



DEPARTMENT OF THE ARMY
HEADQUARTERS, UNITED STATES ARMY TRAINING AND DOCTRINE COMMAND
950 JEFFERSON AVENUE
FORT EUSTIS, VIRGINIA 23604-5700

ATBO-C (1aa4)

MEMORANDUM FOR SEE DISTRIBUTION

SUBJECT: TRADOC Recruitment, Relocation, and Retention Incentives Plan

1. References:

a. Department of Defense Instruction (DoDI) 1400.25, Volume 575, Department of Defense (DoD) Civilian Personnel Management System: Recruitment and Relocation Bonuses, Retention Allowances, and Supervisory Differentials, effective 2 February 2018.

b. Assistant G-1 for Civilian Personnel (AG-1CP), DAPE-CPZ memorandum (Army Implementation Procedures for Civilian Incentive Programs (Recruitment, Relocation, and Retention Incentives)), 16 February 2021 (Encl).

c. HQ TRADOC, ATBO-C (25-50a), memorandum (Delegation of Civilian Human Resources (CHR) Authorities), 25 May 2022.

2. Authority to approve recruitment, relocation, and retention incentives (3Rs) has been delegated to TRADOC DCG/CoS, TRADOC EDCG, MSO subordinate organization commanders, CoE commanders, Commanders/Directors of special activities who report directly to HQ TRADOC, Commandant, Chaplain Center and School, and TRADOC Deputy Chiefs of General Staff and Chiefs of Special Staff Offices. Authority may be further delegated in writing to not lower than deputy to the commanding general or deputy commanding general, as stated in Reference c.

3. These incentives are intended to help recruit new employees, relocate current employees, or retain employees with unusually high or unique qualifications. Each determination to grant an incentive must be made before the employee enters on duty in the new position. The determination will be documented describing the supporting factors used to authorize the incentive and the reasons for establishing the amount and timing of the payments, as outlined in Army's Implementation Procedures for Civilian Incentives (Reference b) (Encl). The hiring official must provide a narrative justification for each incentive offered, that the position is likely to be difficult to fill in the absence of the incentive and the factors used as a basis for that determination (i.e. availability of quality candidates, salaries typically paid outside Federal Government, recent turnover in similar positions, employment trends; special/unique competencies required for the position; etc.), along with the required corresponding incentive quality assurance

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checklist. Approving officials must ensure efficient, effective, budget conscious use of the incentives to support mission requirements, to meet future staffing requirements, or to assist in geographic moves. Each activity G-1 (or equivalent) will maintain records of all determinations to pay an incentive, and or for each incentive offered/accepted, ensuring all records are readily available for review upon request.

4. Recruitment Incentives - In order to offer a recruitment incentive, activities are required to follow the guidance outlined in this memorandum, and in the references 1b and 1c above, as well as monitor the use and effectiveness of these incentives. It is strongly encouraged that the possibility of offering a recruitment incentive be annotated on all vacancy announcements (i.e. incentives "may" be authorized.) in order to ensure a broader applicant pool. A recruitment incentive may not exceed 25 percent of the employee's annual rate of basic pay. The incentive may be paid as an initial lump-sum payment at the beginning of the service period, in installments throughout the service period, or as a final-lump sum payment upon completion of the service period. Employees who accept a recruitment incentive must sign a written service agreement. The minimum period of service is 6 months, the maximum is 4 years. A service period of less than one year will be pro-rated. For example, the maximum of 12.5 percent can be authorized for a 6-month service period. Failure to complete the service agreement will require the employee to repay the incentive on a prorated basis. The servicing CPAC will upload the completed/signed service agreement into the employee's eOPF. An activity will notify an employee in writing if it terminates a recruitment incentive service prior to the end of the original service period.

5. Relocation Incentives - An approving official may authorize a relocation incentive to a current Federal employee who must relocate to accept a TRADOC position in a different geographic area (permanently or temporarily) if he/she determines that the position is likely to be difficult to fill in the absence of an incentive. A relocation incentive may not exceed 25 percent of the employee's annual rate of basic pay. The relocation incentive will require a service agreement for a minimum of 6 months or up to the maximum of 4 years. A position is considered to be in a different geographic area if the worksite of the new position is 50 or more miles from the worksite of the position held immediately before the move. An employee must establish a residence in the new geographic area before the agency may pay the employee a relocation incentive. The incentive may be paid as an initial lump-sum payment at the beginning of the service period, in installments throughout the service period, or as a final lump-sum payment upon completion of the service period. If the relocation is the result of a competitive hiring process, it is strongly encouraged that the possibility of offering a recruitment incentive be annotated on all vacancy announcements (i.e. incentives "may" be authorized) in order to ensure a broader applicant pool. Service agreements must specify the total amount of the incentive; required service period; the method of paying the incentive; the timing and amounts of each incentive payment; and the agreement must be signed prior to the beginning of a pay period for the incentive. The servicing CPAC will upload the completed/signed service agreement into the employee's eOPF.

