



# **A Guide for Planning Training Workshops**

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# Preface

From 2008 - 2010, the National Advisory Council for Office Professionals (NACOP) planned and implemented a training workshop for office professionals across the Agency. The Council developed this guide from actual notes of committee meetings and evaluations from participants to aid others in workshop planning.

Council members responsible for formulating this Guide are:

Diona Austill, NPA	Brittney Jones, MWA
Patricia Berry, HQ	Jacqueline Kelly, HQS
LaTasha Beasley, NAL	Diane Koch, NAA
Mary Dailey, BA	Heather Lewandowski, MWA
Sherry Dewald, SPA	Cathy Lonaberger, OA
Drusilla Fratesi, MSA	Christa Meier, PWA
Linda Fulton, MSA	Kathleen Parker, PWA
Sandy Groneberg, MWA	Linda Parnell, NPA
Barbara Hodges, SPA	Wanda Rohrer, SAA
Brenda Holmes, NAA	Rhonda Sampson, OCIO

# First Things First

Successful workshops don't just happen – they require careful planning and implementation.

**Start the planning process by using Bulletins [05.212.0](#) “Conference Planning Overview” and [00-304](#) "Conference Planning." (<http://www.afm.ars.usda.gov/ppweb/>)**

Some general guidelines to remember when planning an event:

1. Start planning the event at least one year in advance.
2. Determine the needs of ARS and attendees and set objectives accordingly.
3. Request approval to proceed with planning.

This Guide contains sample documents used for the NACOP 2010 Training Workshop. They are provided here to assist in the planning process.

# Establish Committees

It is recommended that committees be established to ensure a successful event.

The committees NACOP used were as follows:

**Core Leadership Group** – tasked with participating in all committee planning sessions to maintain continuity, obtain approval(s), and develop a milestone schedule as directed in Bulletin 00-304. (Exhibit 1)

**Site Selection Committee** – tasked with determining the location that meets Agency guidelines.

**Program Committee** – tasked with identifying and securing speakers and setting the agenda.

**Hospitality/Publicity Committee** – tasked with facilitating the participants’ activities.

Rising to the Challenge NACOP Training Workshop August 18-19, 2010	
Please include the five below on all emails and conference calls. *Diona Austill – Sr. Co-Chair Sandy Groneberg – Jr. Co-Chair *Drusilla Fratesi – Ex-Officio Cathy Lonaberger – Technical Advisor Rhonda Sampson – Technical Advisor *Cost Comparison/Site Committee	
Publicity/Hospitality Committee	Program/Agenda Committee
Sandy Groneberg – Chair LaTasha Burl Barbara Hodges (for Sherry Dewald) *Mary Dailey Heather Lewandowski	*Diane Koch – Chair Wanda Rohrer Jackie Kelly Christa Meier Linda Fulton
Tasks:	Tasks:
List of participants – compile list from online registration/hotel registrations Check hotel list against registrations Ribbons for staff/speakers Lunch seating/pictures (networking – people sit with others from different Areas)	Finalize agenda/print programs Contact speakers Travel authorizations for speakers Bios/IT needs/other needs for speakers Print programs/finalize agenda SF-182s (Authorization, Agreement and Certification of Training) for participants

<p>Name tags with session stickers on back/lanyards</p> <p>Memo to participants regarding registration</p> <p>Directional signs/room signs for easels</p> <p>Booth display/schedule</p> <p>Meal/break menus</p> <p>Web page (workshop and registration information)</p> <p>Certificates</p> <p>Non-monetary items for participants (folder/pens)</p> <p>Welcome reception (if there is one)</p> <p>Optional evening group outings</p>	<p>Non-monetary awards for speakers</p> <p>Speaker handouts – duplication</p> <p>Thank you letters – completed before conference/ready to send out</p> <p>Photography</p> <p>Slide show presentations for dinners/lunches</p> <p>Room monitor assignments</p> <p>Assign participants to breakouts</p> <p>Evaluation forms (develop and compile) for general and breakout sessions</p>
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# Site Selection Committee

- Estimate number of participants from each Area and total transportation costs to each proposed site ([Exhibit 2](#))
- Choose several locations (cities) to compare ([Exhibit 3](#))
- Compare costs of different venues in each city ([Exhibit 4](#))
  - Possible site visits
- Prepare specification sheet so all potential sites are compared on standardized requirements ([Exhibit 5](#))
- Complete Agency request packet per guidelines from Travel & Relocation Services Branch ([Exhibit 6](#))
- Negotiate amenities and food with Hotel

Suggestions:

Enlist the aid of local Chambers of Commerce (Visitors' Bureau)

# Program Committee

- Draft agenda ([Exhibit 7](#))
- Prepare letter for participant registration ([Exhibit 8](#))
- Coordinate training registration for all participants to receive credit via AgLearn
- Invite speakers by initial phone contact
  - If a paid speaker, follow Agency guidelines
- Speaker confirmation letter with details ([Exhibit 9](#))
  - Travel specifications
  - Bio
  - IT and other needs (computers, projectors, etc.)
  - Handouts for duplication
  - Non-monetary award recognition for each Agency speaker
- Develop speaker needs spreadsheet ([Exhibit 10](#))
- Break-out session room monitor assignments ([Exhibit 11](#))
  - Introduce speaker
  - Distribute handouts and evaluation forms
  - Monitor time to maintain schedule
  - Collect evaluations
- Assign participants to breakouts (recommend enlisting the aid of a statistician) ([Exhibit 12](#))
- Thank you letters for speakers – completed before conference/ready to send out ([Exhibit 14](#))
- Evaluation forms (develop and compile) for general and breakout sessions ([Exhibit 15](#))
- Finalize agenda with committee duties ([Exhibit 16](#))
- Print programs

# Publicity/Hospitality Committee

- List of conference participants – Compile database of participants from online conference reservation and hotel registration
- Check hotel registration list against online conference registration
- Encourage networking with participants from different Areas during meal breaks by using assigned seating (get creative and incorporate your theme – tabletop themes, numbered tables, etc.) ([Exhibit 17](#))
- Assign a committee member(s) to do photography
- Prepare directional and room signs as needed
- Booth displays (committee member assignments)
- Welcome & registration (Non-monetary recognition for conference participants)
- Request non-monetary award items from Areas (door prizes)
- Optional group outings at site location (investigate with Visitors' Bureau)
- Meal/break selections (Site Selection Committee to negotiate with hotel)
- Committee member assignments and schedule (registration booth, break-out sessions, speaker introductions)
- Lanyards/name badges
  - List break-out sessions on back of name badges
  - Visually identify committee members and speakers
- Certificates for participants ([Exhibit 18](#))
- Incorporate logo wherever possible

# Exhibits

Samples of documents used for NACOP’s 2010 Training Workshop.

