



State Procurement Manual

Department of Administration, State Bureau of Procurement

Number
PRO-514

Section EXCEPTIONS, WAIVERS AND SPECIAL HANDLING	Effective 9/16/19	Replaces PRO-D-32; 33 Various Dates
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SCOPE: The purpose of this policy is to provide guidance for travel-related purchasing and the procurement procedures for conferences or other similar agency events.

POLICY: When state funds, or funds processed through state accounts are used, procurement rules apply to the purchase of travel for an individual and purchases related to group events such as meetings, trainings and conferences (Group Event). This includes but is not limited to planning and purchasing of meeting rooms, air transportation, lodging, food, beverages and related services, ground transportation, audio visual equipment and other requirements for travel or events.

This policy excludes student-funded athletic travel and student-funded recreational travel.

Uniform Travel Schedule Amounts (UTSA)

In addition to applicable purchasing rules, travel and conference-related expenses are governed by the limits and conditions of the State of Wisconsin Compensation Plan, Section F, UTSA. Employees will also follow all, more stringent, policies and procedures of their agency.

Use of State Resources

State-owned fleet vehicles will be used before the in-state rental car contract(s) whenever possible. State-owned or leased facilities will be used for events whenever possible. See PRO-513, Procurement Considerations in Facilities-Related Projects and Leasing of Space.

- PROCEDURE:**
- I. Use of Travel-Related Contracts
 - A. Employees will first use any existing state or agency contracts for travel agency, vehicle rental or hotel or



Legal Authority

Wis. Stats. 16.001; 16.003(1); 16.70(1) and (3); 16.705; 16.71

Agencies Affected: All, unless otherwise noted

Authorized:

Sara Redford, Director
State Bureau of Procurement



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conference management services before making off-contract purchases. See PRO-402, Statewide Contracts: Standards and Utilization.

- B. When using a contract that was competitively bid, an agency does not need to conduct any additional competitive bidding processes for travel spend.

II. Purchasing for Individual Travel

- A. Where contracts are not available and/or do not meet the business needs of the agency, employees will use best judgment in selecting a travel services provider and/or to make hotel arrangements.
- B. When employees are traveling within the state, properties meeting the business needs of the traveler will be contacted directly. The contracted travel agencies will not be used to reserve in-state hotels.
- C. Employees may book out-of-state hotel rooms through a contracted travel agency, a non-contract travel agency or directly with a hotel property. When using a non-contract travel agency, employees are encouraged to contact small or supplier-diverse businesses. See PRO-606, Supplier Diversity Policy and Reporting.
- D. Payments for individual travel arrangements do not require the use of a purchase order. Use of a state-issued purchasing or travel card is acceptable. See PRO-408, Purchase Requisitions, Orders and Methods of Payment.

III. Group Event Management and Bidding Thresholds



Legal Authority

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- A. When an agency is planning a Group Event, prior to entering into any agreements, it will consider the total cost of all components of the event when determining which competitive bidding process is applicable. See PRO-101, Procurement Definitions and Thresholds.
- B. Group Events 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 taking factors into account such as fuel consumption for transportation; services at the most economical cost to the state; and facilitate public attendance as necessary.
- C. The agency will define the requirements for the Event including but not limited to: location, dates, capacity, meeting room(s), exhibit and/or reception space, meals, audio visual needs, computer and connectivity, setup, number of attendees, number of guest rooms needed and other event related equipment and services.
- D. The agency will ensure that all expenses are allowable and appropriate for the funding source and in accordance with the policy on meetings and meals per UTSA and the Wisconsin Accounting Manual.
- E. The agency will ensure compliance with PRO-401, Basic Contract Eligibility.
- F. The selected facility must be in compliance with applicable ADA standards.



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IV. Group Event Contracts

- A. Careful consideration should be given to terms and conditions that are unique to the event booking of facilities and hotels. At a minimum, agencies will ensure that any agreement with a hotel or other event provider adheres to standard contract terms; see PRO-404, Standard Terms and Conditions.
- B. Payment for Group Events will be made using a purchase order. Payments may also be made using a purchasing card if it meets the threshold limits and other applicable policies for use of the card. Direct charges will not be used to pay for a Group Event.



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