
OCFO TICKET

10-Jul-09

Assigned	DFS
Item No	2009-230
Priority	2
From	Timberlake
Office	OMB
To	Directors
Date	07/06/2009
Due Date	08/14/2009
Ticket No	
Subject	Obtaining Agency Relocation Cost and Management Data
Instructions	CONTACT: John Walker
Distribution	
Copies	



EXECUTIVE OFFICE OF THE PRESIDENT
OFFICE OF MANAGEMENT AND BUDGET
WASHINGTON, D.C. 20503

Budget
John Walker
230

July 6, 2009

BUDGET DATA REQUEST NO. 09-34

MEMORANDUM FOR: PROGRAM DEPUTY ASSOCIATE DIRECTORS

FROM: Courtney B. Timbry 
Deputy Assistant Director for Budget

SUBJECT: Obtaining Agency Relocation Cost and Management Data

Affected Divisions: All RMOs. This BDR must be shared with agencies and completed with input from agency budget offices.

Due Date: c.o.b. August 14, 2009

Contact: David Morris (x5-7565)

Purpose: To help OMB assess the availability and validity of cost data to manage agency relocation programs, to support agency budget requests for relocation activities, and to evaluate the reasonableness of Federal policies for reimbursing relocation costs. The information collected may be used to recommend changes in the funding provided to agencies for relocation activities in FY 2011. It will also help guide further efforts to obtain or improve relocation cost and management data, where agencies currently do not have such data readily available.

Background:

Seven years ago, a Congressional inquiry into relocation costs revealed that payments for certain moves exceeded \$100,000 and that many agencies appeared to lack adequate management information and controls over their relocation costs. In 2004, the General Services Administration (GSA) convened a public advisory board, the Governmentwide Relocation Advisory Board (GRAB), to review all Federal policies and procedures for relocation. In support of the GRAB's work, OMB issued Budget Data Request (BDR) 04-45 in August 2004.

The GRAB delivered its report in September 2005, and GSA has been working since then to implement as many of the GRAB recommendations as possible. Many of the GRAB recommendations concerned management data and controls. GSA is developing a proposed change to the Federal Travel Regulation (FTR) and additional guidance to address these issues. Recent changes in the home sale market have made it much more challenging and more expensive for Federal agencies to relocate personnel. This BDR will help OMB understand the budget impact of these changes.

It should be noted that the statute, at 5 U.S.C. 5707(c) and the FTR, at 41 CFR 300-70.1, have both required that agencies should have data on their relocation activities available and should be able to report these data to GSA. Data collection on a governmentwide basis has not occurred since 2004.

Action Required:

Complete the attached spreadsheet (attachment 1) and then email it to David Morris at David.A.Morris@omb.eop.gov. David is available to answer questions regarding this request, as is Henry Maury at GSA, 202-208-7928, Henry.Maury@gsa.gov.

Wherever the requested data are not readily available, please enter NA in the appropriate cells. It is not the intent of this request that agencies develop new information systems in order to obtain the requested information.

Attachment 2 is a list of agency relocation contacts, provided by GSA. Agency budget offices are encouraged to work with these contacts in developing completing the spreadsheet in attachment 1.

Attachments (2)

Agency Relocation Cost and Management Data
(\$ in thousands)

Department/Agency:
Contact Name:

E-mail:

Phone:

Instructions:

2008 Data is actual based on relocations initiated, authorized, or underway in 2008.
 2009 Data is projected from actual 2009 data until the end of 2009.
 2010 Data is an estimate of future expenditures and relocations.
 Please use "NA" in all cells for which there is no information.
 Cost figures for the data are most frequently found in Budget Object Class codes: 12.0, 21.0, 22.0 and 25.0.

Section 1 -- Number of Relocations:

	2008	2009	2010	
	<u>Actual</u>	<u>Projected</u>	<u>Estimate</u>	-
Number of Relocations Authorized:				
New hires.....				
Transferees.....				
Number of Relocations Initiated:				
New hires.....				
Transferees.....				

Agency Relocation Cost and Management Data
(\$ in thousands)

Department/Agency:
Contact Name:

E-mail:

Phone:

Section 2 -- Relocation Management Information:

Please provide the information for FY 2008 and the projected information for 2009 for the data elements shown.
Please estimate your expenses for these items in FY 2010.

Relocation Costs by Category:	2008 Actual			2009 Projection			2010 Estimate		
	CONUS	Other*	Total	CONUS	Other*	Total	CONUS	Other*	Total
Amended Value Home Sale.....									
Appraised Value Home Sale.....									
Direct Reimbursement Home Sale.....									
Home Sale Assistance.....									
Home Marketing Incentive Payments...									
House Hunting Trips.....									
Transportation of Employee and Family Personally Owned Vehicle (POV)									
Mileage Expenses**.....									
Temporary Quarters Expenses.....									
Transportation of Household Goods.....									
Transportation of POVs**.....									
Storage of Household Goods**.....									
Transportation of Mobile Home or Boat									
Home Buying Assistance.....									
Lease Termination Expenses.....									
Property Management.....									
Relocation Income Tax Allowance (RITA)									
Miscellaneous Moving Expenses.....									
Other.....									
Total Relocation Costs.....									

*NOTE: CONUS are moves within the continental US, i.e., the "lower 48," and "Other" are moves involving any other US, e.g., Alaska, Hawaii, and US territories, or foreign location.

**Figures for storage of household goods and transportation of POVs are included in the amounts for transportation of household goods. POV Mileage expenses are included in figures for transportation of employee and family.

Section 3 -- Other Statistics on Relocation:

2008 Actual 2009 Projected 2010 Estimated

- Number of Authorizations.....
- Number of Direct Reimbursement Relocations Cancelled by Employee
- Number of Home Sale Program Relocations Cancelled by Employee
- Number of Appraised Value Home Sales.....
- Number of Amended Homes Sales.....
- Number of Direct Reimbursement Homes Sales.....
- Number of Household Goods Shipments.....
- Number of Do It Yourself Household Goods Moves.....
- Number of House Hunting Trips.....

**Federal Agency Relocation Contacts
GSA Office of Governmentwide Policy
June 24, 2009**

Commerce	Lisa Singletary
Commerce/NOAA	Cynthia Curtis
DHS	James Landolt
DHS/CBP	Bill Fouts
DOD	Pam Mitchell
DOD/OSD	Marilee Fitzgerald
DOD/OSD	Johnny McLean
DOE	Lois Jessup
DOE	Rossana Ballantine
DOT/FAA	Jeff Karth
DVA	Tom Mueller
DVA	Joanne Rountree
DVA	Edward Murray
DVA	Elizabeth Rodriguez
Education	Cindy Carroll
Education	Darlene Huges
EPA	Sara Floyd
EPA	Kenneth Henderson
GSA	David Parry
HHS	Paul Hoffman
HHS/CDC	William Wiggins
HHS/CDC	Barry Taylor
HUD	Susan Symonds
Interior	Jacquie Lynch
Interior	Robert Smith
Interior	Brenda Rodriguez
Interior	Daniel Fletcher
Interior/NBC	Cynthia Osif
Justice	Marvin Tisdale
Justice/DEA	Ted Kosowski
Labor	Cynthia Jones
OPM	Jeff Sumberg
SBA	Randall Christopherson
SBA	Maria Moy
SSA	Kevin Lanagan
SSA	Jean Peddicord
State	Ann Gibson
State	Raphael Mirabal
Treasury	Angel Saumure
Treasury/BPD	Lee Buckingham
Treasury/BPD	Roger Burris
USDA	Maureen Wood
USDA	Aaron Prose
USDA	Matthew Faulkner