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## Milestone Schedule

Tasks can be followed easily by developing a table similar to this. Enumerate each task and who is responsible for its completion. A column could be added for a target completion date.

DATE	TASK	ASSIGNED		COMMENTS	COMPLETED
		TO:			
6/23/2010	NACOP Notes Special Edition sent to Office Professionals	Mary			Distributed to NACOP reps on 7/2/2010
7/1/2010	Set up registration in AgLearn	Diona			Date Completed by person's name
7/1/2010	NACOP reps remind Area Directors to send list of nominations for Workshop to the NACOP rep (if they haven't already received it).	ALL NACOP Reps			Date Completed
7/1/2010	Registration on AgLearn is ready to go	LaTasha & Rhonda			Date Completed by person's name
7/6/2010	NACOP reps submit list of nominations to co-chairs for distribution of "participant letter."	ALL NACOP Reps		Waiting on one name from XX Area. All other letters have been sent.	DONE
7/6/2010	Letter to Participants regarding registration sent to all participants	Sr. Co-Chair		Waiting on one name from XYZ. All other letters have been sent.	DONE
7/12/2010	Letter to speakers (collect IT needs and handout information to go to Linda)	Drusilla		All letters done except to Speaker of XXX session	

## Cost Analysis of Participants Going to a Particular Site

This spreadsheet estimates travel costs to a particular site. Site Committee members need to calculate what it would cost for participants to fly from various parts of the country to the meeting site. Complete a spreadsheet like this for each site under consideration to identify where travel costs would be most economical. Once at the meeting site, costs would remain constant.

### Tucson

# of Attendees	Departure From	Airfare (cost/person)	POV	Shuttle (cost/person)	Cost (per location/person)	Total Cost/all attendees
5	Peoria, IL	\$964.50		\$30.00	\$994.50	\$4,972.50
1	Madison, WI	\$838.00		\$30.00	\$868.00	\$868.00
4	Des Moines, IA	\$1,011.00		\$30.00	\$1,041.00	\$4,164.00
1	Indianapolis, IN	\$384.00		\$30.00	\$414.00	\$414.00
2	Minneapolis, MN	\$878.00		\$30.00	\$908.00	\$1,816.00
1	Columbus, OH	\$338.00		\$30.00	\$368.00	\$368.00
2	St. Louis, MO	\$570.00		\$30.00	\$600.00	\$1,200.00
1	Kansas City, MO	\$570.00		\$30.00	\$600.00	\$600.00
1	Detroit, MI	\$340.00		\$30.00	\$370.00	\$370.00
2	Houston, TX	\$970.00		\$30.00	\$1,000.00	\$2,000.00
2	Mc Allen, TX	\$854.50		\$30.00	\$884.50	\$1,769.00
4	College Station, TX	\$808.00		\$30.00	\$838.00	\$3,352.00
1	Lubbock, TX	\$754.00		\$30.00	\$784.00	\$784.00
2	Amarillo, TX	\$958.50		\$30.00	\$988.50	\$1,977.00
1	El Paso, TX	\$976.00		\$30.00	\$1,006.00	\$1,006.00
3	Little Rock, AR	\$762.00		\$30.00	\$792.00	\$2,376.00
1	Oklahoma City, OK	\$428.00		\$30.00	\$458.00	\$458.00
5	Philadelphia, PA	\$660.00		\$30.00	\$690.00	\$3,450.00
3	Charleston, SC	\$1,480.00		\$30.00	\$1,510.00	\$4,530.00
3	Boston, MA	\$484.00		\$30.00	\$514.00	\$1,542.00
52	Baltimore/Wash.	\$476.00		\$30.00	\$506.00	\$26,312.00

**Cost Analysis of Different Cities**  
**Fill in Blue Cells; Yellow Cells Calculate**

**NACOP Training Workshop**  
**3/1/2010**

	<b>SITE 1 -</b>	<b>SITE 2 -</b>	<b>SITE 3 -</b>
CITY, STATE	Washington, DC	Albuquerque, NM	Tuscon, AR
HOTEL			
CONTACT			
PHONE			
DATE AVAILABILITY	Yes or No	Yes or No	Yes or No
DISABILITY ACCESSIBLE	Yes or No	Yes or No	Yes or No
<b>ESTIMATED COSTS - LODGING, MEETING, AUDIOVISUAL, REFRESHMENTS</b>			
LODGING RATE			
TAXES			
TOTAL ROOM NIGHTS (Number Attendees times number of nights lodging)			
TOTAL LODGING	\$0.00	\$0.00	\$0.00
MEETING ROOM TOTAL COST			
AUDIOVISUAL AIDS TOTAL COST			
TOTAL LODGING/MEETING/AV, ETC.	\$0.00	\$0.00	\$0.00
<b>ESTIMATED COSTS - LODGING, MEETING, AUDIOVISUAL, REFRESHMENTS</b>			
M&IE FOR PERIOD (ALL DAYS AND PARTIAL DAYS)			
REDUCTION FOR MEALS PROVIDED			
TOTAL M&IE PER PARTICIPANT	\$0.00	\$0.00	\$0.00
NUMBER OF PARTICIPANTS			
TOTAL COST OF M&IE	\$0.00	\$0.00	\$0.00
COST OF PROVIDED MEALS			
LIGHT REFRESHMENTS			
TOTAL COST OF MEALS	\$0.00	\$0.00	\$0.00
<b>ESTIMATED COSTS - AIRFARE AND GROUND TRANSPORTATION</b>			
AIRFARE (Preliminary Estimate) (ALL PARTICIPANTS)			
AIRPORT TRANSPORTATION			
TOTAL AIRPORT TRANSPORTATION	\$0.00	\$0.00	\$0.00
TRAVEL TO & FROM HOME AND AIRPORT AND AIRPORT PARKING			
TOTAL COST AIR AND GROUND TRANSPORTATION	\$0.00	\$0.00	\$0.00
SALARY COST			
<b>TOTAL ESTIMATED COSTS</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
SITE RECOMMENDED	Yes or No	Yes or No	Yes or No

