

Social Security Administration

Conference Information Report

Fiscal Year 2014

Overview

Our conference events are mission critical and support our goal of better serving the public by improving our business practices, adopting new technology, or training our employees on the complex policies and procedures of the Social Security Act. We have a strong review and approval process in place for all of our sponsored conferences and for employee attendance at non-agency sponsored events. Our strong internal conference planning policies ensure we reduce costs for our agency activities. We continue to use cost-cutting initiatives, including hosting events as close as possible to employee duty stations to minimize travel, maximizing our use of free Federal space, and adhering to policies restricting meals and light refreshments. In addition, we require agency components to research alternatives to hosting events, such as video conferencing and interactive video teletraining. We oversee, monitor, and review our spending for all agency-sponsored conferences and employee attendance at non-agency sponsored events to ensure we use Federal funds efficiently and comply with all applicable laws and regulations.

Most of our conference expenses for fiscal year (FY) 2014 were for training (technical, programmatic, and non-programmatic) and associated travel costs. Besides training and associated travel costs, our conference expenses included costs for speakers and presenters, facilities, equipment, supplies, and other miscellaneous conference costs.

Conferences where expenses associated with the conference exceeded \$500,000

For FY 2014, we sponsored two conferences where the expenses exceeded \$500,000. In accordance with OMB M-12-12, we obtained written approval from the Acting Commissioner to waive the \$500,000 limit on conference spending based on the mission-critical nature of each event. We listed these events within our Fiscal Year 2014 Conference Information Table (Table) beginning on page 3.

Conferences where expenses associated with the conference exceeded \$100,000

The Table lists all of our agency-sponsored conferences, in date order, where the expenses exceeded \$100,000. For FY 2014, the Table includes 19 agency-sponsored conferences totaling \$4,471,565. In addition, we also include our single, non-agency sponsored conference in the amount of \$161,553.

Our Office of the Inspector General (OIG) has its own conference review and approval process, and OIG confirmed it did not hold any events over \$100,000 for FY 2014.

For each conference, we include the following information in the Table:

- Name of the conference;
- Total conference expenses incurred by the agency;
- Location;
- Date(s);
- Total number of attendees whose travel expenses or other conference expenses were paid by the agency; and
- Brief explanation of how the conference advanced the mission of our agency.

Social Security Administration

Fiscal Year 2014 Conference Information Table

SSA-Sponsored Conferences					
Conference	Total Expenses	Location	Date	Number of Attendees	Mission Related Narrative
New Administrative Law Judge Training	\$200,154	Social Security Administration (SSA) facility, Falls Church, Virginia	October 21, 2013 to November 15, 2013	43	We provided technical and programmatic training to the agency's newly-hired administrative law judges. This training taught the basic functions and responsibilities of the position and introduced the new administrative law judges to national policy. The training also introduced the uniform writing process used by our agency to ensure administrative law judges write decisions using a consistent format and that the evidence in the case file supports the decision. We trained 28 judges with 10 agency trainers, 4 medical presenters, and 1 judge. This mission-critical training provided our new judges with the tools to process cases efficiently, which will help reduce our backlog of disability cases in a timely manner.
Disability Case Processing System Steering Committee Face-to-Face Meeting	\$123,086	SSA facility, Baltimore, Maryland	January 7, 2014 to September 11, 2014 (6 meetings: 2 meetings, 3 days each, 4 meetings, 2 days each)	180	We held steering committee meetings on the Disability Case Processing System that will replace the five current disability case processing systems. These meetings helped us gather input concerning top priorities and pre-decision topics at a crucial time during the beta releases and before national implementation. We had an average of 30 participants at each of the 6 meetings for approximately 180 attendees. These mission-critical meetings provided oversight and important input from members to lay the foundation for a state-of-the-art disability processing system.

