

Reclamation Manual

Directives and Standards

Subject: Approval of Bureau of Reclamationwide Conferences and Meetings of Standing Work Groups

Purpose: Describes the approval process to hold Reclamationwide conferences and meetings of Reclamation standing work groups.

Authority: 205 DM 2 Attendance at Meetings and Acceptance of Contributions, 205 DM 15.6 Travel and Transportation – Conference Travel, 255 DM 3 Delegation of Authority, Federal Travel Regulations 41 CFR 300, Federal Travel Regulations 41 CFR 301, Policy on Conferences and Meetings Involving Travel, July 19, 2001

Contact: Director, Office of Program and Policy Services, D-5000

1. **Scope of this Directives and Standards (D&S).** This D&S applies to all Reclamation-wide conferences, including standing and ad-hoc work groups that focus on specific functional areas. This D&S also applies to conferences where Reclamation is co-sponsoring the conference on a Reclamationwide basis. This D&S does not apply to meetings, conferences, workshops or similar forums when participation is confined primarily to an individual area office, regional office, Denver Office, or Washington Office, including conferences where a local office is co-sponsoring the event and Reclamation participation is confined primarily to that local office.
2. **Reclamation-wide Conferences.**
 - A. **Definition of Reclamationwide Conferences.** Reclamationwide conferences are defined, consistent with Federal Travel Regulations, as those meetings, conferences, workshops, training, seminars, symposiums or events, or similar forums, where:
 - (1) The attendees come from multiple Reclamation offices and sites requiring travel and,
 - (2) Exceed 10 people in attendance (see paragraph 7 below for requirements for conferences exceeding 30 attendees) and,
 - (3) Are intended to address topics of Reclamationwide interest.
 - (4) Definition includes both periodic (e.g., area manager conferences, human resources conferences, power operations and maintenance conferences, facilities conferences, etc.) and ad hoc conferences (e.g., Water 2025 workshops, Endangered Species Act handbook training, etc.).
 - B. **Exemptions from this D&S.** For the purpose of this D&S, Reclamationwide conferences are not:

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- (1) Meetings to discuss a specific business issue or topic involving only one Reclamation office (e.g., a Regional meeting on design for a particular facility; a meeting to discuss the content of a biological assessment; etc.).
 - (2) Reclamation Leadership Team (RLT) meetings.
 - (3) Meetings, conferences, workshops or training in which the preponderance¹ of attendees is from a specific organizational unit (e.g., a regional office, area office, the Denver Office, or the Washington Office).
 - (4) Budget Review Committee (BRC) meetings, including BRC work groups.
 - (5) Conference calls or videoconference meetings.
3. **Responsibility of Conference Executive Sponsor.** Roles and Responsibilities of the Conference Executive Sponsor (Sponsor):
- A. **Content and Logistical Aspects.** Will be responsible for all content and logistical aspects of the conference;
 - B. **Security Review.** Ensures that appropriate security review of presentations is obtained;
 - C. **Conference Host.** If necessary, secures a conference host for the event;
 - D. **Minimize Liability.** If necessary, ensures that Reclamation's liability is minimized for meeting site cancellation fees in the event the conference is cancelled;
 - E. **Evaluation.** Ensures that conference evaluations are summarized and "lessons learned" identified for use in the next similar conference (such evaluation summaries shall also be posted on an appropriate Reclamation website); and
 - F. **Conference Documentation.** As appropriate, ensures that conference reports, summaries and/or minutes are distributed and posted on an appropriate Reclamation website within 1 month of the conference's last day.
4. **Responsibility of Conference Host.** If requested by the Executive Sponsor and agreed to, the Conference Host (Host) normally will be a Reclamation Senior Executive or Office Manager at or near the Reclamation location where the conference will be held. The Host's responsibility is to assist the Executive Sponsor in identifying suitable conference facilities and associated resources, providing local support during the conference (e.g., registration staff, message/fax assistance, etc.), and providing a welcome message to the conference attendees.

¹ As a working figure, approximately 75 percent of the conference should be comprised of local (area, regional, Denver, Washington office) employees.

