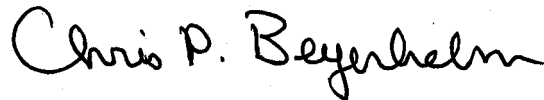


**For:** FSA Offices

**Conference and Training Reporting Guidance**

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**Approved by:** Associate Administrator for Operations and Management



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**1 Required Conference and Training Reporting**

**A Background**

Previously, offices planning a conference and/or training which included travel were required to notify the Senior Accountable Travel Official (SATO) so that a determination could be made as to the proper designation/classification for the event.

On May 1, 2015, OPM provided guidance that empowers agencies to make this distinction themselves.

**B Purpose**

This notice provides guidance on:

- determining if an event should be designated as a conference or training
- the required actions after the determination of designation
- events pre-approval authorization thresholds.

**Note:** Offices shall follow the meeting and conference planning guidance in this notice until 15-AS is updated.

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<b>Disposal Date</b>	<b>Distribution</b>
July 1, 2016 8-19-15	All FSA Offices; State Offices relay to County Offices

**Notice FI-3253**

**2 Training Events**

**A Designating an Event as Training**

An event would be designated as **training** (according to Federal Travel Regulation 14-02, citing 5 USC 4101 (4)) if:

- the purpose of the event is educational or instructional
- more than half of the time is scheduled for a planned organized exchange of information between presenters and audience
- the content of the event is germane to improving individual and/or organizational performance
- developmental benefits will be derived through the employee's attendance.

**Notes:** When making this determination, the event planner should review the event agenda, session descriptions and additional information, as appropriate.

This determination will be made by:

- SED for State and County Office events
- the appropriate National Office Deputy Administrator for their respective program areas.

**B Required Actions When an Event Is Designated as Training**

**When an event is determined to be training**, the event planner shall proceed with meeting coordination using 15-AS, Exhibit 10 for meeting planning.

**C Pre-Approval Cost Thresholds for Training**

After the event has been designated as training, the estimated cost must be submitted to the FSA CFO for review and assurance of budget availability. The pre-approval training document should be submitted to the appropriate approval official, according to this table.

<b>Cost of Training</b>	<b>Approval Authority</b>
Less than \$40,000	<ul style="list-style-type: none"><li>• National Office division or staff director</li><li>• SED</li></ul>
\$40,000 to less than \$100,000	appropriate Deputy Administrator
\$100,000 or more	Administrator

**3 Conference Events**

**A Designating an Event as Conference**

An event would be designated as a **conference** if it is a meeting, retreat, seminar, or symposium requiring attendee travel that does not meet the definition of training in subparagraph 2 A. These types of events may include elements of training but would still be designated as a conference.

**Note:** Based on FSA’s meeting policies, it would be rare that any agency meeting would be designated as a conference.

**B Required Action When an Event Is Designated as a Conference**

**When an event has been designated as a conference**, the event planner must provide the following information to the FMD contacts in subparagraph 4 A:

- planner name
- planner telephone number and e-mail address
- event name
- event location
- event date(s)
- number of attendees
- purpose of event
- event agenda.

This information will assist FSA in meeting OCFO conference reporting requirements. After submission, the event planner shall proceed with meeting coordination using 15-AS, Exhibit 10.

**C Pre-Approval Cost Thresholds for Conferences Less Than \$450,000**

The following table provides pre-approval cost thresholds for conferences with net expenses less than \$450,000.

<b>Projected Cost of Conference</b>	<b>Approval Authority</b>
Less than \$40,000	FSA Administrator, Associate Administrator, and Deputy Administrators
\$40,000 to less than \$75,000	USDA Deputy Secretary, Under Secretary, and Assistant Secretary
\$75,000 to less than \$450,000	Deputy Secretary
	<b>Note:</b> Offices must submit proposals to OCFO for review before submitting to the Deputy Secretary for approval.

**Notice FI-3253**

**3 Conference Events (Continued)**

**D Pre-Approval for Conferences Projected to Cost More than \$450,000**

Events with net expenses exceeding **\$450,000** are **prohibited** and require a written waiver from the Secretary when the conference is considered to be an exceptional circumstance and the most cost-effective alternative.

USDA OCFO will coordinate the Secretarial waiver process on behalf of FSA.

**4 Contacts**

**A Contacts**

If there are questions about this notice, contact the appropriate office as follows.

<b>Issue</b>	<b>Office</b>	<b>Contact</b>
Meeting Coordination	MSD, Information Management Branch	Either of the following: <ul style="list-style-type: none"><li>• Barbara Harris by either of the following:<ul style="list-style-type: none"><li>• e-mail to <b>barbara.harris@wdc.usda.gov</b></li><li>• telephone at 202-720-3135</li></ul></li><li>• Kim Pritchett by either of the following:<ul style="list-style-type: none"><li>• e-mail to <b>kimberly.pritchett@wdc.usda.gov</b></li><li>• telephone at 202-720-3110.</li></ul></li></ul>
Travel	FMD, Travel Policy Staff	Either of the following: <ul style="list-style-type: none"><li>• William Willer, Office Chief, by either of the following:<ul style="list-style-type: none"><li>• e-mail to <b>william.willer@wdc.usda.gov</b></li><li>• telephone at 202-772-6042</li></ul></li><li>• Arthur Holmes by either of the following:<ul style="list-style-type: none"><li>• e-mail to <b>arthur.holmes@wdc.usda.gov</b></li><li>• telephone at 202-772-6016.</li></ul></li></ul>