

NNSA POLICY LETTER

NAP 540.2

Approved: 11-22-16
Certification Due: 11-22-19

NNSA M&O OFF-SITE EXTENDED DUTY ASSIGNMENTS



NATIONAL NUCLEAR SECURITY ADMINISTRATION Office of Acquisition and Project Management

**CONTROLLED DOCUMENT
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OFFICE OF PRIMARY INTEREST (OPI):
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11-22-16

NNSA M&O OFF-SITE EXTENDED DUTY ASSIGNMENTS

1. PURPOSE. To establish National Nuclear Security Administration (NNSA) policies and procedures for the administration of Management and Operating (M&O) contractor employees temporarily working on extended duty assignments. This policy document identifies requirements regarding overall management and administration of all M&O contractor employee extended assignments, including assignments to NNSA, Contractor Domestic Extended Personnel Assignments (CDEPA), and M&O Intergovernmental Personnel Act (IPA) Assignments to agencies other than DOE/NNSA.

The intent of this policy is to standardize monetary, moving, travel, and other allowances provided to M&O contractor employees on extended temporary duty assignments; set forth requirements where none previously existed (IPA assignments) to promote full transparency with respect to these taxpayer-funded assignments; and streamline assignment approval processes.

2. CANCELLATION. NNSA Supplemental Directive (SD) 350.2 Rev 1, *Use of Management and Operating Contractor Employees for Services to the National Nuclear Security Administration in the Washington, DC, Area* dated 10-18-12.

Cancellation of a directive does not, by itself, modify or otherwise affect any contractual or regulatory obligation to comply with the directive. Contractor Requirements Documents that have been incorporated into a contract remain in effect throughout the term of the contract unless and until the contract or regulatory commitment is modified to either eliminate requirements that are no longer applicable or substitute a new set of requirements.

3. APPLICABILITY.

- a. Federal. With the exception of the equivalency in paragraph 3c, this NNSA Policy (NAP) applies to all NNSA elements. NNSA Elements consists of Headquarters' Program Offices (POs) and Field Offices that report directly to the Office of the Administrator.
- b. Contractors. This applies to all NNSA M&O Contractors. The Contractor Requirements Document (CRD), Attachment 1, sets forth the requirements of this policy that apply to M&O contracts. The CRD must be included in all NNSA M&O contracts. M&O contractors are responsible for flowing down the requirements of this NAP to subcontracts at any tier to the extent necessary to ensure compliance with the requirements. M&O contractors must ensure that they and their subcontractors comply with the requirements of this NAP.
- c. Equivalencies/Exemptions.
 - (1) Equivalency. Intergovernmental Personnel Act Assignments of M&O contractor employees to NNSA/DOE will be required to follow the

procedures and provisions contained within DOE M 321.1-1, including any subsequent revisions.

- (2) Exemption. In accordance with the responsibilities and authorities assigned by Executive Order 12344, codified at 50 United States Code sections 2406 and 2511, and to ensure consistency through the joint Navy/DOE Naval Nuclear Propulsion Program, the Deputy Administrator for Naval Reactors (Director) will implement and oversee requirements and practices pertaining to this Directive for activities under the Director's cognizance, as deemed appropriate.
4. SUMMARY OF CHANGES. This policy replaces NNSA Supplemental Directive 350.2 Revision 1, *Use of Management and Operating Contractor Employees for Services to the National Nuclear Security Administration in the Washington, D.C. Area*, dated 10-18-12, and incorporates requirements from DOE Acquisition Letter 2013-01, *Contractor Domestic Extended Personnel Assignments*, dated 10-18-12. It also closes a policy gap regarding M&O employees on IPA assignments with agencies other than DOE/NNSA and provides a single, consistent source of information on process and allowable cost under the M&O contracts regarding for all types of M&O employee temporary extended duty assignments.
5. BACKGROUND. This NAP addresses various extended duty temporary assignments for NNSA M&O contractor employees, including M&O contractor IPA assignments to locations other than DOE/NNSA. The NAP standardizes existing processes and policies on travel allowances for Off-Site Extended Travel Duty Assignments where possible, manages costs, and provides the M&O contractor with a method to implement Off-Site Extended Travel Duty Assignments within policy requirements without transactional approvals by NNSA. The allowances in this policy are generally consistent with the Federal Travel Regulations. This NAP provides the M&O contractors with a risk-based approach to implement Off-Site Extended Travel Duty Assignments upon enacting the internal controls described below and approved by NNSA.

This policy describes requirements set forth by NNSA for the Use of Management and Operating Contractor Employees for Services to the NNSA, Contractor Domestic Extended Personnel Assignments, and M&O contractor IPA assignments to non-DOE/NNSA entities. This policy provides guidance to NNSA Programs and M&O contractors regarding the routing and approval process.

6. REQUIREMENTS.
 - a. NNSA, through the cognizant contracting officer (CO), must inform each M&O contractor no later than September 1 each year, regarding the maximum number of Off-Site Extended Travel Duty Assignments that may be utilized by the M&O contractor during the following calendar year. This figure will include all Off-Site Extended Travel Duty Assignments, including M&O contractor employee assignments to the NNSA, CDEPAs, and M&O IPA assignments to DOE/NNSA or agencies other than DOE/NNSA.

- b. The M&O contractor must follow the Contractor Requirements Document (CRD) attached to this policy. The CRD sets forth requirements for the M&O contractor regarding supporting documentation necessary for each Off-Site Extended Travel Duty Assignment, reimbursable expense limitations for M&O contractor employees on Off-Site Extended Travel Duty Assignments and other limitations such as assignment time limits and requirements that the employees sign nondisclosure/conflict of interest agreements. Adherence to the reporting requirements and travel cost limitations set forth in the CRD is a prerequisite to cost allow-ability for any costs associated with Off-Site Extended Travel Duty Assignments.
- c. Requests for exceptions to Off-Site Extended Travel Duty Assignment policies, such as additional travel allowances, or exceeding assignment term limits, must be submitted to the NNSA Head of Contracting Activity (HCA) for review and approval prior to the beginning of the assignment. The procedure for obtaining exceptions to the requirements set forth in the CRD of this NAP, must be followed (see Attachment 14 for information regarding the procedure for obtaining an exception).
- d. M&O contractors must reimburse assignees for either Temporary Change of Station (TCS) or Extended Travel Duty (ETD) allowances as described in Attachment 2. M&O contractors shall not reimburse assignees for both TCS and ETD allowances.
- e. Each assignment agreement requires the approval of the M&O contractor representative and NNSA PO/IPA sponsoring organization/Contractor Domestic Extended Personnel Assignment Entity, as applicable. The M&O contractor representative must certify the assignment agreement complies with requirements set forth in the CRD to this NAP, upon incorporating the CRD into the contract. Documents substantiating the agreement must be available to NNSA in the NNSA SharePoint database as required in Attachment 1, CRD, A4.
- f. Special Issues with M&O Assignments: Use of M&O Contractor Employees for Services to DOE/NNSA.
 - (1) NNSA elements and M&O contractors must follow the procedure for approving new M&O assignments to NNSA illustrated in Attachment 8.
 - (2) NNSA elements and M&O contractors must follow the procedure for approving extensions of M&O assignments to NNSA illustrated in Attachment 9.
 - (3) Per the *NNSA Act*, (50 USC § 2410(b)), if an NNSA M&O contractor employee is detailed to a non-NNSA PO within DOE, (e.g., Science, Environment Management, Fossil Energy), the employee must not be subject to the authority, direction, or control of any non-NNSA employee, except for the Secretary of Energy consistent with section 202(c)(3) of the

Department of Energy Organization Act (42 USC 7132(c) (3)). Three options are available to the non-NNSA Program Office:

- (a) Conduct the assignment as an IPA, so the individual would have most of the same authorities as a Federal employee.
- (b) Have the detail assignment conducted through an NNSA Program Office that has a similar scope of work as the DOE element to which the M&O contractor employee would be detailed. In this situation, all work performed by the assignee is coordinated through the NNSA PO.
- (c) The non-NNSA PO enters into a Memorandum of Understanding (MOU) with the cognizant CO. The MOU must describe the proposed duties and tasks in sufficient detail to ensure all authorization and control is exercised via that MOU such that there is no NNSA Act violation.

(4) M&O contractor Administrative Staff Offices:

The M&O contractor must request approval to establish an Administrative Staff Office in the Washington, DC, area. This office must provide administrative support functions required for M&O contractor employees while on an Off-Site Extended Travel Duty Assignment. M&O contractor employees in this office typically help employees on assignment and travel to the Washington, DC, area with administrative issues such as payroll, travel, loaner equipment and other administrative functions as determined by the M&O contractor to support contract objectives. Employees working in the M&O contractor Administrative Staff Office are not eligible for extended travel duty or temporary change of station allowances since their permanent duty station is in Washington DC. M&O contractor Administrative Staff Office employees are only eligible to receive salary, benefits, and a transit subsidy.

g. Special Issues Associated with Contractor Domestic Extended Personnel Assignments (CDEPAs):

- (1) CDEPAs include but are not limited to the following types of assignment categories: Change of Station, Strategic Partnership Projects (SPP), loaned personnel, assignments to other DOE/NNSA M&O contractors, and any other type of temporary assignment. Any assignment of an employee away from his/her permanent duty station for more than 30 consecutive calendar days, except for M&O contractor assignments to DOE/NNSA and Intergovernmental Personnel Act (IPA) assignments, are covered in this category. See the *CDEPA* definition in Section 8 of this NAP.
 - (2) Subcontractors to M&O contractors may send employees on CDEPAs. In the event an M&O contractor approves this arrangement for its subcontractor, the M&O contractor must ensure the appropriate CRD clauses are flowed down into its subcontract.
 - (3) All CDEPA assignments must contain an assignment agreement or similar documentation, identifying the nature of the work to be performed; conflict of interest mitigation strategies as appropriate; how the assignment furthers goals and objectives of both participating organizations; anticipated assignment duration; and an evaluation of assignment allowances (ETD and TCS) reflecting projected cost associated with assignment, and any cost reimbursements, if applicable. Assignments must not be initiated to meet personal interest of employees, or to circumvent personnel ceilings or contractor support limitations.
- h. Special Issues Associated with M&O Intergovernmental Personnel Act (IPA) Assignments to non-DOE/NNSA Entities:
- (1) Intergovernmental Personnel Act Assignments of M&O contractor employees to DOE/NNSA must follow the procedures and provisions contained in DOE M 321.1-1, including any subsequent revisions.
 - (2) IPA assignments are a temporary transfer of skilled personnel between the Federal Government, and State or local governments, Native American tribal governments; institutions of higher education; or other eligible organizations (including Federally Funded Research and Development Centers).
 - (3) IPA assignments must be established for purposes of mutual interest to the Department, the M&O contractor, and the participating entity.
 - (4) IPA assignments can be used to achieve objectives, such as:
 - (a) Strengthening the management capabilities of Federal agencies and State, local, and Native American tribal governments.
 - (b) Assisting in the transfer and use of new technologies and approaches to solving governmental problems.

- (5) IPA assignments are of mutual benefit to the participating organizations, therefore both organizations (M&O contractor and IPA receiving entity other than NNSA) shall share in the assignment costs unless an exception has been approved.
- (6) Assignments are voluntary and must be agreed to by M&O contractor employees.
- (7) Status of M&O contractor employee while on IPA assignment (to DOE/NNSA or to other entities):
 - (a) M&O contractor employees may serve on an IPA assignment if their employer is a Federally Funded Research and Development Center or DOE/NNSA has certified the entity as an eligible other organization as described in § 5 CFR 334.103.
 - (b) M&O contractor employees on IPA assignments are considered to be on detail from their permanent employer (M&O contractor) and the following applies:
 - 1 M&O contractor employees may supervise Federal employees and make decisions on behalf of the government for which they are assigned.
 - 2 There is no entitlement to pay from the Federal organization.
 - 3 Assignee is not eligible for federal/state retirement, health benefits, and life insurance benefits. During the IPA assignment, benefits coverage is continued by the M&O contractor.
- (8) Length of Assignments (to DOE/NNSA or other entities):
 - (a) IPA assignments may be intermittent, part-time, or full-time. A single IPA assignment can initially be made for any period up to two years, but the single assignment may not exceed a period of four years. However, NNSA reimbursed ETD assignment allowances will only be provided for a total of three years.
 - (b) IPA assignments should be kept to the minimum time necessary to complete the assigned tasks.
 - (c) Assignments automatically end on the date indicated in the IPA Assignment Agreement. If an assignment ends earlier than the approved end date, the sponsoring entity should notify the M&O contractor at least 30 days prior to the revised end date.

7. RESPONSIBILITIES.

a. NNSA Administrator/Principal Deputy Administrator:

Establishes a list of specific IPA assignments or CDEPAs, at other federal agencies, for which NNSA will provide full funding. This list shall be reviewed annually to determine the continued appropriateness of full funding for these assignments/billets at other agencies.

b. NNSA Program Office Deputy Administrator (for NA-10 and NA-20) or the Associate Administrator (for all other NNSA Program Offices).

Specific for Use of M&O Contractor Employees for Services to DOE/NNSA:

- (a) Approves M&O Task Assignment Statement Agreements and M&O Task Assignment Extensions.
- (b) Provides concurrence on any exception requests (e.g., exceptions to travel allowances, time limits on assignments, etc.).

c. NNSA Head of Contracting Activity (HCA):

- (1) Establishes initial NNSA policies for all M&O Off-Site Extended Duty Assignments. Periodically reviews policies set forth in this NAP to evaluate policy effectiveness.
- (2) Reviews and approves/disapproves exception requests to policy in accordance with Attachment 15.
- (3) Notifies COs when the CRD to this NAP must be included in M&O contracts.
- (4) Specific to Use of M&O Contractor Employees for Services to DOE/NNSA:
 - (a) Annually reviews and approves NNSA Program Offices' staffing plans and, by September 25, provides slot allocation numbers to Program Offices.
 - (b) Reviews and approves any requests to establish an M&O Administrative Staff Office in the Washington, DC, area.
 - (c) Every two years, reviews and approves M&O Administrative Staff Office staffing plan requesting to change or continue an office in the Washington, DC, area.

