



**Rural Business-  
Cooperative Service**

August 20, 2018

Office of the  
Administrator

U.S. Department of  
Agriculture  
1400 Independence  
Avenue, SW  
Stop 3201  
Washington, DC  
20250

Voice: 202.690.4730  
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TO: National Office Officials,  
Western Region, State Directors  
Rural Business-Cooperative Service Program Directors

THROUGH: Western Region Administrative Program Directors,  
Human Resources Managers, and  
State Training Coordinators

FROM: Bette B. Brand /s/ **Bette B. Brand**  
Administrator  
Rural Business-Cooperative Service

SUBJECT: Rural Business-Cooperative Service  
New Loan Specialist Training, West Region  
August 27-31, 2018

**ACTION**

**REQUIRED: Make Hotel Reservations: August 17, 2018**

Rural Development will be conducting a Regional Business and Cooperative Programs training session for new State Office Rural Business-Cooperative Service (RBS) Loan Specialists on August 27-31, 2018.

The training will provide introductory information on RBS programs, Grants Management, Guaranteed Loan System, and Community Economic Development.

The training also provides new employees with orientation on the National Office processes and procedures for regulation and policy decisions, emphasis on best practices for State program delivery, and corrective actions needed to address program weaknesses.

**EXPIRATION DATE:**  
August 30, 2019

**FILING INSTRUCTIONS:**  
Administrative/Other Programs

USDA is an equal opportunity provider and employer.

If you wish to file a Civil Rights program complaint of discrimination, complete the USDA Program Discrimination Complaint Form, found online at [http://www.ascr.usda.gov/complaint\\_filing\\_cust.html](http://www.ascr.usda.gov/complaint_filing_cust.html), or at any USDA office, or call (866) 632-9992 to request the form. You may also write a letter containing all of the information requested in the form. Send your completed complaint form or letter to us by mail at U.S. Department of Agriculture, Director, Office of Adjudication, 1400 Independence Avenue, S.W., Washington, D.C. 20250-9410, by fax (202) 690-7442 or email at [program.intake@usda.gov](mailto:program.intake@usda.gov).

## New Loan Specialist Training, West Region 2018

**Location:** The training will be held on August 28 – 30, 2018, at the Albuquerque, New Mexico, USDA, Rural Development State Office, located at 100 Sun Avenue NE, Suite 130, Albuquerque, NM 87109. **You will need your Federal I.D. to enter the Federal facility.**

We have also arranged for lodging at the government rate at the Albuquerque Marriott Pyramid North, 5151 San Francisco Road NE, Albuquerque, New Mexico 87109. The hotel is located within walking distance of the New Mexico State Office.

**Travel Schedule:** The training will begin on Tuesday, August 28, 2018, at 8:00 a.m., and end at 5:00 p.m., on Thursday, August 30, 2018. All attendees should plan to travel to Albuquerque, New Mexico, on Monday, August 27, 2018, and return on Friday, August 31, 2018. Please make your travel plans accordingly.

**Conference Agenda:** See Attachment 3, for the training agenda.

**Expenses:** The National Office will pay travel expenses for eligible attendees (see confirmed attendees in Attachment 2). **Travelers should use flights offering the most reasonable airfares allowable under existing travel regulations.** Travelers that are located within a 4-hour drive by vehicle are requested to do so in an effort to maintain budgeted expenses.

**PLEASE NOTE:** You are reminded that entitlement to overtime pay for travel may be incurred under the Fair Labor Standards Act.

In addition, the Federal Workforce Flexibility Act includes the provision to grant compensatory time off for time spent traveling, if that travel time is not otherwise compensable. Regulations regarding this new entitlement were effective January 28, 2005. Please be sure to code your time sheet accordingly for comp travel.

**Travel Documentation:** Each traveler is responsible for making his or her travel arrangements and preparing the requisite travel documents. **If you have questions related to the accounting code, you may contact** Michelle Ikard-Woods at (202) 720-7581, via email at: [michelle.woods@wdc.usda.gov](mailto:michelle.woods@wdc.usda.gov); or, Elsa DeLeon at (202) 720-0813, via email at: [elsa.deleon@wdc.usda.gov](mailto:elsa.deleon@wdc.usda.gov).

