

# **USGS OFFICE OF ORGANIZATIONAL AND EMPLOYEE DEVELOPMENT POLICIES AND PROCEDURES**

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**Office of Organizational and Employee Development (OED)**  
**POLICY GUIDANCE MANUAL**  
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## Chapter 1 – Individual Development Plans for USGS Employees

### 1. PURPOSE

- 1.1. The primary focus of Individual Development Plans (IDP) is to document conversations between a supervisor and employee regarding training and development opportunities that improve individual and organizational performance.

### 2. SCOPE

- 2.1. This policy guidance applies to development of IDPs for USGS personnel.

### 3. DEFINITIONS

- 3.1. USGS Employees – Full or part time employees including STEP, SCEP and Term appointments.

### 4. POLICY

- 4.1. Creation of IDPs – Supervisors are encouraged to help create an IDP for each employee under his or her supervision in order to ensure that the development of employees in the USGS reflects the applicable performance goals of both the individual and his/her office. The IDP should focus on both the short-term and long-term performance goals of the employee and the office.
- 4.2. Timing – Supervisors should discuss employee’s developmental needs and goals in conjunction with the annual employee performance appraisal plan and again during the interim review.
- 4.3. Training and Development Priorities – Employees and their supervisors need to identify priority training and development activities necessary for successful performance in the current position.
- 4.4. Format – At a minimum the IDP should include the following:
  - 4.4.1. Performance goals
  - 4.4.2. Specific training and development objectives and opportunities for the performance period

### 5. SUPPORTING INFORMATION

- 5.1. [http://www.usgs.gov/humancapital/ecd/ecd\\_idphome.html](http://www.usgs.gov/humancapital/ecd/ecd_idphome.html)

### 6. APPROVALS AND EFFECTIVE DATE

- 6.1. Effective Date: December 2, 2011

- 6.2. Signed: *Stacy Bushée*

Chief, Office of Organizational and Employee Development

## Chapter 2 – Contacting the USGS OED Strategic Employee Development Consultant

### 1. PURPOSE

- 1.1. The OED provides strategic consultation and information on individual employee and organizational development opportunities.
- 1.2. Employee development continues to be a priority for the USGS. As such, OED provides strategic employee development consulting. Pam Marsters is the USGS Strategic Employee Development Consultant (SEDC) (pmarster@usgs.gov, Tel: 703-648-6703).

### 2. SCOPE

- 2.1. Policy applies to SEDC requests for training and development and/or guidance and services from any USGS personnel.

### 3. DEFINITIONS

- 3.1. USGS Employees – Full or part time employees including STEP, SCEP and Term appointments.

### 4. POLICY

- 4.1. The SEDC is the central point-of-contact for information on the following services to USGS customers:
  - 4.1.1. Organizational Development (OD) – Consult with USGS managers to help them identify and define their needs for a variety of services including team building, meeting facilitation, strategic planning, etc. The SEDC will also coordinate with internal and external OD consultants.
  - 4.1.2. Course Consulting and Sourcing Group Employee Development Events – Provide consulting on courses that include customized design and development to support USGS science goals. The SEDC will offer guidance on acquiring the most appropriate vendor or internally provided training and will advise customers on course coordination responsibilities and the learning management system.
  - 4.1.3. Active Partnering – Collaborate with USGS and other bureaus within DOI to facilitate shared training and development events.
  - 4.1.4. Procurement Guidance and Support – Serve as the Contracting Officer’s Technical Representative (COTR) for bureau-wide employee development contracts.
  - 4.1.5. Employee Development Advocacy – Provide customized presentations, expert advice and guidance regarding employee development activities.
  - 4.1.6. Training Policy Expertise – Respond to queries from USGS offices on employee development guidelines, policies and regulations. Develop and update USGS employee development policy guidance.
  - 4.1.7. Career Development Counseling – Assist managers and supervisors with Individual Development Plans including Upward Mobility, Career Development and Federal Career Intern Programs.
  - 4.1.8. Communicating Training and Development Opportunities – Ensure appropriate communication about training and employee development opportunities using Listservs, Electronic Bulletin Board System (BBS), “Need to Know,” and any relevant websites, etc.

### 5. SUPPORTING INFORMATION

- 5.1. None

### 6. APPROVALS AND EFFECTIVE DATE

- 6.1. Effective Date: December 2, 2011

- 6.2. Signed: *Stacy Bushée*

Chief, Office of Organizational and Employee Development

## Chapter 3 – Communication of Employee Development Opportunities

### 1. PURPOSE

- 1.1. To establish a policy on communicating USGS development opportunities throughout the USGS by OED.

### 2. SCOPE

- 2.1. Applies to all USGS employee development opportunities managed by OED.

### 3. DEFINITIONS

- 3.1. Learning Management System (LMS) – A comprehensive administrative database designed to facilitate training and development activities throughout an organization. The current LMS is DOI LEARN.

### 4. POLICY

- 4.1. All employee development opportunities coordinated by OED and available to USGS employees will be communicated using a variety of methods.
- 4.2. The USGS Electronic Bulletin Board System (BBS) will be utilized by OED to announce courses with open registration. The header will use the following format: Sponsoring Office (if OED should read “USGS Employee Development Opportunity”), Full Class Name, Course Number if any, Dates (month, day(s) year), Location (City, State) and Cost (if \$0 use NO COST). Example: USGS Employee Development Opportunity, Report Planning, Jan 17-18, 2010, Denver CO, NO COST.
- 4.3. Subscription Listservs will also be used to announce courses with open registration by topical area.
- 4.4. All OED managed courses will be placed on a course calendar served from the Human Capital website. This calendar is available to post information about any USGS managed course.
- 4.5. All USGS managed courses will be listed in the LMS. All courses will be referenced by course name and description in the LMS catalog.
- 4.6. Targeted emailing of course information to establish email aliases may be requested by the OED staff.

