

Reclamation Manual

Directives and Standards

Annual/Quarterly Conference Plan Template Instructions
General:
1. The annual plan is due to the Office of Financial Management by October 31st on an annual basis. Plans must be updated quarterly, at a minimum. For Q1 please provide a quarterly plan by June 30th.
2. The purpose of the conference plan is to monitor the flow of conference approval packages and expected workload.
3. For every planned conference, please enter only one line.
4. Please use best information available to determine number of attendees and estimated costs.
5. Bureaus may need to track additional fields. If so, please delete prior to PFM submission.
Line-by-Line Instructions
Event Title - please do not use acronyms and place any year or annual reference at the end. For example, American Bird Catchers Fall Meeting 2016, not 2016 ABC Fall Meeting .
Frequency - Please choose: One-Time, Monthly, Quarterly, Annually, Biennial (every other Year), Ad-Hoc, or Other.
Start Date - Please use format: mm/dd/yyyy
Date Final Approval is Needed - Populate only for those conferences/sponsorships requiring advanced Department approval. Typically, advanced approval is required for procurement purposes, early bird discounts, issuing travel authorizations early for lowest fare availability, etc.
Attendees - Please enter the estimate in numeric characters only.
Costs - Please enter estimated costs in numeric characters only. - Registration Costs are fees to attend externally hosted conferences. - Sponsorship Costs are payments to an external organization. - Administrative Costs are charges for room rental, AV, planning, etc. - Total Conference Costs are automatically calculated.
Bureau Contact Email - Please list the email address for the bureau contact name. Typically, this is the same as listed on the <i>Checklist for Evaluation of Proposed Conference</i> .