



REPLY TO
ATTENTION OF
SFIM-HR-C

DEPARTMENT OF THE ARMY
INSTALLATION MANAGEMENT AGENCY
2511 JEFFERSON DAVIS HIGHWAY
ARLINGTON, VA 22202-3926

JUL 30 2004

MEMORANDUM FOR ALL US Army Installation Management Agency Personnel

SUBJECT: US Army Installation Management Agency Policy Memorandum # 20,
Procedures for Requesting Advanced In-Hire Rates for New Employees

1. REFERENCES.

- a. 5 U.S.C. 5333, Minimum Rate for New Appointments.
- b. 5 CFR 531.203(b), Superior Qualifications Appointments.
- c. 5 CFR 532.249 Minimum Rates for Hard-To-Fill Positions.
- d. 5 CFR 532.403 New Appointments.
- e. DoD 1400-25-M, Civilian Personnel Manual, Chapter 500, Subchapter 531, Pay Under the General Schedule.

2. PURPOSE. To supplement the Code of Federal Regulations, and to provide IMA delegation, policy, and processing procedures for requesting advanced in-hire rates for new employees.

3. APPLICABILITY. These procedures are applicable to all US appropriated fund civilian employees assigned to the IMA.

4. POLICY. It is the policy of the IMA to utilize where appropriate, authorized incentives to attract individuals with critical skills. These incentives include the use of Superior Qualifications Appointments (commonly referred to as advanced in-hire rates). This incentive is used in recognition of the selectee's superior qualifications for the position and is not to be used routinely. In exercising this authority, IMA leadership will give due weight to budgetary considerations, as well as the IMA mission requirements. The Administrative Assistant to the Secretary of the Army (AASA) retains the authority to approve advanced in-hire rates for HQIMA. Outside HQIMA, the AASA has delegated this authority to the Director, IMA with the authority to further delegate. The Director, IMA delegates approval authority for advance in-hire rates for new employees to the Region Directors. Each Region Director may approve advance in-hire rates for new employees in their region office and garrison within their Region.

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5. PROCEDURES.

a. Superior Qualifications Appointments. The superior qualifications authority is intended to improve the Federal Government's ability to compete with non-Federal employers for top-quality candidates. It is not intended solely to match selected candidates' existing pay. Individuals hired at advanced rates, under this authority, must either have unusually high qualifications for the position and be forfeiting income that would justify a salary above the first step (but not above the tenth step) for the grade; or meet a special need of the IMA. A special need may apply to all Regions of IMA, to a Garrison, or to a particular function. Special needs requests shall ordinarily apply to positions involving direct program management or operation, rather than administrative support. All superior qualifications appointments must be approved before the candidate enters on duty and becomes a Federal employee.

b. Covered Positions. The IMA may use the superior qualifications appointment authority to set the rate of basic pay for an employee newly-appointed or reappointed to any covered position, including permanent and temporary positions in the competitive or excepted service. New appointment means the first appointment as an employee of the Federal Government and reappointment generally refers to a break in Federal service of at least 90 days. (See 5 CFR 531.203(b)(2) for exceptions to the 90-day break in service requirement.)

c. Evaluation and Reports. The HQIMA HR will conduct periodic reviews and evaluations of the use of advanced in-hire rates to ensure that usage conforms to the criteria established by this policy. Region Directors will be responsible for submitting annual reports based on fiscal year statistical data. Reports will be organized by each Garrison and submitted to the proponent for this policy. Reports for the previous fiscal year are due NLT 15 November of each year.

(1) Each report will include the number of employees to whom an advanced in-hire rate was offered during the fiscal year; the number of employees who accepted the offer of an advanced in-hire rate; as well as their job title, occupational series, grade and step; and the total cost of the awards for the fiscal year. The report will address the overall effect of the payment of an advanced in-hire rate on the ability to fill positions with high quality candidates.

(2) Other reports and data may be required, as requested by DA for evaluation purposes and to provide information to DOD, OPM, or other interested parties.

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d. Documentation and Recordkeeping. Copies of all requests and supporting documentation, to include the referral list and all resumes of available candidates, will be submitted to and maintained by the respective HQ/Region for report and audit purposes.

e. Criteria for Making Appointment. Requests must clearly establish the superior qualifications of the individual or the IMA's special need that justifies use of the authority. In addition requests have to:

(1) Identify the name of the individual selected for the position, rate of pay being requested, position description number, the vacancy announcement number, area of consideration used for recruitment and length of time the announcement was open.

(2) Describe the selected candidate's superior qualifications that are greater than what would be expected from a well-qualified candidate for the job being filled. The superior qualifications determination will be based on the clear superiority of the candidate's qualifications and must be compared with the qualifications of each of the other available candidates from the referral list.

(3) Describe the actual recruitment efforts undertaken to fill the position in question, and the results of those efforts, including the quantity and quality of candidates on the referral list.

(4) Address the factors considered in determining the individual's existing pay (the request must include information on present earnings or current, firm offers, if any) and the reasons for setting pay at a rate higher than that needed to match existing pay; and

(5) Provide the reasons for authorizing an advanced in-hire rate instead of, or in addition to, a recruitment bonus. In negotiating with the potential employee, IMA leadership will utilize the least costly alternative acceptable.

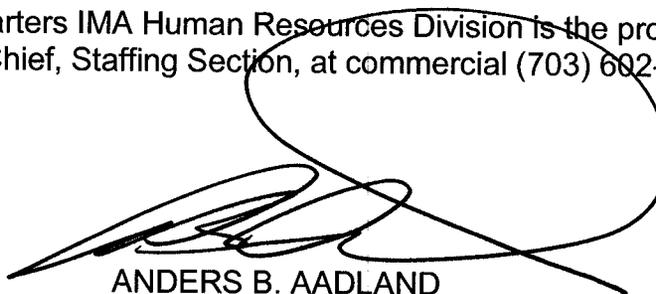
f. Actual Income/Existing Pay. When determining whether a candidate would forfeit income as a result of accepting Federal employment, the request must be based on consideration of the actual income from the candidate's present position and any current firm, written offers of other employment or salary increase. Candidates who are leaving their current employment (for example, retiring from military service or whose employer is going out of business) would not earn any income from that employment.

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Income received on less than a full-time basis is not to be annualized as if received on a full-time basis. The request must not consider income that would either cease or continue independent of whether the candidate accepted the Federal position.

6. PROPONENT. The Headquarters IMA Human Resources Division is the proponent for this IMA policy. POC is the Chief, Staffing Section, at commercial (703) 602-3319, DSN 332-3319.

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ANDERS B. AADLAND
Major General, GS
Director



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MEMORANDUM FOR ALL US Army Installation Management Agency Personnel

SUBJECT: US Army Installation Management Agency Policy Memorandum # 21,
Appointments of Retired Members of the Armed Forces Within 180 Days After
Retirement

1. REFERENCES.

- a. 5 U.S.C. 3326.
- b. DoD Directive Number 1402.1, Employment of Retired Members of the Armed Forces, January 21, 1982.
- c. AR 690-300, Employment, Chapter 300, Subchapter 12, August 12, 1994.
- d. AR 215-3, Nonappropriated Funds Personnel Policy, Chapter 2, August 29, 2003.
- e. Memorandum, Office of the Assistant Secretary of the Army (M&RA), September 14, 2000, Subject: Delegation of Authority to Approve Appointments of Retired Members of the Armed Forces Within 180 Days After Retirement.
- f. Memorandum, Office of the Administrative Assistant to the Secretary of the Army, January 13, 2004, Subject: Reporting Requirements for Appointments of Retired Members of the Armed Forces Within 180 Days After Retirement.

2. PURPOSE. To supplement Department of Defense and Department of Army policy and to provide IMA processing procedures for the appointment of retired members of the Armed Forces to IMA positions during the 180 days immediately following their retirement from the Armed Forces.

3. APPLICABILITY. These procedures are applicable to US employees and all appropriated fund civilian positions in IMA. Nonappropriated fund procedures are described in reference 1d. These procedures are applicable except during periods of declared National Emergency as specified by reference 1a.

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SUBJECT: US Army Installation Management Agency Policy Memorandum # 21,
Appointments of Retired Members of the Armed Forces Within 180 Days After
Retirement

4. POLICY.

a. The basic goal in filling any position in IMA is to appoint the best qualified candidate, consistent with merit principles. The 180-day requirement is essential to avoid the practice or appearance of preferential treatment. It also helps protect selecting officials and retired members from unwarranted allegations that they obtained their positions through influence based upon prior military service.

b. In accordance with reference 1e, authority to approve appointments of retired military members of the armed forces within 180-days of retirement is delegated to the level above the appointing authority for wage systems positions, GS positions at grades GS-7 and below, and GS positions at grades GS-8 to GS-15 for which payment of travel expenses to first duty station has been authorized. Within IMA, the appointing authority is the Garrison Commander at the Garrison, the Region Director at the Region, and the Director, IMA at HQIMA.

c. For all positions in grades GS-8 through GS-15 for which no payment of travel expenses to the first duty station was authorized, the Administrative Assistant to the Secretary of the Army retains approval authority. The ASA(M&RA) retains approval authority for all SES positions.

d. The Garrison Commander has approval for nonappropriated fund positions. Requirements for these positions are provided in reference 1d.

5. PROCEDURES.

a. Requesting officials will provide the information required by references 1b and 1c, and will submit requests for 180 day waiver, through the chain of command, for approval by the appropriate authority. Cases requiring approval above the Region level will be sent through the Region Director to the Director, IMA, (SFIM-HR-C), 2511 Jefferson Davis Highway, Arlington, VA 22202-3926. Within five work-days, the Director, IMA will approve or seek approval of meritorious cases from the Administrative Assistant to the Secretary of the Army.

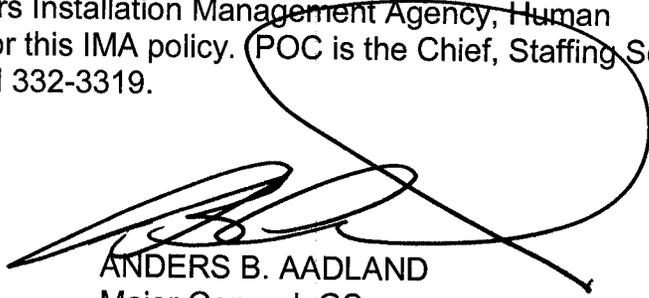
b. Region Directors will approve or review and forward meritorious cases to the Director, IMA, within five work-days.

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SUBJECT: US Army Installation Management Agency Policy Memorandum # 21,
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Retirement

c. Reports will be compiled by SFIM-HR-C using the HQDA Business Objects Applications System. HQIMA may request reports on other aspects of program administration.

6. PROPONENT. The Headquarters Installation Management Agency, Human Resources Division is responsible for this IMA policy. (POC is the Chief, Staffing Section at commercial (703) 602-3319, DSN 332-3319.

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MEMORANDUM FOR ALL US Army Installation Management Agency Personnel

SUBJECT: US Army Installation Management Agency Policy (IMA) Memorandum # 22,
Bringing Positions and Employees into the Competitive Service

1. REFERENCES.

- a. 5 U.S. C 3101, General Authority to Employ.
- b. 5 CFR, Parts 315 and 316, Career and Career-Conditional Employment, Temporary and Term Employment.
- c. AR 690-300, Chapter 300, Subchapter 9, Bringing Positions and Employees Into the Competitive Service, August 12, 1994.
- d. AR 215-3, Nonappropriated Funds Personnel Policy, August 29, 2003.

2. PURPOSE. To supplement DA policy, and to provide the IMA processing procedures to request approval to bring positions into the competitive service and to convert the incumbents of those positions.

3. APPLICABILITY. These procedures are applicable to all appropriated and nonappropriated fund US citizen civilian employees assigned to IMA.

4. POLICY. When a position is brought into the competitive service, the incumbent must be retained in the position and must be offered conversion to the competitive service, unless there is a compelling reason for termination, e.g. eligibility or suitability. The Administrative Assistant to the Secretary of the Army (AASA) retains the authority to approve both the bringing of positions into the competitive service and converting the incumbents of those positions.

5. PROCEDURES.

- a. The Director, IMA will seek approval from the AASA.
- b. Region Directors will review those requests initiated in their Region, and forward meritorious requests to the Director, IMA.

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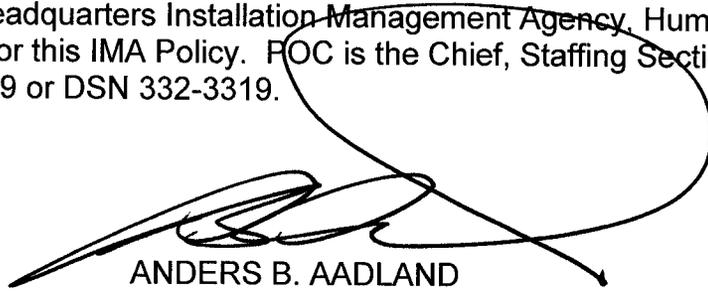
SUBJECT: US Army Installation Management Agency Policy (IMA) Memorandum # 22,
Bringing Positions and Employees into the Competitive Service

c. Garrison Commanders/Garrison Managers will submit requests initiated at the garrison level to Region Directors for review.

d. The request will include a history of each position and the documentation as required by reference c.

e. HQIMA may request reports on specific aspects of program administration.

6. PROPONENT. The Headquarters Installation Management Agency, Human Resources Division is the proponent for this IMA Policy. POC is the Chief, Staffing Section at commercial (703) 602-3319 or DSN 332-3319.

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MEMORANDUM FOR ALL US Army Installation Management Agency Personnel

**SUBJECT: US Army Installation Management Agency Policy Memorandum # 23,
Fulfillment of Centrally Funded Intern Agreements (Waiver Authority)**

1. REFERENCES.

a. AR 690-950, Civilian Personnel Career Management, December 31, 2001.

b. Memorandum, AASA, September 29, 2003, Subject: Delegations of Civilian Personnel Authorities to Headquarters, Department of the Army (HQDA) Activities.

2. PURPOSE. To supplement DA policy and to provide IMA policy and processing procedures for the Fulfillment of Centrally Funded Intern Agreements (Waiver Authority).

3. APPLICABILITY. This policy applies to all Army Civilian Training, Education and Development System (ACTEDS) centrally funded interns (also referred to as DA interns) assigned to the IMA.

4. POLICY.

a. Reference a, Chapter 3, Section VI, paragraph 3-24a, states that DA interns are required to sign employment and mobility agreements as a condition of employment, and that they are subject to separation from Federal service if they fail to complete the terms of the agreements, unless a waiver is approved. Paragraph 3-24b of reference a delegates authority to MACOMs, HQDA staff support activities and Independent Reporting Activities to approve waivers when a DA intern fails to meet the terms of the agreements.

b. Per reference b, the Administrative Assistant to the Secretary of the Army (AASA) has retained the authority to approve subject waivers. Requests for approval must be forwarded through the AASA Director, Human Resources Management Directorate (HRMD) to the AASA for decision.

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SUBJECT: US Army Installation Management Agency Policy Memorandum # 23,
Fulfillment of Centrally Funded Intern Agreements (Waiver Authority)

5. PROCEDURES.

a. Requests for waiver of intern employment/mobility agreements should be rare. However, when one is initiated it is normally due to unforeseen personal circumstances that would create undue hardship on the intern. Decisions on whether to support such requests must be made in a timely manner so as to mitigate the situation. IMA supervisors/management officials will act *immediately* on intern requests for waivers and ensure that they have the appropriate documentation to support the requests, as discussed in subsequent paragraphs. Within IMA, supported/endorsed requests should be forwarded by electronic means (i.e., email with attached documents or facsimile) in order to expedite the process. The following timelines apply to forwarding subject requests through command channels:

1) Supervisors/managers at HQIMA, Region Offices, and Garrison Commanders/Garrison Managers – Make decision and (if supported) forward request within 3 days after receipt of all required documentation from intern and/or subordinate supervisor.

2) HQIMA Division Chiefs or Region Directors – Make decision within 3 days after receipt of request from next lower level.

3) HQIMA – Review and forward to Director, IMA for consideration within 3 days after receipt from HQ IMA Division Chiefs or Region Directors. HQIMA HR will hand-carry request and seek Director, IMA decision within 3 days. If endorsed by Director, IMA, IMA HR will hand-carry the package to the Assistant Chief of Staff for Installation Management (ACSIM). If endorsed by the ACSIM, IMA, HR will hand-carry to the AASA.

b. IMA supervisors/management officials, in coordination with the appropriate Career Program Manager, will decide whether to support or initiate a request for waiver of DA intern agreements. Such a decision will be based on a review of the information and justification submitted by the intern and/or subordinate supervisors and managers. Additionally, the decision will address an assessment of the individual circumstances, the impact on the intern and the organization, and the likelihood for future placement at that installation.

c. When IMA supervisors/management officials decide to support or initiate a request for waiver, they will forward the request through command channels to their respective HQIMA Director/Division Chief or Region Director for consideration. A request must contain compelling reasons for waiving the agreement, such as

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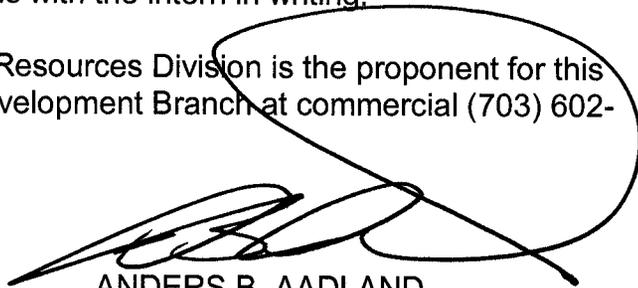
unforeseen personal circumstances involving the intern or family members that would cause undue hardship on the intern if the agreement was not waived. A request should contain supporting documentation regarding the situation or circumstances, such as letters from doctors, schools, or other officials who can attest to the validity of the situation or circumstances.

d. HQIMA Division Chiefs and Region Directors who support requests for approval of waivers for DA interns under their jurisdiction will endorse and forward such requests to the IMA Human Resources (HR) Division for Director, IMA consideration. If supported, requests will be forwarded through the Assistant Chief of Staff for Installation Management (ACSIM) and AASA Director, HRMD and to the AASA for decision.

e. If the decision is to not support, initiate or endorse a request, management officials will notify the next lower level manager or supervisor within their command channels of the decision. The notification must be in writing and include sound reasons for the decision.

f. Supervisors/managers will discuss decisions to not support, initiate or endorse a request for waiver with the DA intern involved and, in consultation with the Civilian Personnel Advisory Center (CPAC), advise them of the consequences of not fulfilling the terms of the agreements. Supervisors and managers should provide the written decision to the intern and document the discussions with the intern in writing.