### 5. SUPPORTING INFORMATION

- 5.1. Memorandum dated July 1, 2001, sent by the USGS Office of Communications stated that all non-urgent information be communicated via “All Employee Bulletin Board” within Lotus Notes. This includes all employee emails announcing USGS employee development opportunities. In order to access the BBS, employees require a Lotus Notes Internet password that can be requested from the local Lotus Notes administrators.
- 5.2. Memorandum dated March 23, 2006, by Associate Director for Water including instructions for signing up for specific water resources course announcements:  
<http://training.usgs.gov/ntc/Listservmemo.html>

### 6. APPROVALS AND EFFECTIVE DATE

- 6.1. Effective Date: December 2, 2011
- 6.2. Signed: *Stacy Bushée*  
Chief, Office of Organizational and Employee Development

## Chapter 4 – Registration Process for OED Managed Courses

1. PURPOSE
  - 1.1. To establish and document a policy on registration of participants to attend training courses managed by OED.
2. SCOPE
  - 2.1. Applies to all participants registering for classes managed by OED.
3. DEFINITIONS
  - 3.1. None
4. POLICY
  - 4.1. USGS personnel must register for all courses managed by OED through the Learning Management System (LMS) at: <http://www.doi.gov/doilearn>.
  - 4.2. Submitting a request for an OED sponsored training in the LMS does not automatically register that individual for the course. The supervisor must first approve the training course request in the LMS. The supervisor will receive an automatic email notification.
  - 4.3. USGS cooperators and non-DOI class applicants must complete a non USGS Course Application to attend OED managed courses. A copy of the course application can be found at: <http://training.usgs.gov/ntc/nonUSGSreg.html>
5. SUPPORTING INFORMATION
  - 5.1. Non-DOI class applicants may request an application form from Gloria Armstrong at 303-445-4676, fax: 303-445-4665, email: [gjarmstr@usgs.gov](mailto:gjarmstr@usgs.gov).
6. APPROVALS AND EFFECTIVE DATE
  - 6.1. Effective Date: December 2, 2011
  - 6.2. Signed: *Stacy Bushée*  
Chief, Office of Organizational and Employee Development

## Chapter 5 – Selection Process for the USGS Supervisory Challenge Course

### 1. PURPOSE

- 1.1. DOI Personnel Bulletin 06-04 requires that all new supervisors receive 40 hours of training during their probationary period in a variety of human resource management topics. The USGS Supervisory Challenge course meets that 40 hour requirement. While it is not the only source for this training, it is specifically designed to provide USGS supervisors with an opportunity to interact with their senior leaders and human capital staffs and network with other USGS supervisors.
- 1.2. New supervisors are identified by the USGS Human Resources (HR) office, and are notified of the training requirement and future class offerings. OED provides the new supervisor with information on training options including the Supervisory Challenge class schedule.
- 1.3. Criteria for Selection of Supervisory Challenge Participants
  - 1.3.1. Supervisory Challenge classes are held at least three times each fiscal year in various locations. The following criteria are applied for each participant:
    - 1.3.1.1. Participants should be newly appointed supervisors that are coded “2” or “4” in Federal Personnel and Payroll System (FPPS). Code 2 supervisors supervise at least 25% of the time. Code 4 supervisors supervise less than 25% of the time.
    - 1.3.1.2. New probationary supervisors (code 2) are given priority.
    - 1.3.1.3. The course curriculum targets new supervisors, however, supervisors desiring refresher training can attend on a space available basis.

### 2. SCOPE

- 2.1. Who is Selected/Can Attend. The class is open to all newly appointed supervisors as identified by HR, and includes all grade levels and all disciplines.
  - 2.1.1. HR will notify new supervisors of the probationary and training requirements at the time of their appointment to a supervisory position.
  - 2.1.2. HR will also identify supervisors who have been appointed to a supervisory position within the past 3 years.
  - 2.1.3. OED will confirm if there is documentation that a supervisor has completed Supervisory Challenge.
  - 2.1.4. Supervisors who have met or plan to meet the requirement by attending a non- USGS class should document that training in the learning management system (<http://www.doi.gov/doilearn/index.cfm>) and provide a copy to OED (upon request).
  - 2.1.5. Supervisors who need this training (both new and those with 3 or less years of supervisory experience) will be referred to the Human Capital web site for the most current Supervisory Challenge class schedule.
  - 2.1.6. New supervisors within their one-year probationary period will be given priority placement in the class.
  - 2.1.7. OED and HR will coordinate the participant list.

### 3. DEFINITIONS

- 3.1. None

### 4. POLICY

- 4.1. How Many Classes are Held/How Many Participants are Selected
  - 4.1.1. At least three Supervisory Challenge classes are held each fiscal year in central locations. Additional classes will be scheduled by OED, if necessary. The class dates and locations are determined by OED in coordination with HR and local leadership. Below are the locations and months that classes are typically held on an annual basis:
    - 4.1.1.1. Reston (May/June)
    - 4.1.1.2. Denver (October)

4.1.1.3. Sacramento (February)

4.1.2. The ideal class size is 24. The class size can be as large as 28, depending on the facility.

4.2. Cost

4.2.1. Tuition is \$500. Salary, travel, and per diem for each participant will be covered by the participant's office/center.

4.3. What to do if you are interested in attending

4.3.1. Communicate your interest to your supervisor/manager.

4.3.2. If you are a new supervisor, expect to receive a memo from HR explaining the training requirement. After receiving that memo, you will also be contacted by OED who will provide you with the Supervisory Challenge class scheduled and confirm your participation.

4.3.3. If you are not a new supervisor i.e., (you have more than 1 but less than 3 years supervisory experience) and you never received this training, please contact OED.

4.3.4. If you are selected for this training and you were unable to attend, OED staff will provide you with other training options.

5. SUPPORTING INFORMATION

5.1. [http://www.usgs.gov/humancapital/ecd/ecd\\_supervisorydevelopmenthome.html](http://www.usgs.gov/humancapital/ecd/ecd_supervisorydevelopmenthome.html)

5.2. <http://www.doi.gov/hrm/guidance/PB06-04.pdf>

6. APPROVALS AND EFFECTIVE DATE

6.1. Effective Date: December 2, 2011

6.2. Signed: *Stacy Bushée*

Chief, Office of Organizational and Employee Development

# Chapter 6 – Selection Process for Participation in the One-Year Guided USGS Mentoring Program

## 1. PURPOSE

- 1.1. Selection for participation in the One-Year Guided Mentoring Program is designed to make the program available to all USGS employees. This effort is intended to create a mentoring culture throughout the USGS that facilitates new employee orientation and skills transfer from more experienced employees to those who are less experienced. Mentoring offers a cost-effective means to gain knowledge and skills that are inherently needed to maintain our science excellence. Mentoring also helps our employees become more invested and engaged.

