

Reclamation Manual

Directives and Standards

Instructions to Complete the [Department of the Interior Checklist for Evaluation of Proposed Conference \(Checklist\)](#)

1. General Instructions.

- A. **The Checklist must be filled out completely and accurately.** The *Checklist* will expand as needed.
- B. Completing the comments portion of the *Checklist* is not optional. **Rather, the Comments boxes must contain justifications for the responses given in the checkboxes.**
- C. For example, if a *Checklist* is marked “No” for Item 13, then an explanation of why video-conferencing technology was not considered must be provided in the *Comments* box to the right of the checkboxes. If the reverse is true, and Item 13 is marked “Yes,” then an explanation of why video-conferencing technologies were inadequate for the purposes of the conference must be provided in the *Comments* box.

2. Item Instructions.

General Conference Review

- A. **Item 1 - Have attendees recently attended similar conferences? Note redundancy vs. supplementary / complimentary event.** If Item 1 is marked “Yes,” additional information must be provided within the *Comments* section regarding similar conferences that proposed attendees have recently attended. In order to properly address whether attendance is redundant, supplementary, or complementary, past conferences attended by proposed employees must be considered, and any similarities and patterns in attendance must be provided in the *Comments* box.
- B. **Item 2 - Have the appropriate attendees been selected? (minimum necessary to complete mission).** Provide a description of how attendees were selected to attend in the *Comments* section.
- C. **Item 3 -Is the location within allowable per diem limits?**
 - (1) If Section 3 is marked “Yes,” the lodging and M&IE rates for the selected conference location must be provided in the *Comments* box. Skip Item 3a and proceed to Item 4.
 - (2) If Item 3 is marked “No,” both the actual and allowable lodging and M&IE rates for the selected conference location must be provided in the *Comments* box. An

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explanation of why the location was selected despite the rates exceeding allowable per diem limits must also be included.

D. Item 3a - If not, have all requirements to authorize the conference lodging allowance been completed? (Include waiver).

- (1) If the previous Item 3 is marked “Yes,” skip this section and proceed to Item 4.
- (2) If Item 3a is marked “Yes,” a reference to the lodging allowance authorization waiver must be attached to the conference approval request package and noted in the *Comments* box. For the purposes of this *Checklist*, the waiver must consist of a cost comparison as outlined in Federal Travel Regulation Section [301-74.6](#) and be signed by the RLT host or RLT external conference attendance approving official (see definitions for these roles in Paragraph 3.I. and 3.D. respectively). Individuals seeking actual expense reimbursement to attend a Reclamation-hosted or externally-hosted conferences must also obtain the appropriate approval from their local approving official.
- (3) If Item 3a is marked “No,” an explanation of why lodging allowance authorization waiver was not completed must be provided in the *Comments* box.

E. Item 4 - Will meals be provided at conference? If so provide details and justification.

- (1) If Item 4 is marked “Yes,” the details and justifications for providing meals must be provided in the *Comments* box.
- (2) If Item 4 is marked “No,” it is not necessary to provide any information in the *Comments* box.

F. Item 5 - Have appropriate procedures to decrease per diem for provided meals been put in place?

- (1) If Item 5 is marked “Yes,” the details of those procedures must be described in the *Comments* section.
- (2) If Item 5 is marked “No,” a justification of why procedures to decrease per diem have not been put in place and/or the plans to put such procedures in place must be provided in the *Comments* box.

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G. Item 6 - Is the length and content of conference appropriate? (Include agenda).

- (1) A reference to the agenda attached to the conference approval request package must be provided in the *Comments* box, regardless of whether or not this section is answered “Yes” or “No.”
- (2) If Section 6 is marked “No,” an explanation of why the length and/or content are not appropriate and why approval is still being requested must be provided in the *Comments* box.

H. Item 7 – Do the conference and associated sponsorship meet acquisition and legal requirements? (i.e., have appropriate solicitor and/or acquisitions personnel been consulted?)

- (1) If Item 7 is marked “Yes,” an explanation must be provided explaining how solicitor and acquisitions personnel were consulted.
- (2) If Section 7 is marked “No,” an explanation must be provided of why the solicitor and acquisitions personnel were not consulted.