(5) Specific to M&O contractor employee IPA Assignments:

Reviews and approves any IPA assignment involving NNSA M&O contractor employees to non-DOE/NNSA entities (except for those approved by the NNSA Administrator/Principal Deputy Administrator for which NNSA will provide 100% funding), for which NNSA will reimburse more than 50% of the assignment costs.

d. Cognizant NNSA Field CO:

- (1) Approves the sites' policies for implementing assignment procedures that meet the requirements of this NAP.
- (2) Informs each M&O contractor of the list of specific IPA assignments and/or CDEPAs, at other federal agencies that NNSA has determined are approved for 100% NNSA funding.
- (3) Reviews exception requests and provides recommendation prior to submitting to HCA for determination.
- (4) Reviews any requests and provides recommendation to establish an M&O Administrative Staff Office prior to submitting to HCA for determination.
- (5) Reviews and approves proposed conflict mitigation strategies included in each assignment package to NNSA prior to the commencement of the assignment, as appropriate. This applies to details to NNSA, CDEPA assignments, and IPA assignments to NNSA.
- (6) Makes compliance and cost allow-ability determinations based on the recommendation of NNSA Contractor Human Resources (CHR) specialists, as appropriate.
- (7) Provides notice to M&O contractors regarding non-compliance with provisions of the CRD attendant to this NAP.
- (8) Informs each M&O contractor no later than September 1, regarding the maximum number of Off-Site Extended Duty Assignments that may be used by the M&O contractor during the following calendar year.

e. NNSA Contractor Human Resources (CHR):

- (1) Provides advice to HQ Program Offices, Field Offices, and M&O contractors as requested, regarding implementation of this NAP.
- (2) Provides first level review of exception requests, and provide recommendation to the cognizant NNSA Field Office CO.
- (3) Periodically assesses M&O contractors' compliance with the CRD

provisions of this NAP and report results to the HCA and cognizant Field Office CO.

- (4) Annually reviews and compiles NNSA Program Office staffing plans (submitted August 1 of each year) for M&O contractor assignments and provides them to HCA for review and disposition.
- f. NNSA Program Offices (Specific to Use of M&O Contractor Employees for Services to DOE/NNSA):
- (1) Submit an annual staffing plan describing the need for current and future year assignments by August 1 to NNSA CHR Staff (see Appendix 1).
 - (2) Ensure new and continuing assignments contained within the approved Program Office's annual staffing plan meet the requirements of this NAP. Assignments requested during the fiscal year must meet the following conditions:
 - (a) Technical expertise or experience critical to the mission is not currently available within the program or at lower cost through other types of contracts (e.g., technical support services contracts).
 - (b) Tasks must be performed in support of DOE/NNSA.
 - (c) Tasks must be within the scope of the M&O contract.
 - (d) Assignment allowances follow Attachment 2.
 - (e) Assignments are limited to three years in duration.
 - (3) Initiate new assignments or reaffirm extension of current assignments based on mission needs.
 - (4) Ensure there is an allocation within the approved Program Office's annual staffing plan for each new assignment.
 - (5) Ensure the M&O contractor provides documentation to demonstrate the length of the proposed assignment, and the estimated cost of the two different assignment options (TCS vs. ETD) were considered and the most reasonable cost approach was selected.
 - (6) Contact the M&O contractor(s) to identify employee(s) for approved temporary assignment whose departure from the M&O contractor facility will not adversely affect the contractor's ability to complete work required under the contract.
 - (7) Create Task Assignment Statement Agreement using the format prescribed

in Attachment 4 and ensure all required information is addressed.

- (8) Submit assignment extension request (Attachment 5) for extensions to M&O contractor at least 60 days prior to the end of the current agreement.
- (9) Maintain official records of M&O Task Assignment Statement Agreement and required documents.
- (10) Coordinate all documents/signatures with M&O contractor, and appropriate NNSA signing official.
- (11) Coordinate NNSA General Counsel (NA-GC) review of all Off-Site Extended Travel Duty Assignment packages and facilitate ethics briefing between M&O assignee and NA-GC attorney.
- (12) Maintain a listing of assignments, and vacant slots in accordance with approved program office staffing plan for distribution to NNSA Program Office officials, NNSA-GC, and NNSA CHR by the fifth of every month.
- (13) Must ensure M&O contractor employee assignments to NNSA do not:
 - (a) Compensate for reductions in support service contracting.
 - (b) Provide administrative support (e.g., clerical or paraprofessional) within Federal facilities or for Federal employees.
 - (c) Perform inherently governmental functions, including but not limited to directly supervising Federal employees, representing the U.S. Government in any manner or making fiscal or policy decisions.
 - (d) Perform contractor business development or lobbying.
 - (e) Adversely affect the M&O contractor's mission or otherwise adversely affect the M&O contractor's ability to meet contract requirements.
 - (f) Extend support beyond the tasks described in the task assignment statement.
 - (g) Place the assignee in a position of performing work that has a direct and predictable effect on the personal and/or financial interest of the assignee's employer, self or family.
 - (h) Place the assignee in a position of participating in any matter with the intent to influence an agency decision or determination regarding the assignee's employer.

- (14) After two consecutive assignments for the same or similar task, the NNSA Program Office's annual proposed staffing plan must explain why the particular assignment should not or cannot be filled with a Federal employee.

g. NNSA Office of General Counsel :

- (1) Provides legal review of all relevant documents including proposed Task Assignment Statement Agreements and extensions.
- (2) Provides an ethics briefing to all M&O contractor employees approved for assignments to NNSA/DOE prior to the start and during any extension.
- (3) Provides guidance to develop conflict mitigation strategies if applicable.
- (4) Provides guidance to NNSA CHR and cognizant Field CO as requested.

8. REFERENCES.

- a. Title IV of the *Intergovernmental Personnel Act* of 1970, as amended [5 United States Code (USC) § 3371-3376], which provides for the interchange of employees between Federal agencies and certain non-Federal organizations.
- b. Title 5, Code of Federal Regulations (CFR), Part 334, which contains regulations on IPA assignments.
- c. Federal Travel Regulations, 41 CFR Sections 300-304.
- d. FAR 31.205-6 (e) Federal Acquisition Regulations, Compensation for Personal Services, Income tax differential pay.
- e. U.S. DOE Office of Inspector General Audit Report: *The Department of Energy's Management of Contractor Intergovernmental Personnel and Change of Station Assignments*, dated March 2007.
- f. DOE M 552.1-1A, *U.S. Department of Energy Travel Manual*, dated 2-17-06.
- g. DOE M 321.1-1, *Intergovernmental Personnel Act Assignments*, dated 8-24-04.
- h. DOE Acquisition Letter (AL) 2013-01, *Contractor Domestic Extended Personnel Assignments*, dated 10-18-12.
- i. NNSA BOP 540.6, *Acquisition Coordination and Approval Processes*, dated 3-18-15.

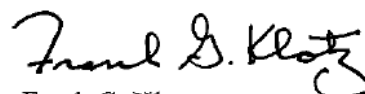
9. DEFINITIONS/ACRONYMS.

- a. APM: Acquisition and Project Management
- b. CDEPA: Contractor Domestic Extended Personnel Assignment: M&O contractor employee on assignment for 30 or more consecutive calendar days, performing work for another Federal agency or a private entity, including other DOE or NNSA M&O contractors, as an advisor or subject matter expert. A CDEPA is not an M&O detail to NNSA HQ nor is it an IPA assignment. CDEPA includes, but is not limited to, the following types of assignment categories: Change of Station, and Strategic Partnership Projects (SPP).
- c. CHR: Contractor Human Resources
- d. CO: Contracting Officer
- e. COI: Conflict of Interest
- f. Extended Travel Duty (ETD): An assignment in excess of 30 days at a temporary work location where an employee is considered on travel status. ETD assignments must not to exceed three years. The assignee receives a reduced per diem allowance for the length of the assignment to cover costs associated with lodging and incidental expenses.
- g. FTR: Federal Travel Regulation
- h. GSA: General Services Administration
- i. HCA: Head of Contracting Activity
- j. IPA: Intergovernmental Personnel Act
- k. NDA: Non-Disclosure Agreement
- l. PO: Program Office
- m. Off-Site Extended Travel Duty Assignment: Assignment of M&O contractor employees to a location at least 50 miles away from his/her permanent duty station for a period of more than 30 consecutive calendar days. This includes M&O Assignments to DOE/NNSA, CDEPAs, and IPA assignments.
- n. SPP: Strategic Partnership Projects
- o. TAS: Task Assignment Statement
- p. Temporary Change of Station (TCS): The temporary relocation of an employee to a new official duty station for a minimum of one year, but not to exceed three years, while performing a long-term assignment. The assignee will subsequently

return to the previous official duty station upon completion of the assignment.
For the duration of the assignment, the assignee is not in travel status.

10. CONTACT Acquisition and Project Management, Contractor Human Resources,
NA-APM-13, 505-845-6274.

BY ORDER OF THE ADMINISTRATOR:



Frank G. Klotz
Administrator

Appendix:

1. NNSA Program Office Staffing Plan

Attachments:

1. Contractor Requirement Document
2. M&O Off-Site Extended Duty Assignment Allowances
3. M&O Off-Site Extended Duty Assignment Allowances Table
4. M&O Assignments to NNSA Task Assignment Statement Agreement
5. M&O Assignments to NNSA Assignment Extension Request
6. Non-Disclosure and Conflict of interest Agreement for M&O Assignments to NNSA
7. Cost Estimate Worksheet for M&O Assignments to NNSA
8. NNSA Approval Process for New M&O Assignments to NNSA
9. NNSA Approval Process for Extensions of M&O Assignments to NNSA
10. NNSA M&O Staff Office Staffing Plans
11. M&O IPA Assignment Agreement for Non DOE/NNSA IPA's
12. OPM Optional Form (OF) 69
13. M&O IPA Cost Estimate
14. NNSA Approval Process for Requesting Exceptions
15. NNSA Exception Request Form

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APPENDIX 1: NNSA PROGRAM OFFICE STAFFING PLAN
DUE: ANNUALLY, AUGUST 1 TO: ROCIO.BOLIVAR@NNSA.DOE.GOV
NNSA PROGRAM OFFICE STAFFING PLAN
FY 20XX – 20XX

1. NNSA Program Office: _____ (e.g., NNSA Defense Programs [NA-10]; also provide a brief summary of the mission of the program)
2. Current Year Allocation: _____ (enter current number of approved assignment slots for the FY that will end 9/30)
3. Current Number of Active Assignments: _____ (enter the current number of occupied slots as of 9/30)
4. Number of Vacant Assignments: _____ (enter the number of approved but vacant slots for the FY that will end 9/30)
5. Proposed Number of Assignments: _____ (enter number of total proposed slots requested/needed for **upcoming** FY. This includes the figure in line three plus other slots proposed for the upcoming FY)

The Attachment to the Program Office Staffing Plan provides detail for all current year active assignments and proposed new assignments.

6. Rationale for Current Year Allocation and Proposed Number of Assignments:

(Justify continued need for number of slots currently allocated for the year; also provide justification if there is a change in number of slots requested)
7. This plan accurately reflects the critical skills support anticipated by the Office of _____ (enter name of NNSA Program Office) as necessary for to meet FYXX-XX requirements in support of DOE/NNSA's mission.

Concurrence:

Name, Deputy Administrator for _____

Approvals:

Name, Head of Contracting Activity
NNSA Office of Acquisition and Project Management (APM)

Appendix 1 Attachment: Detailed Listing of M&O Assignments

NNSA Program Office Staffing Plan FYXX-FYXX

Appendix 1 Attachment: Detailed Listing of M&O Assignments for the Office of_____

Note: The following must be completed for each assignee position.

Assignee 1 Name: Assignee Title

1. Assignee name, job description, required skills to be provided, link between the assignment duties and scope to the M&O contract, and description of assignee's approved mitigation strategy (as applicable):
2. Assignment total estimated monthly cost (including all indirect costs) and estimated yearly cost:
3. Percentage of time charged to each sponsoring NNSA program organization: (If an assignment supports more than one program office, indicate the percentage of support provided to each program with aggregate total equaling 100 percent. For part-time assignments only the percentage of time being charged to NNSA must be reported.)
4. M&O contractor providing employee:
5. Start and end dates for assignment: (If assignment has been extended, include initial start date.)
6. Site location for assignment (government or contractor space):
7. Specific program being supported: (e.g., NA-12.3 rather than NA-10)

ATTACHMENT 1: CONTRACTOR REQUIREMENTS

DOCUMENT NAP 540.2, *NNSA M&O OFF-SITE EXTENDED*

DUTY ASSIGNMENTS

The M&O contractor is responsible for complying with the requirements of this CRD. The M&O contractor is also responsible for flowing down the requirements in this CRD to subcontractors at the tier necessary to ensure compliance with the requirements set forth in the CRD. Adherence to the travel cost limitations set forth herein are a prerequisite to cost allow-ability for any costs associated with Off-Site Extended Duty Assignments.

A. Applicable to all M&O Off-Site Extended Duty Assignments.

The M&O contractor must:

1. Develop internal policies consistent with this NAP and submit for CO approval prior to implementing a risk-based approach for Off-Site Extended Duty assignments.
2. Operate within its ceiling of Off-Site Extended Duty assignments provided by the cognizant NNSA CO on or about October 1 of each year.
3. Submit any exception requests, related to 1) travel allowances that differ from the permitted list in Attachment 2; 2) assignment terms in excess of the maximum permitted duration or; 3) any other deviation from the requirements set forth in this CRD, to the NNSA cognizant CO at least 60 days prior to the start of the assignment.
4. Ensure all new M&O Off-Site Extended Duty Assignments are entered in the NNSA SharePoint database within 30 days of the assignment becoming effective. Failure to include an Off-Site Extended Duty Assignment in the system may render any costs associated with that assignment to be unallowable under the terms and conditions of the contract.
5. Ensure the NNSA SharePoint site includes the following elements for all Off-Site Extended Travel Duty assignments:

a. M&O Assignments to NNSA:

- (1) M&O Assignments to NNSA Task Assignment Statement Agreement (Attachment 4);
- (2) M&O Assignments to NNSA Assignment Extension Request, if applicable (Attachment 5);
- (3) Non-Disclosure and Conflict of Interest Agreement for M&O Assignments to NNSA (Attachment 6);

- (4) Cost Estimate Worksheet for M&O Assignments to NNSA (Attachment 7);
- (5) Actual costs at the end of the assignment;
- (6) NNSA Exception Request Form, if applicable (Attachment 15); and
- (7) Additional support/justification for any particular assignment, if appropriate.

b. IPA Assignments:

- (1) OPM Optional Form (OF) 69 (Attachment 12);
- (2) M&O IPA Assignment Agreement for Non-DOE/NNSA IPA's (Attachment 11) or similar form already used by M&O contractor if that form includes the same information requested in Attachment 11;
- (3) M&O IPA Cost Estimates (Attachment 13);
- (4) Actual costs at end of the assignment;
- (5) Extension Requests, if applicable;
- (6) NNSA Exception Request Form, if applicable (Attachment 15); and
- (7) Additional support/justification that supports any particular assignment, if appropriate.

c. Contractor Domestic Extended Personnel Assignments:

- (1) Assignment Agreement between the M&O contractor and the receiving entity, see D(1) of this CRD regarding the required contents of the agreement;
 - (2) Cost Estimate estimates for both ETD and TCS options;
 - (3) Actual costs at end of the assignment;
 - (4) Extension Requests (if applicable);
 - (5) NNSA Exception Request Form (if applicable) (Attachment 15); and
 - (6) Additional support/justification that supports any particular assignment (if appropriate).
6. Update the NNSA SharePoint site described in A.4 of the CRD with any changes to Off-Site Extended Travel Assignments within 30 days of any new assignment, changes to current assignments, or termination of assignments.