6. PROPONENT. The HQIMA Human Resources Division is the proponent for this IMA policy. POC is Chief, Workforce Development Branch at commercial (703) 602-4259, DSN 332-4259.

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ANDERS B. AADLAND
Major General, GS
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MEMORANDUM FOR ALL US Army Installation Management Agency Personnel

SUBJECT: US Army Installation Management Agency Policy Memorandum # 24,
Civilian Academic Degree Training (CADT)

1. REFERENCES.

- a. 5 U.S.C. 4107, Academic Degree Training.
- b. Section 1121 of the National Defense Authorization Act for Fiscal Year 2001, Public Law 106-398, amending 5 USC 4107.
- c. Memorandum, OASD (FMP), August 15, 2001, Subject: Civilian Academic Degree Training.
- d. Memorandum, ASA (M&RA), October 26, 2001, October 26, 2001, Subject: Civilian Academic Degree Training.
- e. Memorandum, ASA (M&RA), October 6, 2003, Subject: Delegation of Authority for Civilian Personnel Policy/Management.
- f. Memorandum, Deputy Chief of Staff, G-1, October 30, 2003, Subject: Rescission of Delegation of Authority for Civilian Personnel Policy/Management.
- g. Memorandum, AASA, November 24, 2003, Subject: Change in Delegation of Civilian Personnel Authorities to Headquarters, Department of the Army (HQDA) Activities.

2. PURPOSE. To supplement DoD and DA policy and to provide IMA guidance and processing procedures for approval of CADT.

3. APPLICABILITY. This policy applies to all US appropriated and non-appropriated fund civilian employees assigned to IMA. It does not apply to academic courses that are not part of an academic degree program and do not lead to a degree, nor does it apply to academic degrees obtained through education and training identified in Army Civilian Training, Education and Development (ACTEDS) plans, the DoD Leadership and Management Program (DLAMP), or other HQDA approved competitive professional development programs.

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SUBJECT: US Army Installation Management Agency Policy Memorandum # 24,
Civilian Academic Degree Training (CADT)

4. POLICY.

a. Reference 1d contains DA implementation guidance and approval authority for payment of costs associated with degrees for civilian employees, commonly referred to as CADT.

b. References 1e, 1f, and 1g rescind all previous delegations of authority to approve requests for CADT and advise that the Assistant Secretary of the Army (Manpower and Reserve Affairs) (ASA (M&RA)) has retained all approval authority.

c. Reference 1g specifies that requests for approval of CADT must be sent to the Director, Human Resources Management Directorate (HRMD), Administrative Assistant to the Secretary of the Army (AASA), for endorsement prior to forwarding to the Deputy Assistant Secretary of the Army (Human Resources) (DASA (HR)), ASA(M&RA), for decision.

d. HQ IMA Directors/Division Chiefs and Region Directors will forward requests for approval of CADT for civilian employees under their supervision to HQ IMA for endorsement in accordance with the enclosed guidance. Following IMA endorsement, HQ IMA Human Resources (HR) Division will process requests through the Assistant Chief of Staff for Installation Management (ACSIM) and Director, HRMD, AASA to the ASA (M&RA) for decision.

5. PROCEDURES.

a. Employees initiate requests for CADT. Supervisors and managers will advise employees who request CADT of the following:

(1) Employees will be responsible for and will not be reimbursed for costs associated with academic degree programs if they enroll in, start, or complete a course prior to approval of their requests;

(2) Employees should not enroll in an academic degree program until IMA receives an ASA (M&RA) decision on their request, unless the employee is willing to bear all costs for the program;

(3) Employees for whom academic degree training is paid under this policy will be required to sign a continued employment agreement that obligates them to serve in the Department of Defense for a period at least three times the length of the education, beginning after the academic degree training is completed.

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SUBJECT: US Army Installation Management Agency Policy Memorandum # 24,
Civilian Academic Degree Training (CADT)

b. Supervisors and management officials at any level will decide whether to support requests for CADT. Decisions will be based on a review of the information and justifications submitted by employees or subordinate supervisors/managers, discussions with the employee and appropriate Career Program Manager/Career Field Manager, based on assessment of the overall benefit to the organization and DA. If the decision is to support a request, the appropriate supervisor/manager will prepare a memorandum in accordance with the enclosed guidance, and forward the request through command channels for further consideration and decision.

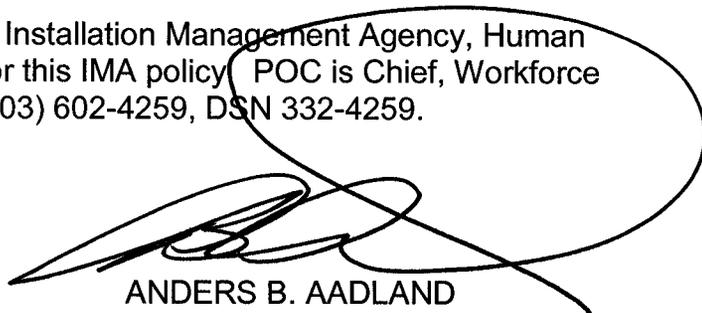
c. If the decision is to deny a request, management officials will notify the next lower level manager or supervisor within their command channels of the decision. The notification must be in writing and include reasons for the decision. Supervisors and managers will discuss decisions to deny a request for CADT with the employee involved, advise them of alternative developmental opportunities available to enhance their performance and advance their careers, and document discussions in writing.

d. IMA Region HR offices will review requests to ensure compliance with DA guidance in reference 1d and procedures in the enclosed guidance, and will advise and assist their respective commanders, managers and Region Directors who decide on CADT requests. HQIMA HR WFD Branch will advise and assist HQ,IMA managers who decide on requests for their employees.

e. See the attached guidance.

6. PROPONENT. The Headquarters, Installation Management Agency, Human Resources Division is the proponent for this IMA policy. POC is Chief, Workforce Development Branch at commercial (703) 602-4259, DSN 332-4259.

Encl



ANDERS B. AADLAND
Major General, GS
Director

GUIDANCE FOR INITIATING AND PROCESSING REQUESTS FOR CADT

1. Requests for approval of CADT will include the following employee information and pertinent information about the degree program in which the employee will enroll:

- a. Employee name, position title, series and grade, and career program/field;
- b. Name and address of the university or college/school;
- c. Courses to be completed (including synopsis of curriculum);
- d. Estimated overall cost for completion of the program and source of funding;
- e. Brief summary of the employee's background and education; and
- f. Justification/reasons for the request including:
 - 1) Training/education objectives;
 - 2) How completion of CADT will enhance or improve the employee's performance, and;
 - 3) Expected return on investment or benefit to Army.

2. Supervisors/managers who support requests will submit a memorandum (see Sample #1) through command channels to their respective HQIMA Director/Division Chief or Region Director for endorsement. HQIMA Directors/Division Chiefs or Region Directors who support request will submit an endorsement memorandum (see Sample #2) to HQIMA. Requests should be initiated so as to reach the HQIMA HR WFD Branch at least six months prior to the start of the proposed program in order to allow sufficient time to process the request through appropriate channels and, if approved by DASA (HR), for the employee to enroll in a timely manner.

3. The following command channel endorsements will be included with memoranda submitted through HQIMA Directors/Division Chiefs or Region Directors to HQIMA for Director, IMA endorsement decision:

- a. Garrison employees – Garrison Commander/Garrison Manager, then Region Director.
- b. Region Office employees – Manager one level below Region Director, then Region Director.
- c. HQ IMA employees – Manager one level below HQIMA Directors/Division Chiefs, and then HQIMA Directors/Division Chiefs.

4. Region HR offices will review requests from garrison and Region employees to determine whether the request is in compliance with IMA and Army guidance, and recommend appropriate action to the Region Director. Region HR offices will forward requests endorsed by Region Directors to the WFD Branch for further processing. Requests may be sent electronically by email or facsimile, then send the original documents by mail. HQ IMA Directors/Division Chiefs will submit requests directly to the WFD Branch.

5. The WFD Branch will prepare endorsements for the Director, IMA and the ACSIM prior to forwarding to the HRMD, AASA for further endorsement. Once notified of the AASA decision, the WFD Branch will immediately notify the requesting organization through the respective HQIMA Director/Division Chief or Region Director.

SAMPLE #1 – CADT MEMORANDUM FROM REQUESTING ORGANIZATIONS

(Office symbol of requesting organization)

MEMORANDUM THRU (Garrison Commander/Garrison Manager if from garrison organization) **OR** (Manager one level below HQ IMA Director/Division Chief if from HQ IMA organization, or one level below Region Director if from Region organizations)

TO (HQ IMA Director/Division Chiefs if for HQ IMA employee) **OR** Director, (Region) (if from garrison and/or region organization)

SUBJECT: Request Approval for Civilian Academic Degree Training – (Employee Name)

1. REFERENCE.

a. Memorandum, OASA (M&RA), Deputy Assistant Secretary of the Army (Civilian Personnel Policy), October 26, 2001, subject: Civilian Academic Degree Training.

b. Memorandum, IMA, dated _____, subject: US Army Installation Management Agency Policy Memorandum # 24, Civilian Academic Degree Training (CADT).

2. In accordance with references 1a and 1b, I am requesting approval for Civilian Academic Degree Training for (employee name). The following information is provided to support this request:

- a. (Position title, series and grade, and career program/field)
- b. (Name and address of the university or college/school)
- c. (Courses to be completed (including synopsis of curriculum))
- d. (Estimated overall cost for completion of the program)
- e. (Brief summary of the employee's background and education)
- f. Justification/reasons for the request:
 - 1) Objectives (include statement that CADT is identified in employee's individual development plan (IDP) or Career Program Plan, if that is the case);
 - 2) How completion of CADT will enhance or improve the employee's performance, and;
 - 3) Expected return on investment or benefit to Army.

3. My POC for this request is (name, phone number and email address).

IMA GOOD MANAGER
Director/Chief
(Organization)

SAMPLE #2 – CADT ENDORSEMENT/SUPPORTING MEMORANDUM FROM
HQ IMA DIRECTOR/DIVISION CHIEF OR REGION DIRECTOR

(HQ IMA Staff or Region office symbol)

MEMORANDUM FOR Director, Installation Management Agency, 2511 Jefferson Davis Highway, Arlington, VA 22202-3926

SUBJECT: Request Approval for Civilian Academic Degree Training - (Employee name and organization)

1. Reference.

a. Memorandum, OASA (M&RA), Deputy Assistant Secretary of the Army (Civilian Personnel Policy), October 26, 2001, subject: Civilian Academic Degree Training.

b. Memorandum, IMA, dated _____, subject: US Army Installation Management Agency Policy Memorandum # 24, Civilian Academic Degree Training (CADT).

2. I am forwarding the enclosed request to approve Civilian Academic Degree Training (CADT) for (employee name). I fully endorse this request, and solicit your support in obtaining endorsements through command channels and approval from the Deputy Assistant Secretary of the Army (Human Resources) (DASA (HR)), Office of the ASA (M&RA).

3. (Brief statement regarding how the Army and employee will mutually benefit from (his/her) completion of the CADT.)

4. Please contact me at (phone number or email address) if you have any questions regarding this endorsement.

(Name)
(Director or Chief)
(Staff Office or Region)



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ARLINGTON, VA 22202-3926

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MEMORANDUM FOR ALL US Army Installation Management Agency Personnel

SUBJECT: US Army Installation Management Agency Policy Memorandum # 25,
Civilian Recruitment and Relocation Bonuses and Retention Allowances

1. REFERENCES.

- a. 5 U.S.C. 5307, Limitation On Certain Payments.
- b. 5 U.S.C. 5541, Premium Pay.
- c. 5 U.S.C. 5753, Recruitment and Relocation Bonuses.
- d. 5 U.S.C. 5754, Retention Allowances.
- e. 5 CFR part 575, Recruitment and Relocation Bonuses; Retention Allowances.
- f. DOD 1400.25-M, Civilian Personnel Manual, Chapter 500, Subchapter 575, Recruitment and Relocation Allowances, December 1996.
- g. JTR, Volume 2, DOD Civilian Personnel.
- h. AR 215-3, Nonappropriated Funds Personnel Policy, Chapter 3, Section VIII, August 2003.
- i. ASA(M&RA) Civilian Personnel Policy Memorandum, June 23, 1999, Subject: Department of Defense (DoD) Policy on Recruitment, Retention, and Relocation Bonuses and Allowances for Nonappropriated Fund (NAF) Employees.

2. PURPOSE. To supplement DOD and DA policy and to provide IMA delegation, policy, and processing procedures for administering civilian recruitment, relocation, and retention incentives.

3. APPLICABILITY. This policy applies to all personnel (US citizen and non citizen) employed in IMA appropriated and nonappropriated fund positions, excluding non-citizens in a nonappropriated fund Local National/Host Nation/Component Commander Employment System.

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4. POLICY.

a. It is the policy of the IMA to utilize where appropriate, authorized incentives to attract and retain a high quality, skilled, and productive civilian workforce. These incentives include the use of recruitment and relocation bonuses, and retention allowances. In exercising this authority, IMA leadership will give due weight to budgetary considerations as well as the IMA mission requirements.

b. Appropriated Fund. The Administrative Assistant to the Secretary of the Army (AASA) retains the authority to approve recruitment, relocation, and retention incentives for HQIMA. Outside HQIMA the AASA has delegated this authority to the Director, IMA with the authority to further delegate. The Director, IMA delegates approval authority for the seven regions and garrisons to the Region Directors.

c. Nonappropriated Fund. Region Directors have authority to approve incentives for Region employees. Garrison Commanders have authority to approve incentives for Garrison employees.

5. PROCEDURES.

a. Coverage.

(1) Appropriated Fund. Recruitment, Relocation, and Retention incentives may be paid to eligible IMA appropriated fund employees.

(2) Nonappropriated Fund. Recruitment, Relocation, and Retention incentives are authorized for regular full time employees.

b. Aggregate Limitation. An employee may not receive an allowance, differential, bonus, award, or similar payment in combination with basic pay, which would exceed Level I of the Executive Schedule.

c. Evaluation and Reports. HQIMA will conduct periodic reviews and evaluations of the use of recruitment, relocation, and retention incentives to ensure that such payments conform to the criteria established by this policy. Region Directors will be responsible for submitting annual reports based on fiscal year statistical data. Reports will be organized by each Garrison and submitted to the proponent for this policy. Reports will be due NLT 15 November of each year for the previous FY.

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(1) Each report will include the number of employees to whom an incentive was offered during the fiscal year, the percentage of salary offered, the number of employees who accepted the offer of an incentive, and the total dollar amount paid in incentives in the Region during the FY.

Additionally, the report will include that evaluation of the overall effect of the payment of an incentive on the ability to hire and retain high quality candidates.

(2) Other reports and data may be required as requested by DA for evaluation purposes and to provide information to DOD, OPM, or other interested parties.

d. Documentation and Recordkeeping. Copies of all requests and supporting documentation to include the referral list and all resumes of available candidates, will be submitted to and maintained by the respective HQ/Region for report and audit purposes.

e. Recruitment and Relocation Bonuses. A recruitment and relocation bonus is a lump-sum payment of up to 25 percent of basic pay that the IMA may pay to an employee newly appointed or a current employee who must relocate to a position in a different commuting area when, in the absence of the bonus, it would be difficult to fill the position with a highly qualified employee. In return, the employee must sign an agreement to fulfill a period of service with the IMA.

(1) Recruitment Bonus.

(a) Appropriated Fund. The IMA may pay a lump-sum recruitment bonus of up to 25 percent of the annual rate of basic pay to an employee who is newly appointed, provided there is a written determination that, absent such a bonus, difficulty would be encountered in filling the position. This includes an employee reappointed with a 90-day or more break in service.

(b) Nonappropriated Fund. A recruitment bonus is a one-time lump-sum payment up to 25 percent of annual basic pay. This may be offered to persons newly hired to NAF in a regular full time position, reinstated, or reemployed after a break in service of at least one year, and the position must be hard to fill and critical to the organization mission. An employee whose appropriated fund position is converted to nonappropriated funds is not eligible for a recruiting bonus.

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(2) Relocation Bonus.

(a) Appropriated Fund. The IMA may pay a lump-sum relocation bonus of up to 25 percent of the annual rate of basic pay to an employee who must relocate to accept a position in a different commuting area, as defined by reference 1g, provided there is a written determination that, absent such a bonus, difficulty would be encountered in filling the position. Law Enforcement Officers (as defined in 5 U.S.C. 5541(3)) may be paid a relocation bonus of \$15,000 or 25 percent of basic pay whichever is greater.

(b) Nonappropriated Fund. A relocation bonus of up to 25 percent of basic pay may be authorized. A relocation bonus may be offered to a current NAF employee to accept a regular full time position in a different area requiring a permanent change of station move. The relocation must be without a break in service. The bonus is intended for hard to fill positions that are critical to the organization mission and also to induce employees to relocate to remote or high cost areas.

(c) Only current employees may receive a relocation bonus. Approval of the bonus is contingent on the employee's changing his or her place of residence in conjunction with acceptance of the position in a different commuting area.

(d) The IMA will not pay a relocation bonus until the employee establishes a residence in the new commuting area.

(e) Relocation bonuses have no effect on an employee's entitlement to reimbursement for Permanent Change of Station (PCS) expenses, under the DOD Civilian Personnel Joint Travel Regulations, and should not be paid in lieu of reimbursing the employee for such expenses.

(3) Service Agreement. Before receiving a recruitment or relocation bonus, an employee must sign a written service agreement under which the employee agrees to be employed by the IMA for a period of 12 months in return for the payment of the bonus. Service agreements for temporary assignments may be for periods of less than 12 months, but will not be for less than the projected duration of the temporary assignment if it is less than 12 months. If an employee fails to complete the service period, he or she must repay the portion of the bonus attributable to the uncompleted period of service. The amount to be repaid will be determined by providing credit for each full month of employment completed by the employee under the service

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agreement. No repayment is required if the employee is involuntarily separated (for reasons other than misconduct or delinquency) or if the employee is involuntarily relocated to a different commuting area. The approving official may waive repayment if it is determined that a waiver is advantageous to the Federal Government. (Sample Service Agreement attached).

