



United States Department of the Interior

OFFICE OF THE SECRETARY
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FINANCIAL MANAGEMENT MEMORANDUM 2009-035 (Vol. X.K)

To: Bureau Chief Finance Officers
Bureau Assistant Directors for Administration
Director, National Business Center

From: Daniel L. Fletcher, 
Director, Office of Financial Management

Subject: Clarification on Approval Needed for Internal Meetings

1. Can internal meetings be exempted from the formal conference planning requirements?

Yes, Program Assistant Secretaries may exempt internal meetings from the formal conference planning process. An exemption may be granted no more frequently than annually.

2. What types of meetings qualify for exemption from the conference planning requirements?

Internal meetings aimed at operational planning, reviewing results, or discussing issues. The meetings must meet all of the following criteria for an exemption:

- the focus is on internal Departmental matters;
- there are few (if any) outside attendees;
- the requirements for conference-type facilities are minimal; and
- the meeting does not require foreign travel.

Examples of these meetings include overseeing program activities, reviewing program results, conducting on-site reviews, determining "lessons learned", providing technical assistance, developing plans, etc.

3. If an internal meeting has been exempted from the formal conference planning requirements, must the participants use trip-by-trip travel authorizations?

No, travel for this purpose may be performed under an "open" or "limited open" travel authorization provided the bureau permits the use of "blanket-type" authorizations.

4. If an internal meeting has been exempted from the formal conference planning requirement, may the conference lodging allowance (CLA) be approved and/or may light refreshments be provided?

No, not under the provisions of Chapter 301, Appendix E of the Federal Travel Regulation (FTR). That authority does not extend to internal meetings exempted from the conference planning requirements.

For information on conferences under Chapter 301, Appendix E of the FTR, please refer to FMM 2009-036. FTR Chapter 301, Appendix E defines a conference as:

A meeting, retreat, seminar, symposium, or event that involves attendee travel. The term "conference" also applies to training activities that are considered to be conferences under 5 CFR 410.404.

If you have any questions regarding this information or if you require additional information, please contact Robert Smith (Robert_Smith@ios.doi.gov) on 202-208-5684.

Replaces: FAM 2004-011