## 2. SCOPE

- 2.1. There are two USGS Mentoring Rollouts per year.
- 2.2. Who is Chosen/Can Attend: The program is open to all USGS employees either as a protégé or as a mentor.
  - 2.2.1. Application Process for USGS One-Year-Guided Program
    - 2.2.1.1. Two months prior to each rollout, OED will send an announcement with application details to every USGS employee with five years or less of USGS service. Simultaneously, a “call for applicants” is placed on the USGS Electronic Bulletin Board System. Applications from potential protégés are accepted until two weeks prior to the rollout or until 30 pairs have been made. Therefore, the sooner a potential protégé submits an application, the better his or her chances for participation. Applications from mentors are accepted until the close of the pairing for that rollout. Both require supervisory approval for participation.
  - 2.2.2. The Pairing Process:
    - 2.2.2.1. Protégé applicants are categorized according to employment status.
    - 2.2.2.2. Potential protégé applications are reviewed to determine who has already designated a mentor. Those applications are accepted into the program automatically.
    - 2.2.2.3. Protégé applications are reviewed to determine the protégé’s goals and objectives.
    - 2.2.2.4. Mentor applications on file are reviewed to determine skills, knowledge, and experience of the mentor.
    - 2.2.2.5. Mentors with suited skills, knowledge, and experiences are then matched with protégés whose goals and objectives are compatible.
    - 2.2.2.6. A deliberate search of all of the USGS with greater than five years of service is initiated to find a suitable mentor for the remaining potential protégés.
    - 2.2.2.7. This process continues until 30 mentoring pairs per rollout are formed.
  - 2.2.3. Who is Chosen to Participate
    - 2.2.3.1. The first 30 pairings with preferential consideration to those who have designated a mentor, permanent employees and then the order in which applications were received.
    - 2.2.3.2. The USGS Mentoring Program Staff makes the final decisions on all pairings.
    - 2.2.3.3. The Mentoring Program Manager (MPM) will notify the formed pairs at least two weeks prior to the scheduled Mentoring Rollout.

## 3. DEFINITIONS

- 3.1. USGS Employees – Full or part time employees including, STEP, SCEP and Term appointments.

## 4. POLICY

- 4.1. How Many Rollouts are Held/How Many Participants Are Chosen

- 4.1.1. There are two Mentoring Rollouts per year consisting of 30 pairs in each rollout. One is held in the spring and one is held in the fall.
- 4.1.2. Each Rollout begins a one-year mentoring partnership
- 4.1.3. The one-year guided program requires:
  - 4.1.3.1. Shadowing Experience/Summary-protégés shadow their mentors typically at their mentor's duty station. After spending 2-days on the shadowing assignment, they are required to send a written report to the MPM. This report includes the benefits of having the shadowing opportunity, lessons learned and a summary of their time together.
  - 4.1.3.2. 2-4 hours mentoring per month-via phone, webinars, email-any mentoring contact counts
  - 4.1.3.3. Participation in at least 3 mentoring exchanges
  - 4.1.3.4. Evaluations Forms (Completed at 1st, 6 month and 12 month intervals)
  - 4.1.3.5. Mentoring Agreement and Learning (Action) Plan Forms to include goals and objectives for the one year program

4.2. COST

- 4.2.1. Salaries are paid by the participant's office/cost center. Travel and per diem for each protégé's shadowing experience will be provided by OED. There is no tuition required from the participant.

4.3. What to do if you are interested in being nominated

- 4.3.1. Contact the MPM for more details or log onto our website at: <http://www.usgs.gov/humancapital> and click on Mentoring Program.
- 4.3.2. Apply online at: [http://130.11.48.87/fmi/iwp/cgi?-db=Mentor\\_Mentoree\\_System&-loadframes](http://130.11.48.87/fmi/iwp/cgi?-db=Mentor_Mentoree_System&-loadframes)

5. SUPPORTING INFORMATION

- 5.1. None

6. APPROVALS AND EFFECTIVE DATE

- 6.1. Effective Date: December 2, 2011

- 6.2. Signed: *Stacy Bushée*

Chief, Office of Organizational and Employee Development

## Chapter 7 – Nomination Process for the USGS Leadership Intensive Course

### 1. PURPOSE

- 1.1. The nomination process for the Leadership Intensive (LI) course is designed to provide a fair and equitable opportunity for all employees. This effort is part of a larger leadership program focused on creating a leadership-centered culture throughout the USGS that emphasizes the importance of people while ensuring high-quality science for the benefit of society. The training is designed to help create a “critical mass” of leaders within the USGS and to help attract, develop and retain talent. This course also serves to build a web of connectivity for rapid transfer of learning and scientific information across the USGS producing powerful benefits.
- 1.2. A “call for nominations” from the Leadership Program Manager (LPM) is solicited to senior USGS Leaders in October of each year. The nominated employees will attend a LI course being held in the following fiscal year.
- 1.3. Criteria for Selecting LI Participants
  - 1.3.1. Participants are from the supervisory and non-supervisory ranks and include all grade levels. Participants should:
    - 1.3.1.1. Possess a strong desire to build leadership skills for the purposes of furthering scientific excellence.
    - 1.3.1.2. Show an aptitude for empowering others to be leaders within their own office/centers and for perpetuating a leadership-centered culture throughout the USGS.
    - 1.3.1.3. Express a willingness to participate in the classroom experience, including but not limited to the sharing of professional skills and personal insights to optimize the learning experience.

### 2. SCOPE

- 2.1. Who is Selected /Can Attend: The class is open to interested USGS employees at all grade levels.

### 3. DEFINITIONS

- 3.1. None

### 4. POLICY

#### 4.1. Number of Classes Held/Number of Participants Chosen Per Course

- 4.1.1. Based on input from senior leadership, a minimum of four classes will be set up around the country each fiscal year.
- 4.1.2. Senior leadership will select 24 candidates to participate in each class.
- 4.1.3. An additional six names should be provided as “backup candidates” for each course. A backup candidate may be contacted as a replacement in the event that any of the 24 primary nominated participants are unable to attend.

**Note:** Backup candidates are re-nominated each year as part of that fiscal year’s nomination process.
- 4.1.4. The LI is a two-day course typically conducted mid-week to allow for travel if necessary.

#### 4.2. Cost

- 4.2.1. Costs incurred for facilitators, coaches and materials will be covered by participant tuition.
- 4.2.2. The participant’s office/center will incur the cost for participant’s travel, lodging and tuition.
- 4.2.3. Tuition is \$800 per participant per LI.

#### 4.3. Follow-up

- 4.3.1. Approximately six months after taking the LI training, participants are sent a link to fill out a post-training Survey. The completion of the survey is an essential component for the completion of the participant’s training and the sustained development and enhancement of the USGS Leadership Program.

- 4.4. What to do if you are interested in being nominated to attend a LI course:
  - 4.4.1. Communicate your interest to your supervisor.
  - 4.4.2. Each Area Office and Headquarters Mission Area has its own process once the letter from the LPM is sent to the Regional Executives and the Deputy Director.
  - 4.4.3. If you were nominated by your supervisor, but were not contacted by the LPM by November, check with your supervisor to inquire about your nomination status.
  - 4.4.4. If you were nominated but not selected this year, notify your supervisor of your continued interest and communicate your sustained desire to be nominated during the next fiscal year.