(4) Criteria for Paying Bonuses. A recruitment or relocation bonus will be calculated as a percentage of the employee's basic pay up to and including 25 percent. The determination that a bonus is appropriate, and the amount of that bonus will be based on written documentation identifying the name of the individual selected for the position, percentage of basic pay being requested, position description number, vacancy announcement number, area of consideration used for recruitment and length of time the announcement was open. In addition the written documentation will address the following factors:

(a) The success of recent efforts to recruit candidates for similar positions, including indicators such as acceptance rates, the proportion of positions filled, and the length of time required to fill similar positions;

(b) Recent turnover in similar positions;

(c) Labor market factors that may affect the ability to recruit candidates now or in the future;

(d) Special qualifications needed for the position and a comparison of the selected candidates special qualifications with the qualifications of each of the available candidates from the referral list; and

(e) Actual recruitment efforts undertaken to fill the position in question, and the results of those efforts, including the quantity and quality of candidates obtained.

f. Retention Allowances.

(1) Appropriated Fund. A retention allowance must be calculated as a percentage of the employee's rate of basic pay, not to exceed 25 percent. It is paid at the same time as the employee's regular pay (usually biweekly). However, a retention allowance is not considered basic pay for any reason. The IMA will not offer a retention allowance to an individual (or authorize the payment of such an allowance) prior to the

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individual's employment with the IMA. The IMA will not begin paying a retention allowance during the service period established by the employee's recruitment or relocation bonus service agreement. A relocation bonus may be paid to an employee already receiving a retention allowance.

(2) Nonappropriated Fund. A retention allowance of up to 25 percent of basic pay may be authorized to regular full time employees in a position without time limitation. Retention allowances will be based on the unusually high or unique qualifications of the employee or a special need for the employee's service.

(3) Individual Allowance. The IMA may pay a retention allowance of up to 25 percent of basic pay to an individual employee if the unusually high or unique qualifications of the employee or a special need of the organization for the employee's services makes it essential to retain the employee, and the IMA determines that the employee would be likely to leave the Federal service without the allowance. For NAF employees, the determination is that they will likely leave the "installation work force." See reference 1i.

(4) Group Allowance. Group allowances are applicable only to appropriated fund employees. Requests for approval of group retention allowances greater than 10 percent of basic pay pass through the Deputy Assistant Secretary of Defense, Civilian Personnel Policy on their way to the Office of Personnel Management.

(a) Requests for the authorization of group retention allowances under 5 CFR 575.305(d)(1) (reference (e)) for allowances of up to 10 percent of basic pay must be coordinated with all other DoD Components within the commuting area having similarly situated employees. DASD(CPP) retains approval authority for these cases. The IMA must determine that the employees have unusually high or unique qualifications, or that it has a special need for the employees' services that makes it essential to retain the employees in that category. The IMA must also determine whether it is reasonable to presume that there is a high-risk that a significant number of employees in the targeted category are likely to leave Federal service in the absence of an allowance. This determination may be based on evidence of extreme labor market conditions, high-demand in the private sector for the knowledge and skills possessed by the employees, significant disparities between Federal and non-Federal salaries, or other similar conditions.

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(b) Requests for OPM approval of group retention allowances under 5 CFR 575.305(d)(2) (reference (e)) for allowances in excess of 10 percent of basic pay must be coordinated with all other DoD Components having similarly situated employees and include the material listed in 5 CFR 575.305(d)(2)(i) through (v) (reference (e)) before submission through the Head of the Component to DASD(CPP).

(5) Criteria for Payment. The determination that an employee is likely to leave may be based on a written offer from an employer outside the Federal Government.

It may also be based on a written statement by the Garrison Commander/Garrison Manager, Region Director, or the Deputy Director, IMA that the employee is likely to leave based on such evidence as personal knowledge that the employee is actively seeking outside employment and that competitive labor market conditions make it likely such efforts will yield positive results for the employee, or the employee will exercise his or her option to retire. The determination that there is a high risk that a significant number of employees in a targeted category are likely to leave may be based on evidence of extreme labor market conditions, high demand in the private sector for the knowledge and skills possessed by the employees, significant disparities between Federal and private sector salaries, or other similar conditions. In determining whether a retention allowance should be paid and in determining the amount of any such payment, the following factors shall be considered:

(a) The success of recent efforts to recruit candidates and retain employees with qualifications similar to those possessed by the employee for positions similar to the position held by the employee;

(b) The availability in the labor market of candidates for employment who, with minimal training or disruption of service to the public, could perform the full range of duties and responsibilities assigned to the position held by the employee; and

(c) The likely duration of the retention allowance;

(d) The likely effects of such payment on the morale of co-workers;

(e) Funding availability.

(6) Review. Payment of a retention allowance may continue as long as the

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conditions giving rise to the original determination to pay the allowance still exist. However, at least annually, each determination to pay an allowance will be reviewed at the HQ/Region to determine whether the payment is still warranted. This determination will address the same requirements as used for the original approval. The reauthorization approving officials remain the same as specified in paragraphs 4.b. and c.

(a) The annual review of retention allowances will be on a fiscal year basis, with reauthorizations to be effective on the first full pay period of the following calendar year. The calculation of the percentage of salary will include any other general increases put into effect in the same pay period.

(b) Appropriated Fund. Except as specified in paragraph 5.b., the retention allowance will be a constant percent throughout the period of time covered by the initial authorization or the reauthorization. Allowances will be automatically recalculated during the year whenever there is a change in basic pay, and the position for which the authorization or reauthorization was established remains the same. A reauthorization will be required to continue the retention allowance if the employee is reassigned to a different position or promoted.

(c) Nonappropriated Fund. Recertification of the allowance is required 45 days prior to the one year anniversary date to determine if the allowance should continue. If a determination is made to reduce or terminate the retention allowance based on the criteria below, the NAF employee is given a 30 day advance notice.

(7) Reduction or Termination. Based on a review and evaluation, the responsible approving official may reduce or terminate a retention allowance when he/she determines:

(a) A lesser amount (or none at all) would be sufficient to retain the employee;

(b) Labor market factors make it more likely to recruit a candidate with qualifications similar to those possessed by the employee;

(c) The need for the employee's services has been sufficiently reduced; or

(d) Budgetary considerations make it difficult to continue payment at the level originally approved (or at all);

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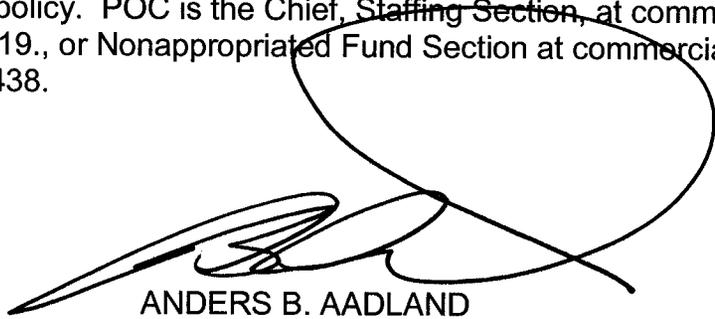
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(e) The employee leaves the position for which the allowance was authorized;
or

(f) The employee's performance falls below the highly successful level of
performance.

6. PROPONENT. The HQIMA Human Resources Division, Civilian Personnel Branch
is the proponent for this IMA policy. POC is the Chief, ~~Staffing Section~~, at commercial
(703) 602-3319, DSN 332-3319., or Nonappropriated Fund Section at commercial
(703) 602-7438, DSN 332-7438.

Encl

A handwritten signature in black ink, appearing to read 'ANDERS B. AADLAND', is written over a large, empty oval shape that serves as a placeholder for a stamp or seal.

ANDERS B. AADLAND
Major General, GS
Director

**RECRUITMENT/RELOCATION BONUS
SERVICE AGREEMENT**

A. LOCATION:	B. TITLE, PAY PLAN, SERIES AND GRADE:	
C. ANNUAL RATE OF BASIC PAY:	D. AMOUNT OF BONUS:	E. PD Number:
F. BEGINNING DATE:	G. ENDING DATE:	

EMPLOYEE'S STATEMENT

I understand that:

a. As a condition of accepting payment, I hereby agree to remain as an employee of the Installation Management Agency (IMA) in the above position from the beginning date at least through the ending date of this agreement, following the effective date of my appointment/relocation, unless the agreement is terminated sooner as indicated below.

b. If my employment in the position shown above is terminated during the period of the agreement at the convenience of the government, I will be entitled to retain the entire bonus.

c. If my employment in the position shown above is terminated during the period of the agreement at my request, or as a result of misconduct or delinquency, I will be required to repay the bonus on a pro rata basis to the IMA. The amount to be repaid shall be determined by providing credit for each full month of employment completed under this agreement. I understand that under such circumstances these monies are recoverable from me as a debt due to the United States Government. The approving official may waive repayment if it is determined that a waiver is advantageous to the Federal Government.

d. The bonus is not considered basic pay for computing overtime, retirement, insurance entitlement, or other benefits based on basic pay.

e. This agreement does not in any way commit the Government to continue my employment until the expiration date.

TYPED NAME:	GRADE:	SSN:
SIGNATURE:		DATE:
APPROVING OFFICIAL: (TYPED NAME, GRADE, TITLE)		
SIGNATURE:		DATE:

Encl



REPLY TO
ATTENTION OF

DEPARTMENT OF THE ARMY
INSTALLATION MANAGEMENT AGENCY
2511 JEFFERSON DAVIS HIGHWAY
ARLINGTON, VA 22202-3926

JUL 30 2004

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MEMORANDUM FOR ALL US Army Installation Management Agency Personnel

SUBJECT: US Army Installation Management Agency Policy Memorandum # 26,
Civilian Training Approval Authority

1. REFERENCES.

- a. Army Regulation 690-400, Chapter 410; Training, June 15, 1983.
- b. Memorandum, U.S. Total Army Personnel Command, October 15, 1993, Subject: Exceptions Permitted to Army Regulation Regarding Non-Government Training.
- c. Memorandum, U.S. Total Army Personnel Command, July 26, 1993, Subject: Policy Changes on Non-Government Training.
- d. Memorandum, AASA, September 29, 2003, Subject: Delegations of Civilian Personnel Authorities to Headquarters, Department of the Army (HQDA) Activities.

2. PURPOSE. To supplement DA policy and to provide IMA delegation, policy, and processing procedures on Civilian Training Approval Authority.

3. APPLICABILITY. This policy applies to all personnel (US citizen and non US citizen) employed in IMA appropriated and non-appropriated fund positions.

4. POLICY.

a. Reference 1a, contains Army policy on delegation of approval authority for training of civilians at non-Government and Government facilities. Subchapter 3, paragraph 3-6e(1) states that officials to whom the Secretary of the Army has delegated appointment authority can approve short-term (120 calendar days or less) training at non-Government facilities for employees under their command jurisdiction and may redelegate the authority through command channels to, but not below, commanders of independent field activities (e.g., Garrison Commanders/Garrison Managers).

b. Reference 1a, Subchapter 3, paragraph 3-6e(2) states that officials with appointing authority will usually designate a subordinate to approve non-Government training for civilian employees, and that such designations will be made in writing.

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Civilian Training Approval Authority

c. References 1b and 1c contain changes to Army policy in reference 1a pertaining to approval authority for short-term training at non-Government facilities. The changes allow re-delegation of training approval authority to line managers, and urge that managers be trained in proper procedures and their responsibilities before they are delegated the authority.

d. Reference 1d contains the Administrative Assistant to the Secretary of the Army (AASA) delegation of appointing authority, which is required for approval of short-term training at non-Government facilities. The AASA delegated appointing authority through HQDA Principal Officials and command channels/supervisory chain to Local Commanders/Activity Heads, but did not authorize redelegation to lower levels. Consequently, authority to approve short-term training at non-Government facilities within IMA is delegated through the Assistant Chief of Staff for Installation Management (ACSIM) and the Director, IMA to subordinate managers within the command channels, but no lower than Garrison Commanders/Garrison Managers.

e. Reference 1a, Subchapter 3, paragraph 3-6e(4) states that supervisors at all levels can approve training at Government facilities for their subordinates.

f. It is IMA policy that Region Directors and Garrison Commanders/Garrison Managers who have been delegated appointing authority may designate subordinate managers to act on their behalf to approve requests for short-term training at non-Government facilities for civilian employees under their control. Such designations will be made to the individual manager, may be made only after the designated manager has completed training in proper procedures and their responsibilities as approving officials, and must be in writing using the format provided with this policy memorandum. Designations will remain in effect until revoked by appropriate authority or when the designee leaves his/her position.

g. It is IMA policy that requests for approval of long-term training at non-Government facilities and contracts with a non-Government facility to develop and conduct full-time, long-term training programs will be forwarded to HQ IMA for appropriate decision. Long-term training (more than 120 calendar days) at non-Government facilities is generally accomplished through Army-approved training programs (e.g., Army Civilian Training, Education and Development System (ACTEDS), Defense Leadership and Management Program (DLAMP), etc.) and approved by Army Functional Chief Representatives or HQDA. Reference 1a requires HQDA approval of contracts with a non-Government training facility to develop and conduct full-time, long term training programs for groups of employees.

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SUBJECT: US Army Installation Management Agency Policy Memorandum # 26,
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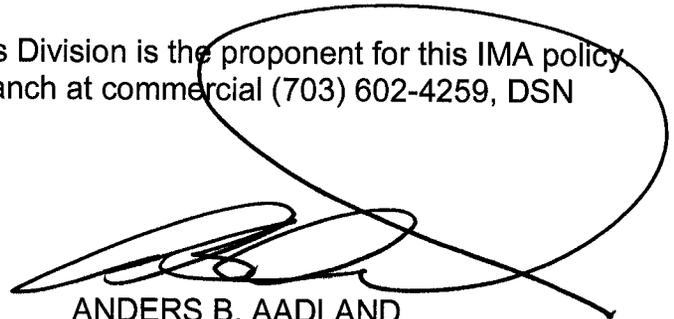
h. It is IMA policy that managers and supervisors at all levels may approve requests for short- and long-term civilian employee training at Government facilities for employees under their jurisdiction. Approving officials must use prudent judgment and equitable treatment when deciding on whether to approve such requests.

5. PROCEDURES. Enclosure contains procedures for designating subordinate managers to approve requests for short-term training for civilian employees at non-Government facilities.

6. PROPONENT. The Human Resources Division is the proponent for this IMA policy. POC is Chief, Workforce Development Branch at commercial (703) 602-4259, DSN 332-4259.

Encls

1. Procedures for Designation
2. Sample Designation Memorandum

A large, stylized handwritten signature in black ink, consisting of several overlapping loops and a long horizontal stroke extending to the right.

ANDERS B. AADLAND
Major General, GS
Director

PROCEDURES FOR DESIGNATION OF IMA TRAINING APPROVAL OFFICIALS

1. The following criteria apply to designation of subordinate managers to act for officials with appointing authority to approve short-term (120 calendar days or less) training at non-Government facilities under IMA's policy:

a. Designated managers must be a line manager with significant responsibility for overall management of an organizational entity. Region Directors and Garrison Commanders/Garrison Managers must use prudent judgment in deciding whom they will designate to act for them to approve short-term training at non-Government facilities for their civilian employees.

b. Region Directors and Garrison Commanders/Garrison Managers must ensure that the designated managers complete appropriate training in proper procedures and responsibilities as a designated approving official before allowing the manager to approve any short-term non-Government training. This can be accomplished by completing the on-line Army Civilian Human Resources Agency (CHRA) training module on Delegated Training Authority, which can be found on the CHRA website at <http://www.cpocma.army.mil/>. Once at the CHRA website, find the module, complete the training and document successful completion:

- 1) Scroll down to bottom of the page;
- 2) Under "Training", click on Online Courses/Training Materials;
- 3) Click on Delegated Training Authority under "Human Resources Development";
- 4) Follow the instructions to complete the module;
- 5) Print the last page that documents successful completion of the module.
- 6) Attach a copy of the page to a short memo, signed and dated by the designated manager, certifying that they completed the training.
- 7) File a copy with the designation memo, and maintain it on file for as long as the manager is a designated to act for the approving official.

2. Region Directors and Garrison Commanders/Garrison Managers will prepare a memorandum (see sample) to document the designation, and maintain it in an appropriate file for the duration of the designation.

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SAMPLE DESIGNATION MEMORANDUM

(Office symbol designating official)

MEMORANDUM FOR (Name and title, series and grade of designated manager)

SUBJECT: Designation to Approve Short-Term Training at Non-Government Facilities

1. Reference memorandum, US Army Installation Management Agency, (date), subject: US Army Installation Management Agency Policy Memorandum #____, Civilian Training Approval Authority.
2. In accordance with above reference, I designate you to act for me in approval of short-term (120 calendar days or less) training at non-Government facilities for civilian employees under your supervision. I am making this designation based on your successful completion of training in proper procedures and responsibilities as a designated approving official on (date). You may not designate any of your subordinates to approve short-term training at non-Government facilities in your absence. You will inform your subordinates that my designated official or I must approve all such training in your absence.
3. This designation will remain in effect for the duration of your employment in your present position, or until revoked by me, my successor(s) or other appropriate authority.

JOHN M. DOE
COL, INF
Garrison Commander

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2511 JEFFERSON DAVIS HIGHWAY
ARLINGTON, VA 22202-3926

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MEMORANDUM FOR ALL US Army Installation Management Agency Personnel

SUBJECT: US Army Installation Management Agency Policy Memorandum # 27,
Obtaining Approval for Reduction In Force (RIF) and Transfer of Function (TOF) Actions

1. REFERENCES.

a. DOD Directive 5410.10, February 2, 1960, Subject: Coordination and Clearance of Announcements of Personnel Reductions, Closures of Installations, and Reductions of Contract Operations Within the United States.

b. ASA(M&RA) memorandum, September 3, 1999, Subject: Planning and Conducting Reductions in Force (RIFs) to Implement A-76 Cost Competition Study Decisions.

c. SAMR-CP message, 231336Z January 1998, Subject: FY 98/99 Civilian Manpower Execution and Personnel Reduction Plan and Delegation of Authority and Processing Requirements for RIF and Voluntary Separation Incentive Pay.

d. DAPE-CPE message, 171955Z February 1994, Subject: Delegation of Authority-Reduction in Force and Voluntary Separation Incentive Pay.

2. PURPOSE. To supplement DoD and DA policy, and to provide the IMA processing procedures to request approval to separate any employee by RIF, or to process any TOF.

