

For: FSA Employees

FY 2013 Outreach Tracking Information System (OTIS) Changes

Approved by: Deputy Administrator, Field Operations



1 Overview

A Background

OTIS is a web-based application that supports program outreach reporting requirements. Previously, users only entered outreach expenses. The primary users of OTIS are the State Outreach Coordinator (SOC), Regional Outreach Coordinator, and County Office Outreach Coordinator. Users are required to follow guidelines set forth in OTIS Training Manual Release 3.0 that is available on DAFO's training web page at <http://fsaintranet.sc.egov.usda.gov/fsatraining>.

B Purpose

This notice provides guidance on entering outreach expenses in OTIS in FY 2013.

C Contact

If there are questions about this notice:

- County Offices shall contact SOC
- SOC's shall contact Nancy Bond by either of the following:
 - e-mail to nancy.bond@wdc.usda.gov
 - telephone at 202-260-6069.

Disposal Date	Distribution
October 1, 2013	All FSA employees; State Offices relay to County Offices

2 Recording Expenses for Outreach Activities

A Outreach Activity Plan

Every OTIS activity plan contains a section for estimated and actual costs incurred by a State, regional, or County Office to conduct the outreach activity entered into OTIS. The costs incurred are broken down into the following 6 categories, as displayed on the following Activity Plan Screen example:

- “Translation” (interpretation expenses for written or sign language)
- “Registration” (cost of workshop or conference registration)
- “Supplies and Materials” (exhibits, printing conference materials, etc.)
- “Travel”
- “Sponsorship (Partner)” (sponsorship costs charged by conference hosts or partner organizations)
- “Misc Services” (expenses not covered in other categories)
- “Booth Space” (exhibitor rental space expense)
- “Fees” (fees incurred, but not reflected in other fee categories).

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2 Recording Expenses for Outreach Activities (Continued)

A Outreach Activity Plan (Continued)

Employees should enter all applicable expenses incurred for each outreach activity recorded in OTIS.

Note: If the activity does not require funding, ENTER “0” in each box, as applicable.

The screenshot displays two main sections of the OTIS system interface. The first section, titled '* Cost', contains a 'Total Estimated Cost (\$):' label with a 'Help' link. Below this, a note states: 'If the activity does not require funding, type zero (0) in the one of the boxes.' There are seven input fields for different cost categories: Translation (\$), Travel (\$), Booth Space (\$), Registration (\$), Sponsorship (Partner) (\$), Fees (\$), Supplies and Materials (\$), and Misc Services (\$). The values entered are: Translation (0), Travel (0), Booth Space (0), Registration (25), Sponsorship (Partner) (0), Fees (0), Supplies and Materials (0), and Misc Services (0). A '^ Top' link is located at the bottom right of this section. The second section, titled '* FSA Roles and Programs', contains two sub-sections. The first is '* Roles:', which has a list box with options: Exhibit, Observe, Partner, Plan, Present, Recruit, and Sponsor. Below the list box is the instruction '(CTRL + click to select multiple items)'. There are right and left arrow buttons next to the list box. To the right of these buttons is an empty rectangular box. A 'Help' link is located to the right of this box. The second sub-section is '* Programs:', which has a list box with options: COC Elections Outreach, Conservation, Employment, and Farm Loan Programs. Similar to the roles section, there are right and left arrow buttons and an empty rectangular box to the right.

B Purpose/Benefits of Entering Expenses

The purpose of reporting activity expenses incurred is to allow FSA to collect and report expenses that are incurred to conduct outreach. This information is pertinent in OTIS regardless of whether a budget allotment is issued for outreach during the course of each FY.

2 Recording Expenses for Outreach Activities (Continued)

C FY End-of-Year Analysis

Expense data provided for each outreach activity in OTIS will be collected in aggregate and used as a measure to calculate the benefits of outreach. Examples of selected expense categories from OTIS may include the following, as displayed on the Generate a Report Screen example.

The screenshot displays the 'Generate a Report' interface in OTIS. On the left is a navigation sidebar with categories: List Activities, Goals and Strategic Outreach Plans, Partner Organizations, Reports, and Administration. The main content area includes a dropdown menu for 'County' (Cheyenne, Conejos), radio buttons for 'Audience Type' (General, Targeted, Both), a dropdown for 'FSA Program' (All), and radio buttons for 'Include Unapproved Activity Plans?' (Yes, No). Below these is a 'Report Columns' section with two columns: 'Exclude' and 'Include'. The 'Exclude' column lists various demographic and cost-related items, while the 'Include' column lists activity-specific metrics. Navigation buttons like '>', '>>', '<', '<<', 'Up', and 'Down' are used to move items between columns.

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2 Recording Expenses for Outreach Activities (Continued)

C FY End-of-Year Analysis (Continued)

At FY-end, outreach activities are counted by State after closeout of OTIS for the respective FY. The following is an example of the type of information that may be collected to analyze outreach performance metrics for a given State, Region, or nationwide.

	A	B	C	D	E	F	G
166	Kiowa County Fair	Pueblo	09/09/2010	Youth: 100%	100	\$0	\$0
167	Listening Session/Ag Forum	Boulder	09/09/2010		50	\$0	\$0
168	Agriculture, Conservation, and Rural Development Forum	Morgan	09/09/2010	General: 100%	31	\$0	\$0
169	COC outreach	Costilla	09/15/2010	Hispanic: 50%, General: 50%	500	\$0	\$0
170	Peoples Garden at Federal Center Denver Colorado	Boulder	09/28/2010		20	\$1,000	\$613
171	COC Election	Montezuma	09/30/2010	American Indian: 50%	25	\$0	\$0
172	COC Election	Dolores	09/30/2010	Women: 50%	25	\$0	\$0
173	Annual Colorado Cattlemen's and Cattlewomen Confernece	El Paso	09/30/2010		500	\$15,000	\$1500
174	PRESS AND NEWS RELEASES submitted to 8 local Newspapers - Northern Colorado Business Report, Johnstown Breeze, Berthoud Weekly Surveyor, North Weld Herald, Ft Lupton Express, Ft Morgan Times, Greeley, Tribune, Lost Creek Guide News,Report Herald i	Weld		General: 100%		\$0	
	164				360235	\$23188	\$5446
176	Estimated Cost Per Outreach Activity: \$ 141.39		Estimated Cost Per Attendee: \$ 0.06				
177	Actual Cost Per Outreach Activity: \$ 33.21		Actual Cost Per Attendee: \$ 0.02				
178							
179							