotes.
1. When the total cost of group travel is estimated to be \$5,000 or less, the travel planner will follow best judgment purchasing rules as defined in [PRO-C-8](#), Simplified Bidding, of the *State Procurement Manual*.
  2. When the total cost of group travel is estimated to be over \$5,000 through \$25,000, the travel planner will follow simplified bidding rules as defined in [PRO-C-8](#).
    - A. When simplified bidding will be used, the following procedures will apply:

Obtain three or more quotes and document the bids using the Simplified Bidding Record, [DOA-3088](#). Telephone and verbal quotes may be provided, but the state agency must receive written confirmation from the selected vendor.
  3. When the total cost of group travel is estimated to be over \$25,000, the travel planner will release an official sealed bid or request for proposal. All procurement rules as defined in the *State Procurement Manual* will be followed.
- G. The travel planner may include air transportation quotes from Wisconsin Air Services for group travel.

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- H. When charter air transportation is required for group travel, the travel planner will follow all state purchasing rules for best judgment, simplified bidding and sealed bids/proposals.
  - I. When air transportation is not required, the travel planner will follow purchasing rules and may work directly with lodging properties, ground transportation companies and other companies as required for each component of the group travel planning.
  - J. No additional bidding is required for group travel when using public facilities or any of the State Bureau of Procurement contracted hotels.
  - K. The state's purchasing card will be used to charge the cost of any group travel commercial carrier tickets, travel agency service fees, lodging and car rental rates. Policy stated in [PRO-E-23](#), Purchasing Card, the [Model Cardholder Instructions](#) and the [State Accounting Manual](#) will be followed.
  - L. The state's travel card may be used in place of or in addition to the state's purchasing card. The state's travel card is optional to the employee. Policy stated in the State of Wisconsin [Travel Card Policies and Procedures Manual](#) will be followed.
- II. Location:
- A. Athletic team travel sponsored by the university will be conducted where appropriate for the team activity.
  - B. Student studies travel sponsored by the university will be conducted where appropriate for the course of study.

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C. All other group travel sponsored by state agencies primarily for the participation of government employees will be conducted at state contracted hotels or public facilities whenever possible, provided the property meets the business needs of the agency and at locations which will: minimize fuel consumption for transportation; provide the necessary services at the most economical cost to the state; and facilitate public attendance and/or press coverage as necessary.

### III. Maximum charges:

The maximum charges for lodging and meals are established by the current employee bargaining agreements and by travel schedule amounts authorized by the Joint Committee on Employee Relations. Questions first should be addressed to the agency chief financial officer. Further financial information is available from the State Controller's Office [State Accounting](#) Manual or, at 608/266-5411.

### IV. Compliance:

A. Employees will follow all more stringent policies and procedures in place at his/her agency.

B. State agencies are responsible for contract compliance and audit.

### V. Non-discrimination:

An agency will meet only in facilities with expressed policies for use and membership which prohibit discrimination based on one's age, race, religion, color, sex, sexual orientation, national origin, or handicapped condition. If an agency's only alternative for a facility is one which does not meet these conditions, the agency will document the reason(s) for use of the facility.

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## VI. Accessibility:

An agency is responsible for ensuring that, to the maximum extent possible, any group travel will be held in facilities that at least meet minimum accessibility features. Exception: A meeting of ten (10) persons or fewer if all participants are known to have no disability and no members of the public are expected to attend the meeting.

Note: The selected conference, meeting or seminar facility must be in compliance with ADA standards.

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