



Department of Energy

Bonneville Power Administration
P.O. Box 3621
Portland, Oregon 97208-3621

FREEDOM OF INFORMATION ACT/PRIVACY PROGRAM

December 16, 2022

In reply refer to: FOIA BPA-2022-01288-F

SENT VIA EMAIL ONLY TO: tawehner@bpa.gov

Todd Wehner

(b) (6)
(b) (6)

Dear Mr. Wehner.

The Bonneville Power Administration (BPA) has received your request for agency records made under the Freedom of Information Act, 5 U.S.C. § 552 (FOIA). BPA received your records request on September 16, 2022, and acknowledged your records request on October 4, 2022.

You requested three items. Each of those items is recapped below, and accompanied by an explanation of the relevant FOIA response.

Request 1: Meadow Nelson

Your request states:

“For Nelson, Meadow: The Job position started and offered initially as a GS-13-Step 01 (JOB Announcement #22-BPA-29552-11458752-DE). I am looking for the justification for advancement in higher salary that management (i.e., Berry, Theresa) filled out to justify Meadow a higher GS Step than what a job is originally offered at. I believe the form is titled ‘BPA HRSC - Hiring Incentives Justification’ or maybe ‘REQUEST & JUSTIFICATION FOR SUPERIOR QUALIFICATIONS OR SPECIAL NEEDS PAY-SETTING AUTHORITY.’

The agency’s Recruitment & Placement office searched for, and collected, a single document consisting of 10 pages, and are releasing it with three redactions under FOIA Exemption 6. The FOIA generally requires the release of all agency records upon request. However, the FOIA permits or requires withholding certain limited information that falls under one or more of nine statutory exemptions (5 U.S.C. §§ 552(b)(1-9)).

Exemption 6 protects Personally Identifiable Information (PII) contained in agency records when no overriding public interest in the information exists. BPA does not find an overriding public interest in a release of the information redacted under Exemption 6—specifically, information about Meadow Nelson’s salary at a previous job and information about another individual’s retirement. The agency has therefore applied 3 minor redactions to the record being released. This information sheds no light on the executive functions of the agency and BPA finds no overriding public interest in its release. BPA cannot waive these redactions, as the protections afforded by Exemption 6 belong to individuals and not to the agency.

Request 2: Jeffrey Hurt

Your request states:

“For Hurt, Jeffrey: The Job position started and offered initially as a GS-13-Step 01 (JOB Announcement #22-BPA-27222-11262549-DE). Again looking to the justification for advancement in higher salary that management (i.e., Berry, Theresa) filled out to justify a higher GS Step than what a job is originally offered at.”

The agency’s Recruitment & Placement office searched for, but did not find, any records responsive to this portion of your request.

Request 3: Andrew Young

Your request states:

“For Young, Andrew: The Job position started and offered initially as a GS-13-Step 01 (JOB Announcement #22-BPA-27222-11262549-DE). Again looking to the justification for advancement in higher salary that management (i.e., Berry, Theresa) filled out to justify a higher GS Step than what a job is originally offered at.”

The agency’s Recruitment & Placement office searched for, but did not find, any records responsive to this portion of your request. The agency’s Recruitment & Placement office informed the FOIA Office that Mr. Young was selected from a Merit Placement (MP) announcement, rather than a Delegated Examining (DE) announcement. Merit Placement employees are not eligible for “superior qualifications” step advances, but are instead eligible for a higher step in accordance with the “Two Step Promotion rule.”¹

Lastly, as required by 5 U.S.C. § 552(a)(8)(A), information has been withheld only in instances where (1) disclosure is prohibited by statute, or (2) BPA foresees that disclosure would harm an

¹ A GS employee promoted to a position in a higher grade is entitled to basic pay at the lowest rate of the higher grade that exceeds his or her existing rate of basic pay by not less than two step increases of the grade from which promoted.

interest protected by the exemption cited for the record. When full disclosure of a record is not possible, the FOIA statute further requires that BPA take reasonable steps to segregate and release nonexempt information. The agency has determined that in certain instances partial disclosure is possible, and has accordingly segregated the records into exempt and non-exempt portions.

Fee

There are no fees applicable to your request for BPA records.

Certification

Your FOIA request BPA-2022-01288-F is now closed with all responsive agency records provided. Pursuant to 10 C.F.R. § 1004.7(b)(2), I am the individual responsible for the records search and release described above.

