



Speaking Invitation Questionnaire

Your organization has invited an U.S. Department of the Treasury (Treasury), Office of Small and Disadvantaged Business (OSDBU), Office of Diversity, Equity, Inclusion, and Accessibility (ODEIA), Equity HUB, Office of Minority and Women Inclusion (OMWI), and the Bureaus official to speak or otherwise participate in your event. Under the Standards of Ethical Conduct for Treasury Employees, Ethics Regulation, and Treasury policy, personnel assigned to U.S. Department of the Treasury may participate in an event sponsored by a Non-Federal Entity under certain criteria. To assist us in determining whether this invitation to speak or otherwise participate in your event falls within the criteria, we ask that you provide the below information. *Nothing in this request for information should be interpreted as a request for payment, gifts, or monetary benefits.* **Please provide responses in bold type.** Once we have this information, we will be able to determine whether the Treasury official may accept your invitation.

Host Organization Information

1. Name of Organization Hosting the Event:
2. What are the goals and activities of the host organization:
3. If the invitation did not come from the host organization, please provide which organization invited the speaker and their POC information:
4. Is the host organization of the event a registered lobbying organization, a 501(c)(3) tax exempt organization, a media organization, or for-profit organization? If so, identify type.

5. Does your organization do business with or have a claim before the U.S. Department of the Treasury? Or, does your organization have an agreement with the U.S. Department of the Treasury? (OSDBU)

6. Point of contact who may provide additional information (name, email, and telephone number):

Event Information

1. Please identify the name of the event:

2. When will the event take place:

3. Where will the event take place (if virtual – please indicate so here):

4. List the names (no abbreviations please) of any additional sponsors of this event:

5. Please describe the event (conference, roundtable, interview, podcast, etc.) and what the host organization purpose for the event is:

6. Is attendance at the event open to the public or limited to membership in a particular organization or by invitation only (If limited to a particular membership, please identify the organization.):

7. How many attendees do you anticipate attending this event?

8. Please describe the makeup of the attendees (for example, Treasury Departmental Offices and the Bureaus contractors, private industry, members of Congress, community leaders, academia, Federal officials (list agencies), etc.):

9. Will attendees generally be accompanied by their spouses or guests? No Yes

10. To your knowledge will any outside media outlets be covering or attending this event?

Event Fee/Costs Information

1. Is this a fundraiser for your or another organization, if so, explain what fundraising activities will occur at the event:

2. List / Identify all of the registration / attendance fees any attendee is charged to attend the event (include early bird and late registration fees, as well as the fee schedule for different categories of persons attending the event. If there is no registration fee, so state:

3. Explain specifically what is included in the registration or attendance fee (e.g., training, meals, lodging, entertainment, etc.). Alternatively, if there is no registration fee, but attendees will be offered meals, food, or refreshments at the event, identify what they will be offered and the estimated value per person of the food and refreshments offered to the attendees:

4. If there is a registration or entrance fee for the event, does the invitation for the Treasury OSDBU official include a waiver of the fee for the invited Treasury OSDBU speaker on the day he/she speaks? If so, is an entity other than event host/sponsor paying for the Treasury OSDBU official's costs to appear at / participate in this event? If so, who:

5. If the fee is waived for this speaker, will the entrance fee also be waived for the speaker's aide or support staff:

6. Is your organization or another offering to cover any other expenses, to include travel or travel-related expenses (such as meals, lodging, parking, etc.): No Yes

7. If so, what expenses has your organization offered to pay and provide the cost or value of any travel-related benefits being offered to the invited speaker:

8. Do you intend to offer the Treasury OSDBU speaker any type of speaker's presentation gift for participating in your event (If so, describe the presentation item and provide its cost or value):

Information Regarding the Speaking Support Being Requested

1. What the total number of speakers or panel members participating in the event:

2. List the number (and names) of anticipated speakers or other participants employed by the Treasury who have been invited to speak or participate in your event:

3. List the number (and names) of anticipated speakers or other participants employed by the U.S. Department of the Treasury (non-Treasury OSDBU) who have been invited to speak or participate in your event:

4. Describe what you want or expect the invited speaker to talk about or address:

5. Will the Speaker be engaging in a Q&A with the attendees? No Yes

6. Will the Speaker be audio or video recorded for future broadcast, if so please explain:

Use the Submit Request button to submit completed questionnaire to
OSDBU_Team@treasury.gov.