5. SUPPORTING INFORMATION

5.1 [http://www.usgs.gov/humancapital/ecd/ecd\\_leadershipbrdescrip.html#intensives](http://www.usgs.gov/humancapital/ecd/ecd_leadershipbrdescrip.html#intensives)

6. DATE

6.1. Effective Date: December 2, 2011

6.2. Signed: *Stacy Bushée*

Chief, Office of Organizational and Employee Development

## Chapter 8 – Nomination Process for the USGS Leadership 101/201

### 1. PURPOSE

- 1.1. The nomination process for the Leadership 101 (L101) and Leadership 201 (L201) two-part series is designed to facilitate fair selection across the USGS for grades 12-15. The course helps create a leadership-centered culture throughout the USGS emphasizing the importance of people, while ensuring high-quality USGS science for the benefit of society. The course is designed to help create a critical mass of leaders within the USGS that attracts, develops and retains talent. The course also serves to build a web of connectivity for rapid transfer of learning, and scientific information across the USGS.
- 1.2. A call for nominations is sent by the Leadership Program Manager (LPM) to the Deputy Director and Regional Executives in early October each year asking for nominations to attend the sessions offered for the coming fiscal year. Responses are due to the LPM by the closing date of the announcement.
- 1.3. Criteria for Choosing L101/L201 Participants
  - 1.3.1. Participants may be from either supervisory or non-supervisory ranks in grades 12-15. The following criteria should be considered for each selection:
    - 1.3.1.1. The ability to communicate effectively both interpersonally and in writing.

Communication skills include the ability to listen with an open mind to the ideas of others and to empathize with any expressed concerns they may offer.
    - 1.3.1.2. The ability to plan, organize and successfully complete assignments in a high quality and timely manner.
    - 1.3.1.3. The ability to assemble and analyze data from a variety of sources, use information to solve problems, draw sound conclusion, and make thoughtful recommendations.
    - 1.3.1.4. The ability to use a wide range of technical and interpersonal skills to develop innovative solutions to complex problems.
    - 1.3.1.5. The ability to use interpersonal skills for liaison and integration of activities with other work units, disciplines, or agencies.
    - 1.3.1.6. The ability to establish and maintain effective working relationships to influence those above and below in the organization as well as fostering collegial relationships with peers.
    - 1.3.1.7. Additionally, candidates should understand that the L101 training comprises part one of a two-part series. The series begins with the L101 training (five days) and concludes with the L201 training (five days), with an average of 16-22 months between the two.

**Note:** Participants must successfully complete Leadership 101 prior to attending Leadership 201.

### 2. SCOPE

- 2.1. Who is Selected/Can Attend
  - 2.1.1. 26 candidates from the GS-12/GS-13 level (winter session) and 26 candidates from the GS-14/GS-15 level (spring session) with recognized leadership/management potential will be developed by USGS Senior Leaders.
  - 2.1.2. The Regional Executives (Rex's) s and the Deputy Director (DD) will make the final choices and forward the names of those selected to the LPM. Additionally, the Rex's and DD will notify managers of those who were nominated but not selected.
  - 2.1.3. The LPM will notify the final candidates in November.

### 3. DEFINITIONS

- 3.1. None

4. POLICY

4.1. Number of Classes Held/Number of Participants Chosen Per Leadership 101 class

4.1.1. The Deputy Director and each Area REx are requested to identify the following number of primary candidates for each group of 26; (two groups total - one in winter and one in spring):

- 4.1.1.1. Midwest\_\_\_\_\_2
- 4.1.1.2. Northeast\_\_\_\_\_3
- 4.1.1.3. Southeast\_\_\_\_\_2
- 4.1.1.4. Rocky Mt.\_\_\_\_\_3
- 4.1.1.5. South Central\_\_\_\_1
- 4.1.1.6. Southwest\_\_\_\_\_4
- 4.1.1.7. Northwest\_\_\_\_\_1
- 4.1.1.8. Alaska\_\_\_\_\_1
- 4.1.1.9. Headquarters\_\_\_\_9

Areas and Headquarters offices should also nominate 4 back up candidates for each class. A “backup candidate” may be contacted as a replacement in the event that any primary candidates are unable to attend. In the event that the list of back up candidates is exhausted, the Office of OED will contact the Roster Coordinator for additional back up candidates.

**Note:** Backup candidates are re-nominated each year as part of that fiscal year’s nomination process.

4.2. Cost

4.2.1. Salary, travel, and per diem for each participant will be covered by the attendee’s cost center for the two-part series. There is no course tuition for the participant/attendee.

4.3. Follow-up

4.3.1. Approximately six months after taking the L101 training (and six months after completion of the L201 training) participants are sent a link to fill out their post- training survey. The completion of the survey is an essential component for the completion of the participant’s training and the sustained excellence of the Leadership Program.

4.3.2. Approximately a year and a half after taking L101, the same group of 26 attendees will reconvene to attend the L201 class (designed as the second half of this leadership training).

4.4. What to do if you are interested in being nominated to attend the L101/L201 series:

4.4.1. Communicate your interest to your supervisor.

4.4.2. Each Area and Headquarters Mission area has its own process once the letter from the LPM is sent to the RExes and the Deputy Director.

4.4.3. If you were nominated by your supervisor but were not contacted by the LPM in November, check with your supervisor or your REx or the Deputy Director (if you are a Headquarters’ candidate) to inquire on your nomination status.

4.4.4. If you were nominated but not selected, simply notify your supervisor of your continued interest and communicate your sustained desire to be nominated for a future class.

5. SUPPORTING INFORMATION

5.1 [http://www.usgs.gov/humancapital/ecd/ecd\\_leadershipdevelopmenthome.html](http://www.usgs.gov/humancapital/ecd/ecd_leadershipdevelopmenthome.html)

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6.2. Signed: Stacy Bushée

Chief, Office of Organizational and Employee Development

## Chapter 9 – Alternate Learning Delivery Methods

### 1. PURPOSE

- 1.1. To establish and document a policy on facilitation and support of Technology Enabled Learning (TEL) as well as provide the standards for the design, development and delivery of such courses.

### 2. SCOPE

- 2.1. Policy applies to all TEL courses developed by USGS subject matter experts (SMEs) that are facilitated and managed by OED.

### 3. DEFINITIONS

- 3.1. The Aviation Industry Computer Based Training (CBT) Committee. Provides a standard for communication between CBT units and a Learning Management System (LMS).
- 3.2. Sharable Content Object Reference Model (SCORM) - A collection of specifications that allow interoperability, accessibility and reusability of web-based learning content.
- 3.3. Technology Enabled Learning (TEL) – Use of technology to maximize learning within an environment of sound course design offering participants the options of time, place, and pacing, to accommodate different learning styles.
- 3.4. Blended Learning – The use of internet-based tools such as Virtual Learning Environments (VLEs) or Learning Management Systems (LMS), discussion boards, chat rooms, streaming video, etc. and may be designed as a "blended" approach, with content available electronically and remotely, as well as "face-to-face" classroom tutorials and lectures.