Appeal

Note that the records release certified above is final. This final decision, as well as the adequacy of the search, may be appealed within 90 calendar days from your receipt of this letter pursuant to 10 C.F.R. § 1004.8. Appeals should be addressed to:

Director, Office of Hearings and Appeals,
HG-1, L'Enfant Plaza
U.S. Department of Energy
1000 Independence Avenue, S.W.
Washington, D.C. 20585-1615

The written appeal, including the envelope, must clearly indicate that a FOIA appeal is being made. You may also submit your appeal to OHA.filings@hq.doe.gov, including the phrase "Freedom of Information Appeal" in the subject line. The appeal must contain all of the elements required by 10 C.F.R. § 1004.8, including a copy of the determination letter. Thereafter, judicial review will be available to you in the Federal District Court either: 1) in the district where you reside; 2) where you have your principal place of business; 3) where DOE's records are situated; or 4) in the District of Columbia.

Additionally, you may contact the Office of Government Information Services (OGIS) at the National Archives and Records Administration to inquire about the FOIA mediation services they offer. The contact information for OGIS is as follows:

Office of Government Information Services
National Archives and Records Administration
8601 Adelphi Road-OGIS
College Park, Maryland 20740-6001
E-mail at ogis@nara.gov
Telephone at 202-741-5770; toll free at 1-877-684-6448; facsimile at 202-741-5769

Questions about this communication may be directed to James King, FOIA Public Liaison, at jjking@bpa.gov or 503-230-7621.

Sincerely,

Candice D. Palen
Freedom of Information/Privacy Act Officer

[Responsive agency records accompany this communication.](#)



BPA HRSC Hiring Incentives Justification Coversheet

- Print
- Save
- Reset

INSTRUCTIONS FOR USING THIS FORM

Section A: APPROVALS AND REGULATORY REVIEW

<p>Requested by: <u>THERESA BERRY</u> <small>Digitally signed by THERESA BERRY Date: 2022.08.03 15:31:49 -07'00'</small> <u>8/3/2022</u> <i>Hiring Supervisor</i> <i>Date</i></p> <p>Approved: <u>DEAN FREEL</u> <small>Digitally signed by DEAN FREEL Date: 2022.08.04 13:22:00 -07'00'</small> <u>8/4/22</u> <i>2nd Level Supervisor</i> <i>Date</i></p> <p>Review/Concur: <u>DAYNA ROMANCITO</u> <small>Digitally signed by DAYNA ROMANCITO Date: 2022.08.08 08:44:51 -07'00'</small> _____ <i>BPA HRSC Staffing Branch Manager</i> <i>Date</i></p>	<p>Concur: <u>Jana Jusupovic</u> <small>Digitally signed by Jana Jusupovic Date: 2022.08.05 12:12:02 -07'00'</small> <u>8/5/22</u> <i>Tier II Manager</i> <i>Date</i></p> <p>Compliance Review: <u>REBECCA OAKS</u> <small>Digitally signed by REBECCA OAKS Date: 2022.08.11 02:43:07</small> <u>8/5/22</u> <i>Staffing Specialist</i> <i>Date</i></p> <p>Review/Approve: <u>LIZA ROSA</u> <small>Digitally signed by LIZA ROSA Date: 2022.08.10 13:44:19 -07'00'</small> <u>8/10/22</u> <i>(Creditable Service Only) BPA HRSC Director</i> <i>Date</i></p>
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Section B: SELECTEE INFORMATION

1. Selectee: Meadow Nelson
2. Position Title, Series, Pay Plan, and Grade: Civil Engineer GS-0850-13
3. Organization: TEPL Duty Station: Vancouver, WA
4. Recruitment Method Type: MP DE DH Other If other, explain: _____
5. Vacancy Announcement Number: 22-BPA-29552-11458752-DE
6. Initial salary offered (include locality or special salary rate): 116,407
7. Selectee Requested Incentive(s):
 - * a) Advance in Hire: Increased Step Requested = Step 10 Pay (include locality): 140,770
 - b) Recruitment or Relocation Incentive = Percentage and equivalent Dollar Amt: % _____ = \$ _____
 - * c) Creditable Service: Years/Months Creditable Service Requested: 7 yr, 6 months
 - d) Student Loan Repayment: Total Amount = \$ _____ per year for 3 years for a total of \$ _____
8. Current Annual Salary (Base Only): (b) (6)
9. Performance Rating and Date of Rating (Relocation Incentive Only):