## Cost Analysis of Different Facilities in the Same City

### National Conference for ARS Office Professionals March, 2010

<b>WORKSHOPS/DATES</b>	<b>SITE 1</b>	<b>SITE 2</b>	<b>SITE 3</b>
CITY, STATE	Washington, DC	Washington, DC	Washington, DC
HOTEL	The Madison	The Dupont	The Ritz-Carlton
CONTACT			
PHONE			
DATE AVAILABILITY	March 16-19/23-26	March 17-19	Mar 17-18, 24-25; May 12-13, 19-20
DISABILITY ACCESSIBLE	Yes	Yes	Yes
<b>ESTIMATED COSTS - LODGING, MEETING, AUDIOVISUAL, REFRESHMENTS</b>			
LODGING RATE (per day)	\$226 (per diem rate)	\$226 (per diem rate)	\$226 (per diem rate)
TAXES	***** (14.5%)	Can request waiver.	Needs Tax Exempt Cert. *****
TOTAL ROOM NIGHTS	110	110	110
TOTAL LODGING (per day)	\$24,860.00	\$24,860.00	\$24,860.00
TOTAL LODGING (2 days)	\$49,270.00	\$49,270.00	\$49,270.00
MEETING ROOM TOTAL COST	\$0	0	0
	Based on \$10K F&B	Based on 80-100% on Room Pick-up	Based on 90% Room Pick-up Less 10% AUD & F&B
AUDIOVISUAL AIDS TOTAL COST	\$13,370 *****	\$4,570 (Does not include setup & delivery charges.) **	\$8,020
LIGHT REFRESHMENTS (working lunches included; amt indicated is above M&IE amt)	\$11,868.00	\$18,768.00	\$28,098.00
***** Does not include 22% tax service charge & 10% DC sales tax to all F&B pricing, 10% DC tax all F&B labor charges.			*****
TOTAL DAYS	2	2	2
TOTAL LODGING/MEETING/AV, ETC.	\$74,508.00	\$72,608.00	\$85,388.00
<b>ESTIMATED COSTS - AIRFARE/GROUND</b>			
AIRFARE (Preliminary Estimate)	\$43,278.00	\$43,278.00	\$43,278.00
AIRPORT/LOCAL TRANSPORTATION	\$5,152.00	\$5,152.00	\$5,152.00
NO. OF COMMUTING PARTICIPANTS	30 (?)	30 (?)	30 (?)
TRAVEL TO & FROM HOME & AIRPORT/AIRPORT PARKING	\$16,560.00	\$13,248.00	\$16,146.00
TOTAL COST AIR/GROUND TRANSPORTATION	\$64,990.00	\$61,678.00	\$64,576.00
<b>TOTAL ESTIMATED COSTS</b>	<b>\$139,498.00</b>	<b>\$134,286.00</b>	<b>\$149,964.00</b>

Requested information does not include M&IE for participants. At \$00.00 per day, the estimate on the cost comparison is approximately \$000.00 per person x 000 + estimate for 00 speakers = \$0000.00. At \$00.00 per day, estimate is \$000.00 per person x 00 = estimate for 0 speakers = \$00000.00 for Washington.

Information above does not include some meeting expenses: \*\*

No outside speakers planned	\$0.00	\$0.00
Non-Monetary Items for Participants/Speakers Completion certificates, folders, name tags Est. salaries for members' preparation time		

## Sample Specification Sheet

Requirement	Hotel A	Hotel B	Hotel C
General Session/classroom style for 200 people			
1 microphone on podium for general session			
2 wireless lavalieres/day for general sessions			
2 standing wireless microphones/day for general sessions			
LCD projector and screen for general session			
A.M. and P.M. break foods/beverages			
8 breakout rooms for 25-30 people for 3 days			
8 screens (1/breakout room)			
8 wired carts with InFocus projector			
Area for sit-down lunch for 200 people			
Finger foods for reception for 200 people			





## United States Department of Agriculture

Research, Education, and Economics  
Agricultural Research Service

FEB 3 2010

SUBJECT: Approval to Conduct a Conference or Training Event with a Cost in Excess of \$100,000 – Agricultural Research Service's National Advisory Council of Office Professionals Training and Workshop

TO: Jon M. Holladay  
Acting Chief Financial Officer  
Office of the Chief Financial Officer

THROUGH: Molly Jahm *Molly Jahm*  
Acting Under Secretary  
Research, Education, and Economics **MAR 03 2010**

FROM: Edward B. Knipling *Edward B. Knipling*  
Administrator

The Agricultural Research Service (ARS) is proposing to hold their triennial National Advisory Council of Office Professionals (NACOP) Training and Workshop in Shepherdstown, West Virginia, during this fiscal year. They are proposing a May 2010 timeframe, contingent upon Departmental approval. While this conference is usually conducted every three years, last year's conference was canceled due to budgetary constraints. The NACOP planning committee, to reduce costs, has eliminated one day from the usual conference length, limited the number of attendees, and has found a Federal facility to hold the event.

ARS office professionals provide support which affects the program operations within our research units. By holding a training workshop that builds a base of information to assist office professionals in supporting the needs of the scientists and research unit, the employees will gain further understanding and insight into the workings of ARS and be able to interact with their peers. Providing these resources should bring the productivity to a new level.