### 4. POLICY

- 4.1. All TEL courses developed by USGS subject-matter experts (SMEs) that are facilitated and managed by OED will be coordinated by OED staff. All USGS employees using Adobe® Connect™ to develop TEL or blended learning course are required to complete an instructor-led course on how to use the Adobe® Presenter. The course must be completed before the SME is issued an Adobe® Connect™ authoring license by OED.
- 4.2. TEL and blended-learning courses will be reviewed and beta-tested by appropriate discipline experts for technical content and by the OED Staff for adherence to Section 508 policy, and graphic standards, including USGS visual identity and instructional integrity.

### 5. SUPPORTING INFORMATION

- 5.1. ELearning: Conforming to Section 508 web pages:  
<http://www.access-board.gov/sec508/e-learning.htm>
- 5.2. ISD checklist:  
<http://www.nwlink.com/~donclark/hrd/sat.html#templates>
- 5.3. Presentations of USGS Data and Publications on the World Wide Web:  
<http://internal.usgs.gov/guidelines/usgs.webguide.html>
- 5.4. Examples of current TEL courses developed with ITSS  
[http://www.usgs.gov/humancapital/ecd/ecd\\_telexamples.html](http://www.usgs.gov/humancapital/ecd/ecd_telexamples.html)

### 6. APPROVALS AND EFFECTIVE DATE

- 6.1. Effective Date: December 2, 2011
- 6.2. Signed: *Stacy Bushée*  
Chief, Office of Organizational and Employee Development

## Chapter 10 – Tuition Payment Procedures for OED Managed Courses

### 1. PURPOSE

- 1.1. To establish and document a policy on how attendees of OED managed courses with an associated tuition will be invoiced.

### 2. SCOPE

- 2.1. Applies to all attendees of tuition-based classroom training managed by OED.

### 3. DEFINITIONS

- 3.1. Cooperator Personnel-Personnel from an organization with a current joint funding agreement (JFA) or memorandum of understanding (MOU) with a USGS office as part of the Federal State Cooperator Program or other.
- 3.2. Other Federal Agencies (OFA)- Any non-DOI agency that does not have cooperator status (i.e., they do not have a JFA, MOU, or other contractual agreement currently in effect with a USGS office).
- 3.3. State Agencies-Any state agency that does not have a cooperator status (i.e., they do not have a JFA, MOU, or other contractual agreement currently in effect with a USGS office).
- 3.4. Local Governments-Any local government that does not have a cooperator status (i.e., they do not have a JFA, MOU, or other contractual agreement currently in effect with a USGS office).

### 4. POLICY

- 4.1. USGS employees attending an OED sponsored course are required to pay the tuition specified in the course announcement. USGS attendees should register through the Learning Management System (LMS). Once the class is held OED will process a VB document in the Financial and Business Management System (FBMS) using the Work Breakdown Structure (WBS) provided. Federal personnel may provide a government charge card account number for payment if the individual course tuition is \$3,000.00 or less.
- 4.2. OFA personnel may fax an SF-182 Training Authorization to Gloria Armstrong at (303)445-4676.
- 4.3. Collections by OED will be processed by one of the following mechanisms: VB processing in FBMS (USGS only), DI-1040 Bill for Collection (training/purchase order provided by attendee), IPAC bill (SF-182 Training Authorization provided by attendee), government charge card, or check made out to the U.S. Geological Survey.
- 4.4. Personnel from OFAs who do not have a joint funding agreement with the USGS attending a USGS sponsored event are required to pay the cost as specified in the OED Learning Support Services Document. All OFAs should submit their name, agency name, address, telephone number, fax number and billing instructions to Gloria Armstrong (gjarmstr@usgs.gov). OFAs can make payment by credit card or check, or the OED staff can prepare an IPAC bill for collection. Agency location code is required for all IPAC bills.
- 4.5. State and local government employees, university personnel, USGS contractors, etc., attending a course will pay the course cost as specified in the course announcement by submitting their name, agency name, address, phone number, fax number and billing instructions to: Gloria Armstrong (gjarmstr@usgs.gov). These attendees can make payment by credit card, check, or OED personnel can prepare DI-1040 Bill for Collection. Course charges for any international participants will be determined by Gloria Armstrong from OED. OED course and/or National Training Center (NTC) Service charges can be paid by internal Voucher (IV) (USGS only), DI-1040 Bill for Collection (training/purchase order provided by attendee), IPAC bill (SF-182 Training Authorization provided by attendee), government charge card, and checks made out to the U.S. Geological Survey.

### 5. SUPPORTING INFORMATION

- 5.1. 31 U.S.C. 3302(b)(1997)
- 5.2. 42 Comp. Gen 673 (1963)
- 5.3. Intergovernmental Personnel Act (IPA) of 1970, Pub L. No. 91-648 (1970)

5.4. 42 USC &4742 (1997)

6. APPROVALS AND EFFECTIVE DATE

6.1. Effective Date: December 2, 2011

6.2. Signed: *Stacy Bushée*

Chief, Office of Organizational and Employee Development

## Chapter 11 – Paying for USGS Managed Training Courses

### 1. PURPOSE

- 1.1. To establish and document a policy on paying for fee based courses managed by OED.

### 2. SCOPE

- 2.1. Policy applies to all USGS employees.

### 3. DEFINITIONS

- 3.1. SF-182: The SF-182 form is a training authorization agreement used for requesting, authorizing, and certifying training for federal employees.

### 4. POLICY

- 4.1. The Learning Management System (LMS) has an electronic SF-182 capability. Employees can create this form from their own LMS account, or their supervisor/alternate approver can create the form for them. Note, this capability in the LMS is not linked to Federal Finance System (FFS). The SF-182 should be used for any external training courses which are not listed in the LMS catalog.
- 4.2. To pay for an individual's training, if the vendor is on the approved Data Universal Numbering System (DUNS) vendor list, once the SF-182 is completed and the cost is manually obligated in FFS, the vendor may be paid via Electronic Funds Transfer (EFT).
- 4.3. If the tuition is \$3,000 or less, a federal charge card can be used for payment.
- 4.4. If the tuition is greater than \$3,000, up to \$150,000, or if the training is for a group, see below:
  - 4.4.1. If the cost of a group training event is from \$3,000 to \$150,000, the coordinating office is advised to have their local administrative officer use the hardcopy OPM SF-182 [http://www.opm.gov/forms/pdf\\_fill/SF182.pdf](http://www.opm.gov/forms/pdf_fill/SF182.pdf) as the authorizing document and then enter a miscellaneous obligation in FBMS to obligate and then enter a logistics invoice to pay for the training. These forms require the signature approval of the OED Strategic Employee Development Consultant (SEDC) in OED. Pam Marsters serves in this capacity and can be reached at [pmarster@usgs.gov](mailto:pmarster@usgs.gov), 703-648-6703. Once approved, the SEDC will sign the form on Page 2, under blocks 3a-3 and return the form to the Administrative Officer for final processing.
- 4.5. If the total training cost is greater than \$150,000, the process should involve the Acquisition and Grants Office.