Section C: BPA HRSC APPROVED INCENTIVES

10. Approved Incentive(s):
 - a) Advance in Hire Requested: Step 10 Pay (include locality): 140,770
 - b) Recruitment or Relocation Incentive Percentage and equivalent Dollar Amt: % _____ = \$ _____
 - Lump Sum
 - Biweekly Payments
 - Non-Biweekly Installments and number per year: Schedule: _____ Amount: _____
 - c) Years/Months Creditable Service Approved: 7 yr, 6 months
 - d) Student Loan Repayment Approved: \$ _____ per year for 3 years for a total of \$ _____
11. Length of Service Agreement for approved incentives (Months): n/a



BPA HRSC

Hiring Incentives Justification

Advance-In-Hire

ONLY COMPLETE THIS PAGE IF AN ADVANCE-IN-HIRE IS BEING REQUESTED

OPM regulations require agencies to consider one or more of the following factors, to determine the step at which to set an employee's rate of pay using the Advance in Hire authority (aka superior qualification and special needs pay setting authority). The consideration of these factors must be fully documented.

MANDATORY

Superior, unique or special competencies required for the position, possessed by the selectee in comparison to other applicants/interviewees.

Describe the candidate's superior, unique or special competencies, the level of expertise, and background or knowledge in the field as compared to the competencies possessed by other applicants. Specifically, how do the qualifications of the selectee significantly exceed the qualifications of the other applicants and how are those qualifications directly related to the position?

The applicant has superior knowledge and experience in project management of utility projects as well as the applications of MSP2016 and the business rules and application of the software to support project management as well as in depth knowledge in the demand and capacity needed for project management. This candidate has developed interdepartmental processes and procedures and has developed and implemented training on best Project Management practices for project managers and project coordinators. This candidate was the top candidate in this round of new hires and has intricate knowledge and understanding of the Project Management skills of scope, schedule and budget. She also has Leadership experience not only leading process improvement and provided recommendations to leadership but has also been a supervisor in prior work experience. This level of experience and knowledge is beyond the typical GS-13 level seen while hiring for new project managers. This applicant can start as a BFTE PM and be able to be assigned the more complex, higher dollar projects immediately. Recent new hires didn't have the knowledge or experience to assign these type of utility type projects. This candidate is PMP Certified with a Master's degree in Engineering Technology Management.

IDENTIFY BY NUMBER, WHICH FACTOR(S) ARE BEING ADDRESSED. At a minimum, one must be addressed.

1. Candidate's existing salary, recent salary history, or salary documented in a competing offer.
2. Significant disparities between Federal and non-Federal salaries for the skills and competencies required.
3. Existing labor market conditions and employment trends, including the availability and quality of candidates for the same or similar positions.
4. **Recent turnover in the position.** Describe the number and/or frequency of losses in the position, or similar positions being filled for any reasons. For example, high volume of separations and retirements.
5. The importance/criticality of the position and the effect on the agency if it is not filled or if there is a delay in filling.
6. Desirability (or lack of) of the geographic location, duties, and/or work environment associated with the position.
7. Other relevant factors.

(b) (6)

We are in a very competitive market with very few applicants having either PM experience or Utility experience. We usually see one or the other and not both.

4)The TEPL has experienced recent retirements, a lot of experience has been lost in recent years especially this year and I anticipate another retirement of a (b) (6). This leaves my team with only one Senior PM with more than 2.5 years of utility and/or PM experience left in the TEPL team.

5) Currently the TEPL org has the most projects that are in the TE Resource Queue. Balancing the workload against the PMs experience leaves some projects in the queue until I can assign the larger more complex projects. This affects my teams ability to execute on the Capital Program and being responsive to customer projects. I also have projects that have started that I have not been able to reassign due to the need for a more experienced and knowledgeable PM. Three out of the four new hires are still getting trained on the processes and procedures for our MSP schedules, how to access and use the reports, forecasting requirements and learning the CIA Process.

7) I will be utilizing this applicant's training skills to mentor the four newer PM hires. I will also be asking her to mentor the new hires on how transmission line projects are project managed but also what the parts and pieces and how to develop a project plan.