7. Ensure any employees on assignment returns to his/her permanent duty station for at least 60 days prior to beginning a new assignment.
8. Ensure the absence of employees due to detail assignment will not impede the M&O contractor's ability to complete work under the contract (written support for that assertion is required in the assignment agreement, see Attachment 4, 3(d)).
9. Ensure a conflict mitigation strategy is reviewed and approved as appropriate.
10. Ensure each assignment is approved by the appropriate M&O contractor representative.
11. Ensure all applicable overhead burdens for the assignment are included in the cost estimate.
12. Disclose total costs of the assignment and information about what percentage, if any, is funded by non-NNSA sources.
13. Ensure Extended Travel Duty Allowances (ETD) are limited to three years for any Off-Site Extended Travel Duty Assignment.
14. Adhere to all allowances for Off-Site Extended Travel Duty Assignments including limits set on salary adjustments, per diem allowances, travel allowances, and relocation allowances as described in Attachment 2. Allowances in excess of the limitations set forth in this policy without an approved exception are unallowable (see Attachment 15).
15. Consider for each assignment the length of the proposed assignment and cost difference between TCS and ETD allowances. The M&O contractor should consider the impact to assignee and which travel option may be in the best interest of NNSA when determining selection of allowances. If the higher cost option is proposed, the M&O contractor shall document justification for the selection of the higher proposed allowances in addition to other relevant facts and circumstances in the assignment package.

B. Requirements specific to the Use of M&O Contractor Employees for Services to DOE/NNSA.

The M&O contractor must:

1. Assist the HQ Program Office requesting the assignment to select a qualified employee for the scope of work, and prepare cost estimates.
2. Ensure all assignees execute a Non-Disclosure Agreement and Conflict of Interest Agreement as described in Attachment 6.
3. Ensure all assignees complete an ethics interview with NNSA General Counsel

prior to the start of any new assignment and any extension(s).

4. Submit to the cognizant Contracting Officer for approval a Washington D.C. Administrative Staff Office staffing plan in the format described in Attachment 10, every two years, by August 1 if applicable.

C. Requirements specific to M&O Intergovernmental Personnel Act Assignments to Non-DOE/NNSA Entities.

The M&O contractor must:

1. Ensure an IPA assignment is established in support of the mutual interest of DOE/NNSA, the M&O contractor, and participating entity.
2. Ensure an IPA assignee completes an official ethics interview with the appropriate M&O contractor representative regarding restrictions on activities during the period of the assignment and restrictions on activities upon return to work with the assignee's M&O contractor employer before the start of the IPA assignment.
3. Document the percentage of cost share, if any, including the rationale for a cost share or lack thereof.
4. Ensure all IPA assignment packages (initial and extensions) are complete and include the following documentation: an Office of Personnel Management (OPM) Optional Form (OF) 69 (Attachment 12); an Assignment Agreement (Attachment 11) or similar form already used by the M&O contractor, if that form includes all information requested in Attachment 11; and a cost estimate for the requested duration of the assignment (Attachment 13).
5. Maintain a four-year limit for specific assignments and six-year career limit for IPA assignments. Note, however, that allowance reimbursement is limited to three years although a single IPA assignment may last for four years.
6. Ensure an employee on assignment may return to a position of like pay and grade level after completion of the assignment.
7. Determine which allowances are provided to the assignee, consistent with this policy.
8. Submit to the NNSA cognizant Contracting Officer any IPA assignment for which NNSA will fund more than 50% of the assignment cost unless the assignment is to a non-DOE/NNSA agency approved for 100% NNSA funding by the NNSA Administrator/Principal Deputy Administrator. The Contracting Officer will inform the contractor in advance as to which non-NNSA IPA assignments will be 100% NNSA funded.
9. Notify a receiving entity of any benefits provided to an IPA assignee that are in

addition to those received by Federal employees (e.g., health club reimbursement provided by current employer, paid holidays/paid shutdown weeks that are not federal holidays etc.). The M&O contractor is responsible for determining the value of these benefits that are provided in addition to the types of benefits provided to Federal employees and shall not charge the value of additional benefit to the receiving entity.

10. Ensure the appropriate M&O contractor representative signs the Assignment Agreement.
11. Set forth guidance to ensure only the appropriate M&O contractor management representatives participate in the initiation and negotiation of assignments. Such guidance should prohibit employees from initiating or proposing their own assignments to other entities.
12. Ensure any employee on an IPA assignment remains an employee of his/her M&O contractor employer, consistent with applicable personnel policies of their employer.
13. Ensure any employee on an IPA assignment will be paid directly by his/her M&O contractor employer.
14. Ensure any employee on an IPA assignment continues to be covered under his/her M&O contractor's leave system.
15. Ensure any employees on an IPA assignment observes holidays in accordance with those observed by the receiving IPA entity.
16. Upon completion of an IPA assignment, ensure the employee returns to the M&O contractor location for the length of the IPA assignment or one year, whichever is less, prior to starting another Off-Site Extended Duty Assignment.

D. Requirements specific to CDEPA.

The M&O contractor must:

1. Ensure all CDEPA assignment packages include an assignment agreement form that:
 - Identifies the employee name and job title;
 - The nature of the work to be performed;
 - Any conflict of interest mitigation strategies (as appropriate);
 - How the assignment furthers the goals and objectives of both participating organizations;

- The relationship between the work activities and the M&O contract;
 - The name of the individual supervising the work of the assignee;
 - The funding arrangement with the participating entity; and
 - The anticipated assignment duration.
2. Ensure all CDEPA assignment packages include a cost estimate reflecting projected costs associated with the assignment, any cost reimbursements if applicable, and an evaluation of the assignment allowances (ETD and TCS).
 3. Ensure M&O subcontractors that allow for Contractor Domestic Extended Personnel Assignments follow the applicable requirements set forth in this CRD regarding documentation and expenses associated with the assignment.

**ATTACHMENT 2: M&O OFF-SITE EXTENDED DUTY ASSIGNMENT
ALLOWANCES – APPLICABLE TO M&O CONTRACTORS AND FEDERAL
ENTITIES**

1. **M&O ASSIGNMENTS AND CONTRACTOR DOMESTIC EXTENDED
PERSONNEL ASSIGNMENTS.**

An assignee may elect to travel to/from the Off-Site Extended Duty Assignment location via a Privately Owned Vehicle (POV) or air travel via a commercial carrier.

Reimbursement for transportation purposes will be limited to the cost of air travel via a commercial carrier. If travel is via POV, reimbursement will be for mileage (via most direct route), lodging, and meals and incidental expenses (M&IE). Mileage for use of a POV will be reimbursed at the approved U.S. General Services Administration (GSA) rate per mile at the time of travel.

An assignee may receive either a Temporary Change of Station or Extended Travel Duty allowances.

a. Temporary Change of Station (TCS) allowances include the following:

- 1) En route allowances for the assignee, including transportation for immediate family. En route allowances to and from the assignment location will not be reimbursed beyond what the costs would have been for air travel via commercial carrier.
- 2) Lodging and M&IE for assignee while en route. Immediate family will receive an M&IE allowance while en route at the rates established by GSA.
- 3) Transportation and shipment of up to 20,000 pounds of household goods (HHG) and personal effects including packing materials to and from assignment location.
- 4) Shipment of up to two personal vehicles to and from assignment location area.
- 5) Rental of a vehicle, if a personal vehicle is in transit) for a maximum of 14 days or until the personal vehicle arrives, whichever is sooner.
- 6) One house hunting trip to the assignment location, not to exceed 10 days in duration.
- 7) An allowance for Temporary Quarters Subsistence Expense (TQSE) for the first 30 days while an assignee and his/her family locate housing. During this time, the assignee may receive 100% of the location lodging and M&IE per diem allowance, immediate family members over 12 years of age are allowed 75% of location M&IE, and immediate family members under the age of 12 are allowed 50% of location M&IE.

- 8) Reimbursement for Property Management Services for assignee's primary residence at his/her official duty station for the duration of the assignment.
 - 9) Temporary long-term storage of HHG for the duration of the assignment.
 - 10) An allowance for short-term storage of HHG not to exceed 30 days at the carrier storage facility or a self-storage facility, only if HHGs were shipped.
 - 11) A temporary adjustment in salary less than or equal to 10% of assignee's base pay for the duration of temporary assignment. NNSA will not reimburse the salary adjustment beyond the end date of assignment.
 - 12) A relocation income tax allowance (payment to offset tax consequences for the move) in accordance with FTR Part 302-17 methodology.
 - 13) Miscellaneous expenses to and from assignment location at the lesser of \$1,300 or two weeks' basic gross pay, if immediate family relocates with employee.
 - 14) Miscellaneous expenses to and from assignment location at the lesser of \$650 or equivalent of one week's basic gross pay, if no immediate family relocates with employee.
 - 15) A transit subsidy for public transportation for assignments in the Washington, DC, area consistent with what is allowed for DOE/NNSA Federal employees.
- b. ETD Allowances include:
- 1) Travel for assignee to assignment location at start of assignment, and from assignment location at the conclusion to include 100% per diem allowance while on travel.
 - 2) Lodging allowance for actual costs, not to exceed 100% of lodging per diem for the first 60 days and last 30 days of assignment. A reduced lodging per diem for actual costs not to exceed 55% of lodging per diem after the first 60 days of assignment.
 - 3) M&IE allowance not to exceed 100% of M&IE per diem for first and last 30 days of assignment. A reduced M&IE per diem, not to exceed 55% of M&IE per diem after first 30 days of assignment.
 - 4) Assignee is authorized up to 10 NNSA reimbursed trips home from assignment location in a 12-month period. Mileage to and from the airport to assignee's home will be reimbursed. For assignees that must commute to a nearby airport, a rental car may be reimbursed if the cost is equal or less than mileage reimbursement. A cost analysis must be conducted to

demonstrate the cost of mileage vs. a rental car, to determine the most cost advantageous option. NNSA will not reimburse lodging, M&IE, rental car, or any other allowances when trips to the home location are taken.

- 5) Assignee is authorized to ship up to 1,000 pounds of personal effects to assignment location. The assignee may choose to substitute all 10 home trips for the shipment of an additional 3,000 pounds of personal effects.
- 6) A transit subsidy for public transportation for assignments in the Washington, DC, area, consistent with what is allowed for DOE/NNSA Federal employees.
- 7) Assignee may be authorized to ship one POV unless they travel to the assignment location via a POV. NNSA will not reimburse the shipment of an additional POV if the employee travels to the assignment location via a POV. Rationale for shipping one POV must be included in the assignment cost estimate and supporting documentation.
- 8) Assignee is authorized to receive an Extended TDY Tax Reimbursement Allowance (ETTRA), which must be calculated in accordance with FTR methodology (FTR 301-11.604).
- 9) On any day the assignee is on official travel away from the assignment location, the M&IE portion of the per diem allowance will be deducted from the reduced per diem amount being received. M&IE will be paid as part of the travel per diem. M&IE cannot be claimed concurrently in two different temporary duty locations.

2. IPA ASSIGNMENT ALLOWANCES.

An assignee may elect to travel to/from the assignment location via a POV or air travel via a commercial carrier. Reimbursement for transportation purposes will be limited to the cost of air travel via a commercial carrier. If travel is via POV, reimbursement will be for mileage (via most direct route), lodging, and M&IE. Mileage for use of a POV will be reimbursed at the approved GSA rate per mile at the time of travel.

a. TCS Allowances include:

- 1) En route allowances the assignee, including transportation of his/her immediate family. En route allowances to and from the assignment location will not be reimbursed beyond what the costs would have been for air travel via commercial carrier.
- 2) Lodging and M&IE for assignee while en route. Immediate family will receive an M&IE allowance while en route at the rates established by GSA.

- 3) Transportation and shipment of up to 20,000 pounds of HHG and personal effects including packing material to and from assignment location.
 - 4) Allowance for TQSE for the first 30 days while an assignee and his/her family locate housing (during this time the assignee may receive 100% of the location lodging and M&IE per diem allowance rate; immediate family members over 12 years of age are allowed 75% of the location M&IE allowance, and immediate family members under the age of 12 are allowed 50% of the location M&IE allowance).
 - 5) Temporary long-term storage of HHG for the duration of the TCS if the assignee is in an isolated location.
 - 6) A relocation income tax allowance (payment to offset the tax consequences for the move) in accordance with the FTR Part302-17 methodology.
 - 7) Miscellaneous expenses to and from the assignment location at the lesser of \$1,300 or two week's basic gross pay, if immediate family relocates with the employee.
 - 8) Miscellaneous expenses to and from the assignment location are the lesser of \$650 or the equivalent of one week's basic gross pay, if no immediate family relocates with the employee.
- b. ETD Allowances include:
- 1) Travel for the assignee including a 100% per diem allowance while on travel to and from the assignment location.
 - 2) Lodging allowance for actuals, not to exceed 100% of lodging per diem for the first 60 days and last 30 days of the assignment. A reduced lodging per diem for actuals, not to exceed 55% of lodging per diem after the first 60 days of the detail assignment.
 - 3) M&IE allowance not to exceed 100% M&IE per diem for the first and last 30 days of the assignment. A reduced M&IE per diem, not to exceed 55% of the M&IE per diem after the first 30 days of the assignment.
 - 4) Assignee is authorized up to 10 NNSA reimbursed trips home from the assignment location in a 12-month period. Mileage to and from the airport to the employee's home will be reimbursed. A cost analysis must be conducted to allow for a cost comparison between the costs of paying mileage vs. a rental car to determine the most cost advantageous option to travel from the airport to the employee's home location. NNSA will not reimburse for lodging, M&IE, rental car, or other allowances for these trips while at the home location.