Departmental regulations require your approval of conferences and meetings with costs in excess of \$40,000. Because this conference costs in excess of \$100,000, we are also seeking approval from the Secretary of Agriculture. Please review the attached information and indicate your decision below.

Office of the Administrator  
Jamie L. Whitten Federal Building • Room 302-A • 1400 Independence Avenue, SW.  
Washington, D.C. 20250-0300  
An Equal Opportunity Employer

**MAR 03 2010**  
OCFO-10-7200

Jon M. Holladay

2

Please return the request with a decision to Steve Helmrich, Director, Financial Management Division, ARS. If you have any questions, please contact Steve on 301-504-1257.

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Decision (circle one):      Approved      Denied

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

1 Enclosure  
USDA Conference or Training Request with Draft Agenda

## USDA Conference or Training Event Request

### I. Basic Information

Agency: USDA-ARS

Staff/Office: National Advisory Council for Office Professionals (NACOP)

Name of Conference or Training: 2010 NACOP Training Workshop

Requested Location of Conference or Training (City and State): Shepherdstown, WV

Dates of Conference or Training: May 2010

Recurring Event:

Yes

If Yes, Frequency: every 3<sup>rd</sup> year

No

Total Event Cost:

If Total Event Cost is over \$100,000, have you obtained clearance from the Assistant Secretary for Administration?

Yes (a copy of the approval must be attached)

No

Location Type:

USDA Facility

Federal Facility

University

Commercial

### II. Attendee Information

Total Participants: 127

Sponsoring/Attending Agency Participants: 127

Other USDA Participants: 11

Non-USDA Participants: 0

Conference Request Template 1/19/10

Page 1 of 6

## USDA Conference or Training Event Request

### III. Justification

1. Please explain how the conference will help further the agency's mission or the Department's strategic plan.

The ARS Strategic Plan (Management Initiative - Ensuring the Quality, Relevance, and Performance of ARS Research) requires quality support to scientists and research leaders. The office professionals provide support which affects the program operations within the research unit. By holding a training workshop that builds a base of information to assist office professionals in supporting the needs of the scientists and research unit, the employees will gain further understanding and insight into the workings of ARS and be able to interact with their peers. Providing these resources should bring the productivity to a new level. Making the participants feel part of a group will give them a new lease on ways to do things in their daily work life.

2. Please explain why the conference or training event is "must-do" considering the limited budgets of the agency.

It has been four years since the last NACOP conference and a lot of things have changed and many office professionals have retired bringing new people into those positions. Recurring issues that continue to come up on a daily basis will be addressed including travel, project documentation, time and attendance, and purchasing. Many office professionals work in isolated locations, some with no other office professionals at the location, some with only one or two. The interaction that occurs at these training workshops allows many spontaneous questions to be asked and answered and allows working relationships to be established so office professionals can seek help when needed. Webcast training cannot answer all our questions. Many of us do not attend any other training when NACOP is providing national training, so it is difficult to compute the expense or savings of having this workshop.

3. Please explain why the information cannot be effectively shared through another means such as a teleconference, video conference, or the Internet.

There are non-measurable benefits of sharing information with our peers and interacting with headquarters personnel. In order for the participants to get the full benefit of networking, personal contact is needed. This is not possible through phones or the Internet. Many locations do not have web conferencing available.

4. The number of employees attending is justified.

In consideration of tightening budgets, the training workshop was reduced from 3 days to 2 days and the number of attendees was reduced by 25%. We would hope that at least one person from each location could attend the workshop and take what they learn back and share it with their coworkers.

5. Is the meeting location near where most attendees are stationed? If not, a detailed cost analysis must be performed for at least two alternate locations. The cost analysis must be documented on the Location Cost Comparison chart in section IV below. If more than 3 locations are compared, please either use another Cost Comparison chart or include all the items requested in section IV within the documentation you provide.

Cost estimates were completed including Washington, D.C. and Shepherdstown, WV, which is close to the 34 headquarters people. It was shown that the desired location of Shepherdstown

### USDA Conference or Training Event Request

was much more cost effective even with those people traveling to the chosen location due to the higher per diem in DC.

6. If the meeting location is not a USDA or government facility, please provide an explanation over why a government facility is not being used. Please also provide supporting documentation detailing that research was performed to determine the availability and usability of a government facility.
7. The location is appropriate and justified and a prudent person would not think it as a waste of their tax dollars for this conference in this location.

A complete cost comparison was done including six cities. The chosen site of Shepherdstown has the lowest cost to the government.

8. Please attach a copy of the conference/training/meeting agenda. The agenda does not have to be a final version.

Wednesday		Breakout Session Topics:
8:00 – 8:10	Opening Remarks & Housekeeping	How to Say No
8:10 – 10:00	General Session	How to do More with Less
10:00 – 10:30	Break	How to get a point across
10:30 – 12:00	Breakout Sessions	Documenting Performance
12:00 – 1:00	Lunch	Sharepoint
1:00 – 2:30	Breakout Sessions	Cats/US Bank
2:30 – 3:00	Break	ARIS/AIMS
3:00 – 4:45	General Session	Time and Attendance
4:45	Closing Remarks and Housekeeping	
6:00	Dinner	
Thursday		General Session Topics:
8:00 – 8:10	Opening Remarks/Housekeeping	Travel/GovTrip
8:10 – 10:00	Breakout Sessions	The Future is Now
10:00 – 10:30	Break	Communication
10:30 – 12:00	General Session	
12:00 – 1:00	Lunch	
1:00 – 2:30	Breakout Sessions	
2:30 – 3:00	Break	
3:00 – 4:45	General Session	
4:45	Closing Remarks	
	Evaluation sheets	
6:00	Dinner	

