

Reclamation Manual

Directives and Standards

Subject:	Approval of Bureau of Reclamation-wide Conferences and Meetings of Standing Work Groups
Purpose:	Describes the approval process to hold Reclamation-wide conferences and meetings of Reclamation standing work groups. The benefit of this Directive and Standard (D&S) is having a centralized procedure and approval process for Reclamation-wide conferences and meetings.
Authority:	Federal Travel Regulations 41 CFR 300 and 41 CFR 301; 205 DM 2 Attendance at Meetings and Acceptance of Contributions; 205 DM 15.6 Travel and Transportation – Conference Travel; 255 DM 3 General Administrative Delegation
Approving Official:	Director, Policy and Program Services (PPS)
Contact:	Program Services Office, 84-52000

1. **Introduction.** The Bureau of Reclamation hosts many conferences and meetings each year. To ensure resources are used efficiently, this D&S establishes the Reclamation-wide process to obtain approval for such conferences and meetings.
2. **Applicability.** 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 when Reclamation is co-sponsoring a conference with another agency on a Reclamation-wide 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, or other directorate, including conferences co-sponsored by a local office with another agency and Reclamation participation is confined primarily to that local office.
3. **Definitions.**
 - A. **Reclamation-wide Conferences.**
 - (1) Reclamation-wide conferences are defined, consistent with Federal Travel Regulations, as those meetings, conferences, workshops, training, seminars, symposiums or events, or similar forums, where:
 - (a) the attendees come from multiple Reclamation offices and sites requiring travel,
 - (b) attendance exceeds 10 people (see Paragraph 6 for requirements for conferences exceeding 30 attendees), and
 - (c) the agenda is intended to address topics of Reclamation-wide interest.

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- (2) This 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 for America Challenge Grants* workshops, Endangered Species Act handbook training, etc.).

B. Exemptions from this D&S. For the purpose of this D&S, Reclamation-wide conferences are not:

- (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 75 percent or more attendees are from a specific organizational unit (e.g., a regional office, area office, Denver office, or Washington office).
- (4) Budget Review Committee meetings, including work groups.
- (5) conference calls or videoconference meetings.

4. Responsibilities.

A. Conference Executive Sponsor (Sponsor). The following are the roles and responsibilities of the Sponsor:

- (1) **Logistical and Content Aspects.** The Sponsor will be responsible for all logistical aspects of the conference and will ensure all conference materials comply with visual identity requirements provided in Reclamation Manual D&S, *Application of Visual Identity in Corporate Materials*, ADM 02-05.
- (2) **Minimize Liability.** If necessary, the Sponsor will ensure that Reclamation's liability is minimized for meeting site cancellation fees in the event the conference is cancelled, through consultation/collaboration with the Acquisition and Assistance Management Division, 84-27810.
- (3) **Evaluation.** The Sponsor will ensure that conference evaluations are summarized and "lessons learned" identified for use in the next similar conference.
- (4) **Conference Documentation.** As appropriate, the Sponsor will ensure that conference reports, summaries and/or minutes are prepared and distributed.

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B. Director, PPS.

- (1) The Director, PPS, is responsible for ensuring the requirements of this D&S are met. In the event that the Director, PPS, is unable to recommend approval of the conference arrangements as identified in Paragraph 5.A. of this D&S, it will be elevated to the Deputy Commissioner, Policy, Administration and Budget (PAB) for resolution.
- (2) PPS will keep an inventory of conferences and standing work groups and provide a summary of conferences held the previous fiscal year, and conferences expected to be held during the upcoming fiscal year, to the RLT at the first meeting of the RLT after the beginning of a new fiscal year. The summary will include recommendations made by the Director, PPS, with regard to conference management, frequency, or subject matter.

5. **Approval Process for Reclamation-wide Conferences.** The following process will be followed regarding the planning and approval of a Reclamation-wide conference. Approval will be obtained before any financial commitments are made for a conference involving more than 10, but less than 30 people.

A. Memorandum Requesting Conference Approval for Less than 30 Attendees.

- (1) No later than 3 months prior to the intended date for the conference, the Sponsor will prepare a memorandum from the Sponsor addressed to the Director, PPS, 84-50000, with a copy to Program and Support Services, 84-52000, covering the following:
 - (a) The purpose of the conference; i.e., what it is intended to achieve.
 - (b) The start and end dates, as well as the location (city and state) of the conference.
 - (c) The total Reclamation/Department of the Interior costs in whole dollars. These costs are the estimated direct costs of the conference (meeting rooms, sleeping rooms, light refreshments, audiovisual equipment, etc.), and attendees' per diem and travel costs, as well as the source of funding for the conference.
 - (d) A preliminary draft agenda for the conference.
 - (e) The expected number of attendees and the offices they will represent, including the Department.

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- (2) An approval disposition block must be added at the end of the approval memorandum. A sample of a disposition block can be found in the Reclamation Correspondence Handbook on page 3-R-18.
- B. Approval/Disapproval of Conference.** Within 2 weeks of receipt of a conference approval request, the Director, PPS, will review the request and respond to the Sponsor by either: (1) requesting additional information, or (2) recommending approval/disapproval of the conference. Such approval is contingent upon the requirements of Paragraph 6 of this D&S, if applicable. Recommended disapproval of a conference by the Director, PPS, will be automatically elevated to the Deputy Commissioner, PAB, for reconsideration.
- C. Approval/Disapproval of Standing Work Groups.**
 - (1) A standing work group is an established, Reclamation-wide team that meets at least annually. To ensure Reclamation has an accurate record of these teams, an annual conference/meeting request by the work group leader addressed to the Director, PPS, is required. The memorandum must include:
 - (a) the purpose of the work group;
 - (b) the frequency of group meetings; and
 - (c) the expected number of attendees at a work group meeting. (For attendance of less than 30 attendees, please see Paragraph 5.A. For attendance of more than 30 attendees, please see Paragraph 6.).
 - (2) Within 2 weeks of receipt of that memorandum, the Director, PPS will review the memorandum and respond to the work group to either: (a) request additional information, or (b) recommend approval/disapproval of the upcoming meetings of the work group. Disapproval of standing work group meetings will be automatically elevated by the Director, PPS, to the Deputy Commissioner, PAB, for reconsideration.
- 6. Approval of Conferences involving 30 or More Attendees.** Assistant Secretary - Water and Science (AS/WS) approval is required for conferences involving 30 or more attendees. If this level of attendance is anticipated, AS/WS approval must be obtained before the conference is convened.
 - A.** A sample of the approval memorandum for such conferences is found in the Reclamation Correspondence Handbook on page 3-D-43.

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- B. When AS/WS approval is required, a completed AS/WS approval memorandum package will be submitted by the conference Sponsor to the Director, PPS, for surname approval. Instructions for assembling an approval memorandum package are found in the Reclamation Correspondence Handbook beginning on page 3-D-10. Upon surname approval of the conference, the Director, PPS will mail the Sponsor's AS/WS approval memorandum package to the Commissioner's office.

- C. Refer to Reclamation Manual D&S, *Purchase of Entertainment*, ADM 06-02, if light refreshments or meals will be provided.