- 5) Assignee is authorized to ship up to 1,000 pounds of personal effects to the assignment location. The assignee may choose to substitute all 10 home visits for the shipment of an additional 3,000 pounds of HHG.
- 6) Transit Subsidy for public transportation in the Washington, DC, area consistent with what is allowed for DOE/NNSA Federal employees.
- 7) Assignee may be authorized to ship one POV unless they travel to the assignment location via POV. NNSA will not reimburse the shipment of an additional POV if the employee travels to/from the assignment location via POV. Rationale for shipping one POV must be included in the assignment cost estimate and supporting documentation.
- 8) Assignee is authorized to receive an ETTRA, which must be calculated in accordance with the FTR methodology (FTR 301-11.604).
- 9) On any day the assignee is on official travel away from the assignment location, the subsistence portion of the per diem allowance will be deducted from the reduced per diem amount, since meals and incidental expenses will be paid as part of the travel per diem. M&IE cannot be claimed concurrently in two different temporary duty locations.

3. DEFINITIONS.

- (a) ETTRA: Extended travel duty (TDY) Tax Reimbursement Allowance
- (b) HHG: Household goods
- (c) Immediate Family: Any of the following members of the employee's household when reporting for duty at the new duty station or when authorized travel involving family members is permitted: 1) spouse (including same sex spouse/registered domestic partner; 2) children of the employee or employee's spouse who are unmarried and under 21 years of age or who, regardless of age are physically or mentally incapable of self-support; 3) dependent parents of the employee or employee's spouse; and 4) dependent brothers and sisters of the employee or employee's spouse who are unmarried and under 21 years of age or who, regardless of age, are physically or mentally incapable of self-support.
- (d) Lodging: The following expenses may be considered part of the lodging cost: rental of a furnished dwelling; if unfurnished, rental of a dwelling and rental cost of appropriate and necessary furniture; connecting/disconnecting and using utilities; reasonable maid fees and cleaning charges; the cost of special user fees; parking if ordinarily associated with rental; and monthly telephone use fees (does not include installation and long distance calls).

- (e) M&IE: Meals and incidental expenses
- (f) POV: Personally owned vehicle
- (g) Property Management Services: A program provided by a private company for a fee, which assists the assignees in managing a permanent residence at the previous official station as a rental property. Services provided by the company include, but are not limited to, obtaining a tenant, negotiating a lease, inspecting the property regularly, managing repairs and maintenance, enforcing lease terms, collecting rent, paying the mortgage, accounting for transactions, and providing periodic reports to the assignee.
- (h) RDP: Registered domestic partner
- (i) Temporary Storage: Storage of household goods (HHG) for a limited period of time at origin, destination, or en route in connection with transportation to, from, or between official station or post of duty or authorized alternate points.
- (j) TQSE: Temporary quarters subsistence expense

ATTACHMENT 3: M&O OFF-SITE EXTENDED DUTY ASSIGNMENT ALLOWANCES TABLE

	M&Os to DOE/NNSA	CDEPA	M&O IPA	
TCS Allowances	Assignment of M&O employees to the Washington, DC, area providing DOE/NNSA with technical expertise.	Assignment of M&O employees for more than 30 consecutive calendar days. This includes, but is not limited to, the following types of assignment categories: Change of Station, SPP, and Loaned Personnel.	Assignments of M&O employees to a Federal government agency (except for DOE/NNSA) for purposes of mutual concern to both organizations.	
En-route travel (employee)	X	X	X	Transportation, 100% lodging and M&IE.
En-route travel (immediate family)	X	X	X	The immediate family will receive transportation and a meals and incidental expenses (M&IE) allowance during the move to and from the assignment location per person.
Transportation of household goods (HHG)	X	X	X	Transportation and shipment of up to 20,000 pounds of HHG and personal effects to and from the assignment location.
Shipment of POV	X	X		Shipment of up to two personal vehicles to and from the assignment location area.
Rental car	X	X		Allowed while POV in transit, NTE 14 days.
House hunting trip	X	X		NTE 10 days. Employee and spouse or registered domestic partner (RDP) will be reimbursed for actual transportation expenses, and a per diem allowance prescribed by the GSA for that location.
Temporary Quarters	X	X	X	NTE 30 days. Employee will receive 100% lodging and M&IE. The immediate family will receive M&IE: family members over age of 12 will receive 75% and family members under age 12 will receive 50%.
Property Management Services	X	X		Services for the assignee's primary residence at his/her official duty station for the duration of the TCS.
Temporary long term storage	X	X	X	<u>For M&O Assignments and CDEPA:</u> Temporary long-term storage of HHG for the duration of the TCS. <u>For M&O IPAs:</u> Only when assigned to isolated location.

Short term storage	X	X		NTE 30 days. An allowance for short-term storage of HHG at the carrier storage facility or a self-storage facility, incident to transportation of HHG.
Salary adjustment	X	X		NTE 10%. Applicable only for the assignment period.
Relocation Income Tax Allowance	X	X		Relocation income tax allowance in accordance with the FTR methodology Part 302-17.
Miscellaneous Expense	X	X	X	The lesser of \$1,300 or two week's basic gross pay, if immediate family relocates with the employee. The lesser of \$650 or the equivalent of one week's basic gross pay, if no immediate family relocates with employee.
Transit subsidy in D.C. area	X	X		NTE \$ amount provided to DOE/NNSA employees.
	M&Os to DOE/NNSA	CDEPA	M&O IPA	
ETD Allowances	Assignment of M&O employees to the Washington, DC, area providing DOE/NNSA with technical expertise.	Assignment of M&O employees for more than 30 consecutive calendar days. This includes, but is not limited to, the following types of assignment categories: Change of Station, SPP, and Loaned Personnel.	Assignments of M&O employees to a Federal/State/local government agency (except for DOE/NNSA) for purposes of mutual concern to both organizations.	
En-route travel (employee)	X	X	X	Transportation, 100% lodging and M&IE.
Transportation of household goods (HHG)	X	X	X	NTE 1k lbs. HHG. Additional 3k lbs. of HHG in lieu of home trips.
Shipment of POV	X	X	X	Authorized on case-by-case basis.
Transit subsidy in D.C. area	X	X	X	NTE \$ amount provided to DOE/NNSA employees.
Lodging allowance	X	X	X	100% first 60 and last 30 days, 55% in between.
M&IE allowance	X	X	X	100% first and last 30 days, 55% in between.
Home trips	X	X	X	NTE 10/year. May substitute for additional 3k lbs. of HHG.
Extended TDY Tax Reimbursement Allowance (ETTRA)	X	X	X	ETTRA calculated in accordance with the FTR methodology (FTR 301-11.604).

**ATTACHMENT 4: M&O ASSIGNMENTS TO NNSA TASK ASSIGNMENT
STATEMENT AGREEMENT**

Employee Name: _____

**TASK ASSIGNMENT STATEMENT (TAS) AGREEMENT
ASSIGNMENT OF M&O CONTRACTOR EMPLOYEE TO NNSA**

1. List the employee's full name, the M&O contractor for whom the employee works, and the employee's proposed job classification.
2. Provide (a) the starting and ending dates of the assignment; (b) detail the assignee's proposed work responsibilities; (c) the relationship between the employee's specific work activity with the organization to the scope of that employee's M&O contract, including a conflict of interest mitigation strategy if appropriate, and (d) if the request is for an extension, a description of why the continued assignment is critical and what significant mutual benefit will be gained by NNSA and the M&O contractor.
3. Regarding this assignment:
 - (a) Provide a well-defined and documented basis for decisions.
 - (b) State specifically what would result if an M&O employee were not assigned to perform the intended work.
 - (c) List all other possible alternatives and why each would not be satisfactory, including clear demonstration that alternatives such as support service contractors were considered.
 - (d) Explain the basis for determining the assignment is cost effective, including documentation showing that all assignment allowances are reasonable. Specifically, discuss the chosen selection of temporary change of station or extended travel duty allowances, how the selection was determined, and why it is in the best interest of NNSA).
 - (e) Describe how the employee's absence due to the detail will not be a detriment to the M&O contractor's completion of mission work.
4. List the program organizational subcomponent (e.g., NA12.3 rather than NA-10 or other organization) to which the employee will provide services, and the employee's expected physical location.
5. Provide the name, organizational code, and the phone number of the Federal employee who will be responsible for assuring that the employee is in attendance and performing his/her work as required, and for ensuring that the employee's work activities conform to the requirements and restrictions of NNSA Policy Letter NAP-XX.

6. Affirm the assignment of this employee is not to compensate for other reductions in support service contracting.
7. Certify this assignment conforms with NNSA's staffing plan and is within your Program Office M&O contractor employee ceiling/slot allocation.

This assignment is consistent with the NNSA Staffing Plan and is within the Program Office's contractor employee ceiling/slot allocation.

CONCURRENCE:

_____/_____
Name
Date

Assistant Deputy Administrator, Program Office

Based upon the information provided on the request, the assignment of the M&O contractor Employee is:

APPROVED:

_____/_____
Name
Date
Deputy Administrator, Program Office

_____/_____
Name
Date

M&O cognizant official

DISAPPROVED:

_____/_____
Name
Date
Deputy Administrator, Program Office

_____/_____
Name
Date

M&O cognizant official

**ATTACHMENT 5: M&O ASSIGNMENTS TO NNSA ASSIGNMENT EXTENSION
REQUEST**

EXTENSION OF TASK ASSIGNMENT STATEMENT AGREEMENT

On _____ (date of final approval for original assignment) a Task Assignment Statement Agreement was signed for the assignment of _____ (name of assignee) to the Office of _____ for the period _____ (dates of original assignment).

This is the _____ (first/second) extension, is within the 36-month limitation, and is within the scope of the original task assignment statement agreement. The duties and limitations of the original task assignment statement agreement remain current and accurate. The Office of _____ continues to require expertise from _____ (name of assignee) because _____.

The expected end date of the assignment is _____. Estimated costs associated with this extension are listed in the attachment to this document.

Name
Assistant Deputy Administrator, Program Office

Date

Name
Deputy Administrator, Program Office

Date

Name
_____ M&O cognizant official

Date

Attachments

1. Original Task Assignment Statement Agreement
2. Updated Cost Estimate
3. Updated Conflict of Interest

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**ATTACHMENT 6: NONDISCLOSURE AND CONFLICT OF INTEREST
AGREEMENT FOR M&O ASSIGNMENTS TO NNSA**

Nondisclosure and Conflict of Interest Agreement for M&O Assignments

In the course of an assignee's temporary assignment to the National Nuclear Security Administration, the assignee:

- a. May have access to information that is not otherwise available to the general public (Nonpublic Information);
- b. Agrees not to share Nonpublic Information with any person or organization outside of the Government or with any Government employee who does not have a need to know such information in connection with their assigned duties;
- c. Acknowledges that if such Nonpublic Information is associated with a Government procurement that it may be considered to be bid/proposal information or source selection information and disclosure of such information would be a violation of the Procurement Integrity Act, 41 USC § 423;
- d. Agrees not to participate in any matter with the intent to influence an agency decision or determination regarding his/her employer;
- e. Agrees not to participate in any matter that may have a direct and predictable effect on either his/her employer or personal/family financial interest (including the financial interest of the a spouse or minor child); and
- f. Understands that violation of this Agreement may subject the employee to immediate termination of this temporary assignment, disciplinary actions by the employer, and prosecution for violations of Federal statutes.

Assignee Name (Print): _____

Assignee Signature: _____

Date: _____

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ATTACHMENT 7: COST ESTIMATE WORKSHEET FOR M&O ASSIGNMENTS TO NNSA

M&O Contractor Employee Cost Breakdown Sheet			
By Fiscal Year			
Name:	John Doe		
Home Site:	XYZ		
Start Date	1/1/2016		
Original Start Date:	N/A		
TCS Estimate			
	FY 16	FY 17	Total
Salary	\$ 174,996	\$ 43,749	\$ 218,745
10% Salary Increase(If Appropriate)	\$ 17,500	\$ 4,375	\$ 21,875
Fringe Benefits Rate	29%	29%	
Benefits	\$ 55,823.72	\$ 13,955.93	\$ 69,780
Total Salary and Benefits	\$ 230,819.72	\$ 57,704.93	\$ 288,525
Relocation Allowances	\$ 45,081.50	\$ 31,888	\$ 76,970
Relocation Tax Allowance	\$ 9,016.30	\$ 6,378	\$ 15,394
Total Dislocation Allowances	\$ 54,097.80	\$ 38,265.60	\$ 92,363.40
Domestic Travel (work related)	\$ 6,000	\$ 6,000	\$ 12,000
International Travel (work related)	\$ 11,000	\$ 11,000	\$ 22,000
Total Travel	\$ 17,000.00	\$ 17,000.00	\$ 34,000.00
Office Support*			
Total Office Support			
Equipment*			
Total Office Equipment			
Other Costs*			
Total Other Costs			
Total	\$ 301,917.52	\$ 112,970.53	\$ 414,888.06
ETD Estimate			
	FY 16	FY 17	Total
Salary	\$ 174,996	\$ 43,749	\$ 218,745
Fringe Benefits Rate	29%	29%	
Benefits	\$ 50,749	\$ 12,687	\$ 63,436
Total Salary and Benefits	\$ 225,744.84	\$ 56,436.21	\$ 282,181
Relocation Allowances	\$ 3,500.00	\$ 3,500	\$ 7,000
Relocation Tax Allowance	\$ 700.00	\$ 700	\$ 1,400
Per diem Allowances	\$ 57,034	\$ 12,392	\$ 69,427
Tax Allowance (if applicable)	\$ 19,962	\$ 4,337	\$ 24,299
Home Trips (if applicable)	\$ 7,200.00	\$ 2,400.00	\$ 9,600
Total Dislocation Allowances	\$ 88,396.10	\$ 23,329.67	\$ 111,725.78
Domestic Travel (work related)	\$ 6,000	\$ 6,000	\$ 12,000
International Travel (work related)	\$ 11,000	\$ 11,000	\$ 22,000
Total Travel	\$ 17,000.00	\$ 17,000.00	\$ 34,000.00
Office Support*			
Total Office Support			
Equipment*			
Total Office Equipment			
Other Costs*			
Total Other Costs			
Total	\$ 331,140.94	\$ 96,765.88	\$ 427,906.83