If you have any questions regarding this conference, please contact **Kristi Kubista-Hovis at (202) 720-0424, via email: [kristi.kubista-hovis@wdc.usda.gov](mailto:kristi.kubista-hovis@wdc.usda.gov); or, Roger Loesch, Training and Conference Administrator, Human Resources Training Division, at (314) 457-5492, via email at: [roger.loesch@stl.usda.gov](mailto:roger.loesch@stl.usda.gov).**

Attachments

**OBJECTIVE:** The training is designed to address basic skill levels for new RBS Loan Specialists. It is anticipated that attendees share training information with staff upon return to their duty station.

Program courses will provide basic RBS program(s) application, loan and grant making, and servicing guidance. The program will also orient the new employee on process and procedures of establishing policies and regulations at the National level, as well as emphasize the use of the Guaranteed Loan System, and educate on Community Economic Development.

**ELIGIBILITY:** From the National Office, selected RBS employees designated by the Administrator. The designated employees are limited to those who are critical to the initiative or needed for the on-site training. From the field, the new RBS Loan Specialist from each State as designated by the Administrator based on the State Director nominations received. **See Attachment 2 for a complete list of designated attendees.**

**HOTEL:** A block of rooms is reserved for the nights of Monday, August 27, 2018, through Friday, August 31, 2018, at the Albuquerque Marriott Pyramid North, 5151 San Francisco Road NE, Albuquerque, New Mexico 87109. Lodging is \$93 per night for single accommodations. Reservations can be made by calling directly (505) 821-3333. In doing so, please ask for the USDA AUGUST TRAINING group room block. Alternatively, you may make your reservation on line at the following link: [Book your group rate for USDA August Training](#).

**PLEASE NOTE:** It is very important that participants make their reservation prior to the cutoff date of August 10, 2018. After this date, the block of rooms will revert back to the hotel and will be given to us on a space-available basis. It is possible that the Government rate will not be available after that time. **If you miss the cutoff date, it will be the employee's responsibility to find other accommodations.**

Facilities for people with disabilities are available at the Sheraton Albuquerque Uptown. Any person requiring disability facilities must request specific accommodations when making his or her reservations. The Sheraton Albuquerque Uptown is in compliance with the Hotel and Motel Fire Safety Act of 1990.

**TAX EXEMPTION:**

Attendees will be responsible for paying all taxes charged by the hotel. Attendees may be responsible for paying other taxes charged by the hotel.

Employees in need of any other special accommodations and/or services should contact Roger Loesch, Training and Conference Administrator, Human Resources Training Division, at (314) 457-5492, or [roger.loesch@stl.usda.gov](mailto:roger.loesch@stl.usda.gov).

**TO MAKE A RESERVATION:**

The first source to make reservations for official Government travel should be Concur. Employees should not contact the hotel directly, unless special lodging facilities are required. Instead, employees should first try to make their travel arrangements through Concur.

**Accounting code**

**81B440001 (Org code GUSDARD32B410000)** has been established for your travel arrangements related to this training. If you have questions related to the accounting code, you may contact Michelle Ikard-Woods (202) 720-7581 or [michelle.woods@wdc.usda.gov](mailto:michelle.woods@wdc.usda.gov).

For travel planning questions, please contact one of the Travel Unit Staff:

- Robin Broussard, at (202) 692-0229 or via email at [robin.broussard@wdc.usda.gov](mailto:robin.broussard@wdc.usda.gov)
- Julie Muschette, at (202) 692-0227 or via email at [julie.muschette@wdc.usda.gov](mailto:julie.muschette@wdc.usda.gov)
- Lisa Washington at (202) 692-0030 or via email at [lisa.washington@wdc.usda.gov](mailto:lisa.washington@wdc.usda.gov).
- You may also email the Travel Unit mailbox at [ssd.travel@wdc.usda.gov](mailto:ssd.travel@wdc.usda.gov).

