



United States Department of Agriculture
Rural Development

RD AN No. 4448 (2057-A)
June 2, 2009

SUBJECT: Policy for Approval to Host or Attend Instructor-Led Training
RESPONSES DUE JULY 14, 2009

TO: National Office Officials
Rural Development State Directors

ATTN: Human Resources Managers
Administrative Program Directors
State Training Coordinators
Rural Development AgLearn Administrators

FROM: Sherie Hinton Henry /s/ *Sherie Hinton Henry*
Administrator
Operations and Management

Purpose/Intended Outcome:

This Administrative Notice (AN) is to remind you of our policy requiring approval by the National Training Committee (NTC) of all Instructor-Led Training (ILT) that costs or exceeds \$25,000.

This policy went into effect April 11, 2008 and is to be adhered to by all Rural Development employees who host or attend ILT that costs or exceeds an aggregate amount of \$25,000. This includes all costs associated with the training, i.e., tuition, travel, and meeting space.

Comparison with Previous AN:

This replaces AN 4344 which expired on April 30, 2009.

EXPIRATION DATE:
May 31, 2010

FILING INSTRUCTIONS:
Preceding RD Instruction 2057-A

1400 Independence Ave, SW • Washington, DC 20250-0700
Web: <http://www.rurdev.usda.gov>

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Washington, DC 20250-9410 or call (800) 795-3272 (voice) or (202) 720-6382 (TDD).

Implementation and Responsibilities (to include the following):

Written requests are to be submitted to the Human Resources Training Division (HRTD) for processing and submittal to the NTC for review 12-weeks prior to the training event. The NTC will render a decision within 10 working days of receipt of the written request.

Attachment A provides the procedures and detailed information of the approval process. Attachment B is a decision memorandum template for you to use as a guide for written requests. After approval, the initiating office must ensure the event is documented in AgLearn via the automated SF-182 process or “External Training Request.”

The NTC is comprised of representatives from each of the program areas, Legislative and Public Affairs Staff, the Under Secretary, and five State Directors. As part of its charter, the NTC is responsible to ensure Rural Development has a comprehensive training system that supports optimal program delivery. This system consists of electronic learning (self-paced AgLearn courses for individuals and Web-based collaboration tools for groups). Attachment C lists examples of self-paced e-Learning and Web collaboration tools.

In support of this training system, Administrators and State Directors are reminded to submit a quarterly report of group jurisdiction-wide and/or regional training. This report excludes individual (under \$25,000) and free online AgLearn training. Attachment D is the ILT Quarterly Report format that you should use for your report submission. This report is due to HRTD (attention Renee Glascon at renee.glascon@wdc.usda.gov) no later than 10 working days after the end of each quarter. The next report for the third quarter is due no later than **July 14, 2009**.

If you have questions, please contact Peggy Hernandez, Director, HRTD, at 202-401-9702 or via e-mail at peggy.hernandez@wdc.usda.gov.

Attachments (4)

Sent by electronic mail on June 4, 2009 at 11:30 a.m. by HR Training Division.
National Office Officials and State Directors should advise other personnel as appropriate.