### 5. SUPPORTING INFORMATION

- 5.1. USGS Office of Acquisition and Grants Policy and Procedures Memorandum Website:  
<http://internal.usgs.gov/ops/acquisition/ppm.html>.

### 6. APPROVALS AND EFFECTIVE DATE

- 6.1. Effective Date: December 2, 2011
- 6.2. Signed: *Stacy Bushée*  
Chief, Office of Organizational and Employee Development

## Chapter 12 – Student Cancellation From Courses and Other Instructional Events Managed by OED

1. PURPOSE
  - 1.1. To establish and document a policy on the cancellation of a registered participant for any OED managed course and/or other instructional event with an associated tuition.
2. SCOPE
  - 2.1. Applies to all participants registered for an OED managed course and/or other instructional events held at any location with an advertised tuition.
3. DEFINITIONS
  - 3.1. “Instructional Event” includes meetings, symposiums, conferences, courses and/or classes attended remotely or in person.
4. POLICY
  - 4.1. Once a participant is registered, accepted, and notified in an OED managed instructional event, the participant’s office is responsible for paying any associated tuition.
  - 4.2. If a participant or their supervisor cancels attendance, and a waitlist exists from which the vacated seat can be filled, no cancellation fee will be charged the original participant. If no waitlist exists, the advertised seat fee will be charged to the registered participant’s office.
  - 4.3. If a registered participant cancels attendance as a result of a personal or family medical emergency, no cancellation fee will be charged if verification by the employee’s supervisor is provided to OED within five business days after the last day of the instructional event.
5. SUPPORTING INFORMATION
  - 5.1. None
6. APPROVALS AND EFFECTIVE DATE
  - 6.1. Effective Date: December 2, 2011
  - 6.2. Signed: *Stacy Bushée*  
Chief, Office of Organizational and Employee Development

## Chapter 13 – Cancellation of USGS National Training Center Room Reservation

### 1. PURPOSE

- 1.1. To establish and document a policy on cancellation of a USGS National Training Center (NTC) room reservation by the event coordinator.

### 2. SCOPE

- 2.1. Applies to all events managed by OED, held at the NTC in Denver, CO with an associated Learning Support Services (LSS) fee.

### 3. DEFINITIONS

- 3.1. "Event"-Includes OED supported meetings, symposiums, conferences, courses and/or classes attended remotely or in person.
- 3.2. "Event Coordinator"-The individual who makes the NTC room reservation.

### 4. POLICY

- 4.1. For events at the USGS NTC, cancellation of a room reservation less than 10 business days before the scheduled event will result in a charge of 25% of the total LSS fee. The fee will be charged to the office of the individual who made the reservation. This fee is waived if the supervisor of the event instructor verifies the cancellation was the result of a medical or family emergency within five business days of the last scheduled day of the event.
- 4.2. All registered participants will be notified of a class cancellation as early as possible by OED staff. If reschedule information is available, that information will also be communicated.
- 4.3. Tuition refunds (if applicable) to registered participants are the responsibility of the event coordinator.
- 4.4. Events that are not economically feasible (where expenses exceed total income from tuition fees) may still be held if (1) the course developer(s) decide that the course event is critical to the USGS and (2) the Chief of OED concurs.

### 5. SUPPORTING INFORMATION

- 5.1. <http://training.usgs.gov/ntc/OED%20Learning%20Support%20Services.pdf>

### 6. APPROVALS AND EFFECTIVE DATE

- 6.1. Effective Date: December 2, 2011

- 6.2. Signed: *Stacy Bushée*

Chief, Office of Organizational and Employee Development

## Chapter 14 – Denver Federal Center Security Requirements for Attendees of Courses and Instructional Events

1. PURPOSE
  - 1.1. To document security procedures affecting attendees of courses and instructional events held at the Denver Federal Center (DFC)
2. SCOPE
  - 2.1. Applies to all persons on the DFC.
3. DEFINITIONS
  - 3.1. None
4. POLICY
  - 4.1. OED staff will provide all registered course participants with information on current DFC security requirements in advance of attending.
5. SUPPORTING INFORMATION
  - 5.1. Security procedures on the DFC are dependent on designated threat level and resulting protocols. All individuals entering the DFC are required to show a current driver's license or federal identification. Weapons and pets are specifically prohibited on the DFC.
  - 5.2. Participants in training at the OED NTC facility (Bldg 53, Room 2nd floor) must enter the building through Entrance W-4 and will be required to produce a valid driver's license or Federal Identification. For visitors without a federal ID, a temporary visitor pass will be issued. All persons must wear either a visitor's pass or their federal ID at all times while in Bldg 53. Visitor passes must be returned to the security staff upon leaving the building. Gate #1, located on Kipling Street is the only gate available for entering or leaving the DFC after 6:00 PM.
6. APPROVALS AND EFFECTIVE DATE
  - 6.1. Effective Date: December 2, 2011
  - 6.2. Signed: *Stacy Bushée*  
Chief, Office of Organizational and Employee Development

## Chapter 15 – Transportation and Lodging for Participants of OED Managed Courses at the National Training Center in Denver, Colorado

1. PURPOSE
  - 1.1. To establish and document a policy on transportation and lodging while attending OED managed courses at the National Training Center (NTC) in Denver, Colorado.
2. SCOPE
  - 2.1. Applies to all non-local participants and instructors attending OED managed courses being held at the NTC in Denver, Colorado.
3. DEFINITIONS
  - 3.1. None
4. POLICY
  - 4.1. All course participants are responsible for making their own transportation arrangements. USGS employees on travel status are encouraged to carpool with other participants whenever possible. Various shuttle options are available to and from the Denver airport.
  - 4.2. If possible, especially for multiple day courses, it is recommended that non-local course participants stay at the same hotel facility. Sharing the same lodging facility promotes both networking and encourages carpooling. Course developers/instructors may recommend specific hotels to course participants. A block of rooms in a specific hotel may be reserved by the OED NTC staff on request.
  - 4.3. Current lodging information is provided on the OED website at [http://training.usgs.gov/ntc/about\\_facility.html](http://training.usgs.gov/ntc/about_facility.html)
5. SUPPORTING INFORMATION
  - 5.1. None
6. APPROVALS AND EFFECTIVE DATE
  - 6.1. Effective Date: December 2, 2011
  - 6.2. Signed: *Stacy Bushée*  
Chief, Office of Organizational and Employee Development