*: Provide an explanation for any costs included
 Relocation Allowance upto 1,000 Lbs ETD and
 Applicable only to ETD option if choosen

TCS V. ETD			
	FY16	FY17	Total
TCS	\$ 301,917.52	\$ 112,970.53	\$ 414,888.06
ETD	\$ 331,140.94	\$ 96,765.88	\$ 427,906.83
Difference*	\$ (29,223.42)	\$ 16,204.65	\$ (13,018.77)
Most Beneficial	TCS	ETD	TCS

*If Green TCS= more beneficial
 *If Yellow ETD= more beneficial

Attachment 7
AT7-2

NAP 540.2
11-22-16

Employee: John Doe
Lab/Plant XYZ

Start Date: 1/1/2016
Original Start Date: N/A

TEMPORARY CHANGE OF STATION OPTION

Relocation Costs to DC			
	Authoriz ed cost per lbs	# of lbs	Total Cost
Relocation To DC	1.50	18,000	\$27,000

Relocation Allowances FY16

Househunting Trip			
Trip: 5 days, 4 nights			
Airfare ABQ to DC (roundtrip x 2)			\$ 1,600
Transportation to/from airport			\$ 100
Meals: Employee	64/day		\$ 320
Meals: Spouse	48/day		\$ 240
Lodging:	209/day		\$ 836
Metro:	20/day		\$ 100
Total Househunting Trip:			\$ 3,196

Shipment of auto			
Shipment of auto	2 cars		\$ 4,000

EnRoute Allowances			
3 day trip			
Enroute meals - employee	64/day		\$ 192
Enroute meals - spouse	48/day		\$ 144
Enroute meals - 2 children	64/day		\$ 102
Lodging	150/day		\$ 450
Total			\$ 888

Temporary Quarters Subsistence Expense			
30 TQSE			
Employee	39/day		\$ 1,080
Spouse	29.25/day		\$ 878
Children	39/day		\$ 1,170
Lodging	109/day		\$ 3,270
Total			\$ 6,398

Property Management Services			
12 Months			
Cost per month	300		\$ 3,600
Total			\$ 3,600

Relocation Costs Home			
	Authoriz ed cost per lbs	# of lbs	Total Cost
Relocation Home	1.50	18,000	\$ 27,000

Relocation Allowances FY17

Househunting Trip is typically not authorized on the return trip home

Househunting Trip			
Trip:			
Airfare			
Transportation to/from airport			
Meals: Employee			
Meals: Spouse			
Lodging:			
Metro:			
Total Househunting Trip:			\$ -

Shipment of auto			
Shipment of auto	2 cars		\$ 4,000

EnRoute Allowances			
3 day trip			
Enroute meals - employee	64/day		\$ 192
Enroute meals - spouse	48/day		\$ 144
Enroute meals - 2 children	64/day		\$ 102
Lodging	150/day		\$ 450
Total			\$ 888

Work Related Travel Costs Domestic Trips		
Location	Fiscal Year	Cost
Albuquerque	2016	\$ 1,500
Las Vegas	2016	\$ 2,000
California	2016	\$ 2,500
Albuquerque	2017	\$ 1,500
Las Vegas	2017	\$ 2,000
California	2017	\$ 2,500
Total		\$ 12,000

Work Related Travel Costs Domestic Trips by year		
Fiscal Year		Cost
2016		\$ 6,000
2017		\$ 6,000
Total		\$ 12,000

Work Related Travel Costs		
Location	Fiscal Year	Cost
England	2016	\$ 5,000
Russia	2016	\$ 6,000
Russia	2017	\$ 5,000
France	2017	\$ 6,000
Total		\$ 22,000

Work Related Travel Costs International Trips by year		
Fiscal Year		Cost
2016		\$ 11,000
2017		\$ 11,000
Total		\$ 22,000

Total Cost for TCS Allowances: \$ 76,970

Costs by FY

2016 \$ 45,082
2017 \$ 31,888

Employee: John Doe
Lab/Plant: XYZ

Start Date: 1/1/2016
Original Start Date: NA

EXTENDED TRAVEL DUTY OPTION

Per diem Allowance Worksheet			
Month/Year	Per diem allowance	Days	Total
FY16			
January	\$ 252.00	31	\$ 7,812
February	\$ 252.00	28	\$ 7,056
March	\$ 252.00	1	\$ 252
March	\$ 138.60	30	\$ 4,158
April	\$ 138.60	30	\$ 4,158
May	\$ 138.60	31	\$ 4,297
June	\$ 138.60	30	\$ 4,158
July	\$ 138.60	31	\$ 4,297
August	\$ 138.60	31	\$ 4,297
September	\$ 138.60	30	\$ 4,158
FY16 Total			\$44,642
FY17			
October	\$ 138.60	31	\$ 139
November	\$ 138.60	30	\$ 4,158
December	\$ 145.75	1	\$ 146
	\$ 265.00	30	\$ 7,950
FY17 Total			\$12,392
Total for 12 months			365 \$57,034

Relocation Costs to DC			
	Authorized cost per lbs	# of lbs	Total Cost
Relocation To DC	1.50	1,000	\$ 1,500
Shipment of auto			
Shipment of auto	1 car		\$ 2,000

Relocation Costs Home			
	Authorized cost per lbs	# of lbs	Total Cost
Relocation Home	1.50	1,000	\$ 1,500
Shipment of auto			
Shipment of auto	1 car		\$ 2,000

Work Related Travel Costs Domestic Trips		
Location	Fiscal Year	Cost
Albuquerque	2016	\$ 1,500
Las Vegas	2016	\$ 2,000
California	2016	\$ 2,500
Albuquerque	2017	\$ 1,500
Las Vegas	2017	\$ 2,000
California	2017	\$ 2,500
Total		\$12,000

Work Related Travel Costs Domestic Trips by year		
Fiscal Year		Cost
2016		\$ 6,000
2017		\$ 6,000
Total		\$12,000

Work Related Travel Costs International Trips		
Location	Fiscal Year	Cost
England	2016	\$ 5,000
Russia	2016	\$ 6,000
Russia	2017	\$ 5,000
France	2017	\$ 6,000
Total		\$22,000

Work Related Travel Costs International Trips by year		
Fiscal Year		Cost
2016		\$11,000
2017		\$11,000
Total		\$22,000

Full Per diem Rates by Month			
Month	Lodging	Meals	Total
January	\$ 184	\$ 71	\$ 255
February	\$ 184	\$ 71	\$ 255
March	\$ 224	\$ 71	\$ 295
April	\$ 224	\$ 71	\$ 295
May	\$ 224	\$ 71	\$ 295
June	\$ 224	\$ 71	\$ 295
July	\$ 167	\$ 71	\$ 238
August	\$ 167	\$ 71	\$ 238
September	\$ 219	\$ 71	\$ 290
October	\$ 219	\$ 71	\$ 290
November	\$ 184	\$ 71	\$ 255
December	\$ 184	\$ 71	\$ 255

Home Trips		
Location	Fiscal Year	Cost
Home	2016	\$ 7,200
Home	2017	\$ 2,400

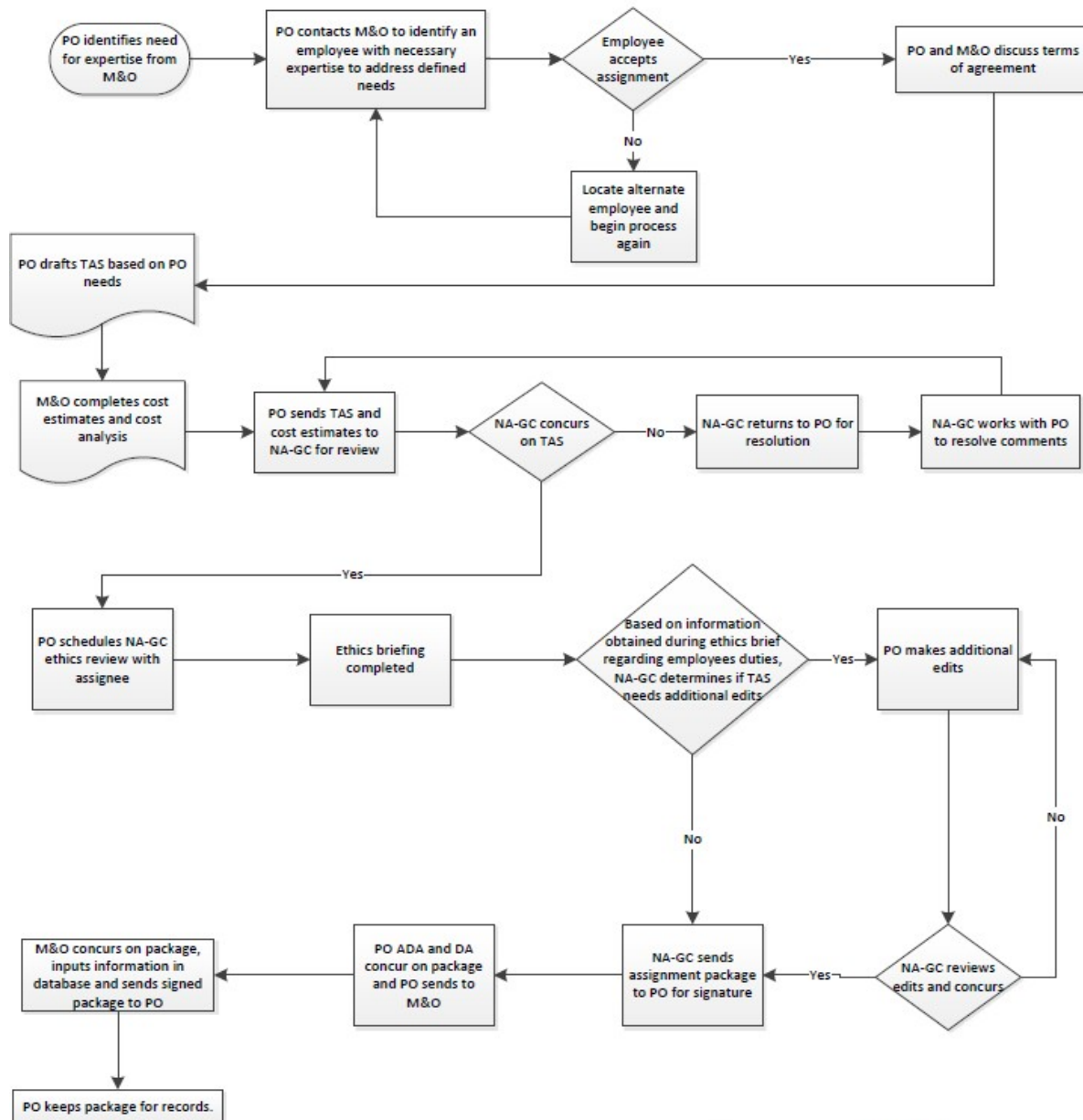
Total Cost for ETD Allowances: \$ 73,634

Costs by FY
2016 \$ 55,342
2017 \$ 18,292

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ATTACHMENT 8: NNSA APPROVAL PROCESS FOR NEW M&O ASSIGNMENTS TO NNSA

NNSA M&O Assignments Flow Chart for New Assignments



LEGEND

ADA-	Associate Deputy Administrator
DA -	Deputy Administrator
NA-GC-	NNSA Office of the General Counsel
M&O-	Management and Operating
PO-	Program Office
TAS-	Task Assignment Statement

Process for *New* M&O Assignments to NNSA

The process is as follows:

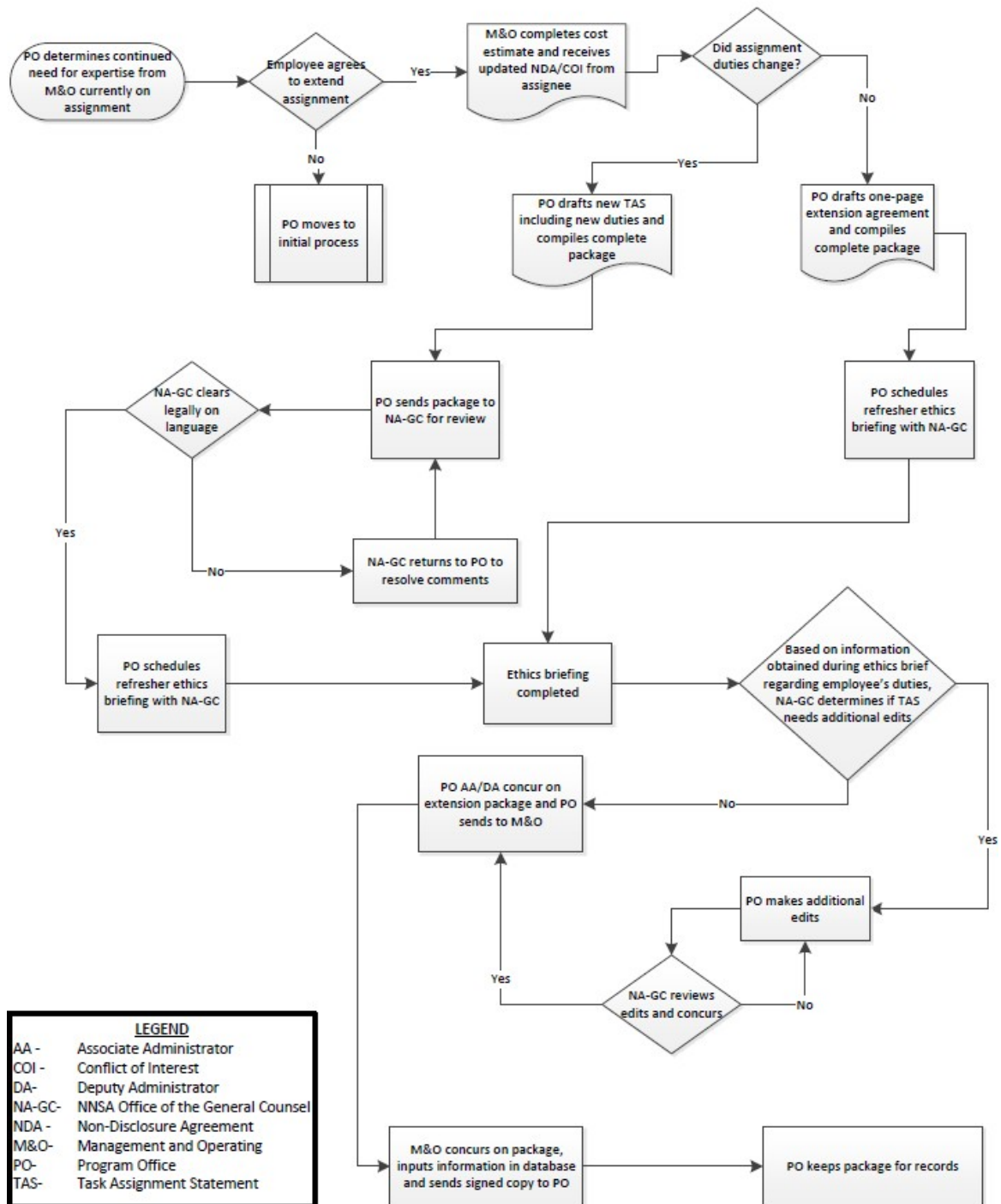
- 1) The PO identifies a need and reaches out to the M&O contractors to find an employee with the necessary expertise to fill the need.
- 2) Once an M&O contractor employee is selected, the HQ Program Office develops a draft Task Assignment Statement (TAS) Agreement using the format in Attachment 4.
- 3) The PO must request the M&O contractor complete a cost estimate for the proposed assignment duration using the format in Attachment 7, and ensure the assignee completes the Non-Disclosure and Conflict of Interest Agreement (NDA/COI) as described in Attachment 6.
- 4) The PO compiles all the necessary documents including, TAS, ETD and TCS Cost Estimates, and NDA/COI to prepare to send to NA-GC for review. If an exception is requested, the exception process as described in Attachment 14 must be followed at this time. If an exception is not requested, the completed assignment package must be routed to NA-GC for review.
- 5) NA-GC reviews the proposed TAS agreement including supporting documentation and will determine whether revisions are necessary or whether the assignee is prepared for an ethics briefing.
- 6) If revisions are necessary, NA-GC will work with the PO to address their comments and/or make revisions. If necessary, the PO and NA-GC will develop a mitigation strategy. Once NA-GC ensures the TAS is complete, the PO may contact the M&O contractor to schedule an ethics interview for the assignee and NA-GC.
- 7) The assignees will complete an ethics briefing with NA-GC.
- 8) NA-GC will inform the PO when the proposed assignee has completed the ethics brief. If required, updates to the TAS will be made based on the information obtained during the ethics briefing; otherwise, the TAS agreement may proceed for signature.
- 9) The PO requesting the assignee will work with the HQ Program Associate Deputy Administrator or designee to concur on the TAS agreement and provide the completed package to the cognizant Program Deputy Administrator for signature.
- 10) The cognizant Program Deputy Administrator or designee will sign the TAS agreement and send the completed package back to the PO requesting the assignee to forward to the M&O contractor for approval.

- 11) The M&O contractor representative who is authorized to approve the TAS will sign and transmit the executed TAS agreement to the PO.
- 12) The PO will keep the official records of the complete task assignment package.

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ATTACHMENT 9: NNSA APPROVAL PROCESS FOR EXTENSIONS OF M&O ASSIGNMENTS TO NNSA

NNSA M&O Assignments Flow Chart for Extensions



Process for *Extensions* of M&O Assignments to NNSA

The process is as follows:

- 1) Once a PO decides that there is a continued need for the assignee, the PO must discuss a possible extension with the M&O contractor to ensure that continuation of the assignment is possible. In addition, the PO must determine if the assignee will be doing the same work or if the assignee will be performing additional duties.
- 2) The PO must request an updated cost estimate sheet (Attachment 7) for the employee, and a newly signed NDA/COI form (Attachment 6) from the M&O contractor. The cost estimate sheet should reflect the length of time of the requested extension using the method of allowances (ETD/TCS) as decided in the initial assignment agreement.
- 3) If it is determined the assignee will be doing the same duties as previously approved:
 - (a) PO must complete the M&O Assignment to NNSA Assignment Extension request (Attachment 5);
 - (b) PO compiles all the necessary documents, approved TAS agreement from initial assignment, extension request, updated cost estimate, new NDA/COI, and prepares submission to NA-GC for review; and
 - (c) Assignee will complete an ethics briefing with NA-GC.
- 4) If it is determined the assignee will be doing additional/different duties than previously approved:
 - (a) PO must complete a new M&O Assignment to NNSA Task Assignment Statement Agreement (Attachment 4);
 - (b) PO compiles all the necessary documents, revised/new TAS, updated cost estimate, new NDA/COI and prepare to send to NNSA GC for review;
 - (c) NA-GC reviews the assignment package including supporting documentation and will determine whether revisions are necessary or whether the assignee is prepared for an Ethics Briefing;
 - (d) If revisions are necessary, NA-GC will work with the PO to address NA-GC's comments and/or make revisions. Once NA-GC ensures the extension documentation is complete, the PO may contact the M&O contractor to schedule an ethics interview for the assignee and NA-GC; and
 - (e) Assignee completes an ethics briefing with NNSA GC.

- 5) NA-GC informs the PO when the proposed assignee has completed the ethics brief. If required, updates to the TAS will be made based on the information obtained during the ethics briefing; otherwise, the TAS agreement may proceed for signature.
- 6) The PO requesting the assignee will work with the HQ Program Associate Deputy Administrator or designee to concur on the TAS agreement, and will then provide the completed package to the cognizant Program Deputy Administrator for signature.
- 7) The cognizant Program Deputy Administrator or designee signs the TAS agreement and sends the completed package back to the PO requesting the assignee forward it to the M&O contractor representative for approval.
- 8) The M&O contractor representative authorized to approve the TAS signs and transmits the executed TAS agreement to the PO.
- 9) The PO keeps the official records of the complete task assignment package.

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ATTACHMENT 10: NNSA M&O ADMINISTRATIVE STAFF OFFICE STAFFING PLANS

**NNSA STAFFING PLAN
FOR WASHINGTON, DC STAFF OFFICES
FY 20XX – 20XX Two year Staffing Plan Request/Approval**

NNSA M&O contractor: _____ Phone Number: _____
(enter name of M&O contractor) (enter phone number for M&O POC)

Address: _____ (enter physical address of M&O location)

Washington, DC Office: _____ (enter physical address of Washington D.C. Staff Office)

This allocation request is to: (indicate below if the request is to establish a new staff office, or continue the currently staff office by choosing “NO” or “YES” for the questions below)

Establish a new Office within the Washington, DC, area. NO
Continue an existing Office within the Washington, DC, area. YES

NNSA Field Office: _____ (enter name of NNSA Field Office)

Field Office Manager: _____ (enter name of NNSA Field Office Manager)

Address: _____ (enter physical address of the NNSA Field Office)

Current Year Allocation: _____ (enter the current number of approved slots for Staff Office employees)

Current Number of Active Assignments: _____ (enter the current number of occupied slots for Staff Office employees)

Proposed Number of Assignments: _____ (enter the number of proposed slots requested/needed for the Staff Office for the upcoming and future year, if different)

Site Identify M&O contractor						
Administrative Staff Member	Duration of Assignment	Function	Total Cost FYXX (Year 1)	Total Cost FYXX (Year 2)	Total Cost FYXX (Current Year)	Accounts Charged (%)
Name of Staff Office employee	Start Date to Anticipated End Date	Statement of Necessity for Presence in DC Office	Cost of employee Year 1 of plan	Cost of employee Year 2 of plan	Cost of employee for current year	Indicate of the cost is split between NNSA and non-NNSA funds (if applicable). If no split, should reflect 100%

Ratio of Administrative to Technical Staff

Site Name and Number	Total Administrative (Admin.) Staff* (FTEs)	Total Professional/Technical (Tech.) Staff (FTEs)	Ratio (Admin: Tech)
Provide name of M&O and number of slots requested in the current Staff Office plan submission	Indicate the number of administrative FTEs in the Staff Office	Indicate the number of technical FTEs in the Washington D.C. area Staff Office employees are providing support to	Provide the ratio of Administrative Staff Office personnel to the number of FTE's in the Washington D.C. area

Anticipated events during FYXX -FYXX that may affect the number of positions, costs, or duration of assignments reflected in the table above (e.g., expansion of a program; discontinuance of support services provided by home site, etc.): _____

Provide justification for the continued need of the Staff Office and the number staff office employees, especially if there is a change in the number requested: _____

Itemized Costs for Maintaining Offices*

Site Name	Estimated FYXX	Estimated FYXX	Previous FYXX
Washington, DC, Staff Office	Estimated cost of Staff Office for Year 1 of Plan	Estimated cost of Staff Office for Year 2 of Plan	Cost of Staff Office for previous year

Estimated FYXX (YR 1 Costs)		Estimated FYXX (YR 2 Costs)		Previous FYXX Estimated Costs	
	\$		\$		\$
Lease		Lease		Lease	
Office Equipment/Supplies		Office Equipment/Supplies		Office Equipment/Supplies	
Office Services (contracts, telephone, network)		Office Services (contracts, telephone, network)		Office Services (contracts, telephone, network)	
Travel		Travel		Travel	
Insert any other office-related items not listed but associated with the staff office as appropriate.					
Total Office Cost	\$	Total Office Cost	\$	Total Office Cost	\$
Insert the staff office employees and their cost, anticipated per year.					
Total Labor Cost		Total Labor Cost		Total Labor Cost	
Total DOE Cost (including labor)	\$	Total DOE Cost (including labor)	\$	Total DOE Cost (including labor)	\$

Justify the Staff Office costs provided above. Include any explanation for discrepancies from the prior year. This section should contain significant detail. _____

This plan accurately reflects the administrative support anticipated by XXXXX as necessary for the M&O contractor to meet FYXX-XX requirements in support of DOE/NNSA's mission.

Name of Field Office Contracting Officer
XXX Field Office

Name of M&O Representative Submitting
Name of M&O Location

Name, Head of Contracting Activity
NNSA Office of Acquisition and Project Management (APM)

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**ATTACHMENT 11: M&O IPA ASSIGNMENT AGREEMENT FOR
NON-DOE/NNSA IPA'S**

M&O IPA Assignment Agreement for Non-DOE/NNSA IPA Assignments

1. Name, current job title, salary, duty station, and employer.
2. Period covered by the assignment.
3. Previous assignment history.
4. Parties to the agreement (Federal and non-Federal organizations).
5. Assignment location.
6. Position title and duties.
7. Assignment goals (include how goals will be achieved).
8. Benefits to each organization.
9. Cost sharing arrangement (based on the above benefits).
10. How increased knowledge, skills, and abilities gained by the employee during the assignment will be used at the completion of the assignment with the employer.
11. Acknowledgement that the employer has informed the employee of any potential conflict of interest.
12. Decisions of the Federal agency and non-Federal agency concerning the following for the assignee:
 - a) Salary,
 - b) Supervision,
 - c) Payment of business travel and transportation expenses,
 - d) Payment of limited relocation allowances OR reduced per diem allowances,
 - e) Supplemental pay (if applicable),
 - f) Entitlement to leave and holidays,
 - g) Performance reviews, and
 - h) Provisions for reimbursement and the method of reimbursement.
13. Arrangements for maintaining leave records.
14. Employee benefits that will be retained.
15. Plans for reintegration of employee to employer.
16. Plan for M&O to keep assignee aware of any major changes at site while on assignment.

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ATTACHMENT 12: OPM OPTIONAL FORM (OF) 69

For the most current version of this form, please visit <https://www.opm.gov/forms/Optional-forms/>.

OF 69 # (REV. 2-89)

U.S. Office of Personnel Management

FPM Chapter 334

Assignment Agreement

Title IV of the Intergovernmental Personnel Act of 1970 (5 U.S.C. 3371-3376)

INSTRUCTIONS

This agreement constitutes the written record of the obligations and responsibilities of the parties to a temporary assignment arranged under the provisions of the Intergovernmental Personnel Act of 1970.

The term "State or local government," when appearing in this form, also refers to an institution of higher education, and Indian tribal government, and any other eligible organization.

Copies of the completed and signed agreement should be retained by each signatory.

Within 30 days of the effective date of the assignment, two copies of this form must be sent to:

U.S. Office of Personnel Management
Personnel Mobility Program
Staffing Operations Division/CEG
1900 E street, NW
Washington, D.C. 20415

Procedural questions on completing the assignment agreement form or on other aspects relating to the mobility program should be addressed to either mobility program coordinators in each Federal agency or to the staff of the Personnel Mobility Program in the U.S. Office of Personnel Management.

PART 1 - NATURE OF THE ASSIGNMENT AGREEMENT

1. Check Appropriate Box

☐

New Agreement

☐

Modification

☐

Extension

PART 2 - INFORMATION ON PARTICIPATING EMPLOYEE

2. Name (Last, First, Middle)

3. Social Security Number

4. Home Address (Street, City, State, Zip Code)

5.- A. Have you ever been on a mobility assignment?

☐

YES

☐

NO

5.- B. If "YES", date of each assignment (Month and Year)

From

To

PART 3 - PARTIES TO THE AGREEMENT

6. Federal Agency (List office, bureau or organizational unit which is party to the agreement)

7. State or Local Government (Identify the governmental agency)

8. Is assignment being made through a faculty fellows program?
If "YES", give name of the program.

☐

YES

☐

NO

PART 4 - POSITION DATA

A - Position Currently Held

9. Employment Office Name and Address (Street, City, State and ZIP Code)

10. Employee's Position Title

11. Office Telephone Number
(Include the Area Code)

12. Immediate Supervisor (Name and Title)

B - Type of Current Appointment

13. Federal Employees (Check appropriate box.)

☐

Career Competitive

Grade Level

☐

Other (Specify):

14. State and Local Employees

State or Local Annual Salary

Original Date Employed by the
State or Local Government (Month,
Day, Year)

C - Position To Which Assignment Will Be Made

15. Employment Office Name and Address (Street, City, State and ZIP Code)

16. Assignee's Position Title

17. Office Telephone Number
(Include the Area Code)

18. Immediate supervisor (Name and Title)

PART 5 - TYPE OF ASSIGNMENT

19. Check Appropriate Boxes

- | | |
|---|---------------------------------------|
| ☐ On detail from a Federal agency | ☐ Full Time |
| ☐ On leave c from a Federal agency | ☐ Part Time |
| ☐ On detail to a Federal agency | ☐ Intermittent |
| ☐ On appointment in a Federal agency | |

20. Period of Assignment (Month, Day, Year)
From _____ To _____

PART 6 - REASON FOR MOBILITY ASSIGNMENT

21. Indicate the reasons for the mobility assignment and discuss how the work will benefit the participating governments. In addition, indicate how the employee will be utilized at the completion of this assignment.