3. APPLICABILITY. These procedures are applicable to all appropriated fund civilian employees assigned to IMA.

4. POLICY

a. IMA has the authority to reorganize, revise or move a mission, change the skills mix in an organization, contract out, implement most efficient organization decision, or downsize to manage a mission more efficiently. These changes may impact one or more employees by RIF or RIF procedures, or result in the movement of one or more employees by TOF. The Administrative Assistant to the Secretary of the Army (AASA) retains the authority to approve any proposed personnel action that will result in the separation by RIF or change to lower grade of one or more employees, or the movement of one or more employees by TOF. Formal RIF notices will not be issued without the approval of the AASA. This includes notices that result in involuntary separations, changes to lower grade, or TOF.

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Obtaining Approval for Reduction In Force (RIF) and Transfer of Function (TOF) Actions

b. It is IMA policy to avoid, or minimize to the extent possible, involuntary employee separations resulting from RIF or TOF. To accomplish this, when involuntary separations are anticipated, activities will use VSIP and are encouraged to use other available downsizing tools to avoid or minimize adverse impact. Voluntary Early Retirement Authority, DoD Priority Placement Program, OPM Interagency Career Transition Assistance, and local outplacement initiatives are some of the programs available to increase voluntary separations.

c. Approval from AASA is required before any public announcement of RIF or TOF is made, and before any employee can be notified of impact by RIF or TOF. The approval process assures that DA Leadership is properly informed, and when appropriate, the public announcement is fully coordinated. The advance information required to obtain clearance varies, depending on the number of employees affected. More information is required if 50 or more employees will be separated by RIF or moved outside the commuting area by TOF. The number of employees affected refers to the actual number of employees to be moved or separated on the effective date of the personnel action.

5. PROCEDURES.

a. In order to avoid or minimize involuntary separations, regions/garrisons anticipating closure, RIF separations, or TOF outside the commuting area must offer VSIP to the affected workforce at least 30 days before RIF or TOF notices are issued.

b. A reassessment will be conducted upon closure of the VSIP window. If the reassessment verifies a continuing need for RIF, the Region Director/Garrison Commander, through the Region Director, will forward a signed memorandum requesting RIF authority. As an alternative, the RIF authority request may be submitted simultaneously with the VERA/VSIP authority request. If the use of VSIP and VERA negates the need for the use of RIF procedures, the Region Director/Garrison Commander, through the Region Director, will submit a memorandum stating that the requirement for RIF was negated based on the use of VERA, VSIP, outplacement activity, and other attrition.

c. If less than 50 involuntary separations are expected, the Region Director/Garrison Commander/Garrison Manager will attach a revised Realignment Fact Sheet, Small RIF based on the actions taken since the initial request for VERA /VSIP. A sample Realignment Fact Sheet, Small RIF is attached, Encl 2. No RIF or TOF announcement can be made and no notices can be issued to employees until the region/garrison receives approval from AASA through IMA command channels.

d. If 50 or more involuntary separations are expected after the VSIP/VERA open window, the Region Director/Garrison Commander/Garrison Manager, through the Region Director, will forward a signed memorandum requesting RIF or TOF authority. The Region Director will review and submit fully justified cases to HQIMA. HQIMA will seek approval from AASA.

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Obtaining Approval for Reduction In Force (RIF) and Transfer of Function (TOF) Actions

The request should include the following: Realignment Fact Sheet, Narrative Realignment Fact Sheet, Large RIF, draft Information for Members of Congress, draft Press Release with Questions and Answers, Environmental Impact documentation, Equal Employment Opportunity Impact documentation. Samples of those documents are at Encl 1-7. No RIF or TOF announcement can be made and no RIF or TOF letters can be issued to employees until the region/garrison receives RIF or TOF approval from AASA through IMA command channels.

e. Successful execution of reductions in force requires advance planning in order to obtain necessary approvals and to satisfy mandatory advance reporting requirements. The timelines at enclosure 8 must be adhered to by IMA activities as they prepare to execute reductions in force.

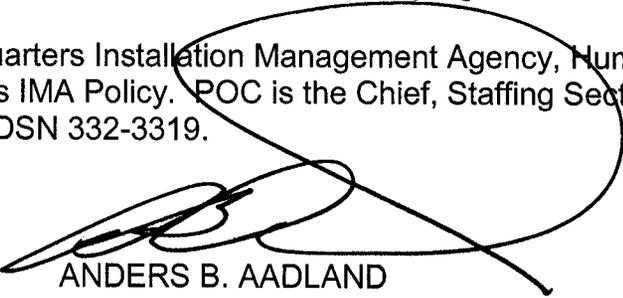
f. See the Office of Personnel Management Restructuring Information Handbooks for an extensive discussion of required and recommended procedures to manage a RIF or TOF. The Handbooks are posted on the OPM Website under RIF General.

g. HQIMA may request reports on specific aspects of program administration.

6. PROPONENT. The Headquarters Installation Management Agency, Human Resources Division is the proponent for this IMA Policy. POC is the Chief, Staffing Section, phone commercial (703) 602-3319 or DSN 332-3319.

Encls

1. Realignment Cover Sheet
2. Realignment Fact Sheet
3. Narrative RFS
4. IMC
5. Draft Press Release
6. EEO Impact Statement
7. Record of Environmental Consideration
8. Timelines



ANDERS B. AADLAND
Major General, GS
Director

REALIGNMENT FACT COVER SHEET

Small RIF
(Less than 50)

A. General Information:

1. Reporting Installation: IMA Region/IMA Garrison
2. Activity/Organization Undergoing Reduction: (comprises a single competitive area):
3. Activity/Organization's MACOM: Installation Management Agency/AASA
4. Activity's installation name (if different than #1 above): (IMA Garrison)
5. Activity geographical locations within the competitive area:
6. Activity ROC/UICs:
7. Number of Employees Assigned to the UICs:
 - a. Not in the competitive area:
 - b. In the competitive area:
8. Reduction Status Code:
 - a. Enter "C" when reduction is in the contingency or planning stages and it's unknown if a RIF will be needed:
 - b. Enter "N" when it is known that a RIF will not be needed to reduce to target level:
 - c. Enter "R" when it is expected that RIF/VSIP/VERA is needed to effect the reductions:
9. Reduction Reason Code:
 - a. Enter "R" when it is expected that a RIF/VSIP/VERA is needed to effect the reductions.
 - b. Enter "BRAC" when the reduction is the result of a Base Realignment and Closure (BRAC) action.
 - c. Enter "A-76" when the reduction is the result of the implementation of a commercial activity/privatization decision. Enter "Other" when reduction is for reasons not covered by one of the specific codes (provide explanation).
10. Effective Date of Reported Data in Item 7 and the Realignment Fact Sheet:

Encl 1

11. Target Data and Losses/Accessions are Projected Through (check appropriate box):

a. The End FY:

b. The RIF Effective Date (provide explanation): (i.e., 30 Jun 04; MEO implementation necessitates reduction as early in the fiscal year as possible.

12. Projected RIF Separations after VSIP/VERA: (Based on mock RIF results, attach list of projected involuntary separations by title, series and grade)

REALIGNMENT FACT COVER SHEET (continued)
Small RIF

B. Form Completion Instructions

1. Instructions are provided only for those entries that are not self-explanatory.
2. Entry 1g should reflect any position you anticipate would be vacant when the RIF is completed. This can include vacancies created by attrition during the course of the RIF if you anticipate that some of these positions will still be vacant. If any number other than "0" is entered in block 1g (projected vacancies remaining), a detailed explanation is required to document why these vacancies could not be used to place surplus employees.
3. Entry 2a = Strength of competitive area.
4. Entry 2d = TOF transfers outside the competitive area.
5. Entry 2e = Other Voluntary Losses. This entry includes all voluntary losses (i.e., resignations, optional retirements, reassignments out of the competitive area, leave without pay in excess of 30 days, etc.) Temporary and term employees whose appointments expire before the end of the FY (or effective date of the RIF) and temporary employees who are to be separated prior to the expiration date of their appointments are also included in this entry.
6. Entry 2f = $2c + 2d + 2e$.
7. Entry 2g = (RIF separations after use of VSIP/VERA)
8. Entry 2h = Other Involuntary Losses. Projected separations through adverse actions procedures, discontinued service and disability retirements are also included in this entry.
9. Entry 2i = $2g + 2h$

REALIGNMENT FACT COVER SHEET (continued)
Small RIF

C. Narrative Justification

1. If temporary employees will remain after the reduction action, explain why they are essential and why none of your surplus employees could perform the duties being performed by the temporary employees.
2. If the Reduction Status Code is "R" indicating that a RIF is needed, provide a detailed explanation of the reasons for the RIF.
3. If there are vacant positions after completion of the action (RFS 1g), explain why they were not/cannot be used to place the surplus employees. This should include a detailed explanation of the type of positions to be filled and the types of skills possessed by the surplus employees. This should also include an explanation as to why these positions will not be filled (from any source) by the RIF effective date.
4. Normally, 1e, 2b and 2k will be same number. When this is not the case, provide a narrative explanation of the variances. This will again explain why existing vacancies cannot be used to place the surplus employees and should include a detailed explanation of the types of positions to be filled and the types of skills possessed by the surplus employees. It is the same as the explanation for entry 1g.
5. Provide an explanation for the entry in 2j. If the entry is greater than zero, explain why these vacancies will be filled by external candidates during a RIF and could not be used to place surplus employees instead.

REALIGNMENT FACT SHEET
Small RIF

MACOM/HQ: AASA
Activity/Installation:

RIF Notification _____
RIF Request _____

Position Impact

1. Number of Positions	Permanent	Term	Temporary	Total
a. Authorized Prior to Action				
b. Minus Abolished By Action				
c. Minus Transferred from Activity				
d. Plus Transferred into Activity				
e. Equals Authorized After Action				
Other Position Information:				
f. Vacant Prior to Action				
g. Projected Vacancies				

Personnel Impact

2. Number of Employees	Permanent	Term	Temporary	Total
a. On-Board Prior to Action				
b. Target Strength				
Projected Attrition				
c. Number of Approved VERA/VSIP				
d. TOF Transfers outside CA				
e. Plus Other Voluntary Losses				
f. Equals - Normal Attrition				
Projected Involuntary Losses				
g. Separation RIF (after VSIP/VERA)				
h. Plus - Other Involuntary Losses				
i. Equals - Total Involuntary Losses After VSIP/VERA				
j. Projected Accessions:				
k. Projected End Strength: Equals 2b. (2a minus 2f minus 2i plus 2j)				
3. Other Projected Information:				
a. Changes to Lower Grade				
b. Reassignments				

4. Projected RIF Letter Issue Date: _____ 5. Projected RIF Effective Date: _____
6. Projected TOF Letter Issue Date: _____ 7. Projected TOF Effective Date: _____

Encl 2

REALIGNMENT FACT SHEET
Large RIF/TOF

MACOM/HQ: AASA

Activity/Installation:

RIF Request _____

Position Impact

1. Number of Positions	Permanent	Term	Temporary	Total
a. Authorized Prior to Action				
b. Minus Abolished By Action				
c. Minus Transferred from Activity				
d. Plus Transferred into Activity				
e. Equals Authorized After Action				
Other Position Information:				
f. Vacant Prior to Action				
g. Projected Vacancies				

Personnel Impact

2. Number of Employees	Permanent	Term	Temporary	Total
a. On-Board Prior to Action				
b. Target Strength				
Projected Attrition				
c. Number of Approved VERA/VSIP				
d. TOF Transfers outside CA				
e. Plus Other Voluntary Losses				
f. Equals - Normal Attrition				
Projected Involuntary Losses				
g. Separation RIF (after VSIP/VERA)				
h. Plus - Other Involuntary Losses				
i. Equals - Total Involuntary Losses After VSIP/VERA				
j. Projected Accessions:				
k. Projected End Strength: Equals 2b. (2a minus 2f minus 2i plus 2j)				
3. Other Projected Information:				
a. Changes to Lower Grade				
b. Reassignments				

4. Projected RIF Letter Issue Date: _____ 5. Projected RIF Effective Date: _____
6. Projected TOF Letter Issue Date: _____ 7. Projected TOF Effective Date: _____

NARRATIVE REALIGNMENT FACT SHEET
Large RIF/TOF
(50 or more)

1. BACKGROUND AND MISSION:

- a. Organization undergoing reduction:
- b. Geographic location of organization:
- c. Mission:

2. NATURE OF THE ACTION:

3. DATE LETTERS WILL BE ISSUED:

4. REDUCTION-IN-FORCE (RIF) OR TRANSFER-OF-FUNCTION (TOF) EFFECTIVE DATE:

5. REASON FOR THE ACTION:

6. IMPACT OF THE ACTION: There were ____ civilian employees assigned to _____ as of _____. This action will result in elimination of _____ positions. Through the use of incentives to encourage voluntary separations and through other known attrition, _____ has reduced the number of employees subject to involuntary separation. With the use of Voluntary Separation Incentive Pay (VSIP) and Voluntary Early Retirement Authority (VERA), outplacement efforts, and other projected attrition, the number of involuntary separations is expected to be reduced further. If all expected voluntary losses occur, the involuntary separations may be reduced to _____.

7. POSITION IMPACT:

- a. Positions prior to this action:
Permanent____; Term:____; Temporary____; Total_____
- b. Vacant positions prior to this action:
Permanent____; Term:____; Temporary____; Total_____
- c. Positions to be eliminated as a result of this action:
Permanent____; Term:____; Temporary ____; Total_____
- d. Positions to be transferred from this activity during the period of this action:
Permanent____; Term____;Temporary____; Total_____

Encl 3

e. Positions to be transferred to this activity during the period of this action:
Permanent___; Term___;Temporary___; Total___

f. Positions remaining at this activity after completion:
Permanent___; Term___;Temporary___; Total___

g. Positions to be changed to lower grade (CLG):
Permanent___; Term___;Temporary___; Total___

8. PERSONNEL IMPACT:

a. The total number of personnel on board prior to this action (Source: CPOL SF-113A report ME _____)

Permanent___; Term___; Temporary___; Total_____

Current on-board strength

(Source: CPOL SF-113A report ME _____)

Permanent ___; Term___; Temporary___; Total_____

NOTE: Use end-month strength figures from month prior to this report. Identify month, day, and year and source from which figures were drawn.

b. The total target end-strength:
Permanent___; Term___; Temporary___; Total ___

c. The total number of reductions:
Permanent___; Term___; Temporary___; Total ___

d. Actual optional retirements during the period of this action:
Permanent _____

Estimated additional optional retirements during the period of this action:

Permanent _____

e. Actual early retirements approved during the period of this action:

Permanent _____

Estimated additional early retirements to be approved during the period of this action:

Permanent _____

f. Actual other retirements approved during the period of this action:

Permanent _____

Estimated other retirements during the period of this action:

Permanent _____

g. Actual resignations during the period of this action:

Permanent__; Term__; Temporary __; Total _____

Estimated additional resignations during the period of this action:

Permanent__; Term__; Temporary __; Total _____

- h. Actual number of personnel placed with other Army or Federal activities during the period of this action:

Permanent__; Term__; Temporary __; Total _____

Estimated additional number of personnel to be placed with other Army or Federal activities during the period of this action:

Permanent__; Term__; Temporary __; Total _____

- i. Actual other attrition during the period of this action:

Permanent__; Term__; Temporary __; Total _____

Estimated additional other attrition during the period of this action:

Permanent__; Term__; Temporary __; Total _____

- j. Actual number of temporaries terminated or released as a result of this action: _____

Estimated number of additional temporaries to be terminated or released as a result of this action: _____

NOTE: The temporary work force must also be used as a reduction tool. Used wisely, the temporary work force can lessen the impact, thus project release as an alternative to RIF/TOF. Explain how the temporary work force, including any intermittent employees, will be used to minimize/prevent the RIF or TOF. Also, see CFR 351.602, Prohibitions.

- k. Actual number of employees transferred to other activities during the period of this action by TOF: _____

Estimated additional number of employees to be transferred to other activities during the period of this action by TOF: _____

- l. Actual number of employees transferred to this activity during the period of this action: _____

Estimated additional number of employees to be transferred to this activity during the period of this action: _____

- m. Estimated number of employees to be separated by RIF:

Permanent____; Term__; Total _____

- n. Estimated number of employees to be separated under adverse procedures as a result of TOF: _____

o. Estimated number of employees to be changed to lower grade (demoted): _____

p. Total number of employees who have already left voluntarily (i.e., attrition) before the planned effective date of the RIF, TOF or CLG:

Permanent___; Term___; Temporary___; Total _____

Estimated additional number of employees who will leave voluntarily (i.e., attrition) before the planned effective date of the RIF, TOF or CLG:

Permanent___; Term___; Temporary___; Total _____

q. Estimated number of employees on board after completion of this action:

Permanent___; Term___; Temporary___; Total _____

r. Estimated number of vacant positions remaining after completion of this action:

Permanent___; Term___; Temporary___; Total _____

9. Estimated annual cost savings: \$ Million

INFORMATION FOR MEMBERS OF CONGRESS

The following wording must be used in the IMC (no creative writing allowed):

The Department of the Army announced today that a Reduction in Force (RIF) will be conducted at the {RFS #1a and #1b}. This action is the result of {RFS #5}.

{Enter first 11 items from IMC/DPR Sentence Formula below}

We have reduced the impact of this action on civilian employees through aggressive outplacement effort, normal attrition, reassignments, hiring controls, and separation incentives including early retirement. A window of opportunity for Voluntary Separation Incentive Pay (VSIP) was open from {Month, Day, Year} until {Month, Day, Year}. The continued use of VSIP, Voluntary Early Retirement Authority, and other outplacement efforts is expected to reduce the number of permanent employee involuntary separations to {RFS #8m}. All possible placement efforts are being explored to assist affected employees.

{Enter last 2 items from IMC/DPR Sentence Formula}

IMC/DPR Sentence Formula

	<u>RFS</u>
In Organization,	1a
there are currently ## authorized positions.	7a
Of the ## positions	7a
## will be eliminated.	7c
There are currently ## employees on board	8a
It is estimated that ## will resign or retire,	8d thru 8g
## will be placed elsewhere,	8h
## temporary employees will be terminated	8j
and up to ## may be separated by RIF.	8m
On Month Day, Year,	4
## positions	7f
and ## employees will remain.	8q
Notices will be given to affected employees	
not earlier than Month, Day, Year.	3
The notices will be effective not earlier than	
Month, Day, Year.	4

Encl 4

**DEPARTMENT OF THE ARMY
OFFICE OF THE SECRETARY OF THE ARMY
WASHINGTON, D. C.**

INFORMATION FOR MEMBERS OF CONGRESS

The Department of the Army announced today that a Reduction in Force (RIF) will be conducted at the _____ located in _____, _____. This action is the result of _____.