## Chapter 16 – Course Evaluations

1. PURPOSE
  - 1.1. To establish and document a policy on evaluating the effectiveness of courses managed by the OED.
2. SCOPE
  - 2.1. Applies to all courses managed by OED.
3. DEFINITIONS
  - 3.1. None
4. POLICY
  - 4.1. At the conclusion of an OED managed course, participants are required to complete a basic evaluation of the course. A more in-depth evaluation is available for all OED managed courses on-line through the Learning Management System (LMS). It includes course content, materials, presentation, instructor effectiveness, etc. Employees are required to complete this evaluation within 30 days of the class end date.
  - 4.2. Employees should evaluate all USGS sponsored training using the LMS.
  - 4.3. Hardcopy evaluations will be provided to the course coordinator/instructor within a week of the course end date. The course coordinator (if available) and/or the lead instructor(s) will be debriefed by OED staff at the conclusion of the course.
5. SUPPORTING INFORMATION
  - 5.1. Feedback from evaluations and instructor/course coordinator debrief will be used for continuous improvement of all aspects of each course including facility and customer service.
6. APPROVALS AND EFFECTIVE DATE
  - 6.1. Effective Date: December 2, 2011
  - 6.2. Signed: *Stacy Bushée*  
Chief, Office of Organizational and Employee Development

## Chapter 17 – Instructor/Developer Costs for OED Managed Courses

### 1. PURPOSE

- 1.1. To establish and document a policy on allowable reimbursement of USGS course instructors/developers for course preparation and delivery of some OED managed courses. These charges are typically allowed for instructors/developers who work under a reimbursable funding model.

### 2. SCOPE

- 2.1. Policy applies to all USGS or other Interior personnel serving as instructor/developer of classroom delivered training courses managed by OED.

### 3. DEFINITIONS

- 3.1. None

### 4. POLICY

- 4.1. OED may reimburse USGS or other Interior instructors/developers of a training course for specific expenses incurred in providing training. This reimbursement amount is calculated as part of the total per person tuition.
- 4.2. USGS instructors/developers whose salaries are not funded by appropriated funds are eligible for partial or full reimbursement for cost incurred by developing and/or teaching OED supported classes. Only Salary costs for such instructors will be reimbursed based on the total number of participant contact hours along with a maximum of three hours preparation time for every hour of lecture the first time the course is taught by that individual. Leave assessments, overhead, and associated expenses will not be reimbursed. If the course has been previously taught by the same individual(s) they will be reimbursed for one hour of preparation time for every participant contact hour. The course developers/instructors will charge those hours to the training course Work Breakdown Structure (WBS) provided to them at least two weeks before the course starts. All travel expenses, including those for developers/instructors funded by appropriated funds, directly related to the delivery of the training course may also be charged to an OED- provided WBS.
- 4.3. USGS instructors/developers who choose to present their classes via streaming video to allow for remote participants will be reimbursed for an additional three hours of preparation time for every hour of lecture the first time they present a course via streaming video and one hour of preparation time for every hour of lecture after the first time.

### 5. SUPPORTING INFORMATION

- 5.1. None

### 6. APPROVALS AND EFFECTIVE DATE

- 6.1. Effective Date: December 2, 2011

- 6.2. Signed: *Stacy Bushée*

Chief, Office of Organizational and Employee Development

## Chapter 18 – Computer Hardware and/or Software Required for USGS National Training Center Courses

1. PURPOSE
  - 1.1. To establish and document a policy on computer hardware and software required for courses held at USGS National Training Center (NTC).
2. SCOPE
  - 2.1. Policy applies to all courses held at the USGS NTC involving computers including events supported by laptops deployed by OED to other USGS locations.
3. DEFINITIONS
  - 3.1. None
4. POLICY
  - 4.1. Any software required for a course managed by OED NTC, beyond Windows, must be provided by the Instructor/Coordinator to the OED Systems Administrator (SA) at least seven business days before training begins. For deployed laptops, a minimum of ten business days is required.
  - 4.2. Software may be mailed to the SA and should include complete instructions on loading, directory structure and any testing information.
  - 4.3. If a non-OED NTC server is required for an event, the course Coordinator(s)/Instructor(s) is responsible for arranging for shipment to and from OED NTC. The SA will provide server connection to the network and disconnect before return shipping.
  - 4.4. Servers and/or external laptops courses shall arrive at the OED NTC at least seven calendar days before scheduled training to ensure compatibility and allow for operational testing.
  - 4.5. Classes scheduled through Friday must end by 3:00 PM on Friday to allow adequate time for hardware/software setup for subsequent classes starting on the following Monday.
  - 4.6. Three-day classes should be scheduled Tuesday through Thursday if the required NTC training room is available to facilitate hardware/software support.
5. SUPPORTING INFORMATION
  - 5.1. Core applications loaded on all PC computers used for training at the OED/NTC include the following:
    - 5.1.1. Windows XP – SP3 or Windows Vista (OS)
    - 5.1.2. MS Office 2007 (except for FrontPage)
    - 5.1.3. Internet Explorer or Mozilla Firefox (to read email over the browser)
    - 5.1.4. WinZip
    - 5.1.5. Adobe Reader
    - 5.1.6. eras – Juniper Remote Connection
6. APPROVALS AND EFFECTIVE DATE
  - 6.1. Effective Date: December 2, 2011
  - 6.2. Signed: *Stacy Bushée*  
Chief, Office of Organizational and Employee Development

## Chapter 19 – USGS National Training Center Facility Usage

### 1. PURPOSE

- 1.1. To establish and document a policy on the use of the National Training Center (NTC) facility in Bldg 53 on the Denver Federal Center in Denver, Colorado.

### 2. SCOPE

- 2.1. Policy applies to individuals, groups or organizations, whether internal or external to the USGS as approved by the Chief, OED.

### 3. DEFINITIONS

- 3.1. None

### 4. POLICY

- 4.1. The OED NTC's primary mission is serving USGS customers.
- 4.2. Technology costs will be recovered through the collection of published OED Learning Support Services Fees.
- 4.3. NTC facilities will be available for use during normal business hours of 7:00am-5:00pm. Facility use during non-business hours requires approval by the Chief, OED.
- 4.4. Scheduling NTC classrooms and meeting rooms is on a first-come, first-reserved basis. The following prioritization (highest to lowest) will be used for simultaneous requests: (1st) USGS training classes, (2nd) Multi-room conferences sponsored by the USGS, (3rd) Any other use by USGS, and (4th) All other users/uses.
- 4.5. NTC staff will continuously monitor and provide regular reports on the NTC facility use to the Chief, OED.
- 4.6. NTC classroom and meeting room support will follow the published OED Learning Support Services that will be updated at least annually to reflect any changes. Other Federal agencies are invited to use the NTC facility, if available. Charges for NTC services, classrooms, and meeting rooms based on hardware and software needs, AV support, IT support, and administrative support are listed in the OED Learning Support Services document.
- 4.7. OED Staff will strive to maximize the use of the NTC facility.