SSA-Sponsored Conferences

Conference	Total Expenses	Location	Date	Number of Attendees	Mission Related Narrative
Employees with Disabilities Cadre Train-the-Trainer Sessions	\$119,262	SSA facility, Baltimore, Maryland	April 14, 2014 to August 29, 2014 (6 sessions, each session 3 ½ days)	75	We provided mission-critical training to members of the Employees with Disabilities Cadre on using our agency’s latest automated assistive technology applications. We trained 62 new and veteran cadre members over 6 sessions. This training complied with requirements of the Americans with Disabilities Act. Due to the intensity of the training, 13 new cadre members received an additional session of training in late summer. Our training strategy employed the “train-the-trainer” method, which provided the attendees the knowledge and skill to train other employees throughout the country.
Training Cadre Planning Meetings	\$143,949	SSA facility, Falls Church, Virginia	April 14, 2014 to September 12, 2014 (5 sessions, each session 5 days)	77	We held planning meetings for our 11 Office of Disability Adjudication and Review training cadres to ensure our training agenda and content is current, relevant, and up-to-date. Our trained cadre members provide our new judges and support staff with detailed technical training on agency policy, procedures, systems, and fraud detection, and provide our managers with specialized technical training on hearing office operations, performance management, equal employment opportunity issues, and Merit Systems Protection Board issues. The planning sessions included 77 cadre attendees, including 5 cadre leaders overseeing the sessions (1 cadre leader overseeing each session). These mission-critical planning sessions enabled our cadre members to relay important data on programmatic topics and consistent management philosophy to our judges, support staff, and managers.

SSA-Sponsored Conferences

Conference	Total Expenses	Location	Date	Number of Attendees	Mission Related Narrative
Fiscal Year 2014 Technical Entry-Level Training – New York	\$123,102	Multiple SSA locations throughout the New York Region	May 5, 2014 to October 17, 2014 (35 sessions, each session approximately 16 weeks)	522	We provided interactive video teletraining and instructor/mentor-led technical entry-level training in the New York Region to support our field office operations and process our agency’s core mission work. We provided entry-level training for service representatives and claims representatives to support the expected increases in key workloads over the next few years. We trained 457 employees with 65 agency instructors/mentors. These mission-critical sessions ensure our entry-level trainees gained the skills necessary to handle our increasing workloads, contribute to field office operations, and provide pertinent services to the public.
Group Supervisor Core Management Training	\$129,447	SSA facility, Falls Church, Virginia	May 19, 2014 to May 23, 2014 and August 18, 2014 to August 22, 2014 (2 sessions, each session 5 days)	61	We provided Group Supervisor Core Management Training to our new first-line managers who supervise 3 to 18 decision writers and all hearing office support staff, including legal assistants and case technicians. This training provided new group supervisors with technical training on performance management, potential fraud situations, equal employment opportunity issues, and leadership skills to lead and manage a diverse group of staff. This training also provided knowledge of our policies, procedures, and operations. We trained 50 supervisors with 11 agency instructors. This mission-critical training enabled group supervisors to effectively lead their groups and support the efforts of higher management in the agency’s efforts to reduce the backlog.

SSA-Sponsored Conferences

Conference	Total Expenses	Location	Date	Number of Attendees	Mission Related Narrative
Fiscal Year 2014 Technical Entry-Level Training – San Francisco	\$178,678	Multiple SSA locations throughout the San Francisco Region	May 19, 2014 to September 19, 2014 (65 interactive video teletraining sessions, each session approximately 12 to 15 weeks and 11 face-to-face training sessions, each session approximately 10 to 12 weeks)	575	We provided interactive video teletraining and face-to face technical entry-level training in the San Francisco Region to support our field office operations and process our agency’s core mission work. We provided entry-level training for service representatives and claims representatives to support the expected increases in key workloads over the next few years. We trained 441 employees with 134 agency instructors/mentors. These mission-critical sessions ensured our entry-level trainees gained the skills necessary to handle our increasing workloads, contribute to field office operations, and provide pertinent services to the public.
New Decision Writer Training	\$181,470	SSA facility, Baltimore, Maryland and SSA facility, St. Louis, Missouri	May 19, 2014 to October 3, 2014 (7 sessions, each session 10 days)	189	We provided Decision Writer Training for newly hired employees assigned to support our nationwide hearings offices. This training was necessary to introduce employees to national policy and the uniform writing process we use in our hearing offices. We trained 177 employees with 12 agency trainers. This mission-critical training ensured that written decisions are consistent with the Social Security Act and comply with the Commissioner’s adjudication policies as reflected in Social Security regulations and rulings.