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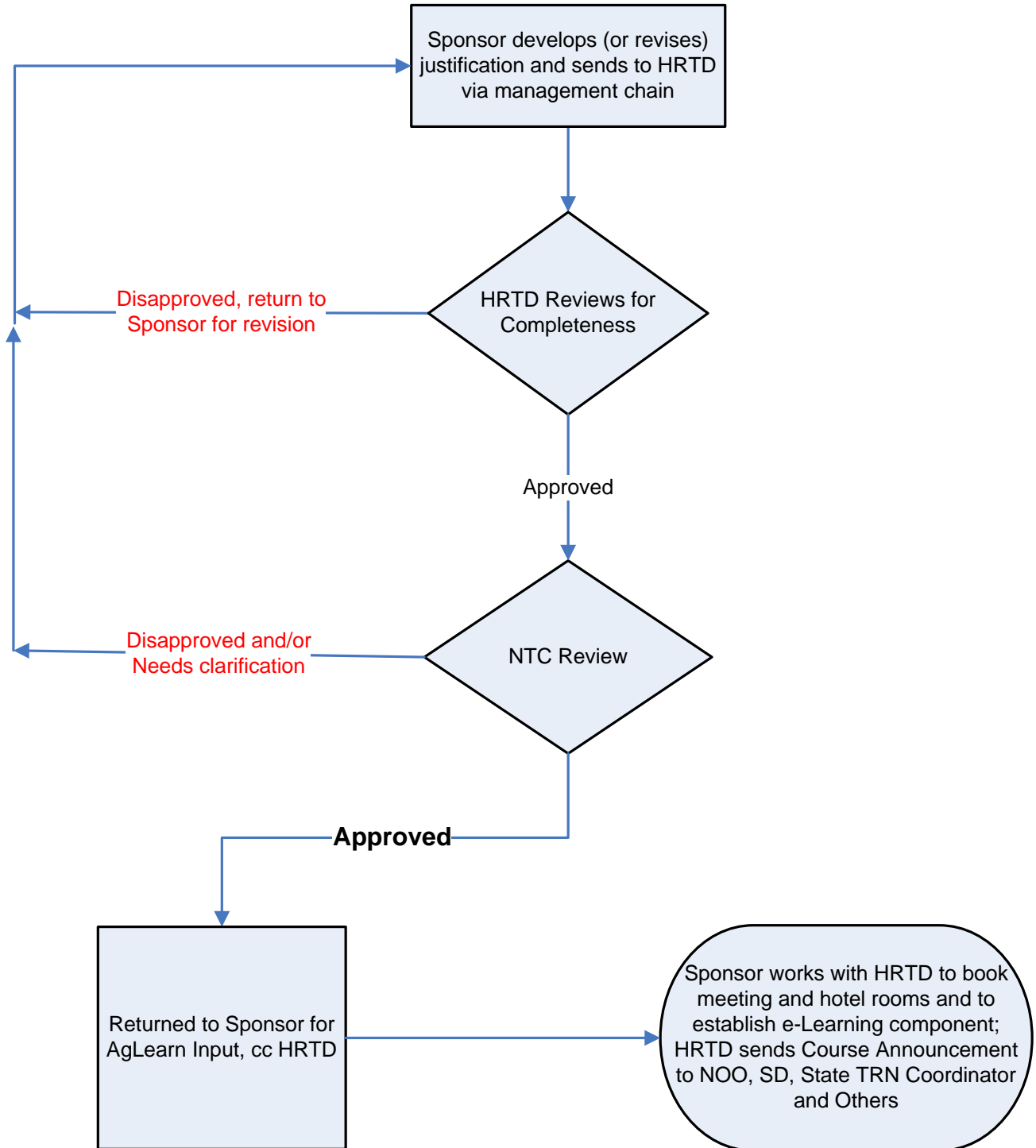
Attachment A
Page 1 of 2