**TRANSPORTATION:** From the Albuquerque International Airport (ABQ), Shuttle service is available at the airport baggage claim with the cost of \$20 one way. Taxis are also available at an estimated expense of \$35 one way. If you are driving to the location, hotel parking is available at a rate of \$10 per day.

**OTHER:** Albuquerque, New Mexico, has a per diem rate not to exceed \$144.00 daily. The maximum reimbursement for lodging will be \$93.00, with meals and incidental expenses of \$51.00.

Dress is business casual.

**Please be prepared to present your Federal I.D. upon hotel check-in.**

	State	Participant Name	Title	E-mail	Telephone	Date participant became RBS Specialist
1	AK	Robin Ezzo	Loan Specialist	<a href="mailto:Robin.ezzo@ak.usda.gov">Robin.ezzo@ak.usda.gov</a>	907.761.7718	5/1/2015
2	AK	Terri Kingsley	Loan Specialist	<a href="mailto:Terri.Kingsley@ak.usda.gov">Terri.Kingsley@ak.usda.gov</a>	907.761.7726	7/1/2015
3	CA	Krista Minges	RBS Specialist	<a href="mailto:Krista.minges@ca.usda.gov">Krista.minges@ca.usda.gov</a>	530-792-5818	9/1/2016
4	CA	Robert Canepa	RBS Specialist	<a href="mailto:Robert.Canepa@ca.usda.gov">Robert.Canepa@ca.usda.gov</a>	530-217-6252	7/1/2018
5	CA	Jose Arroyo	RBS Specialist	<a href="mailto:Jose.Arroyo@ca.usda.gov">Jose.Arroyo@ca.usda.gov</a>	209.205.4972	7/1/2018
6	CA	Maretta Siatunuu	RBS Specialist	<a href="mailto:Maretta.siatunuu@ca.usda.gov">Maretta.siatunuu@ca.usda.gov</a>	530-792-5801	6/1/2014
7	CA	Matt Koch	RBS Specialist	<a href="mailto:Matt.Koch@ca.usda.gov">Matt.Koch@ca.usda.gov</a>	760-347-3675 x115	7/15/2018
8	CO	Cindy Chadwick	Business & Cooperative Program Specialist	<a href="mailto:cindy.chadwick@co.usda.gov">cindy.chadwick@co.usda.gov</a>	720-544-2924	8/21/2016
9	ID	Jeremy French	Loan Specialist	<a href="mailto:jeremy.french@id.usda.gov">jeremy.french@id.usda.gov</a>	(208) 944-3754	10/2/2016
10	ID	Shawn Cafferty	Loan Specialist	<a href="mailto:shawn.cafferty@id.usda.gov">shawn.cafferty@id.usda.gov</a>	(208) 690-3539	6/26/2018
11	IL	Donald Mulson	BP Loan Specialist	<a href="mailto:Donald.mulson3@il.usda.gov">Donald.mulson3@il.usda.gov</a>	217-403-6216	8/5/2018
12	MI	Joshua Church	BP Specialist	<a href="mailto:Joshua.church@mi.usda.gov">Joshua.church@mi.usda.gov</a>	(517) 324-5157	1/1/2017
13	MT	Donna Andreassi	Area Specialist	<a href="mailto:Donna.andreassi@mt.usda.gov">Donna.andreassi@mt.usda.gov</a>	406-585-2545	6/29/2015
14	NE	Christian Gunia	Loan Specialist	<a href="mailto:Christian.gunia@ne.usda.gov">Christian.gunia@ne.usda.gov</a>	308-632-2195 ext, 129	Feb. 2018
15	NM	Carlos Contreras	B&CP Specialist	<a href="mailto:Carlos.Contreras@nm.usda.gov">Carlos.Contreras@nm.usda.gov</a>	(505) 761-4958	8/1/2016
16	NV	Laura Chavez	Loan Specialist	<a href="mailto:Laura.chavez@nv.usda.gov">Laura.chavez@nv.usda.gov</a>	775-887-1222	5/17/2015
17	OR	Mandie Cole	RBS Specialist	<a href="mailto:Mandie.cole@or.usda.gov">Mandie.cole@or.usda.gov</a>	(541)378-3538	7/26/2015
18	OR	New PD Placeholder	Program Director			
19	OR	Nathan Brown	RBS Specialist	<a href="mailto:Nathan.brown2@or.usda.gov">Nathan.brown2@or.usda.gov</a>	(541)801-2685	7/22/2017
20	UT	Stephanie Cecil	CED Specialist	<a href="mailto:Stephanie.cecil@ut.usda.gov">Stephanie.cecil@ut.usda.gov</a>	435.587.2473, x 112	6/12/2016
21	WA	Jeff Peterson	BCP Specialist	<a href="mailto:Jeff.peterson@wa.usda.gov">Jeff.peterson@wa.usda.gov</a>	360-704-7729	1/20/2017
22	WY	Jessica Taylor	BP Loan Specialist	<a href="mailto:Jessica.taylor@wy.usda.gov">Jessica.taylor@wy.usda.gov</a>	307-672-5820 X 4188	8/20/2018