### 5. SUPPORTING INFORMATION

- 5.1. Learning Support Services Document:  
<http://training.usgs.gov/ntc/OED%20Learning%20Support%20Services.pdf>

### 6. APPROVALS AND EFFECTIVE DATE

- 6.1. Effective Date: December 2, 2011
- 6.2. Signed: *Stacy Bushée*  
Chief, Office of Organizational and Employee Development

## Chapter 20 – Materials for National Training Center Managed Courses

### 1. PURPOSE

- 1.1. To establish and document a policy on the creation and distribution of course materials provided to participants for a training managed by National Training Center (NTC).

### 2. SCOPE

- 2.1. Policy applies to NTC managed courses only.

### 3. DEFINITIONS

- 3.1. Agenda or course outline – a summary containing the main points of the training course including key learning objectives and any prerequisites.

### 4. POLICY

- 4.1. OED will serve as the point of contact for electronic collection, and if necessary, reproduction and distribution of all class materials for OED NTC coordinated courses. In an effort to conserve natural resources, OED will strive to provide course materials to participants electronically whenever possible.
- 4.2. OED will order necessary textbooks (ISBN# required), USGS reports, etc., for all USGS managed classes. If course materials are not available (i.e., when reports are out of publication) OED will contact the course developer/instructor for further instructions. If the report/publication is available via the web, it will be made available electronically by NTC. Such requests must be made to NTC staff well in advance of the scheduled course, preferably at the time the support course packet is returned to OED. All course materials must be provided electronically to NTC staff no later than two weeks prior to the class. The information may be sent to NTC by mail or preferably in electronic formats (email, zip file, and/or CD-ROM). If hardcopy materials are required, course developers/instructors are required to provide detailed instructions on copying details (i.e., black and white or color copies, double sided, 3 slides to a page, type of binder, etc.).
- 4.3. A final electronic course agenda is required in advance of communicating the course (advertising and/or posting the course in LMS, etc).
- 4.4. Electronic agendas may be revised two weeks prior to the course start date. Class instructors/developers are responsible for providing detailed instructions regarding requests for any hardcopy handouts (i.e., 3-hole punched, double sided, black and white or color copies, stapled, size of binder, cover pages, etc.).

### 5. SUPPORTING INFORMATION

- 5.1. None

### 6. APPROVALS AND EFFECTIVE DATE

- 6.1. Effective Date: December 2, 2011

- 6.2. Signed: *Stacy Bushée*

Chief, Office of Organizational and Employee Development

## Chapter 21 – Training Documentation, Tracking & Reporting

1. PURPOSE
  - 1.1. To establish a procedure for documenting, tracking and reporting all USGS attendance of employee development activities in the Learning Management System (LMS).
2. SCOPE
  - 2.1. Policy applies to all USGS employees.
3. DEFINITIONS
  - 3.1. None
4. POLICY
  - 4.1. The LMS is the official repository for training data and the required source for all bureau investment training reports. Training attendance will be documented in the LMS by the employee, supervisor and/or a designated administrative contact.
  - 4.2. LMS reports may be run by supervisors, instructors/roster managers/program managers. The LMS Administrator/Data Steward posts reports on an FTP site during Department and Bureau sponsored mandatory training deadlines..
5. SUPPORTING INFORMATION
  - 5.1. [http://206.131.241.18/app\\_dm/act\\_getfiles.cfm?relnum=3787](http://206.131.241.18/app_dm/act_getfiles.cfm?relnum=3787)
6. APPROVALS AND EFFECTIVE DATE
  - 6.1. Effective Date: December 2, 2011
  - 6.2. Signed: *Stacy Bushée*  
Chief, Office of Organizational and Employee Development

## Chapter 22 – Allocation of Seats in OED Managed Courses

1. PURPOSE
  - 1.1. To establish and document a policy on the allocation of seats in classroom delivered training for OED managed courses.
2. SCOPE
  - 2.1. Policy applies to all USGS offices.
3. DEFINITIONS
  - 3.1. Cooperator Personnel-Employees of an organization with a current Memorandum of Agreement (MOA), Memorandum of Understanding (MOU) or Joint Funding Agreement (JFA) with a USGS office.
4. POLICY
  - 4.1. Federal or state agency employees may attend any USGS class if approved by an appropriate senior manager and the course instructors/developer.
  - 4.2. USGS cooperators may attend if approved by an appropriate senior manager and the course instructors/developer.
  - 4.3. Contractors of a cooperator are allowed to attend only if 1) a seat is available and 2) if attendance is deemed to support the mission of the USGS as decided by an appropriate USGS senior manager.
  - 4.4. USGS course instructors/developers may set the minimum and maximum number of participants for their classes.
  - 4.5. USGS course instructors/developers may allocate the number of seats by organizational groups.
  - 4.6. For OED developed and delivered, nationally offered courses, seats will be allocated equitably to USGS regions.
  - 4.7. The Learning Management System (LMS) is designed to allow DOI employees to see if a class is full and they are waitlisted. If nominations exceed available seats, the following actions will be taken:
    - 4.7.1. For water related courses managed by NTC, OED staff will contact the appropriate science/technical specialists to adjust the registrant list as necessary.
    - 4.7.2. For all USGS developed and delivered courses, OED staff will work with Regional Director's Staff to adjust the registrant list as necessary.
  - 4.8. Cooperators must be approved by a USGS office. Contact Gloria Armstrong OED at 303-445-4676 or gjarmstr@usgs.gov for approval form.
5. SUPPORTING INFORMATION
  - 5.1. The Intergovernmental Personnel Act (IPA) of 1970, Pub. L. 91-648 (1970) authorizes agencies to train state and local government employees and accept reimbursements and payment for the training. See Title 42 USC §4742. The IPA authorizes the Federal agencies to:
    - 5.1.1. Admit employees of state and local governments to their training program;
    - 5.1.2. Waive payments for training costs, if the agency wishes to.
    - 5.1.3. Provide for temporary assignment of personnel between the Federal Government and non-Federal organizations, State and local governments, Indian tribal governments, certain nonprofit organizations, and domestic colleges and universities (See Title 5 CFR Part 334). Payments received for training employees of state and local governments are credited to the appropriation or fund used to pay the course costs.
  - 5.2. 42 USC 4742. Admission to Federal employee training programs
6. APPROVALS AND EFFECTIVE DATE
  - 6.1. Effective Date: December 2, 2011
  - 6.2. Signed: *Stacy Bushée*  
Chief, Office of Organizational and Employee Development