REQUIREMENT: Address what other incentives were considered and why they were or were not elected for use.

see documented incentives above.



BPA HRSC

Hiring Incentives Justification

Recruitment or Relocation Incentive

ONLY COMPLETE THIS PAGE IF A RECRUITMENT OR RELOCATION INCENTIVE IS BEING REQUESTED

An agency must document in writing the basis for determining that the position is likely to be difficult to fill in the absence of a recruitment or relocation incentive, the amount and timing of the incentive payments, the length of the required service period, and (for relocation incentives) that the worksite of the new position is in a different geographic area than the previous position. OPM regulations require agencies to consider the following factors.

MANDATORY

Availability and quality of candidates possessing the competencies required for the position. *Include the success of recent efforts to recruit candidates for similar positions. Describe the candidate's superior, unique or special competencies, the level of expertise, and background or knowledge in the field as compared to the competencies possessed by other applicants. Specifically describe how they are directly related to the position.*

In addition to the above factor, identify each additional factor used to further support the incentive request. At a minimum, one must be addressed.

IDENTIFY BY NUMBER, WHICH FACTOR(S) ARE BEING ADDRESSED.

1. Salaries typically paid outside the Federal Government for similar positions.
2. Recent turnover in similar positions.
3. Employment trends and labor market factors that may affect the ability to recruit.
4. Agency efforts to use non-pay authorities, such as special training and work scheduling flexibilities, to resolve difficulties alone or in combination with a recruitment incentive.
5. Desirability (or lack of) of the duties, work or organizational environment; or geographic location of the position.
6. Other relevant factors (i.e. Direct Hire Authority).



BPA HRSC

Hiring Incentives Justification

Creditable Service for Leave Accrual

ONLY COMPLETE THIS PAGE IF CREDITABLE SERVICE FOR LEAVE ACCRUAL IS BEING REQUESTED

Agencies may provide service credit that otherwise would not be creditable under 5 U.S.C. 6303(a) for the purpose of determining the annual leave accrual rate to:

- 1) a newly-appointed or reappointed employee with a break of at least 90 calendar days after his/her last period of civilian employment in the civil service; or
- 2) a retired member of the active duty uniformed service as defined by 38 U.S.C. 4303.

Address the work experience as it relates to how it is:

- essential to the new position and was acquired through performance in a non-Federal or active duty uniformed service position having duties which directly relate to the duties of the position to which the individual is being appointed; and
- necessary to achieve an important agency mission or performance goal.

For multiple periods of potentially creditable service, each must be identified separately with the position title, specific dates and an explanation of the directly related experience to the position.

This applicant has experience performing the specific duties that is being hired for. Looking at the resume there is 7 and 1/2 years of creditable service that counts towards duties in the position such as project management of utility projects; development and implementation of training on best Project Management practices; and development of interdepartmental processes and procedures.

Currently the TEPL org has the most projects that are in the TE Resource Queue. Balancing the workload against the PMs experience leaves some projects in the queue until I can assign the larger more complex projects. With Meadow's extensive background in project management in utility projects, she could be assigned the more complex, higher dollar projects immediately.

This candidate is also PMP Certified.

REQUIREMENT: Address what other incentives were considered and why they were or were not elected for use.

Advance in step incentive is also being offered.



BPA HRSC

Hiring Incentives Justification

Creditable Service for Leave Accrual

Creditable Service Analysis Worksheet

FOR SELECTEE TO COMPLETE

Position Title & Organization	Start Date	End Date	Total Time (Yrs, Mos)
Engineering Project Manager 1	12/08/2014	7/26/2020	5 years, 7 months
Engineering Project Manager 2	7/2020	12/2021	1 yr, 5 months
Engineering Project Manager 3	12/2021	8/2022	0 yrs, 8 months

FOR HIRING MANAGER TO COMPLETE

Position Title & Organization	Total Years & Months	Creditable Time (Yrs, Mos)	Non-Creditable Time (Yrs, Mos)
Engineering PM 1	5 yrs, 7 months	5 yrs, 5 months	0 yrs, 2 months
Engineering PM 2	1 yr, 5 months	1 yr, 5 months	
Engineering PM 3	0 yr, 8 months	0 yr, 8 months	

Total Years/Months Hiring Manager Recommends: 7 yr, 6 months

NOTES:

FOR BPA HRSC TO COMPLETE

Position Title & Organization	Total Years & Months	Creditable Time (Yrs, Mos)	Non-Creditable Time (Yrs, Mos)
Engineering PM 1	5 yrs, 7 months	5 yrs, 5 months	0 yrs, 2 months
Engineering PM 2	1 yr, 5 months	1 yr, 5 months	
Engineering PM 3	0 yr, 8 months	0 yr, 8 months	

Total Years/Months Staffing Specialist Recommends: 7 yr, 6 months

NOTES:

***If recommendation from Hiring Manager and BPA HRSC Staffing Specialist differs, please return to Hiring Manager for final concurrence along with any new updates and/or justifications.**

Hiring Manager Concurrence: **Jana Jusupovic** Digitally signed by Jana Jusupovic
Date: 2022.08.05 08:19:13 -0700



BPA HRSC

Hiring Incentives Justification

Student Loan Repayment Program

ONLY COMPLETE THIS PAGE IF STUDENT LOAN REPAYMENT IS BEING REQUESTED

5 U.S.C. Section 5379(g) and 5 CFR Part 537 authorizes the flexibility to repay all or part of any qualifying federally insured student loans previously taken out by candidates to whom an offer of employment has been made or current employees in order to recruit or retain highly qualified personnel. Use of loan repayment authority under this plan must be based on a detailed written determination by an approving official that, without the offer of the benefit, the agency would encounter difficulty either in filling a specific position with a highly qualified candidate, or retaining a highly qualified employee in that position.

Please provide a justification for authorizing this benefit that addresses the following factors:

- a) Past problems, or other information, on recruiting highly qualified candidates in similar occupations;
- b) Labor market conditions that may be affecting current recruitment efforts;
- c) Special qualifications, skills, or education needed for the subject position;
- d) If a candidate is employed (in DOE or elsewhere), demonstrated proficiency in performing the tasks and functions required by the subject position;
- e) The appropriateness of this incentive in lieu of or in addition to other incentives, e.g., a recruitment or retention incentive or advance in hire appointment;
- f) For current BPA employees, the cost of training already given the employee or that would be needed by a new employee if the candidate did not possess the skills needed; and
- g) If attending school, their grade point average (GPA).



BPA HRSC

Hiring Incentives Justification Instructions for Use

The BPA HRSC Hiring Incentives Justification Form (Justification Form) consolidates the requirements necessary to support regulatory requirements to authorize incentive(s) as a total compensation package for new or transferring employees. The form is used to: 1) assist in developing an appropriate justification to support the incentive(s) from the Hiring Manager, and 2) ensure all reviewers and signing authorities are documented.

Hiring incentives are a tool to be used responsibly in attracting talent to BPA. Ultimately, BPA is beholden to our ratepayers to keep the cost of providing power at the lowest rates possible. This means that hiring incentives should only be considered and authorized when absolutely necessary to secure talent needed to complete BPA's mission.

Roles & Responsibilities

Requesting Office

- Hiring Manager - Recommends the appropriate incentive package based on the needs of the organization and applicant's superior qualifications and/or critical skill sets. Completes the incentive request forms and provides sufficient justification(s) to support each type of incentive requested.
- 2nd Level Manager - Approves hiring incentives and ensures request is within budget.
- Tier II Manager - Concurs with hiring incentives and authorizes funds. If the Tier II Manager is the Hiring Manager then request must be authorized by Tier I Manager.

BPA HRSC

- Staffing Specialist – Communicates the requested incentive(s) from the selectee, confirms eligibility for the requested incentive(s), and initiates and completes Section A: Selectee Information section on the Justification Form. Advises the hiring manager of the incentive process and ensures the hiring incentive package has the appropriate approvals and supporting documentation. Ensures requests are compliant with regulations and policy.
- Staffing Branch Manager - Conducts final review and concurrence of justifications for hiring incentives.
- Director - Conducts final review and approval for Creditable Service for Annual Leave Accrual requests.

