



# Event Planning Guidelines for Invitations and Contracts

## TEN TIPS FOR RWJF EVENT PLANNING

**(Use these before sending invitations/signing event contracts.)**

1. Identify all local, state and federal government speakers/invitees (“Government Attendees”). **(See back side for definitions.)**
2. Determine which **Government Attendees** are **Government Officials** **(See back side for definitions.)** If it is not clear, see the Law Department for a sample form letter you will need to send to confirm that a **Government Attendee** is **NOT a Government Official**.
3. Exclude **Government Officials** from lists of honoraria recipients and/or gifts and event favors exceeding \$25.
4. Calculate the maximum costs of meals and drinks RWJF will pay/provide to **Government Officials**. (Include all estimated food, drinks, taxes, event room, service fees and gratuities.) Determine whether the total per person cost per day is within 125 percent of the applicable GSA rate for the event location at [www.gsa.gov](http://www.gsa.gov). **Note that standard GSA rates for meals are reduced by 25 percent on the first and last day of a meeting or conference.**
5. Determine whether hotel rooms are within 125 percent of the applicable GSA rates at [www.gsa.gov](http://www.gsa.gov).
6. If lodging or meals will likely exceed 125 percent of applicable GSA rates, **SEE THE LAW DEPARTMENT**. (Lodging/meals may only exceed 125 percent of the applicable GSA rates in two circumstances: (1) the meeting includes more than 25 persons (excluding all **Government Officials** and RWJF staff, Trustees, and contractors); or (2) all **Government Officials** must have their travel approved by their supervisors under the procedures of that agency/office.) There is also a ceiling on allowable expenses in these two situations.
7. Determine if the Foundation will be able to reimburse **Government Officials** for any meals in addition to those provided by the Foundation at the event. (If RWJF will be paying the maximum amount per day allowable for meals at the event, no other reimbursements for meals will be allowable on those days.)
8. Confirm that all event contracts reflect allowable per person expenses. **SEE THE LAW DEPARTMENT FOR ASSISTANCE.**
9. For ALL attendees (whose expenses are paid by RWJF) confirm that attendance serves an RWJF purpose. If RWJF is not a major sponsor of the event, **SEE THE LAW DEPARTMENT**. (Additional obligations may be imposed on attendees.)
10. Send out invitations with specific language:
  - for **Government Officials**: about which expenses/reimbursements will be provided
  - about any additional obligations imposed on attendees (See #9 above.)

**Questions? Please contact the RWJF Law Department.**



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## WHO IS A GOVERNMENT OFFICIAL?\*

### AT THE FEDERAL LEVEL:

- an individual who holds elected public office in the executive or legislative branch of the government of the United States;
- an individual who was appointed by the president to hold an office in the executive or judicial branch of the government of the United States;
- an elected official in the federal government (e.g., members of Congress, president, vice president); a presidentially appointed official in the federal government (e.g., cabinet members and other administration political appointees, U.S. District Court judges, certain military officers);
- a federal employee with a position listed in Schedule C of Rule VI of the Civil Service Rules (i.e., positions of a confidential or policy-determining character that are exempt from competitive hiring, as determined by the Office of Personnel Management);
- a federal employee for which the compensation is a rate at or above the current lowest rate of base pay for the Senior Executive Service (in 2015, \$121,956);
- a member of the Internal Revenue Oversight Board;
- an individual who holds a position under the House of Representatives or Senate of the United States, for which the gross compensation is at an annual rate of \$15,000 or more; or
- an individual who is a personal assistant, executive assistant, or secretary to any person in the categories above.

### AT THE STATE/LOCAL LEVEL:

- an individual who holds an elective or appointive office in the executive, legislative, or judicial branch of a state, possession, political subdivision, District of Columbia, or tribal government; and receives gross annual compensation of \$20,000 or more; and a significant part of whose activities include “the independent performance of policymaking functions,”\*\* or
- a personal or executive assistant or secretary to any such official.

\* For purposes of these rules, the following members of a government official's family are treated as if they are government officials: spouse, ancestors, children, grandchildren, great-grandchildren, and the spouses of children, grandchildren, and great-grandchildren.

\*\* Examples of positions that are **not considered to exercise policymaking functions** within the meaning of this definition include: presidents, chancellors, provosts, deans, and similar officers of state colleges and universities; professors, instructors, and other faculty members of state colleges and universities; physicians, nurses, and other professionals employed in that capacity by public hospitals and public health agencies; and superintendents and other public school officials, who are subject to the direction and supervision of a state board of public education.

**Questions? Please contact the RWJF Law Department.**