



STATE OF DELAWARE  
EXECUTIVE DEPARTMENT  
OFFICE OF MANAGEMENT AND BUDGET

MEMORANDUM

**TO:** Chief Justice  
Cabinet Members  
Agency Heads  
Chief Fiscal Officers

**FROM:** Ann S. Visalli, Director *ASV*  
Office of Management and Budget

**DATE:** March 8, 2013

**SUBJECT:** Agency Requests for Outside Consultants and Training Vendors

As we continue to closely monitor state expenditures, it has become clear that some agency expenses associated with training may be better coordinated by the Office of Management and Budget (OMB). This would include training on such topics as leadership, management, communication, teambuilding, and e-learning provided by outside consultants and training vendors. This does not include specialized training for IT, healthcare services, or training provided by agencies for non-state workers. You may recall that Title 29, §5916 requires express approval by OMB for the use of "personnel" consultants.

(b) No agency shall engage a consultant or authorize expenditures of any General or Special funds for the purpose of studying personnel policies and/or the wage and salary classification of employees without the written authorization of the Director of the Office of Management and Budget and the concurrence of the Controller General.

In addition, we have established a contract for professional training and consulting with a list of approved vendor services (GSS-GSS12659-PROFTRN [http://contracts.delaware.gov/contracts\\_detail.asp?i=1128](http://contracts.delaware.gov/contracts_detail.asp?i=1128)). Please refer to the list of vendors and pricing spreadsheet, which can be found at: [http://bidcondocs.delaware.gov/GSS/GSS\\_12659\\_PS.xls](http://bidcondocs.delaware.gov/GSS/GSS_12659_PS.xls). Approval for services which exceed \$5,000 should be obtained by completing and submitting the attached Training Request Form to HRM's Manager of Training and Organization Development, Barbara McCleary ([Barbara.mccleary@state.de.us](mailto:Barbara.mccleary@state.de.us)) prior to requesting OMB approval of a purchase order or requisition for an outside trainer or consultant (which is required before any funds are committed).

We will evaluate the quality of the services requested, including the training program and instruction, and determine whether (1) some of the need may be met with existing statewide training programs or other in-house resources, (2) other agency employees may benefit from the same training; and/or (3) group discounts may be obtained.

Once an endorsement from the Training and Organization Development Section is received, the agency will need to submit a purchase order and/or requisition. Please do not contract for training/consultation services without an approved purchase order and/or requisition. If you have any questions, please feel free to contact me at (302) 739-4204.

cc: Meaghan Brennan, Director, Budget Development, Planning and Administration  
Brenda Lakeman, Director, Human Resource Management  
Amy Bonner, Deputy Director, Human Resource Management  
Barbara McCleary, Manager of Training and Organization Development, Human Resource Management



## Training Request Form

Agency:	
Division:	
Agency Contact Name:	
Agency Telephone Number:	
Name of Trainer/Consultant:	
Reason Consultant was selected?	
Summary of Training Need:	
Program Description (Outline of training and method of providing training):	
Total Cost:	
Number of training participants and job classifications:	
Length of program:	
Other information:	

*Return form to Barbara McCleary, OMB/HRM Statewide Training and Organization Development at [Barbara.McCleary@state.de.us](mailto:Barbara.McCleary@state.de.us)*