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5. **Responsibility of Director, Office of Program and Policy Services (OPPS).** The Director, OPPS, will be responsible for ensuring the requirements of this D&S are met. In the event that the Director, OPPS is unable to approve the conference arrangements as identified in paragraph 6.B of this D&S, he/she will elevate the issue to the Director, Policy, Management and Technical Services (PMTS) for resolution. The Director, OPPS, will keep an inventory of conferences and standing work groups and provide a summary of conferences having been held the previous year, and conferences expected to be held during the upcoming year, to the RLT at the first meeting of the RLT after the beginning of a new calendar year. That summary will include any recommendations of the Director, OPPS, with regard to conference management, frequency, or subject matter.
6. **Approval Process for Reclamation-wide Conferences.** The following process will be followed regarding the planning and approval of a Reclamationwide conference. This approval will be obtained before any financial commitments are made for the conference involving more than 10 people.
 - A. **Memorandum Requesting Conference Approval.** No later than 3 months prior to the intended date for the conference, the office manager or organizing entity proposing a Reclamationwide conference will prepare a memorandum from the Executive Sponsor, addressed to the Director, Office of Program and Policy Services (OPPS, D-5000), with a copy to D-7736, Accounts Receivable and Travel Team and D-7800, Acquisition and Assistance Management Services covering the following:
 - (1) The purpose of the conference (i.e., what is it intended to achieve?).
 - (2) The dates and location of the conference and the Conference Host.
 - (3) The estimated direct cost of the conference (i.e., excluding attendees' per diem and travel costs) and the source of funding for the conference.
 - (4) A preliminary draft agenda for the conference.
 - (5) The expected number of attendees and the offices they will represent.
 - B. **Approval/Disapproval of Conference.** Within 2 weeks of receipt of a conference approval request, the Director, OPPS, will review the request and respond to the Executive Sponsor either (1) requesting additional information or (2) approving/disapproving the conference. Such approval is contingent upon the requirements of paragraph 7 of this D&S, if applicable. Disapproval of conferences by the Director, OPPS, will be automatically elevated to the Director, PMTS for reconsideration.
 - C. **Approval of Conference Sponsored by the Director, OPPS.** For Reclamationwide conferences sponsored by the Director, OPPS, a memorandum to the file with the information in paragraph 6.A above will be prepared to document the conference approval, subject to the requirements of paragraph 7, if applicable.

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D. **Standing Work Groups.** A standing work group is an established, Reclamationwide team that meets at least annually. To ensure that Reclamation has an accurate record of these teams, a one-time conference/meeting request is required from the work group leader to the Director, OPPS. That memorandum will cover:

- (1) The purpose of the work group.
- (2) The frequency of group meetings.
- (3) The expected number of attendees at a work group meeting.

Within 2 weeks of receipt of that memorandum, the Director, OPPS, will review the memorandum and respond to the work group either (1) requesting additional information or (2) approving/disapproving the upcoming meetings of the work group. Nonapproval of standing work group meetings will be automatically elevated by the Director, OPPS, to the Director, PMTS for reconsideration.

In October of each year, the Director, OPPS, will request by email to the work group leader confirmation of the work group's continuing existence and intent to actively meet during the forthcoming fiscal year.

7. **Approval of Conferences in Excess of 30 Attendees.** In addition, existing procedures remain in effect for requesting Assistant Secretary/Water and Science (AS/WS) approval of Reclamation conferences involving 30 or more attendees (when a majority of the participants will be in a temporary duty travel status). When these conditions are anticipated AS/WS approval must be obtained before the conference may be convened.

- A. The form for the approval memorandum for such conferences is found in the Reclamation Correspondence Handbook at page 3-D-43
<http://intra.do.usbr.gov/records/Corresp/1-3-D%20Memorandums.pdf?>
- B. When AS/WS approval is required, the completed AS/WS approval memorandum will accompany the approval request submitted by the Executive Sponsor to the Director, OPPS (see paragraph 6.A above). The request for AS/WS approval memorandum will include a carbon copy to the Deputy Director, OPPS, D-5050. Upon Reclamation approval of the Conference, the Director OPPS will mail the Executive Sponsor's AS/WS approval memorandum.