At _____ there are currently _____ authorized positions. Of those _____ positions, _____ will be eliminated. There are currently _____ employees on board. It is estimated that _____ will resign or retire, _____ will be placed elsewhere, _____ temporary employees will be terminated, and up to _____ may be separated by RIF. On _____, _____ positions and _____ employees will remain.

We have reduced the impact of this action on civilian employees through aggressive outplacement efforts, normal attrition, reassignments, hiring controls, and separation incentives including early retirement. An initial window of opportunity for Voluntary Separation Incentive Pay (VSIP) was open from _____ to _____. The continued use of VSIP, Voluntary Early Retirement Authority, and other outplacement efforts is expected to reduce the number of permanent employee involuntary separations to _____. All possible placement efforts are being explored to assist affected employees.

Notices will be given to affected employees not earlier than _____. The notices will be effective not earlier than _____.

FURNISHED BY:

Office, Chief of
Legislative Liaison

Draft Press Release (DPR)

The following wording must be used in the DPR (no creative writing allowed):

The Department of the Army announced today that a Reduction in Force (RIF) will be conducted at the {RFS #1a and #1b}. This action is the result of {RFS #5}.

{Enter first 11 items from IMC/DPR Sentence Formula}

We have reduced the impact of this action on civilian employees through aggressive outplacement effort, normal attrition, reassignments, hiring controls, and separation incentives including early retirement. A window of opportunity for Voluntary Separation Incentive Pay (VSIP) was open from {Month, Day, Year} until {Month, Day, Year}. The continued use of VSIP, Voluntary Early Retirement Authority, and other outplacement efforts is expected to reduce the number of permanent employee involuntary separations to {RFS #8m}. All possible placement efforts are being explored to assist affected employees.

This action is expected to save the Department of the Army an estimated {RFS #9} annually.

{Enter last 2 items from IMC/DPR Sentence Formula}

IMC/DPR Sentence Formula

	<u>RFS</u>
In Organization,	1a
there are currently ## authorized positions.	7a
Of the ## positions	7a
## will be eliminated.	7c
There are currently ## employees on board	8a
It is estimated that ## will resign or retire,	8d thru 8g
## will be placed elsewhere,	8h
## temporary employees will be terminated	8j
and up to ## may be separated by RIF.	8m
On Month, Day, Year,	4
## positions	7f
and ## employees will remain.	8q
Notices will be given to affected employees	
not earlier than Month, Day, Year.	3
The notices will be effective not earlier than	
Month, Day, Year.	4

For additional information, contact {insert name and phone number of the POC at the affected installation}.

Encl 5

DRAFT PRESS RELEASE

The Department of the Army announced today that a Reduction in Force (RIF) will be conducted at the _____ located in _____, _____. This action is the result of _____.

At _____ there are currently _____ authorized positions. Of those _____ positions, _____ will be eliminated. There are currently _____ employees on board. It is estimated that _____ will resign or retire, _____ will be placed elsewhere, _____ temporary employees will be terminated, and up to _____ may be separated by RIF. On _____, _____ positions and _____ employees will remain.

We have reduced the impact of this action on civilian employees through aggressive outplacement efforts, normal attrition, reassignments, hiring controls, and separation incentives including early retirement. An initial window of opportunity for Voluntary Separation Incentive Pay (VSIP) was open from _____ to _____. The continued use of VSIP, Voluntary Early Retirement Authority (VERA), and other outplacement efforts is expected to reduce the number of permanent employee involuntary separations to _____. All possible placement efforts are being explored to assist affected employees.

This action is expected to save the Department of the Army an estimated \$ _____ million annually.

Notices will be given to affected employees not earlier than _____. All actions will be completed not earlier than _____.

For additional information, contact {insert name and phone number of the POC at the affected installation}.

Proposed Questions and Answers

The following wording must be used in the Questions and Answers (additional Questions and Answers may be included, but these are the minimum required):

Q1: What is the reason for this reduction in force?

A1: {RFS #5}.

Q2: How many civilian employees are projected to be involuntarily separated as a result of this action?

A2: Up to {RFS #8m} civilian employees are projected to be involuntarily separated as a result of this action.

Q3: When will the affected employees be notified that their jobs have been eliminated?

A3: Employees will be provided a minimum of 60 days advance notice before effective date of the reduction. Specific notices are projected to be issued no earlier than {RFS #3} with an effective date no earlier than {RFS #4}.

Q4: What will happen to the remaining employees?

A4: Of the {RFS #7c} positions to be eliminated, only {RFS #7c - (#7a - #8a)} are encumbered. There have already been {actuals in RFS #8d + 8e + 8g} employees approved for voluntary separation (retirement or resignation) with incentive pay. It is anticipated that an additional {estimated additional from RFS #8d + 8e + 8f + 8h + 8i} employees will retire, resign or find jobs with other activities. In addition, {RFS #8j} temporary employees will be terminated.

Q5: What assistance will be provided to employees who actually lose their jobs?

A5: Career employees will be given assistance in continuing their careers as employees of the Defense Department through the Priority Placement Program. Employees will also be given placement assistance for positions in other federal agencies and the private sector through the Interagency Career Transition Assistance Program, Defense Outplacement Referral System and State Employment Service. Eligible employees will also receive severance pay.

Equal Employment Opportunity Impact Assessment

This document is normally prepared by the EEO office. The EEO Office may use any appropriate wording to describe the impact of the RIF on representation of women and minorities. However, ensure that the number used to represent Total Civilian Work Force (CWF) before the action is the same as RFS #8a and that the number used to represent Total CWF after the RIF is the same as RFS #8q. Also ensure the percentages are consistently computed and check basic math computations to ensure the following:

Total CWF = Total Men in CWF + Total Women in CWF

Total Women in CWF = Non-Minority Women in CWF + Minority Women in CWF
Total Men in CWF = Non-Minority Men in CWF + Minority Men in CWF

Total Minorities in CWF = Minority Women in CWF + Minority Men in CWF

Total Non-Minorities in CWF = Non-Minority Women in CWF + Non-Minority Men in CWF

Asian/Pacific Islander + American Indian/Alaskan Native + African American + Hispanic in CWF = Total Minorities in CWF

EQUAL EMPLOYMENT OPPORTUNITY ASSESSMENT

_____ is anticipating a potential decrease of _____ permanent employees. This represents a _____% decrease in the work force. This _____% decrease will have the greatest impact on the representation of _____

Equal Employment Officer

CATEGORY	NUMBER (%) BEFORE ACTION	NUMBER (%) AFTER ACTION
(1) Total Work Force		
(2) Total Men in Work Force		
(3) Total Women in Work Force		
(a) Nonminority women in work force		
(b) Minority women in work force		
(4) Total nonminority in work force		
(5) Total minority in work force		
(a) Black		
(b) Hispanic		
(c) Asian American/Pacific Islander		
(d) American Indian/Alaskan Native		
(6) Total Individuals with disabilities in work force		
(7) Total Individuals with Targeted Disabilities		

Source:

Record of Environmental Consideration

This document is prepared in accordance with AR 200-2. The format follows:

PROJECT TITLE: Reduction in Force (RIF)

BRIEF DESCRIPTION: The {RFS #1a and #1b} proposes to reduce its civilian workforce by approximately {RFS #7c} permanent civilian positions. This action will reduce the workforce at {RFS #1a} from the current approximate {RFS #8a} civilian employees to a target of approximately {RFS #8q} civilian employees. In conjunction with this action, no military personnel positions will be eliminated or transferred elsewhere.

ANTICIPATED DATE AND/OR DURATION OF PROPOSED ACTION:
Anticipated effective date of RIF is on or about {RFS #4}.

{Environmental office will enter description of environmental impact, or state that there will be no significant environmental impact, and provide an installation level environmental POC name and phone number.}

- Not required for an A-76 study.



REPLY TO
ATTENTION OF

DEPARTMENT OF THE ARMY
INSTALLATION MANAGEMENT AGENCY
2511 JEFFERSON DAVIS HIGHWAY
ARLINGTON, VA 22202-3926

JUL 30 2004

SFIM-HR-C

MEMORANDUM FOR ALL US Army Installation Management Agency Personnel

SUBJECT: US Army Installation Management Agency Policy Memorandum # 28,
Obtaining Approval to Offer Voluntary Separation Incentive Pay (VSIP) and Voluntary Early
Retirement Authority (VERA) for Reduction-in-Force

1. REFERENCES.

a. Memorandum, Administrative Assistant to the Secretary of the Army, February 9, 2004, Subject: Delegation of Authority and Allocation for National Security Personnel System – Voluntary Separation Incentive Program (VSIP) and Voluntary Early Retirement Authority (VERA).

b. Memorandum, ASA (M&RA), January 29, 2004 Subject: National Security Personnel System – Voluntary Separation Incentive Pay (VSIP) and Voluntary Early Retirement Authority (VERA).

c. Memorandum, Under Secretary of Defense, December 30, 2003, Subject: National Security Personnel System – Voluntary Separation Incentive Pay (VSIP) and Voluntary Early Retirement Authority (VERA) Policy.

2. PURPOSE. To supplement DoD and DA policy, and to provide the IMA processing procedures for requesting authority to offer VSIP and VERA.

3. APPLICABILITY. These procedures are applicable to all appropriated fund civilian employees assigned to IMA CONUS regions/garrisons.

4. POLICY.

a. IMA has the authority to reorganize, revise or move a mission, change the skills mix in an organization, contract out, implement the most efficient organization decision, or downsize to manage a mission more efficiently. These changes may impact one or more employees by reduction in force (RIF) or RIF procedures, or by the movement of one or more employees under transfer of function (TOF). The Administrative Assistant to the Secretary of the Army (AASA) retains the authority to approve any proposed personnel action that will result in the separation by RIF or change to lower grade of one or more employees, or the movement of one or more employees by TOF. Formal RIF notices will not be issued without the approval of the AASA. This includes notices that result in involuntary separations, changes to lower grade, or TOF.

SFIM-HR-C

SUBJECT: US Army Installation Management Agency Policy Memorandum # 28,
Obtaining Approval to Offer Voluntary Separation Incentive Pay (VSIP) and Voluntary Early
Retirement Authority (VERA) For Reduction-in-Force

b. The use of VERA and VSIP is subject to the guidance and procedures described in Reference 1c. Regions/garrisons anticipating involuntary separations by RIF will offer VERA and VSIP at least 30 days before RIF notices are issued. The Director, IMA has authority to approve the use of VERA and VSIP within IMA for employees occupying positions up to grade GS-15 (or equivalent), except for special salary rate employees, which is retained by the Secretary of the Army.

c. When provisions of this policy differ from the provisions of a written agreement between the installation/serviced organization and an exclusive bargaining unit, the provisions of the agreement apply to employees subject to the agreement.

5. PROCEDURES.

a. Regions/garrisons will offer VERA and VSIP separation incentives before issuing RIF notices. Region Directors and Garrison Commanders/Garrison Managers, through the Region Director, will submit the following documents to request authority to offer VERA and VSIP:

(1) Memorandum signed by the Region Director/Garrison Commander/Garrison Manager requesting VERA/VSIP authority.

(2) Realignment Fact Cover Sheet (Encl 1).

(3) Realignment Fact Sheet (Encl 2).

(4) Request For VSIP (Encl 3).

b. The Region Director/Garrison Commander/Garrison Manager may submit a request for RIF authority with the VERA/VSIP authority request. See policy memorandum # 27 for further guidance. To assist in planning, also see the processing timelines chart at Encl 8 of that memorandum.

c. Upon closure of the VERA and VSIP window, the Region Director/Garrison Commander/Garrison Manager, through the Region Director, will forward a report to HQIMA describing the use of VERA and VSIP. The report should cite the number of approvals by optional retirement, early retirement (with and without VSIP) and resignation.

d. Following the VERA/VSIP open window, the region/garrison will reassess the need for RIF based on VERA and VSIP attrition, any other attrition (both known and anticipated), and any other factors that may impact the continued requirement for RIF. If the reassessment indicates a RIF is required, follow the procedures outlined in the RIF Policy Memorandum. If the reassessment indicates no RIF is necessary, the Region Director/Garrison Commander/Garrison Manager, through the Region Director, will submit a

SFIM-HR-C

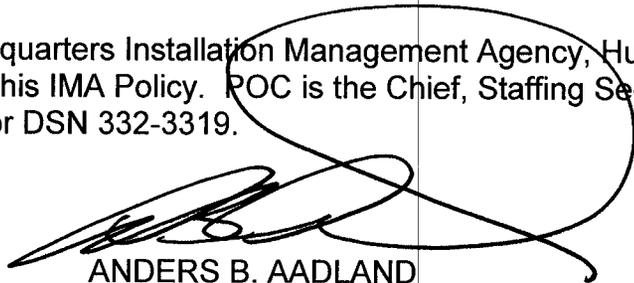
SUBJECT: US Army Installation Management Agency Policy Memorandum # 28,
Obtaining Approval to Offer Voluntary Separation Incentive Pay (VSIP) and Voluntary Early
Retirement Authority (VERA) For Reduction-in-Force

memorandum, stating that the need for RIF was negated based on VERA/VSIP,
outplacement actions, and other attrition.

e. Region Directors will review all requests and endorse fully justified cases to HQIMA
for consideration with a signed memorandum.

f. HQIMA may request reports on specific aspects of program administration.

6. PROPONENT. The Headquarters Installation Management Agency, Human Resources
Division is the proponent for this IMA Policy. POC is the Chief, Staffing Section, phone
commercial (703) 602-3319 or DSN 332-3319.



ANDERS B. AADLAND
Major General, GS
Director

3 Encls

1. Realign Fact Cover Sheet
2. Realign Fact Sheet
3. Request for Authority, VSIP

REALIGNMENT FACT COVER SHEET
VERA/VSIP

A. General Information:

1. Reporting Installation: IMA Region/IMA Garrison
2. Activity/Organization Undergoing Reduction: (comprises a single competitive area):
3. Activity/Organization's MACOM: Installation Management Agency/AASA
4. Activity's installation name (if different than #1 above): (IMA Garrison)
5. Activity geographical locations within the competitive area:
6. Activity ROC/UICs:
7. Number of Employees Assigned to the UICs:
 - a. Not in the competitive area:
 - b. In the competitive area:
8. Reduction Status Code:
 - a. Enter "C" when reduction is in the contingency or planning stages and it's unknown if a RIF will be needed:
 - b. Enter "N" when it is known that a RIF will not be needed to reduce to target level:
 - c. Enter "R" when it is expected that RIF/VSIP/VERA is needed to effect the reductions:
9. Reduction Reason Code:
 - a. Enter "R" when it is expected that a RIF/VSIP/VERA is needed to effect the reductions.
 - b. Enter "BRAC" when the reduction is the result of a Base Realignment and Closure (BRAC) action.
 - c. Enter "A-76" when the reduction is the result of the implementation of a commercial activity/privatization decision. Enter "Other" when reduction is for reasons not covered by one of the specific codes (provide explanation).
10. Effective Date of Reported Data in Item 7 and the Realignment Fact Sheet:

Encl 1

REALIGNMENT FACT COVER SHEET (continued)
VERA/VSIP

11. Target Data and Losses/Accessions are Projected Through (check appropriate box):
- a. The End FY:
 - b. The RIF Effective Date (provide explanation): (i.e., 30 Jun 04; MEO implementation necessitates reduction as early in the fiscal year as possible).
12. Projected RIF Separations after VSIP/VERA: (Based on mock RIF results, attach list of projected involuntary separations by title, series and grade)

REALIGNMENT FACT COVER SHEET (continued)
VERA/VSIP

B. Form Completion Instructions

1. Instructions are provided only for those entries that are not self-explanatory.
2. Entry 1g should reflect any position you anticipate would be vacant when the RIF is completed. This can include vacancies created by attrition during the course of the RIF if you anticipate that some of these positions will still be vacant. If any number other than "0" is entered in block 1g (projected vacancies remaining), a detailed explanation is required to document why these vacancies could not be used to place surplus employees.
3. Entry 2a = Strength of competitive area.
4. Entry 2d = TOF transfers outside the competitive area.
5. Entry 2e = Other Voluntary Losses. This entry includes all voluntary losses (i.e., resignations, optional retirements, reassignments out of the competitive area, leave without pay in excess of 30 days, etc.) Temporary and term employees whose appointments expire before the end of the FY (or effective date of the RIF) and temporary employees who are to be separated prior to the expiration date of their appointments are also included in this entry.
6. Entry 2f = 2c + 2d + 2e.
7. Entry 2g = (RIF separations after use of VSIP/VERA)
8. Entry 2h = Other Involuntary Losses. Projected separations through adverse actions procedures, discontinued service and disability retirements are also included in this entry.
9. Entry 2i = 2g + 2h

REALIGNMENT FACT COVER SHEET (continued)
VERA/VSIP

C. Narrative Justification

1. If temporary employees will remain after the reduction action, explain why they are essential and why none of your surplus employees could perform the duties being performed by the temporary employees.
2. If the Reduction Status Code is "R" indicating that a RIF is needed, provide a detailed explanation of the reasons for the RIF.
3. If there are vacant positions after completion of the action (RFS 1g), explain why they were not/cannot be used to place the surplus employees. This should include a detailed explanation of the type of positions to be filled and the types of skills possessed by the surplus employees. This should also include an explanation as to why these positions will not be filled (from any source) by the RIF effective date.
4. Normally, 1e, 2b and 2k will be same number. When this is not the case, provide a narrative explanation of the variances. This will again explain why existing vacancies cannot be used to place the surplus employees and should include a detailed explanation of the types of positions to be filled and the types of skills possessed by the surplus employees. It is the same as the explanation for entry 1g.
5. Provide an explanation for the entry in 2j. If the entry is greater than zero, explain why these vacancies will be filled by external candidates during a RIF and could not be used to place surplus employees instead.