Instructor-Led Training Approval Process

1. The Sponsor determines that Instructor-Led Training (ILT) is the most suitable method for training delivery for either an individual or a group and the aggregate cost estimate is or exceeds \$25,000.
2. The Sponsor prepares a Decision Memorandum for approval by the National Training Committee (NTC). The Memorandum must include a justification, a budget estimate and an agenda. The budget estimate must include, but is not limited to, the following (as appropriate per situation): tuition fee, instructor fee, travel expenses, duplication and/or text book fee, room rental, computer rental, audiovisual equipment, supplies, and related items. **Sponsor must include learning objectives and identify why an e-Learning methodology is not suitable to deliver the learning objectives. Be specific: identify exactly which items cannot be done online.** For instance, almost all of our training requirements can be fulfilled via a Webinar.
3. The Sponsor submits the package to Human Resources Training Division (HRTD), attention Peggy Hernandez, Director, at peggy.hernandez@wdc.usda.gov **no later than 12-weeks** before the deadline for registration.
4. HRTD reviews the package for completeness and returns to Sponsor for revision as appropriate. HRTD analyzes the justification and submits to the NTC with an approval/disapproval recommendation. HRTD will process each request within 10 working days of receipt.
5. The NTC analyzes package and either (1) approves the request or (2) returns to Sponsor for additional justification or clarification. The NTC will make a decision on each request within 10 working days of receipt.
6. After receiving NTC approval, the sponsor must coordinate the meeting and hotel requirements, if required, with HRTD. Upon completion of all facility arrangements, HRTD will send out the announcement to all National Office Officials, State Directors, State Training Coordinators, and others as appropriate.
7. All approved ILT requests must be complemented with an e-Learning component. Contact HRTD for assistance.
8. Once approved, a recurring annual training course will not need to be re-submitted to the NTC for approval.

The diagram on the next page shows the process flow for approval of an ILT request.

Instructor-Led Training (ILT) Approval Process





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Attachment B
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DECISION MEMORANDUM FOR THE NATIONAL TRAINING COMMITTEE

ATTENTION: Chair
Rural Development National Training Committee

THROUGH: Peggy Hernandez, Director
Human Resources Training Division
Date

THROUGH: *(Insert)* Name of Administrator/State Director/Office Head
Title
Office Name (National Office Official/State Office)
Date

FROM: *(Insert)* Name of Immediate Supervisor
Supervisor's Title
Organization Name
Date

SUBJECT: Approval for Instructor-Led Training for *(insert training event name)*

ISSUE:

To obtain the National Training Committee's approval for use of Instructor-Led Training for *(insert training title)*.

BACKGROUND:

Provide background explanation of requirement. Include the agenda for the training session, the start and end date, travel dates, vendor name (if applicable).

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DISCUSSION:

*(Explain why ILT is the most appropriate method for delivery of this training topic. What are the learning objectives that **cannot** be accomplished using e-Learning? For example, WebEx coupled with a conference line is not suitable for this training event because (insert reason). Be specific as to the learning objectives. Include cost estimate per the table below.)*

COST ESTIMATE:

	Item	Qty	Unit Cost	Extended Cost
1.	Vendor Instructor Fees			
2.	Room Rental Fees			
3.	Textbook Fees			
4.	Reproduction Costs			
5.	Students Travel Cost (See GSA rates at http://apps.fas.gsa.gov/citypairs/search/)			
6.	Students Per Diem (See GSA rates at http://www.gsa.gov/Portal/gsa/ep/contentView.do?P=MTT&contentId=17943&contentType=GSA_BASIC)			
7.	Government Instructors Travel Cost			
8.	Government Instructors Per Diem			
9.	Equipment rental			
10.	Supplies			
11.	(add other lines as needed)			
12.	(add other lines as needed)			
13.	(add other lines as needed)			
14.	(add other lines as needed)			
Total Cost Estimate =				(Sum above)

RECOMMENDATION:

We recommend approval of *(insert name of training event)* at estimated cost of \$xx,xxx. Funding is available within our budget allotment to cover this cost.

DECISION BY THE NATIONAL TRAINING COMMITTEE:

Approve: _____

Disapprove: _____

Discuss with us: _____

Date: _____

Reviewed by: _____



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Attachment C
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Examples of Rural Development e-Learning Tools

Below are examples of the e-Learning tools and courses which are approved for use in Rural Development. Following each example, we have provided information on the execution process for each tool.

