

## San Francisco Region Management Training Forum

**Issue:** The San Francisco Region Management Training Forum was held July 7 - 9, 2009 in Phoenix, AZ at the Arizona Biltmore Hotel. Media interest has been generated regarding the event, specifically related to the location, cost and value.

### Background:

- **Purpose of the Forum:** to enhance the quality and effectiveness of the Social Security Administration's service provided to the American public by providing substantive training for managers, by increasing management alignment so that local efforts effectively support Agency priorities, and by improving collaboration among all components of the Agency.
- This was the first regional management training forum in the San Francisco Region since 2001.
- Approximately 675 SSA managers and presenters attended, including representatives from Central Office, State Disability Determination Services, Office of Disability Adjudication and Review, Office of General Counsel, Office of the Inspector General and Office of Quality Performance.

### **Training Forum Content:**

- The Region IX Management Training Forum provided a unique opportunity for the managers and supervisors to hear directly from Social Security's leadership about the goals and initiatives the Social Security Administration is implementing to serve the American public.
- Nearly half of the attendees have been in their current positions less than two years. Most had never heard or seen the Commissioner of Social Security and most of the Deputy Commissioners and Assistant Deputy Commissioners. Many had never attended a region-wide training forum, as the last one was held in 2001. Attendees had an opportunity to submit their personal questions in advance or at the presentations and to interact informally with their leadership and their peers.
- Social Security leaders addressing the attendees included:

Commissioner of Social Security Michael Astrue  
Acting Deputy Commissioner Jason Fichtner  
Deputy Commissioner for Operations Linda McMahon  
Deputy Commissioner for Human Resources Dr. Reginald Wells  
Deputy Commissioner for Budget, Finance and Management Mary Glenn-Croft  
Deputy Commissioner for Systems William Gray  
Assistant Deputy Commissioner for Communications Phil Gambino  
Assistant Deputy Commissioner for Retirement and Disability Policy Marianna LaCanfora  
Assistant Deputy Commissioner for Disability Adjudication and Review Ron Raborg  
Acting Deputy Associate Commissioner for the Office of Electronic Services Theresa Gruber  
Special Advisor for Health IT Jim Borland

Associate Commissioner, Office of Communications, Planning and Technology Tom  
Tobin  
San Francisco Regional Commissioner Pete Spencer

- The conference provided a substantive training experience to participants; a complete agenda is attached in this Word document.



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- Attendees were given a choice of workshops to attend during three breakout periods of one and a half hours each. Workshop sessions varied from 50 participants to several hundred. The workshop descriptions are attached in this Word document.



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- Two of the workshop instructors, Sonia Aranza and Sheila Haji, are consultants with long records of educating Social Security staff at Leadership Symposiums and other training opportunities. All other instructors were either Social Security or other government staff.
- Each of the eight Area Directors and the Acting Director of Regional Telephone Operations held component meetings to discuss increasing workload challenges, goals, best practices and strategies to reach those goals and objectives.

## Costs

- Hotel bids were solicited according to standard federal contracting procedures.
- The Arizona Biltmore's bid was significantly lower than any others received from hotels who met the requirements advertised in the statement of work. The Arizona Biltmore submitted the lowest bid in the amount of \$69,750. Their charges per person were far lower than any other qualified hotel submitting a bid. All other bids were over \$100,000 and ranged upward to \$230,000.
- Federal procurement rules required the contract to be awarded to the Arizona Biltmore.
- The Biltmore's catering prices ranged from \$15 per person for refreshment breaks to \$20 per person for a luncheon. The quoted prices were inclusive of service charge (normally 23%) and 8.3% tax. Actual costs will be lower than the submitted bid.
- The federal per diem lodging rate for Phoenix at this time of year is \$96. The Arizona Biltmore offered sleeping rooms at below the government lodging rate. Attendees paid \$85.51 per room night. Furthermore, the hotel waived their usual \$24 per night resort fee.
- There were no charges for ballrooms or meeting rooms.
- Audiovisual services for sound, magnification screens and lighting were advertised separately through the government contracting procedures. The award was made as required to the lowest bidder, Swank Audio Visuals. The award was made for a maximum of \$70,071. The actual costs were \$67,760.

- All charges were reviewed daily and approved by the regional contracting officer.
- To minimize travel and per diem costs, most of the attendees traveled the morning of the Forum's opening day and returned home the afternoon or evening of the closing day. Most attendees were only authorized two nights lodging. The travel estimate for planning purposes for all travelers was \$640,000.
- No government funds or government time were used for what was referred to as "Casino Night." This was an optional activity which was not part of the Forum. A local casino provided complimentary bus transportation from the hotel for all who stayed at the hotel. This optional activity was after business hours and after a full eight hour work day.
- Several door prizes were given out during the event. These were provided through donations. No federal funds were used.

#### Media and Congressional Contacts

- Regional Commissioner Pete Spencer was interviewed at the Arizona Biltmore by William Lagenesse from Fox News, Los Angeles.
- Pete Spencer was interviewed by ABC's Good Morning America remotely from New York City at 5:00 pm on Friday, July 10. The Good Morning America interview may be aired on July 13.
- Pete Spencer answered a few questions from Senator Grassley's staff about the number of attendees and the cost.
- At the request of the Senate Finance Committee, SSA's Inspector General will audit the contracting process used for the training forum.

7/11/09