Section A: Approvals & Regulatory Review (Mandatory)

All incentives must be approved by management and reviewed for regulatory adherence by the BPA HRSC Staffing Branch. The following chart includes all of the required signatures:

	Requesting Office Approvals			BPA HRSC Regulatory Review		
	Hiring Manager	2nd Level Manager	Tier II Manager	Staffing Specialist	Staffing Branch Manager	Director
Advance-In-Hire	Yes	Yes	Yes	Yes	Yes	No
Recruit/Relo Incentive	Yes	Yes	Yes	Yes	Yes	No
Creditable Service	Yes	Yes	Yes	Yes	Yes	Yes
Student Loan Repayment	Yes	Yes	Yes	Yes	Yes	No



BPA HRSC

Hiring Incentives Justification

Instructions for Use

Section B: Selectee Information (Mandatory)

Lines 1 through 9 will be completed by the Staffing Specialist. This section includes pertinent information regarding the vacant position, selectee, and requested incentive(s). The Staffing Specialist is responsible for gathering the supporting documentation from the applicant (e.g., paystubs to support salary determinations, most recent performance evaluations). The Justification Form and supporting documentation is then forwarded to the Hiring Manager for review.

Section C: Requesting Office Approved Incentives (Mandatory)

Lines 10 and 11 will be completed by the requesting office. This section is to document the final approved incentive(s). All incentive totals that include pay calculations will include locality. For relocation and recruitment incentives, the requesting office has the discretion to provide a single lump sum payment, bi-weekly payments, or designated installments throughout the service period. The length of service period must be documented and will be included in the applicable service agreements.

Any Creditable Service requested must be supported by the Creditable Analysis Worksheet.

Justifications

Justifications are required to support each incentive authorized. The following information further explains the requirements necessary for each incentive to be awarded.

Advance-In-Hire

The Advance-In-Hire (AIH) may be used when (1) an applicant exhibits superior, unique, or special competencies in comparison to the competencies possessed by other applicants or (2) the position for which the candidate is being hired into meets BPA workforce needs, as documented in the BPA Staffing Plan. These competencies, levels of expertise, and background or knowledge in the field must be directly related to the position. The Hiring Manager must provide a comprehensive explanation of these competencies and their direct relationship to the position.

In addition to the superior, unique, or special competencies, or special needs identified, the Hiring Manager must identify and explain the factors used to determine the appropriate step within the grade level as it pertains to the position and the applicant's qualifications. At minimum, one of the listed factors must be addressed.

The final requirement for AIH is for the Hiring Manager to address whether or not other incentives were considered and why they were or were not elected to be used. The Hiring Manager should keep in mind that the long term costs for an AIH are much higher than a Recruitment or Relocation Incentive. Therefore, a Recruitment or Relocation Incentive should always be considered first when a hiring incentive is determined to be necessary to secure talent.

Recruitment or Relocation Incentive

The Recruitment or Relocation incentive may be used when recruitment efforts have demonstrated a position is difficult to fill. Hiring Managers must address the availability and quality of candidates possessing the competencies required for the position. The applicant's competencies, levels of expertise, and background or knowledge in the field must be addressed related to the position (the position description is the key reference to identify relevant competencies).

In addition to the availability of candidates, the Hiring Manager must identify and explain the additional factors used to further support the requested incentive. At minimum, one of the listed factors must be addressed. A service agreement is required; the Staffing Specialist will advise on the appropriate period based on past practices.



BPA HRSC

Hiring Incentives Justification Instructions for Use

Creditable Service for Annual Leave

Creditable Service for Annual Leave should be used sparingly and only for critical or difficult-to-fill positions when other well-qualified applicants who may accept the position without this benefit are not available. Under this benefit, new employees receive credit for non-federal and/or military experience that is not otherwise creditable to the applicant for the purposes of leave accrual. The period(s) of service must address the work experience(s), supported by the resume, as it directly relates to the duties of the position and the necessity of the experience to achieve a critical agency mission or performance goal.

The Hiring Manager is required to address whether or not other incentives were considered and why one or more were elected not to be used. A service agreement of one (1) year is required for this benefit.

Creditable Service Analysis Worksheet: The applicant must identify the specific time periods to be considered for the request so that the Hiring Manager can address each period identified in the justification. The Staffing Specialist submits this document to the Hiring Manager to review and notate the total creditable and non-creditable time, as indicated on the worksheet. The total time to be awarded must be approved by the BPA HRSC Director.