PART 7 - POSITION DESCRIPTION

22. List the major duties and responsibilities to be performed while on the mobility assignment.

PART 8 - EMPLOYEE BENEFITS

23. Rate of Basic Pay During Assignment

24. Special Pay Conditions (Indicate any conditions that could increase the assigned employee's compensation during the assignment period)

25. Leave Provisions (Indicate the annual and sick leave benefits for which employee is eligible. Specify the procedures for reporting, requesting and recording such leave.)

PART 9 - FISCAL OBLIGATIONS

Identify, where appropriate, the office to which invoices and time and attendance records should be sent.

26. Federal Agency Obligations (If paying more than 50 percent of a Federal employee's salary beyond a 6-month period, specify rationale for cost-sharing decision.)

27. State or Local Government agency Obligations

PART 10 - CONFLICTS OF INTEREST AND EMPLOYEE CONDUCT

☐ 28. Applicable Federal, State or local conflict-of-interest laws have been reviewed with the employee to assure that conflict-of-interest situations do not inadvertently arise during this assignment.

☐ 29. The employee has been notified of laws, rules and regulations, and policies on employee conduct which apply to him/her while on this assignment.

PART 11 - OPTIONS

30. Indicate coverage "N/A", if not applicable.

A. Federal Employees Group Life Insurance

☐ Covered ☐ N/A

B. Federal Civil Service Retirement system or federal Employees Retirement System

☐ Covered ☐ N/A

C. Federal employee Health Benefits

☐ Covered ☐ N/A

31. State or Local Agency Benefits (Indicate all State employee benefits that will be related by the State or local agency employee being assigned to a Federal agency. Also include a statement certifying coverage in all State and local employee benefit programs that are elected by Federal employee on leave without pay from the Federal agency to a State or local agency.)

32. Other Benefits (Indicate any other employee benefits to be made part of this agreement)

PART 12 - TRAVEL AND TRANSPORTATION

33. Indicate: (1) Whether the Federal agency or State or local agency will pay travel and transportation expenses to, from, and during the assignment as specified in Chapter 3344 of the Federal Personnel Manual, and (2) which travel and relocation expenses will be included.

PART 13 - APPLICABILITY OF RULES, REGULATIONS AND POLICIES

34. Check Appropriate Boxes.

- | | |
|---|--|
| ☐ A. The rules and policies governing the internal operation and management of the agency to which my assignment is made under this agreement will be observed by me. | ☐ D. I have been informed of applicable provisions should my position with my permanent employer become subject to a reduction-in-force procedure. |
| ☐ B. I have been informed that my assignment may be terminated at any time at the option of the Federal agency or the State or local government. | ☐ E. I agree to serve in the Civil Service upon the completion of my assignment for a period equal to that of my assignment. Should I fail to serve the required time, I have been informed that I will be liable to the United States for all expenses (except salary) of my assignment. (For Federal Employees only). |
| ☐ C. I have been informed that any travel and transportation expenses covered from Federal agency appropriations may be recoverable as a debt due the United States, if I do not serve until the completion of my assignment (unless terminated earlier by either employer) or one year, whichever is shorter. | |

PART 14 - CERTIFICATION OF ASSIGNED EMPLOYEE

In signing this agreement, I certify that I understand the terms of this agreement and agree to the rules, regulations and policies as indicated in Part 13 above.

35. Location of Assignment (*Name of Organization*)

36. Date (*Month, Day, Year*)

From To

37. Signature of Assigned Employee

38. Date of Signature (*Month, Day, Year*)

PART 15 - CERTIFICATION OF APPROVING OFFICIALS

In signing this agreement, we certify that;

- the description of duties and responsibilities is current and fully and accurately describes those of the assigned employee;
- this assignment is being entered in to to serve a sound, mutual public purpose and not solely for the employee's benefit;
- at the completion of the assignment, the participating employee will be returned to the position he or she occupied at the time this agreement was entered into or a position of like seniority, status pay.

State or Local Government Agency

Federal Agency

39. Signature of Authorizing Officer

40. Signature of Authorizing Officer

41. Date of Signature (*Month, Day, Year*)

42. Date of Signature (*Month, Day, Year*)

43. Typed Name and Title

44. Typed Name and Title

PRIVACY ACT STATEMENT

Sections 3373 and 3374, Assignment of Employees To or From State or Local Governments, of Title 5, U.S. Code, authorizes collection of this information. The data will be used primarily to formally document and record your temporary assignment to or from a State or local government, institution of higher education, Indian tribal government, or other eligible organization. This information may also be used as the legal basis for personal and financial transactions, to identify you when requesting information about you, e.g., from prior employers, educational institutions, or law agencies, or by State, local, or Federal income taxing agencies.

Solicitation of your Social Security Number (SSN) is authorized by Executive Order 9397, which permitted by use of the SSN as an identifier of individual records maintained by Federal agencies. Furnishing your SSN or any other data requested is voluntary. However, failure to prove any of the requested information may result in your being ineligible for participation in the Intergovernmental Assignment Program.

ATTACHMENT 13: M&O IPA COST ESTIMATE

M&O IPA Cost Breakdown Sheet - Total Cost					
By Fiscal Year					
Name:					
Home Site:					
Start Date					
Original Start Date:					
Cost Sharing Arrangement Explanation: There will be a 50/50 cost sharing arrangement between NNSA and Other Agency for salary, fringe benefits and assignment allowances. NNSA will pay for all travel expenses.					
TCS Estimate					
	FY 16	FY 17	FY 18	FY 19	Total
Salary	\$ 131,247	\$ 174,996	\$ 174,996	\$ 43,749	\$ 524,988
10% Salary Increase(if Appropriate)	\$ 13,125	\$ 17,500	\$ 17,500	\$ 4,375	\$ 52,499
Fringe Benefits Rate	27%	29%	29%	29%	
Benefits	\$ 38,980.36	\$ 55,823.72	\$ 55,823.72	\$ 13,955.93	\$ 164,584
Total Salary and Benefits	\$ 170,227.36	\$ 230,819.72	\$ 230,819.72	\$ 57,704.93	\$ 689,572
Relocation Allowances					
Relocation Allowances	\$ 45,082			\$ 35,084	\$ 80,166
Relocation Tax Allowance	\$ 9,016			\$ 7,017	\$ 16,033
Total Dislocation Allowances	\$ 54,097.80	\$ -	\$ -	\$ 42,100.80	\$ 96,198.60
Domestic Travel (work related)					
Domestic Travel (work related)	\$ 3,500	\$ 2,500	\$ 3,500	\$ 2,500	\$ 12,000
International Travel (work related)	\$ 5,000	\$ 6,000	\$ 5,000	\$ 6,000	\$ 22,000
Total Travel	\$ 8,500.00	\$ 8,500.00	\$ 8,500.00	\$ 8,500.00	\$ 34,000.00
Office Support*					
Total Office Support					
Equipment*					
Total Office Equipment					
Other Costs*					
Total Other Costs					
Total	\$ 232,825.16	\$ 239,319.72	\$ 239,319.72	\$ 108,305.73	\$ 819,770.34
ETD Estimate					
	FY 16	FY 17	FY 18	FY 19	Total
Salary	\$ 131,247	\$ 174,996	\$ 174,996	\$ 43,749	\$ 524,988
Fringe Benefits Rate	27%	29%	29%	29%	
Benefits	\$ 35,437	\$ 50,749	\$ 50,749	\$ 12,687	\$ 149,622
Total Salary and Benefits	\$ 166,683.69	\$ 225,744.84	\$ 225,744.84	\$ 56,436.21	\$ 674,610
Relocation Allowances					
Relocation Allowances	\$ 3,500			\$ 3,500	\$ 7,000
Relocation Tax Allowance	\$ 700			\$ 700	\$ 1,400
Per diem Allowances					
Per diem Allowances	\$ 44,642	\$ 57,034	\$ 57,034	\$ 12,392	\$ 101,676
Tax Allowance (if applicable)	\$ 15,625	\$ 19,962	\$ 19,962	\$ 4,337	\$ 59,886
Total Dislocation Allowances	\$ 64,466.43	\$ 76,996.10	\$ 76,996.10	\$ 20,929.67	\$ 169,961.81
Domestic Travel (work related)					
Domestic Travel (work related)	\$ 3,500	\$ 2,500	\$ 3,500	\$ 2,500	\$ 12,000
International Travel (work related)	\$ 5,000	\$ 6,000	\$ 5,000	\$ 6,000	\$ 22,000
Home Trips (if applicable)	\$ 7,200.00	\$ 2,400.00			\$ 9,600
Total Travel	\$ 15,700.00	\$ 10,900.00	\$ 8,500.00	\$ 8,500.00	\$ 43,600.00
Office Support*					
Total Office Support					
Equipment*					
Total Office Equipment					
Other Costs*					
Total Other Costs					
Total	\$ 246,850.12	\$ 313,640.94	\$ 311,240.94	\$ 85,865.88	\$ 888,171.39

*: Provide an explanation for any costs included
Relocation Allowance up to 1,000 Lbs. ETD
and Applicable only to ETD option if chosen

TCS V. ETD					
	FY 16	FY 17	FY 18	FY 19	Total
TCS	\$ 232,825.16	\$ 239,319.72	\$ 239,319.72	\$ 108,305.73	\$ 819,770.34
ETD	\$ 246,850.12	\$ 313,640.94	\$ 311,240.94	\$ 85,865.88	\$ 888,171.39
Difference*	\$ (14,024.96)	\$ (74,321.22)	\$ (71,921.22)	\$ 22,439.85	\$ (68,401.05)
Most Beneficial	TCS	TCS	TCS	ETD	TCS

*If Green TCS= more beneficial
*If Yellow ETD= more beneficial

M&O IPA Cost Breakdown Sheet - NNSA Cost					
By Fiscal Year					
Name:					
Home Site:					
Start Date					
Original Start Date:					
TCS Estimate					
	FY 16	FY 17	FY 18	FY 19	Total
Salary	\$ 65,624	\$ 87,498	\$ 87,498	\$ 21,875	\$ 262,494
10% Salary Increase(If Appropriate)	\$ 3,281	\$ 4,375	\$ 4,375	\$ 1,094	\$ 13,125
Fringe Benefits Rate	27%	29%	29%	29%	
Benefits	\$ 18,604.26	\$ 26,643.14	\$ 26,643.14	\$ 6,660.79	\$ 78,551
Total Salary and Benefits	\$ 84,227.76	\$ 114,141.14	\$ 114,141.14	\$ 28,535.29	\$ 341,045
Relocation Allowances	\$ 22,541			\$ 17,542	\$ 40,083
Relocation Tax Allowance	\$ 2,254			\$ 3,508	\$ 5,762
Total Dislocation Allowances	\$ 24,794.83	\$ -	\$ -	\$ 21,050.40	\$ 45,845.23
Domestic Travel (work related)	\$ 3,500	\$ 2,500	\$ 3,500	\$ 2,500	\$ 12,000
International Travel (work related)	\$ 5,000	\$ 6,000	\$ 5,000	\$ 6,000	\$ 22,000
Total Travel	\$ 8,500.00	\$ 8,500.00	\$ 8,500.00	\$ 8,500.00	\$ 34,000.00
Office Support*					
Total Office Support					
Equipment*					
Total Office Equipment					
Other Costs*					
Total Other Costs					
Total	\$ 117,522.59	\$ 122,641.14	\$ 122,641.14	\$ 58,085.69	\$420,890.55
ETD Estimate					
	FY 16	FY 17	FY 18	FY 19	Total
Salary	\$ 65,624	\$ 87,498	\$ 87,498	\$ 21,875	\$ 262,494
Fringe Benefits Rate	27%	29%	29%	29%	
Benefits	\$ 17,718	\$ 25,374	\$ 25,374	\$ 6,344	\$ 74,811
Total Salary and Benefits	\$ 83,341.85	\$ 112,872.42	\$ 112,872.42	\$ 28,218.11	\$ 337,305
Relocation Allowances	\$ 1,750			\$ 1,750	\$ 3,500
Relocation Tax Allowance	\$ 175			\$ 175	\$ 350
Per diem Allowances	\$ 22,321	\$ 28,517	\$ 28,517	\$ 6,196	\$ 50,838
Tax Allowance (if applicable)	\$ 3,906	\$ 4,990	\$ 4,990	\$ 1,084	\$ 14,971
Total Dislocation Allowances	\$ 28,152.06	\$ 33,507.56	\$ 33,507.56	\$ 9,205.51	\$ 69,659.44
Domestic Travel (work related)	\$ 3,500	\$ 2,500	\$ 3,500	\$ 2,500	\$ 12,000
International Travel (work related)	\$ 5,000	\$ 6,000	\$ 5,000	\$ 6,000	\$ 22,000
Home Trips (if applicable)	\$ 7,200.00	\$ 2,400.00			\$ 9,600
Total Travel	\$ 15,700.00	\$ 10,900.00	\$ 8,500.00	\$ 8,500.00	\$ 43,600.00
Office Support*					
Total Office Support					
Equipment*					
Total Office Equipment					
Other Costs*					
Total Other Costs					
Total	\$ 127,193.90	\$ 157,279.98	\$ 154,879.98	\$ 45,923.61	\$450,564.23

*: Provide an explanation for any costs included
 Relocation Allowance up to 1,000 lbs. ETD and