## USDA Conference or Training Event Request

**IV. Location Cost Comparison**

	Location 1	Location 2	Location 3
City & State of Event	Shepherdstown, WV	Washington, DC	Indianapolis, IN
Type of Facility (USDA, Federal, University or Commercial)	USDA Federal	Commercial	Commercial
TDY Transportation Expense: (Airfare, car rental, mileage, etc.)	49436.00	49,436.00	74628.80
TDY Per Diem Expense: (Lodging & M&IE)	58925.00	92,706.00	81156.00
Other TDY Expenses	6120.00	6120.00	7920.00
Total Local Travel Expense (Expenses from local participants: subway, parking, mileage, etc.)	9660.00	5854.00	5054.00
<b>Total Travel Expense</b>	<b>124141.00</b>	<b>154116</b>	<b>168758.80</b>
Speaker Fees	0	0	0
Printing & Reproduction	1200.00	1200.00	1200.00
Rental/Facility Charges	4000.00	8020.00	1900.00
Other Costs	1500.00	1500.00	1500.00
Description of Other Costs	Certificates, name tags, folders, nonmonetary gifts for speakers		
<b>Total Conference Cost</b>	<b>6700.00</b>	<b>10,720.00</b>	<b>4600.00</b>
<b>Event Total Cost</b>	<b>130,841.00</b>	<b>164,836</b>	<b>173,358.80</b>

For each location listed above, please provide an explanation of the pros and cons of each. If additional documentation is attached for a location rather than an explanation being provided, please note that by writing, "see attached documentation".

Location 1: Shepherdstown offers two federally owned training centers, either of which would work for our training. Each provides on-site housing and meals along with plenty of room for a general session and breakout sessions. Costs would be minimal for equipment and room rent.

Location 2: Washington DC does not have a federally owned center where there would be room for a general session as well as break-out sessions. The per diem rate is very high.

### USDA Conference or Training Event Request

Location 3: Indianapolis, IN, as well as Albuquerque, NM, were both looked at very closely. Both places have hotels that would provide adequate space. The travel expenses were quite high compared to having the meeting in a location where a good share of the participants could drive.



## Draft Agenda

### NACOP TRAINING WORKSHOP Rising to the Challenge – Soaring to New Heights National Center for Employee Development August 18-19, 2010, Norman, Oklahoma

#### August 18, 2010

- 8:00 – 8:10      Opening Remarks & Housekeeping - Sandy Groneberg, Sr. Co-Chair
- 8:10 – 10:00    General Session
- Barbara Hodges, Planning Committee Member –  
Dr. Dan Upchurch – Welcome – SPA Area Director  
Cathy Lonaberger, Technical Advisor, HQ  
Dr. Caird Rexroad – Welcome  
Diona Austill, Ex Officio, NPA  
Kate O’Hara - Technology Communication Officer, MWA  
ARS: Making A Difference  
Wanda Rohrer, Recorder, SAA  
Sharon Drumm – National Program Staff Officer  
“How To Say “No”, Mean It, And Look Good In The Process!”
- 10:00 – 10:30    Break
- 10:30 – 11:30    Breakout Session
- 11:30 – 12:30    Lunch
- 12:45 – 1:45     Breakout Session
- 1:45 – 2:45     Breakout Session
- 2:45 – 3:15     Break
- 3:15 – 4:45     General Session – Drusilla Fratasi, Planning Committee Member, MSA  
National Center for Employee Development  
Practical Tips for Abundant Living –
- 4:45             Closing and Housekeeping  
Dinner on your own

#### August 19, 2010

- 8:00 – 8:10      Opening Remarks & Housekeeping – Jackie Alexander, Jr. Co-Chair
- 8:10 – 10:00    General Session
- Jim Bradley, ARS Deputy Administrator

The Future is Now

Heather Lewandowski, Planning Committee Member, MSA

Diane Strub – Self Development: How to Help Yourself and ARS

10:00 – 10:30	Break
10:30 – 11:30	Breakout Session
11:30 – 12:30	Lunch
12:45 – 1:45	Breakout Session
1:45 – 2:45	Breakout Session
2:45 – 3:15	Break
3:15 – 4:45	General Session – Sherry Dewald - SPA Jeff Schmitt and Jan Lewis, REE Cooperative Resolution Program Collaborative Conversations
4:45	Closing Wrap-up – Jim Bradley

Breakout Session Possibilities

What is records management? How can we improve the upkeep of our files?– Lisa Baete, NPA

SharePoint – Jose Portalis, SPA

Travel/GovTrip – Diane Eggert and Janelle McClintock, HQ

Partnership Office – Rick Brenner, SAA

Grants.gov – Marcie Currie-Gross, NPA

T&A/WebTA – Michelyn Boyd, HQ

Procurement – Kathy Newton, HQ

Correspondence – Cathy Lonaberger, Secretary to the Administrator

Foreign Nationals – Jason Groves, Homeland Security

## Memo to Workshop Participants



August 5, 2010

SUBJECT: “Rising to the Challenge – Soaring to New Heights”

TO: Training Workshop Participants

FROM: Sandy Groneberg, Sr. Co-Chair  
Jackie Kelly, Jr. Co-Chair  
National Advisory Council for Office Professionals

The 2010 NACOP Training Workshop will be held at the National Center for Employee Development (NCED) in Norman, Oklahoma. This U. S. Postal Service training facility specializes in training meetings and offers unexpected amenities. We encourage you to visit their website (<http://cc.nced.com/>) to learn more about their 60,000 square foot fitness center. It includes walking tracks, whirlpool, sauna, basketball and volleyball courts, exercise classes, available massage services, and much more. Some sports equipment is available to rent.

Other items to note include:

- Airport transportation is available for the meeting participants. You should have received this information already. If you need to request transportation, call 800-682-4560 at least 48 hours in advance to make the reservation. Note: It is suggested that individuals verify shuttle departure arrangements at the front desk no later than 7:00 a.m. the day prior to their departure.
- Check in time is 3:00 p.m. and check out is 12:00 p.m. Inquire at the registration desk if you arrive early or to request later departure.
- A parking pass is attached for participants having vehicles. Please fill out the pass prior to arrival to present at the guard gate. The parking pass should be visible through the front window and remain in the vehicle throughout your stay. Those who have arranged for airport transportation will enter on a shuttle and will not need any kind of pass for the guard gate. If you arrive at the facility in a vehicle without the parking pass, be prepared to show identification and mention the NACOP training workshop as your purpose at the facility.
- Complimentary wireless internet access is available to meeting participants in the dining area, the lounge, and the lobby. Complimentary wired internet is available in the guest rooms.
- Rental cars are available on-site through a local dealership for evening rentals. A table in the lobby will have information or you can call 405-364-2371 for advance information and reservations.