1. **WebEx.** Rural Development has purchased a number of licenses for WebEx, a Web-based conferencing tool. Every employee can attend a meeting hosted on the Rural Development WebEx server. Selected individuals in each State Office and in the National Office (Washington and St. Louis) have been given “hosting” rights which allows them to schedule and conduct WebEx sessions. Here are some of the ways you can use WebEx to conduct the Rural Development mission:

- **Demonstrate products and services** to anyone, anytime. Show PowerPoint presentations, highlight program features, and review regulations for comments and other types of documentation. Personalize meetings by including video from a Webcam.
- **View, annotate, or edit documents** in real time and conduct spontaneous Q&A sessions. Develop project budgets, collaborate on presentation material, and communicate without the inconvenience or expense of traveling.
- **Deliver live, time-sensitive interactive training** on any topic to employees and partners anywhere. Train employees on process changes, regulatory compliance and new agency-wide initiatives without the need to travel.
- **Manage geographically dispersed project teams** and build closer relationships using secure instant messaging for quick communications, then moving seamlessly into a Web meeting when you need to share documents.

Contact the Human Resources Training Division (HRTD) for assistance in setting-up and using this tool. HRTD can help streamline the process of (1) establishing the event in WebEx and the Training Resources SharePoint and (2) sending formal notification to National Office Officials and State Directors.

2. **Microsoft SharePoint.** The Training SharePoint site is accessed from the “Training Resources” link on the bottom left of the Rural Development Intranet Home page (<http://teamrd.usda.gov/>). The direct link is <http://teamrd.usda.gov/rd/training>. SharePoint allows us to facilitate collaboration, provide content management features, implement program/support processes, and supply access to information that is essential to our goals and processes. We can quickly create SharePoint sites that support specific content publishing, content management, records management, or business intelligence needs. SharePoint can also be used to conduct effective searches for people, documents, and data, participate in forms-driven program and support processes, and access and analyze large amounts of program or training data.

Contact HRTD for assistance for posting your training information to the Training Resources SharePoint and the National Training Calendar.

3. **Mandatory Courses (USDA and Rural Development)**. These courses are available in the AgLearn Library and are free. Topics include:
- Computer Security Awareness Training
 - Privacy Basics
 - Introduction to the Performance Appraisal System

HRTD will post a consolidated list of these courses each year as they become available in the Training Resources SharePoint.

4. **SkillSoft Library**

These courses are available in the AgLearn Library and are free to all employees. Topics include:

- Principles of Financial Statements
- Becoming a Manager: Leading and Communicating
- Problem Solving and Decision Making in Groups
- Several Microsoft Office courses

5. **Custom Rural Development e-Learning Courses**

We are actively developing and fielding a library of custom self-paced courseware to support all program areas. Below are some of the courses that are available or under development.

- Rural Development Community Development
- Rural Development Cross Programs Training
- Making Rural Development Programs Accessible (CD-ROM)
- MortgageServ Browser Overview
- Adjudicating Veterans Preference
- Rural Development's Orientation Video for the Native American Lending Guide
- Single Family Housing (SFH): Direct Employee Training Curriculum
- Single Family Housing Guaranteed Loan Program (SFHGLP): Employee's Steps to Closing SFH Guaranteed Loan Course
- SFHGLP: Guaranteed Underwriting System (GUS) Course
- SFHGLP: Loss Claim Processing/Administration Training for Employees
- Multi-Family Housing (MFH) Direct Loans/Asset Management (DL/AM) Course
- MFH Guaranteed Rural Rental Housing Program (GRRHP) Course
- Credit and Financial Analysis Training (CFAT) Curriculum
- Business Programs Intermediary Relending Program (IRP) Course

Custom courses will require contractor programming support. Upon approval of the custom courseware development, contact HRTD immediately to begin the process of defining your specific course content for development of documents that require contractor support.

Instructor-Led Training Quarterly Report

	Event Title	Dates		# Students	Event Description	Tuition	Travel Cost	Total Student Cost	Instructor Fee	Instructor Travel	Room Rental	Textbook Fee	Reproduction Cost	Equipment Rental	Supplies	Other	Grand Total	
		Start	End															
1								\$0										
2								\$0										
3								\$0										
4								\$0										
5								\$0										
6								\$0										
7								\$0										
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