

Working Group Activity Planning Guide

Please use this guide to assist with working group planning

Your Research, Education, & Innovation (REI) Specialist [*program details*] and Business Operations Specialist [*funding arrangements*] are available to assist you and answer any questions

ACTIVITY or PRODUCT

1. Refer to *1-CAES Programmatic Activity – Product Table* document for list of activity and product options. Feel free to consider and share other ideas.
2. Notify working group leads of your intended activity and/or product.
3. If funding is needed, complete the correct tab(s) on the *2-WG Funding Request Template* spreadsheet.
 - a. Fill in the grey boxes
 - b. Include funding request if required in yellow highlighted box
 - c. You may include more than one activity request on the same document
 - d. Include co-PIs
 - e. If travel is requested, complete the *3-WG Travel Budget Template* and submit spreadsheets together
 - f. Rename the template to include your name and activity and/or product(s) (i.e. JDoe Proposal WG Funding Request)
4. Submit completed document to WG leads and REI and Business Ops Specialists.

TRAVEL If travel is required for your activity, please follow these steps

1. WG event organizer or PI completes *3-WG Travel Budget Template*
 - a. Select tab for your event
 - i. Use “Air Travel” or “Auto Travel” when travel is associated with a conference, agency pitch, or site visit
 - b. Fill in the grey boxes (formulas will auto-populate)
 - c. Confirm total funding requested is in yellow highlighted box
 - d. You may include more than one request on the same document
 - e. If travel is linked to an activity or event, submit spreadsheets together
 - f. Rename the template to include your name and event(s) (i.e. JDoe Tech Workshop Travel Funding Request)
2. Submit request to REI and Business Ops Specialists

NOTES

If you previously received funding from CAES, the scope of work and deliverables must be met prior to being awarded additional funds.