In order to comply with the Rules Governing NCED in our contract, the following are requirements:

- No smoking in any building, including sleeping rooms. (Violators will be assessed a cleaning charge. Repeated violators will be required to leave the property.) There are designated smoking areas outside of the building.
- No firearms are permitted on the property.

## Training Workshop Participants

2.

- Only service animals are allowed on the property. All other animals are prohibited.

The facility has a food court with à la carte items available, which is open most of the day (5:30 am – 10:00 am, 10:45 am – 2:30 pm, and 5:00 pm – 9:00 pm on weekdays). Guests will receive complimentary breakfast passes at hotel check-in. Lunches for Wednesday and Thursday will be located in a private seating area in the food court. Lunch cards (\$12/day) may be charged to the hotel room at check-in, and it is encouraged that you purchase the lunch card as this will reduce wait time at the cashier stand. Meeting participants who are not staying at the facility may purchase their meals at the food court. Evening meals are on your own, either in the food court or outside the facility.

## Information specific to our training workshop:

- Registration packets will be available from 6:00 to 8:00 p.m. on Tuesday, August 17; and 7:30 to 8:00 a.m. on Wednesday, August 18, in the lobby of the hotel meeting area.
- Light refreshments will be provided during breaks.
- Attire for the conference will be “business casual.”
- Breakout assignments will be listed on the back of the participant nametags.

Driving directions from the Will Rogers World Airport are below. If you are driving in, you will need to end up on I-35 to exit 108 A, following directions from there.

Start out going NORTH on TERMINAL DR toward AMELIA EARHART LN  
TERMINAL DR becomes S MERIDIAN AVE.

Take the SW 54TH EAST ramp.

Merge onto SW 54TH ST.

SW 54TH ST becomes SW 59TH ST.

Take the I-44 W ramp.

Merge onto OK-3 E/OK-74 S.

Merge onto I-35 S/OK-74 S via EXIT 4A toward DALLAS.

Take the OK-9 E exit, EXIT 108A, toward UNIV. OF OKLA./TECUMSEH.

Stay STRAIGHT to go onto OK-9 E.

End at 2801 E State Highway 9 Norman, OK 73071-1101

We look forward to meeting you in Norman!

## Letter to Speakers

July 2, 2010

Dr. Caird E. Rexroad, Jr.  
Associate Administrator, USDA-ARS  
5601 Sunnyside Avenue, 4-2152  
Beltsville, Maryland 20705



Dear Dr. Rexroad:

Thank you for agreeing to participate in the National Advisory Council for Office Professionals Training Workshop to be held in Norman, Oklahoma, August 18-19, 2010. The items listed below need your attention prior to the meeting. If there is anything we can do to assist you in these requests, please let us know.

### By July 20, 2010:

- Register for your room accommodations through the hotel link listed below:  
[http://www.nced.com/NCED\\_requests.php?event\\_name=NACOP%20Training&event\\_date=08/16/2010&event\\_notes=Group%20with%20USDA%20ARS&rtp=t2120+s170+&group\\_number=6037](http://www.nced.com/NCED_requests.php?event_name=NACOP%20Training&event_date=08/16/2010&event_notes=Group%20with%20USDA%20ARS&rtp=t2120+s170+&group_number=6037)
- Send a brief biographical sketch to Drusilla Fratesi at [Drusilla.Fratesi@ars.usda.gov](mailto:Drusilla.Fratesi@ars.usda.gov) to be included on the conference website.
- Notify Drusilla via e-mail of audio visual and/or internet needs for your presentation. Be sure to mention if your presentation will be interactive so that microphones can be placed for the audience to use.

### By July 30, 2010:

- Send your PowerPoint presentation to Drusilla Fratesi at [Drusilla.Fratesi@ars.usda.gov](mailto:Drusilla.Fratesi@ars.usda.gov) for her to upload on our computer
- Also send any handouts you would like duplicated for participants to [Drusilla.Fratesi@ars.usda.gov](mailto:Drusilla.Fratesi@ars.usda.gov). Handouts will be given to the participants at registration.

We look forward to the workshop and to your presentation. If you have any questions, please e-mail or give us a call. Thank you again for your willingness to share your expertise with others.

Sandy Groneberg  
Sr. Co-Chair  
320-589-3411, ext 123  
[Sandy.Groneberg@ars.usda.gov](mailto:Sandy.Groneberg@ars.usda.gov)

Jackie  
Jr.  
202-740-4421

Kelly  
Co-Chair  
[Jacqueline.Kelly@ars.usda.gov](mailto:Jacqueline.Kelly@ars.usda.gov)