SSA-Sponsored Conferences

Conference	Total Expenses	Location	Date	Number of Attendees	Mission Related Narrative
Leadership Essential 501K Key Managers Sessions	\$165,270	Multiple SSA locations throughout the country	June 2, 2014 to September 25, 2014 (9 sessions, each session 4½ days)	114	We provided training to new managers assuming responsibility over a facility, typically a field office, program service center, or teleservice center. This course trains participants in topics such as security, automation, field facilities, financial management, human resources, labor/employee relations, and public affairs. We trained 100 managers, using 14 experienced agency managers to deliver the training. These mission-critical sessions provided new managers with the tools necessary to manage their facility.
Fiscal Year 2014 Technical Entry-Level Training – Philadelphia	\$183,360	Multiple SSA locations throughout the Philadelphia Region	June 9, 2014 to September 19, 2014 (interactive video teletraining: 36 service representative sessions, each session 13 weeks, and 48 claims representative sessions, each session 15 weeks)	447	We provided interactive video teletraining training in the Philadelphia Region to support our field office operations and process our agency’s core mission work. We provided entry-level training for service representatives and claims representatives to support the expected increases in key workloads over the next few years. We trained 325 employees with 122 agency instructors/mentors. These mission-critical sessions ensured our entry-level trainees gained the skills necessary to handle increasing workloads, contribute to field office operations, and provide pertinent services to the public.

SSA-Sponsored Conferences

Conference	Total Expenses	Location	Date	Number of Attendees	Mission Related Narrative
Fiscal Year 2014 Technical Entry-Level Training – Atlanta	\$134,360	Multiple SSA locations throughout the Atlanta Region	June 9, 2014 to September 26, 2014 (interactive video teletraining: approximately 16 weeks and face-to-face training approximately 8 weeks)	678	We provided interactive video teletraining and face-to-face technical entry-level training in the Atlanta Region to support our field office operations and process our agency’s core mission work. We provided entry-level training for service representatives and claims representatives to support the expected increases in key workloads over the next few years. We trained 420 employees with 258 agency instructors/mentors, and coordinators. These mission-critical sessions ensured our entry-level trainees gained the skills necessary to handle increasing workloads, contribute to field office operations, and provide pertinent services to the public.
Region IV Management Training	\$145,812	Multiple SSA locations throughout the Atlanta region	June 16, 2014 to September 18, 2014 (5 sessions, each session 3 ½ days)	215	We provided management training to the Office of Disability Adjudication and Review Atlanta Region managers. This training provided managers the ability to address emerging issues proactively and covered workload management, performance management, leadership, and labor relations. We trained 210 managers with 5 agency trainers (1 trainer per each session). This mission-critical training provided managers with current, correct, and consistent information on how to improve office productivity and best process workloads.

SSA-Sponsored Conferences

Conference	Total Expenses	Location	Date	Number of Attendees	Mission Related Narrative
Region IX Management Training	\$109,541	SSA facility, Oakland, California	June 23, 2014 to August 15, 2014 (3 sessions, each session 5 days)	138	We provided management training to the Office of Disability Adjudication and Review San Francisco Region managers. This training provided managers the ability to address emerging issues proactively and provided in-depth presentations and discussions on program policy, workload management, fraud detection, administration, and evolving labor relations. We trained 96 managers with 42 agency trainers and presenters. This mission-critical training provided managers with current, correct, and consistent information on how to improve office productivity and best process workloads.
Leadership Essentials for New Supervisors (LENS) 4.2 Applying Human Resources Policy and Basic Leadership	\$546,769	Multiple SSA locations throughout the country	June 23, 2014 to September 30, 2014 (19 sessions in the regions, each session 4 days)	313	We provided mission-critical training to new supervisors nationwide. This session focused on human resources policy including civil rights, equal employment opportunity, labor and employee relations, timekeeping/certification, reasonable accommodations, performance management, records management, and basic leadership skills. We trained 273 new regional supervisors, using 40 local agency regional staff and instructors, and outside speakers. The Office of Personnel Management mandates agencies provide a training program for new supervisors to complete within one year of their initial appointment (5 Code of Federal Regulations 412.202). On May 23, 2014, our Acting Commissioner, Carolyn W. Colvin, signed a waiver to hold this event because the total expenses exceeded \$500,000.