Student Loan Repayment Program

Use of loan repayment authority under this plan must be based on a detailed written determination by an approving official that, without the offer of loan repayment benefit, the service would encounter difficulty either in filling a specific position with a highly qualified candidate, or retaining a highly qualified employee in that position. The following employees are eligible for this benefit:

1. Candidates who have been selected for full-time career or career- conditional appointments, appointments without time limit in the excepted service, term appointments of at least three years remaining, or appointments with non-competitive conversion to term, career, or career- conditional (e.g. Career Intern, Presidential Management Fellow, etc.);
2. Current full-time BPA employees serving under career or career- conditional appointments, appointments without time limit in the excepted service, term appointments with at least three years remaining, or appointments with non-competitive conversion to term, career, or career- conditional (e.g., Career Intern, Presidential Management Fellow, etc.) who are likely to leave for employment outside the Federal service and it is essential to retain the employee based on the employee's high or unique qualifications or special need of the Department; and
3. Employees and candidates as described above who have defaulted on their student loans, providing that the default is resolved and is not expected to reoccur with the benefit.

Qualifying student loans are outstanding loans made, insured, and guaranteed under parts B, D or E of title IV of the Higher Education Act of 1965; Outstanding health education assistance loans made or insured under part A of title VII of the Public Health Service Act, or under part E of title VIII of that Act; and Outstanding PLUS loans held by eligible employees for their children.

The amount of student loan repayment benefits provided by BPA is subject to both of the following limits: \$10,000 per employee per calendar year; and a total of \$60,000 per employee. A service agreement is required for this benefit. The service period is based upon the total benefit authorized:

Period of Service	Total Repayment Benefit Amount
3 Years	Up to \$30,000
4 Years	\$30,001 - \$40,000
5 Years	\$40,001 - \$50,000
6 Years	\$50,001 - \$60,000

To process student loan repayment requests, the BPA HRSC will need documentation of the student loans including account identification information; the Staffing Specialist will collect this information from the candidate/ employee. In order to finalize the benefit, and before payments can be made, the BPA HRSC also requires a signed Loan Information Release Consent Form from the candidate/employee and a verification letter from the lender/ noteholder.



BPA HRSC Hiring Incentives Justification Instructions for Use

Completed Incentive Packages

The BPA HRSC Hiring Incentive packages must be completed and authorized prior to entry on duty by the new employee. The Staffing Specialist will assist the Hiring Manager in compiling the necessary supporting documents and initiate the BPA HRSC Hiring Incentive Coversheet. The following documents must be completed by the Requesting Office:

	Documents Required from the Requesting Office			
	Coversheet	Justification(s)	Creditable Service Analysis Worksheet	Service Agreement
Advance-In-Hire	Yes	Yes	No	No
Recruit/Relo Incentive	Yes	Yes	No	Yes
Creditable Service	Yes	Yes	Yes	Yes
Student Loan Repayment	Yes	Yes	Yes	Yes

Forms List	Complete Incentive Package Checklist							
	Advance-In-Hire		Recruitment/ Relocation Incentive		Creditable Service		Student Loan Repayment	
	Required	Attached	Required	Attached	Required	Attached	Required	Attached
Resume	X	<input type="checkbox"/>	X	<input type="checkbox"/>	X	<input type="checkbox"/>	X	<input type="checkbox"/>
Certificate	X	<input type="checkbox"/>	X	<input type="checkbox"/>	X	<input type="checkbox"/>	X	<input type="checkbox"/>
Request for Incentive	X	<input type="checkbox"/>	X	<input type="checkbox"/>	X	<input type="checkbox"/>	X	<input type="checkbox"/>
BPA HRSC Incentive Justification - Coversheet	X	<input type="checkbox"/>	X	<input type="checkbox"/>	X	<input type="checkbox"/>	X	<input type="checkbox"/>
BPA HRSC Incentive Justification(s)	X	<input type="checkbox"/>	X	<input type="checkbox"/>	X	<input type="checkbox"/>	X	<input type="checkbox"/>
Creditable Service Analysis Worksheet					X	<input type="checkbox"/>		
SF 144a					X	<input type="checkbox"/>		
Service Agreement			X	<input type="checkbox"/>	X	<input type="checkbox"/>	X	<input type="checkbox"/>
Documentation of Student Loans							X	<input type="checkbox"/>
Pay Statement and/or Other Pay Documents (W-2/1099/etc) <i>When request is due to loss in pay</i>	X	<input type="checkbox"/>						