## Break-out Session Room Monitor Assignments

Name	Breakout Sessions						
Austill, D.	Grants.gov - 3	Correspond - 4	Records - 2	Travel/GovTrip - 1	ForeignNatls - 6	SharePoint - 5	
Burl, L.	Records - 3	Correspond - 4	Grants.gov - 2	Travel/GovTrip - 6	Procurement - 5	WebTA - 1	
Dailey, M.	Correspond - 5	Records - 2	SharePoint - 6	Travel/GovTrip - 4	WebTA - 1	Procurement - 3	
Dewald, S.	WebTA - 1	Records - 2	Grants.gov - 3	SharePoint - 6	Procurement - 5	Correspond - 4	
Fratesi, D.	Grants.gov - 6	Partnership - 5	Correspond - 1	Records - 4	Travel/GovTrip - 2	Procurement - 3	
Fulton, L.	Procurement - 4	Travel/GovTrip - 6	ForeignNatls - 1	WebTA - 3	Grants.gov - 2	Records - 5	
Groneberg, S.	Records - 5	Grants.gov - 3	ForeignNatls - 2	Travel/GovTrip - 6	Procurement - 4	Partnership - 1	
Hodges, B.	Grants.gov - 2	Travel/GovTrip - 5	SharePoint - 6	Correspond - 4	WebTA - 3	Partnership - 1	
Kelly, J.	Records - 3	SharePoint - 6	Travel/GovTrip - 4	Partnership - 5	WebTA - 1	Procurement - 2	
Koch, D.	Records - 5	SharePoint - 2	ForeignNatls - 1	Travel/GovTrip - 6	WebTA - 3	Procurement - 4	
Lewandowski, H.	ForeignNatls - 6	Travel/GovTrip - 1	WebTA - 2	Grants.gov - 4	SharePoint - 5	Records - 3	
Lonaberger, C	Records - 3						
Meier, C.	ForeignNatls - 6	Records - 2	Travel/GovTrip - 4	Procurement - 3	SharePoint - 5	Partnership - 1	
Sampson, R.	Records - 6	SharePoint - 3					
Rohrer, W.	Records - 2	SharePoint - 5	Partnership - 4	Grants.gov - 3	ForeignNatls - 6	Correspond - 1	
Correspond	Sessions 1 on 8/18 and 4, 5 on 8/19		Wanda, Session 1	LaTasha, Session 4	Mary, Session 5		
ForeignNatls	Sessions 1, 2 on 8/18 and 6 on 8/19		Linda, Session 1	Sandy, Session 2	Heather, Sess'n 6		
Grants.gov	Sessions 2, 3 on 8/18 and 4, 6 on 8/19		Barbara, Session 2	Diona, Session 3	Heather, Sess'n 4	Drusilla, Sess'n 6	
Partnership	Sessions 1 on 8/18 and 4, 5 on 8/19		Barbara, Session 1	Wanda, Session 4	Jackie, Session 5		
Procurement	Sessions 2, 3, on 8/18 and 4, 5, on 8/19		Jackie, Session 2	Mary, Session 3	Diane, Session 4	LaTasha, Sess'n 5	
Records	Sessions 2, 3, on 8/18 and 4, 5, 6 on 8/19		Sherry, Session 2	Cathy, Session 3	Drusilla, Session 4	Sandy, Session 5	Rhonda, Session 6
SharePoint	Sessions 2, 3 on 8/18 and 5, 6 on 8/19		Diane, Session 2	Rhonda, Session 3	Christa, Session 5	Mary, Session 6	
Travel/GovTrip	Sessions 1, 2, on 8/18 and 4, 5, 6 on 8/19		Diona, Session 1	Drusilla, Session 2	Christa, Session 4	Barbara, Session 5	Linda, Session 6

## Assign Participants to Breakout Sessions

ID	FIRST NAME	LAST NAME	CHOICE 1	SESS	CHOICE 2	SESS	CHOICE 3	SESS	CHOICE 4	SESS	CHOICE 5	SESS
1	Whitney	Adams	Records	2	Grants.gov	3	Correspond	4	SharePoint	5	Travel/GovTrip	6
2	Michelle	Archdale	SharePoint	3	Partnership	1	Grants.gov	4	WebTA	2	Correspond	5
3	Diona	Austill	Grants.gov	3	Correspond	1	Records	2	Travel/GovTrip	4	ForeignNatls	6
4	Brenda	Aysenne	Grants.gov	3	Partnership	4	ForeignNatls	6	Travel/GovTrip	1	SharePoint	2
5	Barbie	Ballengee	Records	5	Grants.gov	4	ForeignNatls	6	Procurement	3	SharePoint	2
6	Karen	Barry	Grants.gov	2	Partnership	4	WebTA	1	Correspond	5	Records	3
7	Kerri	Bentley	Travel/GovTrip	1	Procurement	3	Records	4	WebTA	2	Correspond	5
8	Patricia	Berry	Records	2	SharePoint	3	Travel/GovTrip	6	WebTA	1	Procurement	5
9	Cheryl	Borg	Travel/GovTrip	2	WebTA	3	Correspond	1	Procurement	4	SharePoint	6
10	Brooke	Bowers	Records	4	Grants.gov	2	Travel/GovTrip	6	Correspond	1	Procurement	5
11	Amy	Bownds	Records	3	Grants.gov	2	Correspond	5	Travel/GovTrip	6	WebTA	1
12	Carolyn	Brandon	Records	5	Procurement	3	Correspond	1	SharePoint	6	WebTA	2
13	Patricia	Brown	SharePoint	5	Partnership	1	WebTA	3	Grants.gov	4	ForeignNatls	6
14	LaTasha	Burl	Records	3	Correspond	4	Grants.gov	2	Travel/GovTrip	6	Procurement	5
15	Lori	Burma	Travel/GovTrip	1	SharePoint	6	Correspond	5	WebTA	2	Grants.gov	3
16	Telecia	Burton	Travel/GovTrip	2	WebTA	1	Grants.gov	3	Correspond	5	SharePoint	6
17	Marci	Bushman	Records	2	WebTA	1	SharePoint	3	Travel/GovTrip	6	Grants.gov	4
18	Darlene	Butler	SharePoint	2	Travel/GovTrip	4	WebTA	3	Procurement	5	Correspond	1
19	Sherri	Buxton	SharePoint	6	Records	5	Correspond	1	Procurement	3	WebTA	2
20	Christopher	Carter	Travel/GovTrip	4	SharePoint	2	WebTA	3	Partneship	1	Records	6
21	Diane	Carter	Grants.gov	2	SharePoint	5	Procurement	4	Travel/GovTrip	6	WebTA	1
22	Jackie	Clark	WebTA	3	Travel/GovTrip	2	Records	4	Correspond	1	Procurement	5
23	Jackie	Coleman	Travel/GovTrip	6	SharePoint	3	WebTA	2	Correspond	4	Procurement	5
24	Marlene	Coley	Records	3	SharePoint	6	Grants.gov	2	Correspond	5	Partnership	4
25	Rayma	Cox	Records	2	SharePoint	3	Travel/GovTrip	6	Grants.gov	4	Procurement	5
26	Marianne	Cruikshank	SharePoint	6	Partnership	1	Grants.gov	3	Procurement	4	ForeignNatls	2
27	Nikki	Dahl	SharePoint	5	Travel/GovTrip	4	WebTA	2	Grants.gov	3	ForeignNatls	6
28	Mary	Dailey	Correspond	5	Records	2	SharePoint	6	Travel/GovTrip	4	WebTA	1

## Sample Name Tag

The back of each name tag tells the participant to which breakout sessions they have been assigned. This way they can easily remember where to go for their upcoming session.