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**Rural Business and Cooperative Programs**  
**New Specialist Orientation Training**  
**Albuquerque, New Mexico**  
**August 27-31, 2018**

<b>Monday</b>	<b>Description</b>	<b>Instructor</b>
All Day	Travel to Albuquerque, New Mexico	
<b>Tuesday</b>	<b>Description</b>	<b>Instructor</b>
8:00 – 8:30 AM	<i>Welcome and Introductions</i>	<i>Arthur A. Garcia</i> <i>State Director, New Mexico</i>
8:30 – 9:00 AM	<i>Rural Development's Mission</i> Demographics, geography and statistics	<i>Robert Fry</i> <i>Western RBS Coordinator</i>
9:00 – 9:30 AM	<i>National Office Structure</i>	<i>Robert Fry</i>
9:30 – 10:00 AM	<i>Program Authorizing Legislation</i> Overview of the budget, appropriation and regulatory process Farm Bill and ConAct	<i>Valarie Flanders</i>
10:00 – 10:30 AM	<i>Break – Check in with your home office</i>	
10:30 – 11:15 AM	<i>Spotlight On: RBDG</i> CA Success Story: Robert Canepa Program Highlights IL Success Story: Donald Mulson	<i>Robert Fry</i>
11:15 - 11:45	<i>Budget and Allocations</i> Discussion on allocation models and subsidy rates that determined how much money your state received in allocations	<i>Robert Fry</i>
11:45 – 1:00 PM	<i>Lunch</i>	
1:00 – 2:00 PM	<i>Loan Specialist Priorities</i> What makes a great specialist? Discussion on the most important aspects of the job	<i>Robert Fry/Valarie Flanders</i>



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 West Region  
 August 27-31, 2018**

2:00 – 3:00 PM	<p><b><i>Spotlight On: Cooperative Program Grants</i></b>     <i>Valarie Flanders</i></p> <p>OR Success Story VAPG: Nathan Brown          ID Success Story VAPG: Shawn Cafferty          Program Highlights          WA Success Story RCDG: Jeff Peterson          CA Success Story RCDC: Maretta Siatunuu</p>
3:00 – 3:30 PM	<p><b><i>Break - Check in with your home office</i></b></p>
3:30 – 4:30 PM	<p><b><i>Spotlight On: Revolving Loan Funds</i></b>     <i>Robert Fry</i></p> <p>AK Success Story IRP: Terri Kingsley          NM Success Story IRP; Carlos Contreras          Program Highlights          MT Success Story RMAP: Donna Andreassi          CA Success Story RMAP: Jose Arroyo</p>
4:30 – 5:00 PM	<p><b><i>Spotlight On: REDLG</i></b>     <i>Robert Fry</i></p> <p>WY Success Story: Jessica Taylor          Program Highlights          CO Success Story: Cindy Chadwick</p>