6. Retention Incentives - In accordance with the CHR Delegated Authorities, an authorized official may approve a retention incentive upon written determination that an employee's unusually high or unique qualifications, or the special need of the organization, makes it essential to retain the employee, and that absent a retention

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incentive, the employee would likely leave Federal service. The determination must document the factors used as a basis for the determination, to include the extent to which the employee's departure would affect the activity's ability to carry out an activity, perform a function, or complete a project that is deemed mission essential, and for determining the amount of the incentive, up to 25 percent of basic pay, to include a special or locality rate. Before receiving a retention incentive, an employee must sign a written agreement to complete a specified period of service with the agency. Employees receiving bi-weekly payments for retention incentives do not require a service agreement, however the supervisor will establish a statement of understanding to address all required conditions and the employee must sign the statement of understanding. The servicing CPAC will upload the completed/signed service agreement into the employee's eOPF. Hiring officials will review retention incentives at least every 12 months and make a written determination to document whether the incentive is still warranted and whether the conditions still exist, or whether the incentives should be cancelled or recalculated no later than 30 days before the termination date of the service agreement. A retention incentive for longer than 3 years must be approved by the TRADOC, DCS, G-1/4 sixty (60) days prior to the expiration of the incentive. Activities must notify an employee in writing when it terminates a retention service agreement before an approved expiration date.

7. Termination of 3Rs.

a. An agency must terminate a service agreement if an employee is demoted or separated for cause (i.e., for unacceptable performance or conduct), receives a rating of record lower than "Fully Successful" or equivalent during the service period, fails to maintain a residence at the new geographic location for the duration of the service agreement, or otherwise fails to fulfill the terms of the service agreement. In such cases, the employee may retain any incentive payments attributable to completed service, but must repay any portion of the incentive attributable to uncompleted service. (See 5 CFR 575.211(h) for a repayment waiver authority). The agency is not obligated to pay the employee any outstanding incentive payment attributable to completed service unless such payment was required under the terms of the incentive service agreement. The full amount of the authorized incentive must be prorated across the length of the service period to determine the amount attributable to completed service and uncompleted service.

b. An agency must notify an employee in writing when it terminates an incentive service agreement.

c. The termination of a service agreement is not grievable or subject to appeal.

8. Payment Methods and Calculations.

a. Recruitment and relocation incentive payments may be paid in the following manners, which must be identified within the service agreement:

(1) In a one-time payment at the beginning of the service period stated in the service agreement;

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(2) In equal or variable installment payments throughout the service period required by the service agreement; or

(3) As a final lump-sum payment at the end of the full service period required by the service agreement.

b. Retention incentive payments may be paid in a lump-sum payment after the full period of service has been completed or in installments after the completion of a specified period of service or in bi-weekly installments.

c. Calculations: The chart below provides an example using GS-12, step 1, 2020 salary for the D.C. area, based on the maximum incentive of 25% of annual basic pay:

(1) Service agreement for 1 year: Salary \$86,335 x 0.25 = \$21,583

(2) Service agreement for 1 and ½ years: Salary \$86,335 x 0.25 = \$21,583;
\$21,583 multiplied by 1.5 years \$32,374

Length of Service Agreement	Maximum Incentive Amount	Formula: Annual Rate of Pay x Incentive % x Service Period
1 year	\$21,583.75	\$86,335 x 25% x 1 Year
1 ½ years	\$32,375.62	\$86,335 x 25% x 1.5 Years
2 years	\$43,167.50	\$86,335 x 25% x 2 Years
2 ½ years	\$53,959.37	\$86,335 x 25% x 2.5 Years
3 years	\$64,751.25	\$86,335 x 25% x 3 Years
3 ½ years	\$75,532.12	\$86,335 x 25% x 3.5 Years
4 years	\$86,335.	\$86,335 x 25% x 4 Years

NOTE: You may choose to pay a **lower incentive rate** for the same period of service, (i.e. 10, 15, or 20%).

9. Documentation and Record Keeping – Each Activity/CoE G-1, or equivalent, is responsible for ensuring that all documentation regarding the justification and approval for all incentives are available for review and quality assurance. Recordkeeping will include the following:

- a. Justification memo signed by the appropriate approving authority.
- b. A copy of the signed service agreement.
- c. Complete TRADOC QC Checklist.

10. Quarterly reporting requirement. Quarterly reports regarding usage of 3R incentives using the TRADOC Quarterly 3R Report (Encl) must be submitted to HQ TRADOC, G-1/4, CHRD by the 10th day of the month following the end of each quarter.

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11. Before paying any of the 3R incentives, an organization must follow the guidance outlined in this plan. All documentation supporting 3R incentives must be maintained on file by the authorizing organization for 7 years.

12. Local labor relations obligations must be met prior to implementation.

Encl

W. D. BRINKLEY
Senior Executive Service
Deputy Chief of Staff, G-1/4

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