

U.S. Geological Survey Instructional Memorandum

No. **IM AEI 2011-08**

Issuance Date: October 20, 2012

Expiration Date: Effective until Rescinded

Subject: Conference Related Activities and Spending

Purpose

This IM establishes guidelines and procedures for managing and reporting on conference related activities and spending; and is in accordance with the October 12, 2011 memorandum from DOI Deputy Assistant Secretary for Budget, Finance, Performance and Acquisition (attached).

Definitions

Per OMB memorandum dated September 21, 2001 (attached), a conference is defined as a meeting, seminar, retreat, or symposium and includes a conference for the purpose of providing training. Meetings include senior bureau leadership meetings and meetings of specific disciplines or initiatives, for example, acquisitions, planning, youth, etc. A conference does not include formal classroom training.

Policy

- (1) By October 21, 2011, each Associate Director, Regional Executive and/or Office Chief who reports to the Deputy Director must submit to the Associate Director for Administration and Enterprise Information list of planned conference activity for the first quarter of Fiscal Year 2012 for both those USGS will host and those hosted by another entity where 15 or more total USGS employees will attend.
- (2) Quarterly (as described under Reporting Requirements), the USGS will prepare a list of planned USGS hosted conferences and a list of USGS employees who will attend non-USGS hosted conferences. (Reference attached spreadsheets).
- (3) USGS Hosted Conferences: The Assistant Secretary, Water and Science must approve attendance for all conferences hosted by a USGS office where 30 or more USGS employees will attend and 50 percent or more of those employees will travel away from their duty station in an authorized travel status. These requests must include the least costly alternative with supporting documentation attached to the official request. Such requests must be submitted at least 8 weeks in advance of the proposed conference to permit time for the approval process and the acquisition of the venue.

- (4) Non-USGS Hosted Conferences: The Director must approve attendance at non-USGS hosted conferences where 15 or more USGS employees will attend and 50 percent or more of those employees will travel away from their duty station in an authorized travel status. Conferences of this nature include such as those hosted by ESRI, the Geological Society of American (GSA), Association of State Geologists (ASG), American Geophysical Union (AGU), and/or DOI-sponsored conferences,
- (5) Employees on travel status who attend any conference **must** designate the travel purpose as "Conference Attendance" in GovTrip.

Reporting Requirements

At the beginning of each quarter, each Associate Director, Regional Executive, and/or Office Chief who reports to the Deputy Director must submit to the Director their planned USGS Hosted Conferences using the attached workbook.

For those conferences not USGS hosted and where USGS employees will attend, it will be the responsibility of the Mission Area Associate Director under whose program the conference subject matter falls to collect and consolidate a list of USGS employees who plan to attend. Since most of these types of conferences are well established, with conference dates announced in advanced, this list will be compiled and submitted the first day of each quarter to the Director for approval.

Monitoring

The Office of Accounting and Financial Management will provide to the USGS Executive Leadership Team quarterly reports on conference travel. This information will be extracted from the GovTrip system. The information will be reconciled to the quarterly list of planned USGS Hosted Conferences and the list of attendees at Non-USGS hosted conferences.



Karen D. Baker
Associate Director for Administration
and Enterprise Information

October 20, 2011

Date

Attachments:

- (1) 10/13/2011 Memo from DAS-Budget, Finance, Performance Acquisition
- (2) 9/21/2011 Memo from OMB (M-11-35)
- (3) Conference Reporting Workbook