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M&O IPA Cost Breakdown Sheet - Other Agency Cost					
By Fiscal Year					
Name:					
Home Site:					
Start Date					
Original Start Date:					
TCS Estimate					
	FY 16	FY 17	FY 18	FY 19	Total
Salary	\$ 65,624	\$ 87,498	\$ 87,498	\$ 21,875	\$ 262,494
10% Salary Increase(If Appropriate)	\$ 3,281	\$ 4,375	\$ 4,375	\$ 1,094	\$ 13,125
Fringe Benefits Rate	27%	29%	29%	29%	
Benefits	\$ 18,604.26	\$ 26,643.14	\$ 26,643.14	\$ 6,660.79	\$ 78,551
Total Salary and Benefits	\$ 84,227.76	\$ 114,141.14	\$ 114,141.14	\$ 28,535.29	\$ 341,045
Relocation Allowances	\$ 22,541			\$ 17,542	\$ 40,083
Relocation Tax Allowance	\$ 2,254			\$ 3,508	\$ 5,762
Total Dislocation Allowances	\$ 24,794.83	\$ -	\$ -	\$ 21,050.40	\$ 45,845.23
Domestic Travel (work related)					\$ -
International Travel (work related)					\$ -
Total Travel	\$ -	\$ -	\$ -	\$ -	\$ -
Office Support*					
Total Office Support					
Equipment*					
Total Office Equipment					
Other Costs*					
Total Other Costs					
Total	\$ 109,022.59	\$ 114,141.14	\$ 114,141.14	\$ 49,585.69	\$386,890.55
ETD Estimate					
	FY 16	FY 17	FY 18	FY 19	Total
Salary	\$ 65,624	\$ 87,498	\$ 87,498	\$ 21,875	\$ 262,494
Fringe Benefits Rate	27%	29%	29%	29%	
Benefits	\$ 17,718	\$ 25,374	\$ 25,374	\$ 6,344	\$ 74,811
Total Salary and Benefits	\$ 83,341.85	\$ 112,872.42	\$ 112,872.42	\$ 28,218.11	\$ 337,305
Relocation Allowances	\$ 1,750			\$ 1,750	\$ 3,500
Relocation Tax Allowance	\$ 175			\$ 175	\$ 350
Per diem Allowances	\$ 22,321	\$ 28,517	\$ 28,517	\$ 6,196	\$ 50,838
Tax Allowance (if applicable)	\$ 3,906	\$ 4,990	\$ 4,990	\$ 1,084	\$ 14,971
Total Dislocation Allowances	\$ 28,152.06	\$ 33,507.56	\$ 33,507.56	\$ 9,205.51	\$ 69,659.44
Domestic Travel (work related)					\$ -
International Travel (work related)					\$ -
Home Trips (if applicable)	\$ 7,200.00	\$ 2,400.00			\$ 9,600
Total Travel	\$ 7,200.00	\$ 2,400.00	\$ -	\$ -	\$ 9,600.00
Office Support*					
Total Office Support					
Equipment*					
Total Office Equipment					
Other Costs*					
Total Other Costs					
Total	\$ 118,693.90	\$ 148,779.98	\$ 146,379.98	\$ 37,423.61	\$416,564.23
*: Provide an explanation for any costs included					
Relocation Allowance up to 1,000 lbs. ETD and					
Applicable only to ETD option if chosen					

Employee: _____ Start Date: _____
Home Station: _____ Original Start Date: _____

TEMPORARY CHANGE OF STATION OPTION

Relocation Costs to DC			
	Authoriz ed cost per lbs	# of lbs	Total Cost
Relocation To DC	1.50	18,000	\$ 27,000

Relocation Allowances FY14

Househunting Trip			
Trip: 5 days, 4 nights			
Airfare ABQ to DC (roundtrip x 2)			\$ 1,600
Transportation to/from airport			\$ 100
Meals: Employee	64/day		\$ 320
Meals: Spouse	48/day		\$ 240
Lodging:	209/day		\$ 836
Metro:	20/day		\$ 100
Total Househunting Trip:			\$ 3,196

Shipment of auto			
Shipment of auto		2 cars	\$ 4,000

EnRoute Allowances			
3 day trip			
Enroute meals - employee	64/day		\$ 192
Enroute meals - spouse	48/day		\$ 144
Enroute meals - 2 children	64/day		\$ 102
Lodging	150/day		\$ 450
Total			\$ 888

Temporary Quarters Subsistence Expense			
30 TQSE			
Employee	39/day		\$ 1,080
Spouse	29.25/day		\$ 878
Children	39/day		\$ 1,170
Lodging	109/day		\$ 3,270
Total			\$ 6,398

Property Management Services			
12 Months			
Cost per month		300	\$ 3,600
Total			\$ 3,600

Relocation Costs Home			
	Authoriz ed cost per lbs	# of lbs	Total Cost
Relocation Home	1.50	18,000	\$ 27,000

Relocation Allowances FY17

Househunting Trip			
Trip: 5 days, 4 nights			
Airfare ABQ to DC (roundtrip x 2)			\$ 1,600
Transportation to/from airport			\$ 100
Meals: Employee	64/day		\$ 320
Meals: Spouse	48/day		\$ 240
Lodging:	209/day		\$ 836
Metro:	20/day		\$ 100
Total Househunting Trip:			\$ 3,196

Shipment of auto			
Shipment of auto		2 cars	\$ 4,000

EnRoute Allowances			
3 day trip			
Enroute meals - employee	64/day		\$ 192
Enroute meals - spouse	48/day		\$ 144
Enroute meals - 2 children	64/day		\$ 102
Lodging	150/day		\$ 450
Total			\$ 888

Work Related Travel Costs Domestic Trips		
Location	Fiscal Year	Cost
Albuquerque	2016	\$ 1,500
Las Vegas	2016	\$ 2,000
California	2017	\$ 2,500
Albuquerque	2018	\$ 1,500
Las Vegas	2018	\$ 2,000
California	2019	\$ 2,500
Total		\$ 12,000

Work Related Travel Costs Domestic Trips by year		
Fiscal Year		Cost
2016		\$ 3,500
2017		\$ 2,500
2018		\$ 3,500
2019		\$ 2,500
Total		\$ 12,000

Work Related Travel Costs		
Location	Fiscal Year	Cost
England	2016	\$ 5,000
Russia	2017	\$ 6,000
Belarus	2018	\$ 5,000
France	2019	\$ 6,000
Total		\$ 22,000

Work Related Travel Costs International Trips by year		
Fiscal Year		Cost
2016		\$ 5,000
2017		\$ 6,000
2018		\$ 5,000
2019		\$ 6,000
Total		\$ 22,000

TCS Allowances to Washington DC: \$ 45,082

TCS Allowances to home location: \$ 35,084

Total Cost for TCS Allowances: \$ 80,166

Employee:
Lab/Plant:

Start Date:
Original Start Date:

EXTENDED TRAVEL DUTY OPTION

Per diem Allowance Worksheet

Month/Year	Per diem allowance	Days	Total
FY14			
January	\$ 252.00	31	\$ 7,812
February	\$ 252.00	28	\$ 7,056
March	\$ 252.00	1	\$ 252
March	\$ 138.60	30	\$ 4,158
April	\$ 138.60	30	\$ 4,158
May	\$ 138.60	31	\$ 4,297
June	\$ 138.60	30	\$ 4,158
July	\$ 138.60	31	\$ 4,297
August	\$ 138.60	31	\$ 4,297
September	\$ 138.60	30	\$ 4,158
FY14 Total			\$ 44,642
FY15			
October	\$ 138.60	31	\$ 139
November	\$ 138.60	30	\$ 4,158
December	\$ 145.75	1	\$ 146
	\$ 265.00	30	\$ 7,950
FY15 Total			\$ 12,392
Total for 12 months			365 \$ 57,034

Relocation Costs to DC

	Authorized cost per lbs	# of lbs	Total Cost
Relocation To DC	1.50	1,000	\$ 1,500

Shipment of auto

Shipment of auto	1 car		\$ 2,000
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Relocation Costs Home

	Authorized cost per lbs	# of lbs	Total Cost
Relocation Home	1.50	1,000	\$ 1,500

Shipment of auto

Shipment of auto	1 car		\$ 2,000
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Work Related Travel Costs Domestic Trips

Location	Fiscal Year	Cost
Albuquerque	2016	\$ 1,500
Las Vegas	2016	\$ 2,000
California	2017	\$ 2,500
Albuquerque	2017	\$ 1,500
Las Vegas	2018	\$ 2,000
California	2019	\$ 2,500
Total		\$ 12,000

Work Related Travel Costs Domestic Trips by year

Fiscal Year	Cost
2016	\$ 3,500
2017	\$ 2,500
2018	\$ 3,500
2019	\$ 2,500
Total	\$ 12,000

Work Related Travel Costs International Trips

Location	Fiscal Year	Cost
England	2016	\$ 5,000
Russia	2017	\$ 6,000
Belarus	2018	\$ 5,000
France	2019	\$ 6,000
Total		\$ 22,000

Work Related Travel Costs International Trips by year

Fiscal Year	Cost
2016	\$ 5,000
2017	\$ 6,000
2018	\$ 5,000
2019	\$ 6,000
Total	\$ 22,000

Full Per diem Rates by Month

Month	Lodging	Meals	Total
January	\$ 184	\$ 71	\$ 255
February	\$ 184	\$ 71	\$ 255
March	\$ 224	\$ 71	\$ 295
April	\$ 224	\$ 71	\$ 295
May	\$ 224	\$ 71	\$ 295
June	\$ 224	\$ 71	\$ 295
July	\$ 167	\$ 71	\$ 238
August	\$ 167	\$ 71	\$ 238
September	\$ 219	\$ 71	\$ 290
October	\$ 219	\$ 71	\$ 290
November	\$ 184	\$ 71	\$ 255
December	\$ 184	\$ 71	\$ 255

Home Trips

Location	Fiscal Year	Cost
Home	2014	\$ 7,200
Home	2015	\$ 2,400

ETD Allowances to Washington DC: \$ 55,342

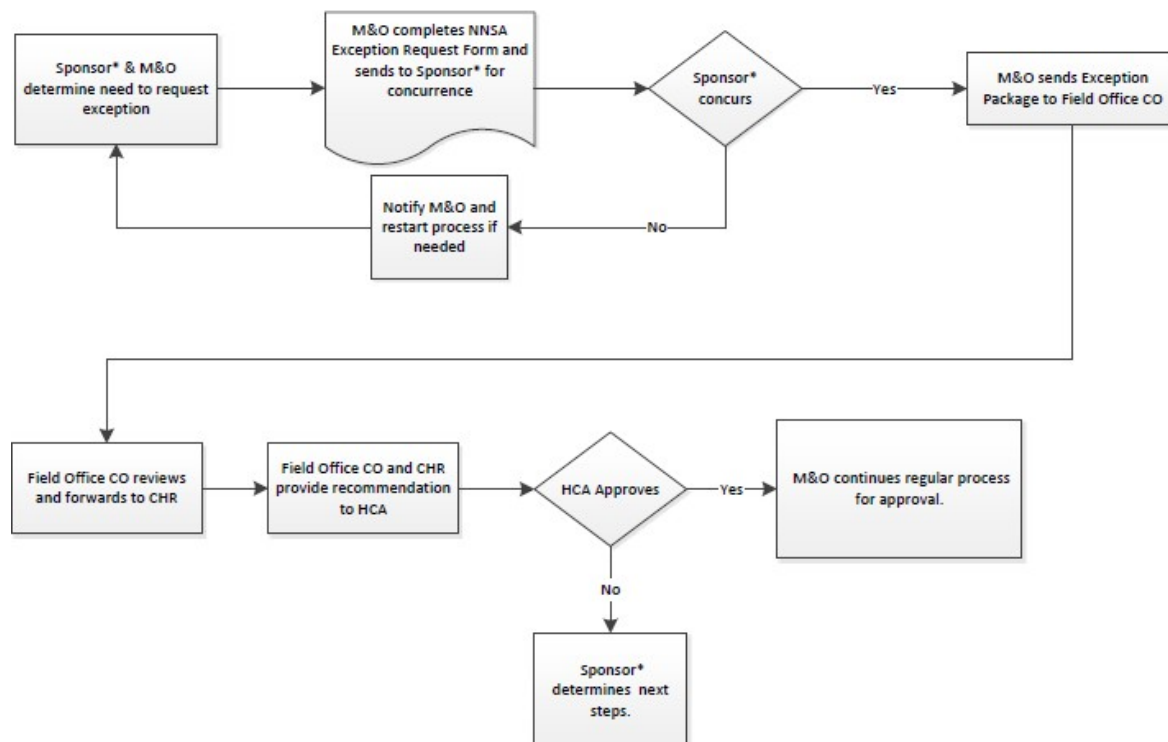
ETD Allowances to home location: \$ 18,292

Total Cost for ETD Allowances: \$ 73,634

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ATTACHMENT 14: NNSA APPROVAL PROCESS FOR REQUESTING EXCEPTIONS

NNSA Approval Process for Exceptions



LEGEND

CO – Contracting Officer
HCA – Head of Contracting Activity
M&O – Management and Operating
CHR – Contractor Human Resources
*Sponsor – M&O PO/CDEPA Entity/IPA Sponsoring Organization

Process for Exceptions

Once it is determined there is a need for an exception to this policy, the following process must be followed:

- 1) The M&O contractor and the PO/CDEPA Entity/IPA Sponsoring Organization determine there is a need for an exception to policy.
- 2) The M&O contractor assembles an exception request package that consists of the following completed documents: NNSA Exception Request Form (Attachment 15), Assignment Agreement specific for the type of assignment, and cost estimate.
- 3) The M&O contractor submits the completed exception package to the Field Office CO after obtaining concurrence from the PO/CDEPA Entity/IPA Sponsoring Organization.
- 4) The cognizant Field Office CO reviews the exception package and forwards it to NNSA CHR for review. The cognizant Field Office CO, and NNSA CHR, jointly determine the recommendation for the exception package.
- 5) NNSA CHR sends the exception package and corresponding recommendation to the HCA for approval.
- 6) The cognizant Field Office CO communicates the HCA's approval or disapproval to the M&O contractor.

ATTACHMENT 15: NNSA EXCEPTION REQUEST FORM

TO: XXXXXX
Field Office Contracting Officer, NNSA

FROM: M&O Contractor Representative
M&O Contractor Site

SUBJECT: EXCEPTION REQUEST: Exception to NNSA NAP XXXX for
(Assignee Name)

ISSUE: Approval is requested for an exception to _____ (explain what exception(s) to requirement(s) is/are being requested (i.e., length, assignment allowances, etc.) with regard to the assignment of (Assignee Name) to _____.

JUSTIFICATION: Provide detailed justification.

CONCURRENCES:

Name, PO/CDEPA Entity/IPA Sponsoring Organization

DECISION:

_____ Approved _____ Not Approved

Barbara H. Stearrett
NNSA Head of Contracting Activity

ATTACHMENTS:

Task Assignment Document (or assignment agreement specific to assignment type)
Cost Estimate