



Meeting Planning Policies and Guidelines

Driver Safety Program

The following guidelines were created to assist the Driver Safety Program (DSP) volunteers when working with the National Office staff in supporting Regional and State meetings and are in compliance with the AARP Volunteer Travel & Subsistence Policy (can be found on VolunteerNet).

Reminder:

AARP Meal Spending Guidelines –

\$12 Breakfast, \$18 Lunch, \$30-\$35 Dinner (Includes beverages, snacks, tax & tip)

AARP Hotel Spending Guidelines -

\$79 - \$179.00 per night (rates may be higher in high cost cities)

Getting Started: Planning a Meeting

- Discuss your meeting plans with your immediate supervisor for feedback and approval prior to getting started.
- **All** workshops and meetings must be approved by the Regional or State Coordinator and have been budgeted for in the year in which they will occur prior to working with a venue and the National Office staff. Please use the ***Defining Meeting Types*** document while pre-planning.
- For Regional and State Meetings – please complete and submit the ***Meeting Planning Worksheet*** to **Gia DiMuzio** at the National Office. This will help ensure the contract matches what was discussed with the venue.
- All requests must be submitted to **Gia DiMuzio** for processing and approval **at least 60 days** prior to the first day of the meeting/workshop.
- Although a volunteer may gather the logistics for the meeting, he/she must **never** sign the contract on behalf of AARP; this will make the signer responsible for all charges pertaining to the meeting. **Contracts signed by anyone other than AARP's official contract officer are not authorized and will not be honored.**
- The National Office will attain contracts, vendor information forms, tax information and final cost estimations; however the volunteer is responsible for providing the confirmation of accuracy prior to processing.
- The New Vendor Form and W-9 is required for all new venues. Without the form AARP will not be able to pay the venue unless they are setup in the accounting system.
- To expedite the contract signature process make sure the following clauses are in the contract:

❖ **Force Majeure (Impossibility)**

The performance of this Agreement by either party is subject to acts of God, government authority, disaster, strikes, civil disorder, or other emergencies, or any of which making it illegal or impossible to provide the facilities and/or services for

your meeting. It is provided that this Agreement may be terminated for any one or more of such reasons by written notice from one party to the other without liability.

❖ Indemnification

Each party (the “Indemnifying Party”) shall, at its own expense, defend, hold harmless and indemnify the other party (the “Indemnified Party”) and the Indemnified Party’s subsidiaries, affiliates, officers, directors, employees, members, independent contractors and agents (provided they are acting in the course of their duties with respect to the foregoing) from and against any claims, damages (including consequential and punitive damages), judgments, awards, settlements, costs and expenses including reasonable fees and expenses of counsel, resulting from third-party claims arising, directly or indirectly, out of the Indemnifying Party’s performance under this Agreement or breach or alleged breach of any agreement, obligation, representation, or warranty under this Agreement, except to the extent caused by the negligence or willful misconduct of the Indemnified Party.

Information to Consider when Planning your Meeting

- Meeting date(s) and time(s);
- Meeting location (check locally for the **most economical** venue and when appropriate, use the AARP State Office);
- Total number of meeting attendees;
- Video conferencing is available for AARP staff participation in your meeting if the meeting is held at an AARP State Office. Gia DiMuzio can arrange this feature if the required prior notice is given.
- In some instances, conference calls can be arranged, but will require at least 5 business days notice for guaranteed usage.
- Number of sleeping rooms and total number of nights;
- Catering needs for each day of your meeting, along with total count and any special diet restrictions of attendees;
- Audio visual and equipment needs for each day of your meeting;
- Special services that will be required (i.e., translators, interpreters, etc.);
- Additional space needed (i.e., exhibit space, registration area, etc.);
- Special needs (ie. group meals, reception or other after hours function).

Important Reminders:

- Incomplete information and information received outside of the specified timeframes will not be processed or approved.
- Reimbursable out-of-pocket expenditures related to the meeting must be submitted on a Standard Activity Expense Statement (D13600) within **30 days** of the date the expense

was incurred. Make sure **itemized** receipts are attached to the statement and it is signed by your supervisor before submission. Incomplete forms and forms without receipts (copies are ok) will be returned.

- All group meals require a list of attendees (first and last names) and your itemized meal receipt (copies are ok) with the expense statement you are submitting.
- DSP will process payment for sleeping rooms, catering, audio visual/equipment needs, meeting room fees, special services and venue deposit. Make sure this information is included in the Meeting Planning Form and submitted to **Gia DiMuzio**.

Making Travel Arrangements:

If you or your attendees traveling for AARP DSP business need to make air, rail or rental car arrangements, please contact Travel Incorporated at the number listed below for rates.

Volunteers are also encouraged to shop online for lower rates. If you book your travel arrangements online, you will be reimbursed by submitting the information on your Standard Activity Expense Statement (D13600). Everyone is responsible for making their own travel arrangements.

Contact **Travel Incorporated at 1-800-952-1950** during their normal business hours:

Hours of Operation (Eastern Time) Calls received after hours are considered an emergency and will incur a fee.	4 a.m. – 11 p.m. Mon. – Fri. (ET) 9 a.m. – 6 p.m. Saturday (ET) 11 a.m. – 9 p.m. Sunday (ET)
E-mail	AARP.Travel@Travelinc.com 8 a.m. – 6 p.m. Mon. - Fri. (ET)

Travel Incorporated will ask you for an accounting code to process your request.

For regional and state meetings, it is **1000-33520000-5856-600100-UA60XXX** (the last 3 digits are your region or state code).

For workshops, it is **1000-33520000-5853-600100-UA60XXX** (the last 3 digits are your region or state code).

Driver Safety Program
Meeting Planning Contact:
Gia DiMuzio - gdimuzio@aarp.org or (202) 434-3685