REALIGNMENT FACT SHEET
VERA/VSIP

MACOM/HQ: AASA
Activity/Installation:

RIF Notification _____
RIF Request _____

Position Impact

1. Number of Positions	Permanent	Term	Temporary	Total
a. Authorized Prior to Action				
b. Minus Abolished By Action				
c. Minus Transferred from Activity				
d. Plus Transferred into Activity				
e. Equals Authorized After Action				
Other Position Information:				
f. Vacant Prior to Action				
g. Projected Vacancies				

Personnel Impact

2. Number of Employees	Permanent	Term	Temporary	Total
a. On-Board Prior to Action				
b. Target Strength				
Projected Attrition				
c. Number of Approved VERA/VSIP				
d. TOF Transfers outside CA				
e. Plus Other Voluntary Losses				
f. Equals - Normal Attrition				
Projected Involuntary Losses				
g. Separation RIF (after VSIP/VERA)				
h. Plus - Other Involuntary Losses				
i. Equals - Total Involuntary Losses After VSIP/VERA				
j. Projected Accessions:				
k. Projected End Strength: Equals 2b. (2a minus 2f minus 2i plus 2j)				
3. Other Projected Information:				
a. Changes to Lower Grade				
b. Reassignments				

4. Projected RIF Letter Issue Date: _____ 5. Projected RIF Effective Date: _____
6. Projected TOF Letter Issue Date: _____ 7. Projected TOF Effective Date: _____

Encl 2

REQUEST FOR AUTHORITY TO USE
VOLUNTARY SEPARATION INCENTIVE PAY

For VSIP approval use this form only. No requirement for realignment fact sheet

1. Name and Location of Installation:
2. Civilian Employment:
Total: (Includes temps and terms)
Target Reduction:
Expected Involuntary Separations Without VSIP:
3. Projected Date for Involuntary Separation:
4. Number and Type of Separation Pay Requested:
Resignation:
VERA:
Optional Retirement:
5. Proposed Expansion Beyond Requesting Installation (VSIP Phase II):
- 6.: List each abolished position by pay plan, series and grade. See the format below.

PROFILE OF ABOLISHED POSITIONS

POSITION TITLE

PP-SERIES-GR

NUMBER

Encl 3



REPLY TO
ATTENTION OF

DEPARTMENT OF THE ARMY
INSTALLATION MANAGEMENT AGENCY
2511 JEFFERSON DAVIS HIGHWAY
ARLINGTON, VA 22202-3926

SFIM-HR-C

JUL 30 2004

MEMORANDUM FOR ALL US Army Installation Management Agency Personnel

SUBJECT: US Army Installation Management Agency (IMA) Policy Memorandum # 29, Overseas Allowances and Waiver Authorities Living Quarters Allowance (LQA), Foreign Transfer Allowance (FTA), Temporary Quarters Subsistence Allowance (TQSA), and Separate Maintenance Allowance (SMA).

1. REFERENCES.

- a. Department of State Standardized Regulation (DSSR).
- b. DoD 1400.25, subchapter 1250, Overseas Allowances and Differentials, December 1996.
- c. AR 25-400-2, The Army Records Information Management System (ARIMS), March 18, 2003.
- d. Department of Army Memorandum, March 20, 2000, Subject: Delegation of Authority to Approve Certain Foreign Allowances.
- e. AR 215-3, Chapter 3-26, Nonappropriated Funds Personnel Policy, August 29, 2003

2. PURPOSE. To supplement DoD and HQDA policy, to redelegate approval authority, and to provide IMA processing procedures for the payment of various overseas allowances.

3. APPLICABILITY. This policy applies to all appropriated and nonappropriated fund United States citizen civilian employees assigned to IMA serving in foreign areas, who were recruited by the employing agency in the United States, the Commonwealth of Puerto Rico, the Commonwealth of the Northern Mariana Islands, and the possessions of the United States, and also to certain other employees recruited outside the United States.

4. POLICY. It is IMA policy that LQA, FTA, TQSA, and SMA be granted in accordance with the guidance provided in references a through e, above. The Administrative Assistant to the Secretary of Army has retained approval authority for (1) Waiver of Living Quarters Allowance, (2) Extending 10 day limit on Foreign Transfer Allowance, and (3) Separate Maintenance Allowance. Region Directors and Garrison Commanders/Garrison Managers are delegated the authority to approve the simultaneous payment of LQA and TQSA. These authorities may not be further delegated.

SFIM-HR-C

SUBJECT: US Army Installation Management Agency (IMA) Policy Memorandum # 29, Overseas Allowances and Waiver Authorities (Living Quarters Allowance (LQA), Foreign Transfer Allowance (FTA), Temporary Quarters Subsistence Allowance (TQSA), and Separate Maintenance Allowance (SMA)).

a. These allowances are not automatic salary supplements nor are they entitlements. They are specifically intended to be recruitment incentives to encourage U.S. citizen civilian employees living in the United States to accept Federal employment in a foreign area. If a person is already living in the foreign area, that inducement is normally unnecessary.

b. Individuals shall not automatically be granted these benefits simply because they meet eligibility requirements.

5. PROCEDURES.

a. The Director, Installation Management Agency (Dir, IMA), will:

(1) Conduct an annual review of the overseas allowance programs that are specified in this memorandum. HQIMA may request reports on specific aspects of program administration.

(2) Be the approval authority for all waiver requests pertaining to LQA, extending 10-day limit on FTA and the grant of SMA.

b. Region Directors (RD), will:

(1) Forward meritorious requests for allowances to the appropriate approving official for final decision.

(2) Institute procedures to periodically review and revalidate hard to fill position designations.

(3) Review all request for waiver of LQA, extending 10 day limit on FTA and the grant of SMA and forward those request that contain an acceptable reason for exception to the Director, Installation Management Agency for final decision.

c. Garrison Commanders (GC), will:

(1) Review and forward requests for waiver of LQA, extending 10 day limit on FTA and the grant of SMA to the Region Director, ensuring the requests contain valid justifications and are in compliance with this memorandum and applicable references, as stated above.

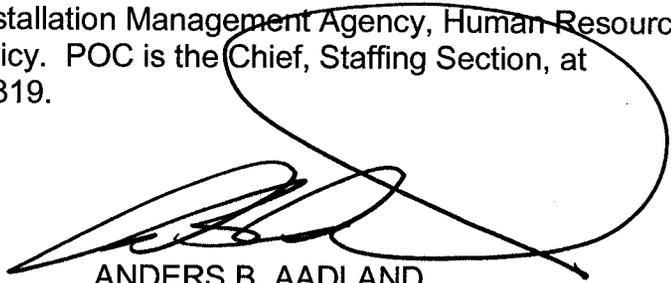
(2) Send the IMA RD a request to designate positions as hard-to-fill. The request must include detailed documentation that shows the efforts made to fill the position and the results of those efforts, during the 3 months before requesting, that the position be

SFIM-HR-C

SUBJECT: US Army Installation Management Agency (IMA) Policy Memorandum # 29, Overseas Allowances and Waiver Authorities (Living Quarters Allowance (LQA), Foreign Transfer Allowance (FTA), Temporary Quarters Subsistence Allowance (TQSA), and Separate Maintenance Allowance (SMA)).

designated as hard-to-fill. If the position is newly created or has no current recruitment record, the requester must indicate, and documentation from similar positions in similar locations will be used to evaluate the position.

6. PROPONENT: The Headquarters Installation Management Agency, Human Resources Division is the proponent for this IMA Policy. POC is the Chief, Staffing Section, at commercial (703) 602-3319, DSN 332-3319.

A handwritten signature in black ink, consisting of several loops and a long horizontal stroke, positioned above the printed name and title.

ANDERS B. AADLAND
Major General, GS
Director



REPLY TO
ATTENTION OF

DEPARTMENT OF THE ARMY
INSTALLATION MANAGEMENT AGENCY
2511 JEFFERSON DAVIS HIGHWAY
ARLINGTON, VA 22202-3926

SFIM-HR-C

JUL 30 2004

MEMORANDUM FOR ALL US Army Installation Management Agency Personnel

SUBJECT: US Army Installation Management Agency Policy Memorandum # 30,
Extension of Overseas Tours Beyond Five Years

1. REFERENCES.

- a. Title 5 and Title 10 U.S. Code.
- b. 5 CFR, Part 301.
- c. DoD Directive 1400.25-M, Department of Defense Civilian Personnel Manual, Chapter 301.4, Overseas Employment, August 24, 1988.
- d. DoD Manual 1400.20-1-M (DoD Program for Stability of Civilian Employment).
- e. DoD Directive Number 1400.25, DoD Civilian Personnel Management System, November 25, 1966.
- f. AR 690-300, Chapter 301 (Overseas Employment).
- g. AR 690-300, Chapter 352 (Reemployment Rights).
- h. Memorandum, Assistant Secretary of Defense, subject: Five-Year Rule Limitation on Foreign Employment, March 26, 1977.

2. PURPOSE. To supplement relevant policies of the Department of Defense (DoD) and Department of the Army (DA), to redelegate approval authority, and to provide implementing procedures for the administration of overseas tour extensions beyond five years for civilian employees.

3. APPLICABILITY. These procedures are applicable to all appropriated fund civilian employees assigned to IMA serving in foreign areas, to include DCIP employees. These procedures do not apply to employees with uninterrupted foreign area service since 1 April 1966; individuals employed at the GS-6 level or lower or in non-supervisory wage grade positions as long as they remained continuously employed at this GS or WG level after 24 August 1988 and family member employees who are not sponsors.

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SUBJECT: US Army Installation Management Agency Policy Memorandum # 30,
Extension of Overseas Tours Beyond Five Years

4. POLICY.

a. Installation Management Agency Region Directors are delegated the authority to approve tour extensions beyond 5-years. This authority cannot be further redelegated.

b. IMA supports the DOD Five Year Overseas Rotation Policy. Extension of overseas tours beyond five years is a management option, not an employee benefit. IMA encourages CONUS and foreign area interchange of employees. This interchange provides employees career development opportunities and supports the Department of Army goal of maintaining a cadre of mobile employees with broad experience.

c. Requests for extension of overseas tours beyond 5 years will be based on significant mission requirements, career development considerations, or situations of a humanitarian nature. The following are examples:

(1) An organization's mission will be seriously harmed if the employee leaves (i.e., the employee is engaged in an important special project that cannot be handled effectively by another individual without significant delay and/or cost).

(2) Employee was recently promoted or assigned to a new and challenging position (less than 12 months before the current tour ending date), and management has decided that his/her remaining in the foreign area for an additional tour will enhance the employee's career development.

(3) The employee wants his/her child to complete the current school year or to allow the employee or an employee's family member to continue medical treatment before traveling to a new location. In this case, a short-term extension (6 months or less) of the current tour might be approved.

d. RDs may grant extensions for a period of up to 24 months in a 24-month or 36-month tour of duty area and for a period of up to 12 months in a 12-month tour of duty area.

e. Officials with the authority to approve tour extensions must consider the following factors when evaluating a tour extension request:

(1) Mission and operational impact.

(2) Individual's special/unique qualifications, and an analysis of the availability of such qualifications in the applicant pool.

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SUBJECT: US Army Installation Management Agency Policy Memorandum # 30,
Extension of Overseas Tours Beyond Five Years

(3) The impact (financial, operational, efficiency, manpower, political, etc.) of a decision to not extend the individual.

(4) Consistency in application of the tour extension policy.

(5) Rational for the recommended period of extension.

(6) The employee's current performance rating must be fully successful or better.

(7) The employee has current knowledge, skills, and abilities required in the job.

(8) The employee has successfully adapted to the overseas work and cultural environment.

f. Consistency in application of the tour extension policy.

g. Will the extension result in the employee's loss of return rights.

h. The effect the extension will have on placement of surplus employees.

i. All preceding employment with the Department of Defense in a civilian, appropriated fund capacity overseas shall be included in computing the five-year period, except service that was interrupted by residence in the United States or other non-foreign areas.

j. Management decisions regarding tour extensions are not subject to grievance or appeal procedures.

k. Employees serving in the following positions are exempt from the DoD 5-Year limitation on overseas employment:

(1) Employees in positions that require frequent contact with officials of the host nation and a detailed current knowledge of the culture, mores, laws, customs, or government processes of the host nation, which usually cannot be acquired outside the host nation. A position will not be placed in this category unless the position description clearly specifies that the above duties and special knowledge are required. A requirement to speak the host-country language and have frequent contact with officials of the host nation is not sufficient reasons to automatically designate a position exempt.

(2) Family members of military or civilian DoD employees, not serving under their own transportation agreement.

SUBJECT: US Army Installation Management Agency Policy Memorandum # 30,
Extension of Overseas Tours Beyond Five Years

(3) Employees in the Senior Executive Service (SES).

(4) Employees who were employed in a foreign area continuously since 1 April 1966, regardless of grade.

(5) As of 24 August 1988, employees employed in GS-6 or below, or nonsupervisory wage grade positions that are currently exempt from rotation, may continue to be exempt as long as they remain continuously employed at those levels.

(6) Employees who are appointed on an Overseas Limited Appointment of indefinite duration.

(7) Some employees who are serving on excepted service appointments.

5. PROCEDURES.

a. Approving Officials. Region Directors are delegated authority to approve tour extensions beyond five years for employees assigned to their regions, including employees in Garrisons and other region activities. Local commanders are delegated authority to approve tour extensions beyond the initial tour, not to exceed the 5-year limitation on overseas tours established by DoD. This authority may not be redelegated.

b. The Director, Installation Management Agency (DIMA) will conduct an annual review of the Overseas Rotation Program.

c. Region Directors (RD) will:

(1) Ensure compliance with the established criteria identified in appropriate references and in this memorandum, and approve requests based on delegated authority.

(2) RD's will be the approval authority in designating positions as "Overseas Unique" and therefore exempting subject position from the 5-year limitation. The authority to designate positions, as "Overseas Unique" should be consistent with the authority to approve overseas tour extensions beyond 5 years.

(3) Prepare an annual evaluation of the Overseas Rotation Program for the Director, IMA (Encl 3). Report is due not later than 15 November for all tour extensions processed for the previous fiscal year. The annual evaluation report will contain the following information on employees extended beyond five years:

SFIM-HR-C

SUBJECT: US Army Installation Management Agency Policy Memorandum # 30,
Extension of Overseas Tours Beyond Five Years

- (a) Number of employees who were considered for tour extensions.
 - (b) Number of employees who were extended.
 - (c) Number of employees extended beyond five years and the reason for management's decision to extend.
 - (d) HQ, IMA may request reports on other aspects of program administration.
 - (e) Percentage of employees remaining overseas beyond 5-years.
- (4) Review the selections of all candidates selected from another geographic area whose overseas tour would result in serving more than 5 years in one or more overseas areas. Region Director must provide an approval/disapproval decision prior to official offer of employment.
- (5) Document the final decision. The employee's signed rotation agreement will serve as the basis for returning employees to the United States. The decision to extend an employee's tour beyond five years must be based on valid, mission-related, nondiscriminatory reasons.

d. Garrison Commanders (GC) will:

- (1) Make recommendations to the RD identifying individuals for tour extensions that would extend the employee's total overseas service beyond 5-years.
- (2) Ensure that justifications for all tour extensions are in compliance with DoD 1400.25-M, Chapter 301, subchapter 4, Rotation of Employees from Foreign Areas, 24 August 1988 and this policy.
- (3) Coordinate tour extension packets with appropriate Career Program Manager.

e. Managers/Supervisors will:

- (1) Prepare the extension proposal documentation packet (enclosure 4) and submit packet through the chain of command to the appropriate approval authority at least 8 months prior to current incumbent's tour expiration date.
- (2) Review the organization's mission and previous recruitment efforts in order to provide documentation supporting the need to extend an employee's overseas tour.

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SUBJECT: US Army Installation Management Agency Policy Memorandum # 30,
Extension of Overseas Tours Beyond Five Years

(3) Provide the final written decision to the employee in a timely manner in order to maximize the employee's opportunity to register in the Priority Placement Program (PPP), exercise Reemployment Rights, or make other personal decisions. Sample notification memorandums provided at enclosures 1 and 2.

(4) Ensure that employees who are not extended take the appropriate action to register in the Priority Placement Program within 7 workdays after notification that their tour is not being extended, or no later than the earliest possible registration date.

(5) Plan well ahead of an employee's tour expiration date in order to ensure that effective recruitment efforts are made. Requests for extensions of employees based on lack of a selected replacement will not be approved unless there is evidence that recruitment began with sufficient lead-time (at least 90 days prior to incumbent's tour expiration date), and that the position is critical and difficult to fill.

(6) Make recommendation for approval or disapproval for all tour extension requests.

(7) Seek required information, advice and guidance concerning overseas tour extensions, to include eligibility for renewal agreement travel (RAT), exercise of return rights and registration in the PPP from the servicing CPAC.

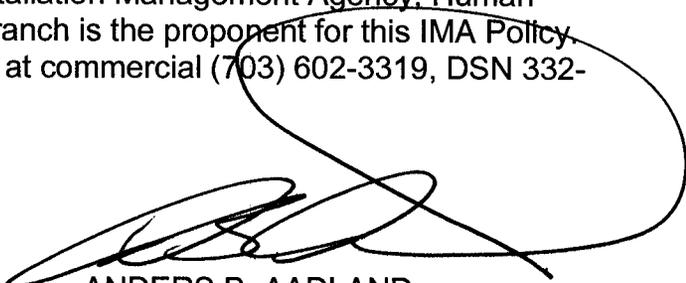
(8) After decision, forward extension packets to the servicing CPAC.

(9) Use the enclosed sample memorandums and formats to document tour extensions.

6. PROPONENT: The Headquarters Installation Management Agency, Human Resources Division, Civilian Personnel Branch is the proponent for this IMA Policy. POC is the Chief, Staffing Policy Section, at commercial (703) 602-3319, DSN 332-3319.

4 Encls

1. Sample Tour Extension
2. Sample Tour Disapproval
3. Sample Report
4. Request for decision



ANDERS B. AADLAND
Major General, GS
Director

SAMPLE TOUR EXTENSION APPROVAL MEMORANDUM

(Office Symbol of Requesting Organization)
MEMORANDUM THRU (organization Requesting Extension)
FOR Civilian Personnel Advisory Center
SUBJECT: Extension of Overseas Tour Beyond Five Years – Mr./Mrs.

1. Approval is granted to extend the overseas tour of Mr./Ms. for – year(s) until (date). Please ensure that this action is coordinated with the activity maintaining return rights for the employee, if applicable
2. This approval is subject to the understanding and agreement to register for return placement in the United States under provisions of the Department of Defense Priority Placement Program, if applicable, or to make other arrangements acceptable to the command at least six months prior to expiration of this extension.

Authorizing Official's Signature

Encl 1

SAMPLE DISAPPROVAL TOUR EXTENSION MEMORANDUM

(Office Symbol of Requesting Organization)
MEMORANDUM THRU (Organization Requesting Extension)
FOR Civilian Personnel Advisory Center
SUBJECT: Extension of Overseas Tour Beyond Five Years – Mr./Ms.

