



DECISION MEMORANDUM FOR THE CHIEF FINANCIAL OFFICER

TO: Jon M. Holladay
Chief Financial Officer

THROUGH:
Under Secretary

Signature by Under Secretary and Date

FROM:

Signature by:

SUBJECT: Approval to Host a **Conference/Training** with a Cost Excess of \$75,000

ISSUE:

DISCUSSION:

RECOMMENDATION:

DECISION BY THE CHIEF FINANCIAL OFFICER:

Approve: _____

Disapprove: _____

Discuss with me: _____

Date: _____

Conference or Training Request Approval Template

Basic Information:

Agency:

Program Area:

Accounting Code:

Appropriation:

Project code:

Estimated total cost (pending approval): _____

Select One: Conference Training

If the event is training is it considered Continual Professional Education? Yes
No

Name of Conference or Training:

Will the Conference or Training be held in a USDA facility? Yes No

If the Conference or Training will not be held in a USDA facility will it be held in a Federal facility?

Yes No

If the Conference or Training will not be held in a USDA or other Federal facility, please provide a justification for using an external facility?

Dates of Conference or Training: _____

Recurring Event: Yes No

If yes, frequency: _____

Conference or Training Purpose: (Narrative description of the Conference or Training objectives and expected outcomes.)

The conference or Training will help further the Agency's mission or the Department's strategic plan: (Narrative description):

The information cannot be effectively shared through another means such as a teleconference or the Internet: (Narrative description)

The conference or training is a "must-do" considering the limited budget of the agency; Vendors providing supplies or services for the conference were selected through a competitive contracting process - conference requests involving a sole source contract or no contract must include additional justification: (Narrative description)

The number of employees attending is justified: (Narrative description)

The location is appropriate and justified and a prudent person would not think it as a waste of their tax dollars for this event in this location: (the request must indicate whether the conference will take place at a non-USDA government facility, commercial facility, or a combination of facilities): (Narrative description)

The meeting location is near where most attendees are stationed; and if not, the detailed cost analysis is must include cost comparisons to locations near the majority of attendees: (Narrative description)

Location Cost Comparison Estimated

Name of Event:

Start Date:

End Date:

City & State of Event	Location 1 ()	Location 2 ()	Location 3 ()
Per Diem Rates	Lodging: _____	Lodging: _____	Lodging: _____
	M & IE: _____	M & IE: _____	M & IE: _____
Location of event			
Type of Facility (<i>USDA, Federal, University or Commercial</i>)			
1) Air Fare			
2) Total Miscellaneous Expenses: (<i>Car rental, mileage, shuttle, taxi, Uber, Lyft, parking, tolls, baggage, etc.</i>)			
3) Total Local Travel Expense (<i>Expenses from local participants: subway, parking, mileage, etc.</i>)			
4) Total M&IE: (<i>Must be reduced if any meals (breakfast, lunch or dinner) are provided by contractor and/or vendors</i>)			
5) Total Lodging:			
6) Other TDY Expenses (<i>Hotel Tax, etc.</i>)			
Total Travel Expense (1 - 6)			
1) Speaker Fees			
2) Printing & Reproduction			
3) Audio Visual Services			
4) Event Room Rental			
5) Facility Charges: (<i>Provide details or any contracting documentations related to this cost</i>)			
6) Other Costs (Itemize)			

7) Light refreshments (<i>less than 18% of total M&IE/per day/per location</i>)			
8) Registration fees			
Total Non-Travel Expense (1 - 8)			
Non-Federal Contribution			
Total Event Cost without Salary (Travel Expense + Non Travel Exp) - (Non-Federal Contribution)			
Total Salary and Benefits			

Location 1 Pro: _____

Location 1 Con: _____

Attendee Information:

Total Attendees: _____

Sponsoring Agency Attendees/Participants: _____

Other USDA Attendees/Participants: _____

Non-USDA Attendees/Participants: _____

External Contributions towards the cost: \$.....

Will contributions be accepted from non-federal sources to defray the cost of the conference?

Yes No

If Yes how much will be accepted? \$.....

If contributions will be accepted has the acceptance decision been discussed with the Office of General Counsel?

Yes No N/A

Contract Details:

Services to be provided:

Competition Type:

Justification for Other than Full and Open Competition: already has an open contract with

Promotional Materials:

Please describe any promotional materials to be distributed and justify the usage of promotion materials

Attachments:

- 1) Agenda
- 2) Attendants estimated cost detail excels spreadsheet. (See attachment)

Primary POC: _____
Name, Phone, email

Secondary POC: _____
Name, Phone, email