<b>Wednesday</b>	<b>Description</b>	<b>Instructor</b>
8:00 – 8:45 AM	<p><b><i>National Office Tools</i></b></p> <p>Demo of national office SharePoint and other national office resources</p>	<i>Maggie Wilkens</i>
8:45 – 10:00 AM	<p><b><i>GLS: The Importance of Data Integrity</i></b></p> <p>Examples of Integrity Issues            How to detect and resolve            Status and Classification codes</p>	<i>Maggie Wilkens</i>
10:00 – 10:30 AM	<p><b><i>Break – Check in with your home office</i></b></p>	



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## **Rural Business and Cooperative Programs New Specialist Orientation Training West Region August 27-31, 2018**

10:30 – 11:00 AM	<b><i>How to Read RD Instruction</i></b> Understanding and recognizing the difference Between USC, CFR and Instruction language. Demonstration of the difference between forms and templates, regulation and guidance	<b><i>Robert Fry</i></b>
11:00 – 11:45 AM	<b><i>Grant Management</i></b> How to utilize 2 CFR regulation and agency guidance to effectively underwrite and oversee grant projects in your state	<b><i>Valarie Flanders/Robert Fry</i></b>
11:45 – 1:00 PM	<b><i>Lunch</i></b>	
1:00 – 1:45 PM	<b><i>Project Scoring</i></b> Best practices on how to accurately score projects Review of common mistakes made for each program	<b><i>Robert Fry</i></b>
1:45 – 2:30 PM	<b><i>What is a Reimbursement?</i></b> How to effectively process and approve reimbursement requests	<b><i>Robert Fry</i></b>
2:30 – 3:00 PM	<b><i>Oversight Review</i></b> Discussion on the purpose and functions of SIR, MCR and Supplemental review processes	<b><i>Valarie Flanders</i></b>
3:00 – 3:30 PM	<b><i>Break – Office check-in</i></b>	
3:30 – 5:00 PM	<b><i>Partnership Development</i></b> Group discussion on effective and efficient partnership development activities	<b><i>Robert Fry</i></b>



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**Rural Business and Cooperative Programs  
 New Specialist Orientation Training  
 West Region  
 August 27-31, 2018**

<b>Thursday</b>	<b>Description</b>	<b>Instructor</b>
8:00 – 8:45 AM	<b>Workshop: State Challenges</b> Attendees will share challenges facing the delivery of programs in their state	<b>Valarie Flanders</b>
8:45 – 10:00 AM	<b>Guaranteed Loan Programs</b> CA Success Story REAP Guarantee: Matt Koch Processing 101 UT Success Story B & I: Stephanie Cecil	<b>Valarie Flanders</b> <b>Kevin Boone</b>
10:00 – 10:30 AM	<b>Break – Office check-in</b>	
10:30 – 11:45 AM	<b>Guaranteed Loan Servicing</b> CA Success Story B & I: Krista Minges Routine Servicing 101 OR Success Story REAP Guarantee: Mandie Cole	<b>Valarie Flanders</b> <b>Kevin Boone</b>
11:45 – 1:00 PM	<b>Lunch</b>	
1:00 – 1:45 PM	<b>Spotlight On: Energy 9003 and 9005</b> NV Success Story 9003: Laura Chavez Program Highlights	<b>Kevin Boone</b>
1:45 – 3:00 PM	<b>Renewable Energy for America Program</b> AK Success Story REAP Grant: Robin Ezzo Efficiency vs Renewable Energy Technology ID Success Story REAP Grant: Jeremy French	<b>Kevin Boone</b>
3:00 – 3:30 PM	<b>Break - Office Check In</b>	
3:30 – 4:30 PM	<b>Renewable Energy for America Program</b> MI success Story REAP Grant: Joshua Church Program highlights and success stories	<b>Kevin Boone</b>



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**Rural Business and Cooperative Programs**  
**New Specialist Orientation Training**  
**West Region**  
**August 27-31, 2018**

4:30 – 5:00 PM      *Best Presentation Voting and Awards*

5:00 PM              *Adjourn*