1. The request to extend the overseas tour of Mr./Ms. is disapproved.
2. Extension would not be consistent with Army and command policy to promote US-foreign area interchange of employees.
3. Please arrange within seven days-to counsel Mr./Ms. _____ on his/her options for return placement assistance and registration in the Department of Defense Priority Placement Program, if applicable.

Authorizing Official's Signature

Encl 2

-- SAMPLE REPORT --

**ANNUAL TOUR EXTENSION REPORT
FY 2003**

IMA REGION: XX REGION

REGION POC: JOHN SMITH, DSN 333-3333

- 1. Total Appropriated Fund workforce subject to rotation in FY03: 422**
- 2. Total number of positions designated exempt from rotation in FY03: 02**
 - a. GS-0201-13, Human Resource Spec (Classification), CPCN BA02021-43442**
 - b. GS-2001-12, General Supply Spec, CPCN BA00221-24442**
- 3. Total Number of employees extended beyond 5-Years: 75**
 - a. Total extended based on mission requirements: 68**
 - b. Total extended based on personal/humanitarian reasons: 03**
 - c. Total extended based on position being hard-to-fill: 04**
- 4. Percentage of workforce remaining overseas beyond 5-Years: 12%**

**REGION DIRECTOR'S
SIGNATURE BLOCK**

Encl 3

**OVERSEAS TOUR EXTENSION - REQUEST FOR DECISION
(USAIMA TEMPLATE)**

IMA Region/Garrison: _____ POC: _____ Date Prepared: _____
Phone Number: _____ Fax Number: _____ E-Mail: _____

Part A - Employee Information

Employee Name: _____ Social Security Number(Last Four): _____
PP/Series/Grade: _____ Date Last Promoted: _____
Employee Organization: _____
Emergency Essential No Yes (if yes, must have signed DD Form 2365)
Return Rights (SG/HG) No Yes (if yes, RR to and date RR expire: _____)
Employment Status Career/Career Conditional Overseas limited (OSL) NTE: _____
Current DEROS: _____ Date Arrived Overseas: _____ Date 5-Year Limit Expires: _____
Total Overseas Service: _____ Years _____ Months

Part B - Supervisor Recommendation

- Recommend extension for a period of _____ months (NTE _____)
- Not extended in accordance with Department of Defense policy limiting civilian employment in foreign area to five years

By recommending this extension, I hereby certify that the employee—

1. Is current in knowledge, skills, and abilities,
2. Has a current performance appraisal of fully successful or higher, and
3. Has adapted to the overseas environment.

Justification:

1. **Required only when overseas tour extensions are recommended.**
2. **As a minimum, when requesting an extension for operational necessity you must address the specific project(s), programs, initiatives, etc.; employee's unique qualifications; impact if not extended, and any previous recruitment concerns which may render subject position as being "hard-to-fill".**
3. **Justification must be submitted on a separate sheet.**

Typed/printed name of supervisor

Duty Phone

Supervisor Signature

Date

Part C - Garrison Commander

- Recommend Approval (for a period NTE _____ months) Nonconcur (Return Action to Supervisor)

Supervisor will inform employee of extension decision and inform employee of their rights for placement assistance in CONUS.

Typed/printed name of Garrison Commander

Duty Phone

Garrison Commander's Signature

Date

Part D - IMA Region Director

- Approve (for a period NTE _____ months) Nonconcur (Return Action to Garrison Cdr)

Typed/printed name of Region Director

Duty Phone

Region Director's Signature

Date



REPLY TO
ATTENTION OF

DEPARTMENT OF THE ARMY
INSTALLATION MANAGEMENT AGENCY
2511 JEFFERSON DAVIS HIGHWAY
ARLINGTON, VA 22202-3926

SFIM-HR-C

JUL 30 2004

MEMORANDUM FOR ALL US Army Installation Management Agency Personnel

SUBJECT: US Army Installation Management Agency Policy Memorandum # 31,
Position Classification and Job Grading Authority

1. REFERENCES.

- a. 5 U.S.C. 5107, Classification of Positions.
- b. 5 U.S.C. 5346, Job Grading System.
- c. 5 CFR 511.202, (Classification) Authority of Agency.
- d. 5 CFR 511.203, Exercise of (Classification) Authority.
- e. Public Law 92-392, Federal Wage System, Job Grading System.
- f. DoD 1400.25M, Civilian Personnel Manual, Chapter 300, Subchapter 511, Classification Program.
- g. DoD Supplemental Guidance for the General Schedule Supervisory Guide (GSSG), June 1993 (for FWS to GS grade equivalencies).
- h. Memorandum, Assistant Secretary of the Army (Manpower and Reserve Affairs), Civilian Personnel Policy (SAMR-CPP), December 17, 1997, subject: Delegation of Position Classification Authority.
- i. Memorandum for Headquarters, Department of the Army Principal Officials, Subject: Delegation of Civilian Personnel Authorities to HQDA Activities, September 29, 2003.
- j. AR 215-3, Nonappropriated Fund Personnel Policy, August 29, 2003.
- k. Memorandum, Administrative Assistant to the Secretary of Army, May 21 2004, Delegation of Classification Authority for Nonappropriated Fund (NAF) Positions.

2. PURPOSE. To supplement DoD and HQDA policy and to provide IMA policy and procedures on the exercise of position classification authority.

SFIM-HR-C

SUBJECT: US Army Installation Management Agency Policy Memorandum # 31
Delegations of Position Classification and Job Grading Authority

3. APPLICABILITY. All appropriated fund (APF) and Nonappropriated Fund (NAF) U.S. citizen positions in IMA.

4. POLICY. The references and IMA policy require each position to be accurately described and classified. Each civilian position will be classified strictly in accordance with law, regulation, and in accordance with applicable classification and job grading provisions of position classification and job grading standards and guides published by the United States Office of Personnel Management. These are the sole criteria by which position classification and job grading decisions will be exercised within the IMA. IMA officials exercising position classification and job grading authority will ensure every classification decision is made in strict accordance with applicable laws, standards, guides, and precedent decisions and will keep in mind that position descriptions are pay documents that draw on Army funds, and that this authority for expenditure requires the same due diligence as is used in exercising any other fiscal authority.

a. The Director and Deputy Director, IMA, and designated HQ civilian Human Resources (HR) personnel have authority to classify any position in IMA and to withhold classification and job grading authority within IMA. The Director and Deputy Director, IMA may not exercise classification and job grading authority unless they have first been trained by their civilian human resources staff. HQIMA retains classification and job grading authority for HQIMA positions, for all IMA Region and Garrison positions at grades GS-14/NF 05 equivalent, and higher and for equivalent Federal Wage System positions, and for any other position in IMA that HQIMA has classified.

b. IMA Region Directors, Deputy Directors acting for the Region Directors, and designated Region civilian HR personnel have position classification and job grading authority for all Region positions GS-1 through GS-13/NF 01-05 equivalent and for all Garrison positions within their area of responsibility at grade GS-13/NF 05 equivalent/Child Care (CC) and equivalent Federal Wage System positions, except those cited in paragraph a above. Region Directors may not exercise classification and job grading authority unless their civilian Human Resources staff has first trained them. Classification and job grading authority within a Region may be withheld or withdrawn for cause by Region Directors at their discretion.

c. Garrison Commanders and Garrison Managers have position classification and job grading authority for garrison positions in grades GS-1 through GS-12/NF-01-04/CC and for equivalent Federal Wage System positions, except those cited in paragraphs a and b above. Garrison Commanders and Garrison Managers may not exercise classification and job grading authority until Civilian Human Resources Agency (CHRA) Human Resource Management Specialists train them. Garrison Commanders and Garrison Managers will obtain a written classification advisory opinion from the servicing Civilian Personnel

SFIM-HR-C

SUBJECT: US Army Installation Management Agency Policy Memorandum # 31,
Delegations of Position Classification and Job Grading Authority.

Operations Center (CPOC) APF or NAF HRO staff before making APF/NAF classification or job grading decisions. NAF classification may be delegated from the Garrison Commander to a NAF Activity Manager.

d. Positions previously classified by HQIMA may not be reclassified without prior approval of HQIMA, SFIM-HR-C; garrisons and Regions may amend these position descriptions to meet local requirements if doing so does not impact IMA's classification. The IMA Director, IMA Deputy Director, and Region Directors and their Deputies will receive and consider the written classification advice of their classification staffs before making classification or job grading decisions. The classification advisory opinion will include the full rationale for the recommended title, series, and grade. The servicing classifier will certify the position description is adequate for classification. If the IMA Director, Deputy Director, Region Director, Garrison Commander, or Garrison Manager classifies a position differently than as recommended, they will prepare an evaluation statement outlining the reasons for the decision, will annotate changes on the position description, and will prepare a memorandum certifying the final classification of the position.

e. OCONUS IMA Region Directors and designated overseas HR personnel have position classification authority for all local national positions within their region to the extent provided by applicable agreements with host nation governments; OCONUS Region Directors will determine the extent to which local national position classification authority will be further re-delegated within their regions.

f. Any IMA official exercising classification authority must be certified in accordance with reference h. This authority may not be further re-delegated except as provided herein.

5. PROCEDURES. Garrisons will maintain records of all commander classification decisions. Reports will be submitted annually to the Region Director who will consolidate information for the Region for submission to HQIMA, SFIM-HR-C by the 15th of November each year. The Regions and HQIMA will review these actions for legal and regulatory compliance and will direct corrective action as appropriate. These reports will identify each position classified by the commander during the previous year and will include the following for each position so classified:

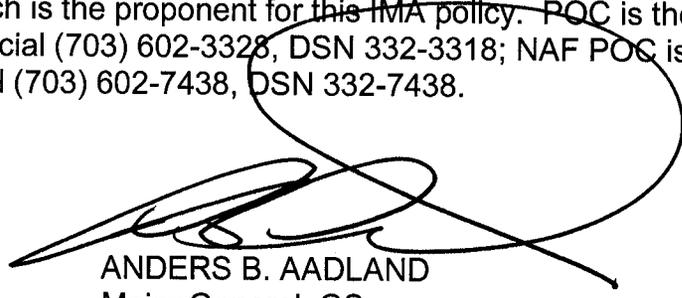
a. Title, series, and grade recommended by the CPOC or NAF HRO and the commander's decision.

b. Organization location, date classified, and name and title of the commander making the classification decision.

SFIM-HR-C

SUBJECT: US Army Installation Management Agency Policy Memorandum # 31,
Delegations of Position Classification and Job Grading Authority.

6. PROPONENT. The Headquarters Installation Management Agency, Human Resources Division, Civilian Personnel Branch is the proponent for this IMA policy. POC is the Chief, Classification Section, at commercial (703) 602-3328, DSN 332-3318; NAF POC is the Chief, NAF Section at commercial (703) 602-7438, DSN 332-7438.

A handwritten signature in black ink, appearing to read 'ANDERS B. AADLAND', is written over a large, faint circular stamp or watermark.

ANDERS B. AADLAND
Major General, GS
Director



REPLY TO
ATTENTION OF

DEPARTMENT OF THE ARMY
INSTALLATION MANAGEMENT AGENCY
2511 JEFFERSON DAVIS HIGHWAY
ARLINGTON, VA 22202-3926

JUL 30 2004

SFIM-HR-C

MEMORANDUM FOR ALL US Army Installation Management Agency Personnel

SUBJECT: US Army Installation Management Agency Policy Memorandum # 32,
Permanent Change of Station (PCS)

1. REFERENCES.

- a. JTR, Volume II.
- b. AR 690-950, Career Management, December 31, 2001.
- c. AR 215-3, Nonappropriated Funds Personnel Policy, August 29, 2003.

2. PURPOSE. To supplement Department of Army policy and to provide IMA policy regarding payment of PCS costs.

3. APPLICABILITY. This policy applies to all personnel, US citizen and non US citizen employed in IMA appropriated and non appropriated positions subject to mandatory career program referral level; non-career program positions GS-13 and above and Federal Wage System equivalent; and NF-5 nonappropriated positions.

4. POLICY. It is IMA policy to pay PCS costs for positions identified in paragraph 3 to attract a high quality, skilled, diverse, and productive civilian workforce. Our basic goal in filling any position in IMA is to appoint the best-qualified candidate, consistent with merit principles. Authorizing PCS expenses assists in attracting the best candidates from many sources and is an important factor in building a workforce that is culturally and experientially diverse. As such, payment of PCS costs will be offered to all US employees for all positions referenced above. This policy does not restrict authority to pay PCS costs for any other positions, which are deemed appropriate for funding such costs.

5. PROCEDURES.

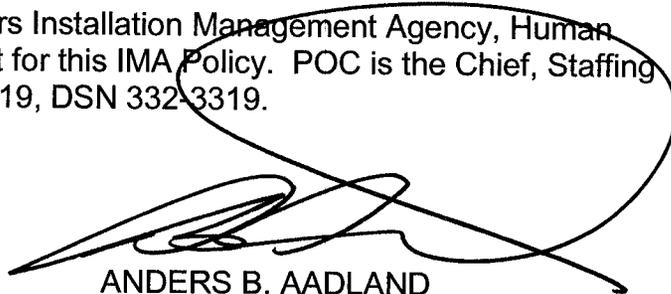
- a. Exceptions may be requested in writing on a case-by-case basis and must include reasons for the request. Authority to approve exceptions for garrison positions rests with the Region Directors. The Director, IMA, retains authority to approve exceptions for Region and HQIMA positions.

SFIM-HR-C

SUBJECT: US Army Installation Management Agency Policy Memorandum # 31,
Permanent Change of Station (PCS)

b. HQIMA may request reports on specific aspects of program administration and costs.

6. PROPONENT. The Headquarters Installation Management Agency, Human Resources Division is the proponent for this IMA Policy. POC is the Chief, Staffing Section at commercial (703) 602-3319, DSN 332-3319.

A handwritten signature in black ink, appearing to read 'A. Aadland', is written over a large, hand-drawn oval. The signature is fluid and cursive.

ANDERS B. AADLAND
Major General, GS
Director



DEPARTMENT OF THE ARMY
INSTALLATION MANAGEMENT AGENCY
2511 JEFFERSON DAVIS HIGHWAY
ARLINGTON, VA 22202

JUL 30 2004

SFIM-HR-C

MEMORANDUM FOR US ALL Army Installation Management Agency Personnel

SUBJECT: US Army Installation Management Agency Policy Memorandum # 33,
Recruitment and Selection Policy

1. References:

- a. 5 U.S.C 3302.
- b. 5 CFR 300.
- c. AR 690-300, Civilian Personnel Employment, October 15, 1979.
- d. AR 690-950, Civilian Personnel Career Management, December 31, 2001.
- e. DA PAM 690-950, Civilian Personnel Career Program Referral Registration and Administration, February 15, 2002.
- f. AR 215-3, Nonappropriated Funds Personnel Policy, August 29, 2003.
- g. Memorandum, ASA, M&RA, March 10, 1997, subject: Senior Civilian Affirmative Outreach and Recruitment Policy (GS-15).
- h. HQ, IMA Policy #2, Equal Employment Opportunity/Equal Opportunity, June 16, 2003.

2. PURPOSE. The purpose of this memorandum is to establish the US Army Installation Management Agency (IMA) recruitment and selection policy for the positions described below. This policy will also emphasize IMA's commitment to comply with Army employment and career program and Senior Civilian Affirmative Outreach and Recruitment requirements in the above references.

3. APPLICABILITY. This policy applies to IMA, GS-15 and Nonappropriated Fund (NAF) equivalent positions; all supervisory GS-14 and NAF equivalent positions at HQ IMA, region offices, and garrisons; and all Career Field 29 positions at GS-13 and above.

SFIM-HR (690-300)

SUBJECT: US Army Installation Management Agency Policy Memorandum # 33,
Recruitment and Selection Policy

4. POLICY.

a. IMA leadership will review and approve senior civilian recruitment strategies and selections from a broad perspective. The objective is to recruit, select and develop an innovative, highly capable, professional work force with diverse attributes and talents that will exemplify the competencies required to support the IMA Strategic Plan and meet mission requirements. Significant involvement by IMA senior level leaders reinforce our core values and the importance of selecting high caliber people for key executive leadership positions.

b. Selecting officials will use competitive recruitment and selection procedures when filling civilian positions covered by this policy, unless the IMA Director or Deputy Director grants an exception, and will follow the guidance in references 1d. and 1e., when such positions are subject to Army career programs. Exceptions to this policy are discussed in the enclosed guidelines.

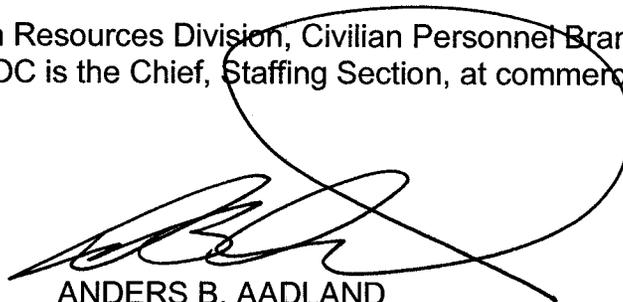
c. When filling positions subject to Army career programs, selecting officials will comply with specific career program recruitment and selection requirements in references 1d. and 1e. When such positions are also covered by this policy, selecting officials will coordinate with the appropriate IMA career program manager at the next higher level (i.e., region or headquarters), prior to submission of requirements in references 1d. and 1e.

d. Selecting officials have ultimate responsibility for selections, consistent with the references, and subject to the approval of the IMA Director.

5. PROCEDURES. See attached procedural guidance.

6. PROPONENT. The HQIMA Human Resources Division, Civilian Personnel Branch is the proponent for this IMA policy. POC is the Chief, Staffing Section, at commercial (703) 602-3319, DSN 332-3319.

Encl

A handwritten signature in black ink, appearing to read 'A. Aadland', is written over a large, hand-drawn oval. The signature is fluid and cursive.

ANDERS B. AADLAND
Major General, USA
Director

**PROCEDURAL GUIDELINES FOR IMPLEMENTATION OF
IMA RECRUITMENT AND SELECTION POLICY MEMO #17-03**

1. PROCEDURES. Selecting officials will, in coordination with their civilian personnel representative, determine the appropriate area of consideration and open window period to ensure the candidate pool consists of diverse and, well-qualified applicants. The minimum area of consideration is Army wide. When positions are subject to mandatory career program referral procedures, supervisors are required to consult with the appropriate IMA career program manager, who will consult with the respective Army functional chief (FC) or functional chief representative (FCR) listed in table 1-1 of AR 690-950, which is available online at http://www.usapa.army.mil/pdffiles/r690_950.pdf.

a. When using competitive procedures, selecting officials will ensure development of criteria to evaluate candidates referred by the servicing Civilian Personnel Operations Center (CPOC). This should be done in consultation with HR and EEO advisors.

b. Panels, discussions with former supervisors and interviews are optional. Useful information on interviewing questions and documentation is available on the Army CPOL web site <http://cpol.army.mil/permis/index.html> under "Staffing", Candidate Referral and Selection.

c. The selection process will be completed and request for approval forwarded to the approving official within **30** days of receipt of the referral list.