I. Item 8 - Has pre-approval been granted for sponsorship, membership, support, or cooperative agreements? (Include approval).

- (1) If Item 8 is marked “Yes,” attach pre-approval documentation.
- (2) If Item 8 is marked “No,” provide an explanation of how you plan to request approval for sponsorship, membership, support, or cooperative agreement in the *Comments* box.

Hosted or Co-Hosted Conference Planning (disregard this section if not hosting)

J. Item 9 - Were alternative conference locations considered? (Include cost comparison with at least three alternative locations).

- (1) If Item 9 is marked “Yes,” the analysis of the conference approval request package must be referenced in the *Comments* box.
- (2) If Item 9 is marked “No,” a justification must be provided in the *Comments* box.

K. Item 10 - Was least costly location selected? If not, provide justification.

- (1) If Item 10 is marked “Yes,” a reference to the cost analysis of the conference approval request package must be included in the *Comments* box.

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- (2) If Item 10 is marked “No,” the rationale used to justify this decision must be provided in the *Comments* box.

L. Item 11 - Was a Government facility selected? If not, provide justification.

- (1) If Item 11 is marked “Yes,” the Government facility where the conference will be held must be identified in the *Comments* box.
- (2) If Item 11 is marked “No,” then the reason why a Government facility was not selected must be justified in the *Comments* section.

M. Item 12 - Is fee or cost appropriate for conference venue?

- (1) If Item 12 is marked “Yes,” an explanation of how the fee or cost was determined to be appropriate must be provided. If the conference is held at a Federal facility for no charge, include this information in the *Comments* box.
- (2) If Item 12 is marked “No,” then you must justify the selection of a venue that’s fee or cost is not appropriate.

N. Item 13 - Was the use of video-conferencing technology considered for this conference?

- (1) If Item 13 is marked “Yes,” an explanation why such technology was inadequate for the needs of the conference must be provided in the *Comments* box.
- (2) If Section 13 is marked “No,” a justification for why video-conferencing technology was not considered must be provided.

O. Item 14 - Is a meeting/event planner to be used; at what cost?

- (1) If Item 14 is marked “Yes,” the meeting planner and the fee charged by the planner must be identified in the *Comments* box.
- (2) If Item 14 is marked “No,” it is not necessary to provide any information in the *Comments* box. Skip Item 15 and proceed to Item 16.

P. Item 15 - Was review completed to ensure planner does not receive kick-back?

- (1) If Item 15 is marked “Yes,” describe the review process and findings in the *Comments* box.
- (2) If Item 15 is marked “No,” the decision to not conduct a review must be justified.

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Q. Item 16 - Are the fees paid to speakers appropriate?

- (1) If Item 16 is marked “Yes,” the speaker fee must be identified and a description of how the fee was determined to be appropriate must be provided.
- (2) If Item 16 is marked “No,” the speaker fee must be identified and a justification for the decision to proceed with hiring the speaker must also be provided.

R. Item 17 - Are speakers appropriate for objective of conference?

- (1) If Item 17 is marked “Yes,” a description of why the speaker is appropriate for the objectives of the conference must be provided.
- (2) If Item 17 is marked “No,” a justification for the decision to proceed with hiring the speaker must be provided.

S. Item 18 - Were speaker’s credentials verified and suitability checked?

- (1) If Item 18 is marked “Yes,” a description of what was done to make this determination must be provided.
- (2) If Item 18 is marked “No,” justifications why neither the speaker’s credentials were verified or suitability checked must be provided.

T. Item 19 – Are there any other Interior Bureaus or Office personnel attending this event?

- (1) If Item 19 is marked “Yes,” indicate which Bureaus or Offices and the number of personnel from each that will attend the event.
- (2) If Item 19 is marked “No,” it is not necessary to provide any information in the *Comments* box.

DEPUTY SECRETARY CONFERENCE SPONSORSHIP REVIEW AND APPROVAL (this section is only required for co-sponsorships costing \$10,000 or more and is self-explanatory in filling out)