SSA-Sponsored Conferences

Conference	Total Expenses	Location	Date	Number of Attendees	Mission Related Narrative
Leading by Example...Equal Employment Opportunity and Ethics Matter	\$861,606	Multiple SSA locations throughout the country (Headquarters, Regional areas, and State Disability Determination Offices)	July 8, 2014 to September 29, 2014 (77 training sessions, each session 1 day, 1 train-the-trainer session, and 1 preparatory rehearsal training session)	2,999	We provided equal employment opportunity and ethics training throughout the country for Operations and Office of Quality Review managers using instructor-led lectures and discussions, video on demand, online resource kits, and handouts printed internally at no cost. This training provided managers the required tools to manage ethics and equal employment opportunity issues. We trained 2,902 managers with 97 agency cadre instructors and subject matter experts. This mission-critical training ensured managers had the knowledge and information needed to handle ethics and equal employment opportunity matters appropriately and in accordance with agency procedure, equal employment opportunity law, and the Code of Federal Regulations. On May 23, 2014, our Acting Commissioner, Carolyn W. Colvin, signed a waiver to hold this event because the total expenses exceeded \$500,000.
2014 Judicial Training	\$337,441	Marriott Inner Harbor, Baltimore, MD	July 29, 2014 to July 31, 2014 and August 26, 2014 to August 28, 2014 (2 sessions, each session 3 days)	288	We provided technical training to the agency's administrative law judges and administrative appeals judges. Periodic judicial training is necessary to ensure the agency's judges have the requisite knowledge and skills to adjudicate complex cases accurately and efficiently. We trained 239 judges using 49 agency trainers and speakers. These mission-critical sessions helped ensure that our judges have the requisite knowledge to conduct hearings, issue legally defensible decisions, and correctly apply agency policy, applicable statutes, and case law.

SSA-Sponsored Conferences

Conference	Total Expenses	Location	Date	Number of Attendees	Mission Related Narrative
2014 Advanced Leadership Program Candidate Development Assessment Center	\$147,208	Marriott BWI, Linthicum, MD	September 8, 2014 to September 9, 2014 and September 10, 2014 to September 12, and September 15, 2014 (2 sessions, 1 st session 2 days, 2 nd session 4 days)	156	We provided training and assessments for our Advanced Leadership Program. In our first session, we trained 31 agency employees to conduct assessment center activities. In our second session, our 115 advanced leadership program candidates participated in assessment center activities using the agency manager assessors from the first session, 5 Office of Learning employees, and 5 contractors from an outside company. Assessment activities included candidates participating in a number of different situations that allowed the evaluators to obtain a comprehensive and rounded profile of each candidate. This mission-critical assessment was the first step in meeting the challenge of maintaining the continuity of strong leadership within our agency by selecting the most highly-qualified individuals to participate in this 18-month program.
New Administrative Law Judge Training – Phase 2	\$461,716	SSA facility, Falls Church, Virginia	September 15, 2014 to October 10, 2014	91	We provided technical and programmatic training for a second group of newly-hired administrative law judges. Similar to the same session held earlier in the year, this session taught the basic functions and responsibilities of the position, and introduced the new administrative law judges to national policy. The training also introduced the uniform writing process used by our agency to ensure administrative law judges write decisions using a consistent format and that the evidence in the case file supports the decision. We trained 44 judges with 35 agency trainers, and 12 specialized presenters. This mission-critical training provided our new judges with the tools to process cases efficiently, which will help reduce our backlog of disability cases in a timely manner.

SSA-Sponsored Conferences

Conference	Total Expenses	Location	Date	Number of Attendees	Mission Related Narrative
SSA Senior Executive Service Candidate Development Program Assessment Center	\$179,334	Hilton Double Tree Inn BWI, Linthicum Maryland	September 23, 2014 to September 26, 2014	147	We administered an agency senior executive service candidate development program assessment to select a group of individuals to move into executive leadership positions in the near future. We utilized a third party to conduct the assessments to select the most qualified to participate in this program, as using an outside source provides the necessary expertise of industrial psychologists experienced with developing assessment tests. We evaluated 111 applicants using approximately 33 agency and retired senior executive services assessors, 2 outside assessment contractors, and 1 executive services staff. Our development program assessment was mission critical to meet the challenges of maintaining the continuity of strong leadership within the agency.

Non-Agency Sponsored Conference					
Conference	Total Expenses	Location	Date	Number of Attendees	Mission Related Narrative
Partnership for Public Service's Excellence in Government Fellows Program	\$161,553 ⁱ	April 2014 session in Williamsburg, VA, the remaining six sessions held in Washington D.C.	April 29, 2014 to March 5, 2015 (Fellows meet every 6 weeks, and spend approximately 20 days in session)	14	This non-SSA sponsored conference is a one-year program to strengthen the skills of top performing GS-13 through GS-15 employees, which provides a proven combination of coursework, best practices benchmarking, executive coaching, and government-wide networking. The 14 agency participants remain in their full-time jobs during completion of this program. This training is mission critical to ensure our agency has a comprehensive leadership succession management plan in place.

ⁱ Event runs through March of 2015, and we will not know finals costs until the course end date.