2. RESPONSIBLE OFFICIALS. Table 1 below identifies the responsible officials for recruitment and selections under this policy. The IMA Director has discretion to further delegate approval authorities.

Table 1

Covered Position	Selecting Official	Approving Official
All GS-15s and NAF equivalents	Immediate supervisor of vacant position	IMA Director (or Deputy Director)
All supervisory GS-14 and NAF equivalent in HQIMA		IMA Director (or Deputy Director)
All Career Field 29 at GS-13 and above.		IMA Director (or Deputy Director)
All supervisory GS-14s and NAF equivalents at Region Offices and Garrisons		Region Director

Encl 1

DOCUMENTATION.

a. The selecting official will forward a request for approval of the selection to the approving official. The request will include the name of the selectee and one or more alternates, in order of selection (in case the first/subsequent choices are not approved or decline the job offer). The request should include the rationale for the selection.

b. Selecting officials will maintain all documents used to support the selection. Documents will be maintained for a period of at least two years from the date of final decision/approval of the action.

4. EXCEPTIONS.

a. Approving officials designated in Table 1 may grant exceptions to this policy, thereby permitting selecting officials to fill permanent positions non-competitively as allowed by statute, regulations and policies. Selecting officials may submit requests for exceptions, on a case-by-case basis, through their chain of command to the appropriate approving official, after consulting with their servicing civilian HR and EEO staff. Requests should include a brief explanation of why the proposal is prudent. Specifically how the placement will enhance development of an executive work force with diverse attributes and talents, which exemplify the competencies required to support the IMA Strategic Plan and meet mission requirements.

b. Selecting officials may approve filling a position on a non-competitive basis for up to 120 days as an exception to this policy. Extensions of temporary actions beyond 120 days require approval from the appropriate officials identified in Table 1.

c. IMA employees who were selected to formal developmental programs (e.g., Defense Leadership and Management Program, Senior Service Schools) may be given assignments to covered positions as an exception to this policy. Such assignments must be consistent with Army policy and their approved Individual Development Plans.

d. IMA employees may be placed in lieu of reduction-in-force as an exception to this policy, subject to mandatory placement requirements under the Department of Defense Priority Placement Program or equivalent program.

e. Placement actions directed by an appropriate authority, such as an arbitrator, administrative judge with the Equal Employment Opportunity Commission, or Merit Systems Protection Board, or a Federal court judge, will be made as exceptions to this policy.



REPLY TO
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2511 JEFFERSON DAVIS HIGHWAY
ARLINGTON, VA 22202-3926

SFIM-HR-C

JUL 30 2004

MEMORANDUM FOR ALL US Army Installation Management Agency Personnel

SUBJECT: US Army Installation Management Agency (IMA) Policy Memorandum # 34,
Repayment of Student Loans

1. REFERENCES:

- a. 5 U.S.C. 5379, Student Loan Repayments.
- b. 5 CFR, Part 537, Repayment of Student Loans.
- c. Department of Defense Memorandum, dated October 17, 2001, Subject: Authority Delegation - Student Loan Repayment Approval.
- d. Department of Army Memorandum, dated November 26, 2001, Subject: Guidance on Repayment of Student Loans.
- e. DoD 7000.14-R, August 29, 1999, Volume 8, Financial Management Regulation.

2. PURPOSE. To supplement DoD and DA policy, to redelegate approval authority, and to provide IMA processing procedures for the administration and repayment of student loans.

3. APPLICABILITY. This policy applies to all personnel (US citizen and non US citizen) employed in IMA appropriated and nonappropriated fund positions, excluding non-citizens in nonappropriated fund Local National/Host Nation/Component Commander Employment System.

4. POLICY.

a. The repayment of student loans is not an employee entitlement. The repayment of student loans is a discretionary recruitment and retention tool available to managers. It may be offered as an incentive to recruit highly qualified applicants, or to retain highly skilled employees in hard to fill positions. The Director, IMA, Region Directors, and Garrison Commanders/Garrison Managers are delegated the authority to approve the repayment of student loans for their respective staffs. This authority may not be further re delegated.

SFIM-HR-C

SUBJECT: US Army Installation Management Agency (IMA) Policy Memorandum #34,
Repayment of Student Loans

b. Where provisions of this policy differ from the provisions of a written agreement between the installation/serviced organization and an exclusive bargaining unit, the provisions of the agreement apply to employees subject to the agreement.

5. PROCEDURES.

a. The repayment authority is limited to student loans authorized by the Higher Education Act of 1965 and the Public Health Service Act. These are Federally insured loans made by educational institutions or banks and other private lenders. The Higher Education Act covers guaranteed student loan programs such as:

- Stafford Loans (subsidized, unsubsidized, Direct subsidized, and Direct unsubsidized)
- Plus Loans (Federal and Direct Federal)
- Federal Consolidation Loans (Direct subsidized and Direct unsubsidized)
- Defense Loans (made before July 1, 1972)
- National Direct Student Loans (made between 7/1/72 and 7/1/87); and
- Perkins Loans

Loans covered under the Public Health Service Act include:

- Nursing Student Loan Program
- Health Profession Student Loan Program; and
- Health Education Assistance Loan Program

b. Reference 1.b. provides eligibility criteria for the repayment of student loans. The approving official will document in writing that, in the absence of student loan repayment, the employing activity would encounter difficulty in filling the position or retaining the employee in that position. Determinations for recruitment must be made before the employee enters on duty. Determinations for retention must be made on the special need of the employing activity for the employee's services and qualifications and, in the absence of offering loan repayments, an assessment that the employee would be likely to leave the Federal service. Justifications for student loan repayment for retention purposes will include the employee's offer of employment from outside the Federal service. When identifying eligible employees to be recipients, the employing activity shall consider both equitable treatment and diversity of the workforce.

c. The employee or applicant selected to receive repayment of student loans under this program must sign a service agreement with the employing activity to remain with the organization for a minimum period of 3 years. The service agreement covers the

SFIM-HR-C

SUBJECT: US Army Installation Management Agency (IMA) Policy Memorandum #34,
Repayment of Student Loans

total loan amount paid. A new service agreement is not necessary for each annual payment. However, with each payment, the employee must provide the supervisor with documentation from the lending institution that shows the current outstanding loan balance (within the previous 30 days) and certifies that the employee made any required payments during the previous year.

d. Prior to authorizing loan repayments, the official must verify that the employee has a qualifying outstanding student loan or loans. The employing activity may repay more than one loan as long as the payments do not exceed the legally prescribed limits. Employees who do not complete periods of service under the terms of service agreement are subject to the debt collection process as outlined in reference e. The employing activity may waive the recovery of an employee's debt, in whole or in part, if the recovery would be against equity and good conscience, or against the public interest.

e. Documentation for student loan repayments will be submitted to the Garrison Resource Manager and to the activity's Customer Service Representative (CSR). The CSR will forward to the appropriate Defense Finance and Accounting Service (DFAS). DFAS will make payments to the lender on a biweekly basis. The loan repayment amount will be considered as taxable wages and will include tax withholding. The employing activity is not responsible for any late fees or penalties assessed by the loan holder(s) prior to, during, or subsequent to this agreement.

f. During the service agreement period, an employee is not eligible for continued benefits if he/she:

- (1) Leaves the Federal service.
- (2) Does not maintain an acceptable level of performance.
- (3) Fails to make loan repayments on the portion of the loan that continues to be his/her responsibility.
- (4) Violates any conditions of the service agreement.

g. Director, IMA, Region Directors, and Garrison Commanders will:

- (1) Review and approve requests for the repayment of student loans.

SFIM-HR-C

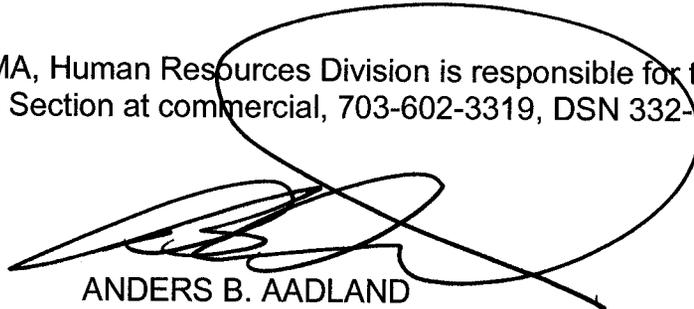
SUBJECT: US Army Installation Management Agency (IMA) Policy Memorandum #34,
Repayment of Student Loans

(2) Fax a copy of the Continued Service Agreement for each approved loan repayment to 703-602-5445, DSN 332 ATTN: SFIM-HR-C, and to the Region Human Resources Office.

(3) Employing activity will maintain appropriate records for reporting purposes.

h. HQIMA may request reports on specific aspects of program administration and program costs.

6. PROPONENT. The HQ IMA, Human Resources Division is responsible for this IMA policy. POC is Chief, Staffing Section at commercial, 703-602-3319, DSN 332-3319.

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ANDERS B. AADLAND
Major General, GS
Director



REPLY TO
ATTENTION OF

DEPARTMENT OF THE ARMY
INSTALLATION MANAGEMENT AGENCY
2511 JEFFERSON DAVIS HIGHWAY
ARLINGTON, VA 22202-3926

JUL 30 2004

SFIM-HR-C

MEMORANDUM FOR ALL US Army Installation Management Agency Personnel

SUBJECT: US Army Installation Management Agency Policy, Memorandum # 35,
Restoration of Forfeited Annual Leave

1. REFERENCES.

- a. 5 U.S.C. Chapter 63, Leave.
- b. 5 CFR 630, Absence and Leave.
- c. DoD Manual 1400.25-M, Subchapter 630 – Leave, December 1996.
- d. DoD Financial Management Regulation, Volume 8, Chapter 5, Subchapter 0508, Restored Leave, and Vol. 13, Nonappropriated Fund Policy and Procedures, February 2002.
- e. Army Regulation 215-3, Nonappropriated Funds Personnel Policy, Chapter 5, August 29, 2003.

2. PURPOSE. To supplement DoD and HQDA policy and to delegate the authority to approve the restoration of forfeited annual leave for civilian personnel.

3. APPLICABILITY. This policy applies to all appropriated and nonappropriated fund employees. It does not apply to Local National employees.

4. POLICY. In keeping with the references above, civilian employees normally forfeit unused annual leave in excess of 240 hours (up to 360 hours for employees who built an annual leave balance above 240 hours while overseas) at the end of the leave year. If cancellation of scheduled leave occurs during the leave year due to exigency of the public business or sickness, every effort should be made to reschedule the leave for use before the end of the leave year to avoid forfeiture. Employees may have forfeited leave restored to them if the leave was scheduled in advance with the employee subsequently being denied the opportunity to take that scheduled leave due to the exigencies of public business, a lengthy period of illness, or an administrative error. In cases where leave is denied due to an exigency of public business, that leave must have been requested in writing by the 3rd bi-weekly pay period prior to the end of the leave year.

SFIM-HR-C

SUBJECT: US Army Installation Management Agency Policy, Memorandum # 35,
Delegation of Authority for Restoration of Forfeited Annual Leave

a. The Director, IMA delegates the authority to determine exigencies of public business that qualify for restoration of annual leave to Region Directors and Garrison Commanders for employees located outside the National Capital Region (NCR). However, in keeping with regulations:

(1) The exigency determination may not be made by any official whose leave would be affected by the decision, and

(2) No officials with delegated authority may approve exigencies that affect employees for whom they approve leave; e.g., Garrison Commander can approve exigency for employees within the Public Works Department, but the Region Director will approve exigencies for the Director, Public Works, if required.

b. Requests for restoration for HQ IMA employees, will be forwarded to the Administrative Assistant to the Secretary of the Army, through the Director, IMA and the Assistant Chief of Staff for Installation Management (ACSIM). Paragraphs 4.a.(1) and (2) also apply.

5. PROCEDURE. To restore leave forfeited as a result of an exigency or illness, an employee must submit a written request to the supervisor who in turn submits the request to the management official who is delegated the authority to approve the restoration. An Office of Personnel Management (OPM) Forms, OPM Form 71, Request for Leave or Approved Absences, should be submitted as well as memo describing the circumstances. Documentation must include the following:

a. The calendar date the leave was approved by the supervisor,

b. The date(s) during which the leave was scheduled and the amount,

c. Reasons for the subsequent canceling of approved leave (e.g., if because of an exigency of the public business, documentation must include the beginning and ending dates of the exigency),

d. The calendar date the canceled leave was rescheduled for use, and

e. The date(s) during which the leave was rescheduled for use and the amount.

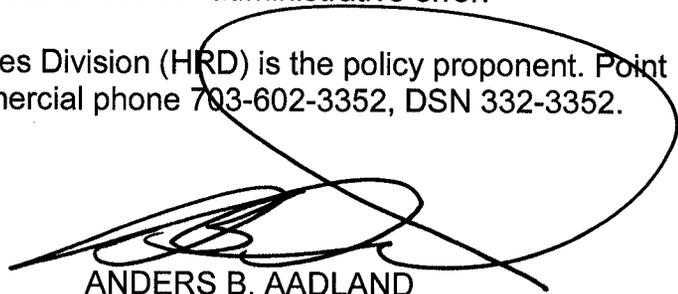
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SUBJECT: US Army Installation Management Agency Policy, Memorandum # 35,
Delegation of Authority for Restoration of Forfeited Annual Leave

f. The request will be reviewed and, upon determination that documentation is adequate, the official may authorize the restoration of the leave. The authorization will be returned to the supervisor, with supporting documents. The supervisor will ensure that the documentation is provided to Defense Civilian Payroll System (DCPS). Restored leave must be scheduled and used not later than the end of the leave year ending 2 years after the date of restoration.

g. DCPS will restore leave that is lost as a result of administrative error.

6. PROPONENT. The Human Resources Division (HRD) is the policy proponent. Point of contact (POC) is LMER branch, commercial phone 703-602-3352, DSN 332-3352.

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ANDERS B. AADLAND
Major General, GS
Director



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2511 JEFFERSON DAVIS HIGHWAY
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JUL 30 2004

SFIM-HR

MEMORANDUM FOR ALL US Army Installation Management Agency Personnel

SUBJECT: US Army Installation Management Agency Policy Memorandum # 36,
Training Agreements that Include Waiver of Time-in-Grade Requirements

1. REFERENCES.

- a. 5 CFR, Subpart F, Time-in-Grade Restrictions.
- b. Memorandum, ASA (M&RA), November 18, 1996, Subject: Divestiture of Civilian Personnel Authorities.
- c. Memorandum, AASA, September 29, 2003, Subject: Delegations of Civilian Personnel Authorities to Headquarters, Department of the Army (HQDA) Activities.

2. PURPOSE. To supplement DA policy and to provide IMA policy and processing procedures on training agreements that include waiver of time-in-grade requirements.

3. APPLICABILITY. This policy applies to all appropriated fund civilian personnel training agreements established within IMA that include a waiver of time-in-grade provisions.

4. POLICY.

- a. Reference 1b delegated to Major Army Commands (MACOMs), including the Administrative Assistant to the Secretary of the Army (AASA), the authority to approve training agreements that require waiver of time-in-grade requirements in accordance with Section 300.603(b)(6) of reference 1a.
- b. Per reference 1c, the AASA has retained the authority to approve subject training agreements. Requests for approval must be forwarded through the Director, Human Resources Management Directorate (HRMD) and to the AASA for decision.
- c. It is IMA policy that requests for approval of training agreements that include waiver of time-in-grade requirements will be submitted only when IMA identifies a recruitment/retention problem for developmental positions (i.e., Department of Army or local intern positions, or positions with promotion potential to higher grade levels that

SFIM-HR

SUBJECT: US Army Installation Management Agency Policy Memorandum # 36,
Training Agreements That Include Waiver of Time-in-Grade Requirements

are contingent upon satisfactory completion of specific training, meeting Office of Personnel Management qualification requirements, and recommendation of the supervisor).

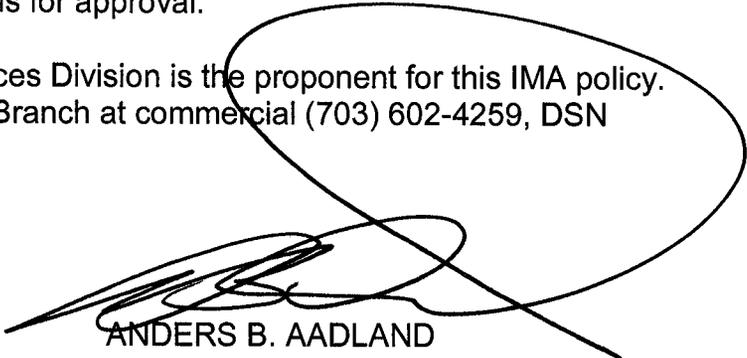
5. PROCEDURES.

a. HQIMA Human Resources Division will develop requests for approval of subject agreements only after analysis of pertinent information and coordination with all IMA Regions and Career Program Managers/Career Field Managers. HQIMA HR Division will forward requests through the ACSIM and Director, HRMD to the AASA for decision.

b. Garrisons and Regions may request development of subject training agreements in writing. Requests will include documentation to show that extensive recruitment efforts failed to produce viable candidates or that candidates who were selected declined offers for the positions because of the time-in-grade requirements. Garrisons should consult with their servicing Civilian Personnel Advisory Centers (CPACs) to obtain statistical information regarding recruitment efforts prior to initiating requests. Requests must be forwarded through the respective Region HR offices and include endorsements by the appropriate Garrison Commander/Garrison Manager and Region Director prior to submission to HQIMA, HR Division for further action.

c. Upon receipt of requests, the HQIMA, HR Division will coordinate with other Regions to determine if similar recruitment problems exist. If sufficient justification is available to warrant development of a formal request for approval of a training agreement, HQIMA, HR Division will prepare the necessary documentation to forward the request through appropriate channels for approval.

6. PROPONENT. The Human Resources Division is the proponent for this IMA policy. POC is Chief, Workforce Development Branch at commercial (703) 602-4259, DSN 332-4259.



ANDERS B. AADLAND
Major General, GS
Director