<p>Front of Name Tag:</p>	<p>Showing</p>	<p>Back of Name Tag breakout sessions:</p>
		<p><b>Sandy Groneberg</b>  <b>8/18</b>                  Sess 1 – 10:30 AM: Partnership                  Sess 2 – 12:45 PM: ForeignNatl                  Sess 3 – 1:45 PM: Grants.gov  <b>8/19</b>                  Sess 4 – 10:30 AM: Procurement                  Sess 5 – 12:45 PM: Records                  Sess 6 – 1:45 PM: Travel/GovTrip</p>



## Thank You Letter to Speaker

September 1, 2010

Ms. Diane Eggert  
Branch Chief  
USDA-ARS-TRSB  
5601 Sunnyside Avenue, Room 3-2178  
Beltsville, Maryland 20705-5114

Dear Diane:

Thank you for participating in the Agricultural Research Service National Advisory Council for Office Professionals Training Workshop held in Norman, Oklahoma, on August 18-19, 2010. Your presentation on Travel/GovTrip was exactly what we wanted and feel it met the needs of our participants perfectly.

Many of the participants stopped us individually to express how much they enjoyed the workshop, and we would like to express the same feelings to you. Without you, this workshop would not have been such a success.

Thank you again for your willingness to share your expertise with others.

Sincerely,

Sandy Groneberg  
Sr. Co-Chair

Jackie  
Jr.

Kelly  
Co-Chair

## Evaluation for Breakout Session

**NACOP TRAINING WORKSHOP AUGUST 18-19, 2010, NORMAN, OK  
 RISING TO THE CHALLENGE – SOARING TO NEW HEIGHTS  
CORRESPONDENCE BREAK-OUT EVALUATION**

Cathy Lonaberger

**SESSION #**

	Poor 1	Fair 2	Average 3	Outstanding 4	Excellent 5
1. Introduced information in an understandable manner?					
2. Presented material in an organized fashion?					
3. Increased your knowledge of subject matter?					
4. Was length of time for break-out sessions adequate?					
5. Were facilities adequate for the break-out sessions?					
6. Did facilitators adequately involve the group in discussion?					

7. How will this information help you in your workplace environment?

8. Did you have the opportunity to have your questions answered? Explain.

9. Additional Comments:

## Final Agenda with Committee Duties



### **NACOP TRAINING WORKSHOP**

#### **Rising to the Challenge – Soaring to New Heights National Center for Employee Development August 18-19, 2010, Norman, Oklahoma**

#### **Tuesday -August 17, 2010**

6:00 – 8:00 pm Registration & Hors d’oeuvres/Karaoke

#### **Wednesday - August 18, 2010**

8:00 – 8:10 Opening Remarks & Housekeeping –

Sandy Groneberg, Sr. Co-Chair, MWA

8:10 – 10:00 General Session

Barbara Hodges, Planning Committee Member – SPA

**Welcome - Dr. Dan Upchurch – SPA Area Director**

Cathy Lonaberger, Technical Advisor, HQ

**Welcome - Dr. Caird Rexroad, ARS Associate Administrator**

Diona Austill, Ex Officio, NPA

**Kate O’Hara - NCAUR Deputy Director for External  
Relations, MWA**

**ARS: Making A Difference**

Wanda Rohrer, Recorder, SAA

**Dr. Sharon Drumm – Staff Officer**

**Office of National Programs**

**How To Say “No,” Mean It, And Look Good In The  
Process!**

10:00 – 10:30 Break

10:30 – 11:30 Breakout Session

11:30 – 12:30 Lunch  
12:45 – 1:45 Breakout Session  
1:45 – 2:45 Breakout Session  
2:45 – 3:15 Break  
3:15 – 4:45 General Session  
Drusilla Fratesi, Planning Committee Member, MSA  
**Jody R. Watson, Fitness & Recreation Director, U. S. Postal Service – National Center for Employee Development**  
**Practical Tips for Abundant Living**  
4:45 Closing and Housekeeping  
Dinner on your own

**Thursday - August 19, 2010**

8:00 – 8:10 Opening Remarks & Housekeeping – Jackie Kelly, Jr. Co-Chair  
8:10 – 10:00 General Session  
**Jim Bradley, AFM Deputy Administrator**  
**The Future is Now**  
Christa Meier, PWA, NACOP Member  
**Diane Strub, Deputy Area Director, MWA**  
**Self Development: How to Help Yourself and ARS**  
10:00 – 10:30 Break  
10:30 – 11:30 Breakout Session  
11:30 – 12:30 Lunch  
12:45 – 1:45 Breakout Session  
1:45 – 2:45 Breakout Session  
2:45 – 3:15 Break  
3:15 – 4:45 General Session –  
Sherry Dewald, Historian, - SPA  
**Jeff Schmitt, HR Specialist – Cooperative Resolution Program, Office of Outreach Diversity and Equal Opportunity**  
**Collaborative Conversations**  
4:45 Closing Wrap-up – **Jim Bradley**

## Networking Example

We placed various images (related to our workshop theme or location) on the tables for lunch. As participants entered the lunch area, we gave them images in random order that matched the table images. Participants sat at the table that matched the image they were given. By doing this, participants networked with other participants they may not have met otherwise. It is a very successful tool in creating a setting conducive to networking.



## Certificate for Participants



*Presented to*

*Sandy Groneberg*

For Successful Completion of the  
**2010 National Advisory Council for Office Professionals (NACOP)**  
*“Rising to the Challenge – Soaring to New Heights”*  
**Norman, Oklahoma**  
**August 18-19, 2010**



*Partnership for Success*

*Edward B. Knipling*

Edward B. Knipling

Administrator