



EXECUTIVE OFFICE OF THE PRESIDENT
OFFICE OF MANAGEMENT AND BUDGET
WASHINGTON, D.C. 20503

October 4, 2004

BUDGET DATA REQUEST NO. 05-02

MEMORANDUM FOR: PROGRAM DEPUTY ASSOCIATE DIRECTORS

FROM: Art Stigile
Chief, Budget Concepts Branch

SUBJECT: Collection of Information on Agency Training Costs

Due Date: October 22, 2004

Affected Divisions: All RMOs. The attached instructions and spreadsheet of this BDR **should** be shared with the agencies and departments.

Contact: Monique Dilworth (room 7236, extension 5-9146). Responses should be provided both electronically and hard copy.

Purpose: To assess and summarize agency data on resources invested in training activities. This information will be compiled and provided to the Deputy Director for Management, the Director of the Office of Personnel Management, and the President's Management Council.

Background: The data requested in this BDR will provide an overview of the investment being made to address current skill gaps and anticipate developmental needs so that Federal employees may meet mission-critical goals across the Government. Each agency should involve its Training or Human Capital Officers in the development of these data. Examiners may give agencies the option to submit funding information at the agency level or by budget account (the same ones used for MAX data input) depending on RMO branch preference, however the default will be for the information to be collected at the budget account level.

Training is currently defined in 5 U.S.C., section 4101 (4) as follows:

"training" means the process of providing for and making available to an employee, and placing or enrolling the employee in, a planned, prepared, and coordinated program, course, curriculum, subject, system, or routine of instruction or education, in scientific, professional, technical, mechanical, trade, clerical, fiscal, administrative, or other fields which will improve individual and organizational performance and assist in achieving the agency's mission and performance goals.

Action Required: For agencies with more than 2,500 employees, please provide the following information for FY 2004-2006, using the attached instructions and spreadsheet (Attachments 1 and 2), which are same ones provided in the electronic version of OMB Circular A-11, Section 25.5 under "data on training costs". (Agencies can reference the OMB website at http://www.whitehouse.gov/omb/circulars/a11/current_year/s25.pdf)

Total training costs, for each of the following categories: Executive Development, Management training, Supervisory training, Skills training, other training, and a grand total. Please use the following definitions for these categories:

Executive - Planned development, class work, and formal coaching in the principles and practices of leadership, and in leading strategic-level planning, organizing and controlling.

Management - Planned development, class work, and formal coaching in the concepts, principles, and practice of technical subjects, e.g. public policy formulation, quantitative approaches to management; or advanced education in planning, organizing and controlling work systems or other people.

Supervisory - Planned development, class work, and formal coaching in the principles, policies, and practices of allocating and managing the work of a unit; and in supervising and developing other people.

Skills Training - Planned development, class work, and formal coaching that develops critical knowledge and skill in a particular occupation or field of expertise: for instance, HR specialist or personnel, budget analyst or finance, attorney or law, etc; or critical personal knowledge and skill for working professionals: for instance, communication, facilitating groups, career planning, etc.

Other Training - Any other training provided by the agency, such as that in support of agency mission, but not included in the categories above.

Participant salaries should **not** be included in the cost estimates that are provided in response to this BDR.

Identify major cost elements. Agencies should indicate which of the following major cost factors are included in the cost estimates: vendors/consultant fees, materials, salaries of training staff, travel & per diems, technology and equipment, facilities. As noted above, participant salaries should **not** be included in the cost estimates.

Instructions for Agency Training Cost Data Collection

Contact: Monique Dilworth, (202) 395-9146, Monique_L._Dilworth@omp.eop.gov

What is the purpose of this information?

As referenced in OMB Circular A-11, Section 25.5, agency training cost data will be collected (refer to http://www.whitehouse.gov/omb/circulars/a11/current_year/s25.pdf). This information will be used to assess and summarize agency data on resources invested in training activities. The data requested will provide an overview of the investment being made to address current skill gaps and anticipate developmental needs so that Federal employees may meet mission-critical goals across the Government. This information will be compiled and provided to the Deputy Director for Management, the Director of the Office of Personnel Management, and the President's Management Council.

What agencies need to report?

All agencies with more than 2,500 employees should report.

When is this information due to OMB?

October 22, 2004

How will this information be displayed in the President's Budget?

At this time, there are no plans to display agency training costs in the President's Budget.

How do I prepare the exhibit?

Table 1 - Provide FY 2004 through FY 2006 funding information for each agency budget account. (Note: The agency budget accounts should be the same ones used for MAX.) This funding information should be broken out by the "type of training" (see definition below). Agencies should involve their Training or Human Capital Officers in the development of these data. The following major cost elements should be included in the cost estimates: 1) vendors/consultant fees, 2) materials, 3) salaries of training staff, 4) travel & per diems, 5) technology and equipment, 6) facilities. Participant salaries should **not** be included in the cost estimates.

Table 2 - Agencies should indicate the cost elements that are included in the funding information provided in Table 1 by placing an "X" in the appropriate box.

What are the definitions for "Type of Training"

Executive - Planned development, class work, and formal coaching in the principles and practices of leadership, and in leading strategic-level planning, organizing and controlling.

Management - Planned development, class work, and formal coaching in the concepts, principles, and practice of technical subjects, e.g. public policy formulation, quantitative approaches to management; or advanced education in planning, organizing and controlling work systems or other people.

Supervisory- Planned development, class work, and formal coaching in the principles, policies, and practices of allocating and managing the work of a unit; and in supervising and developing other people.

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