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# Transition Plan

**Mike Dallas, COO**  
**Core Managers Meeting**

April 13, 2006



Jefferson Science Associates

Thomas Jefferson National Accelerator Facility

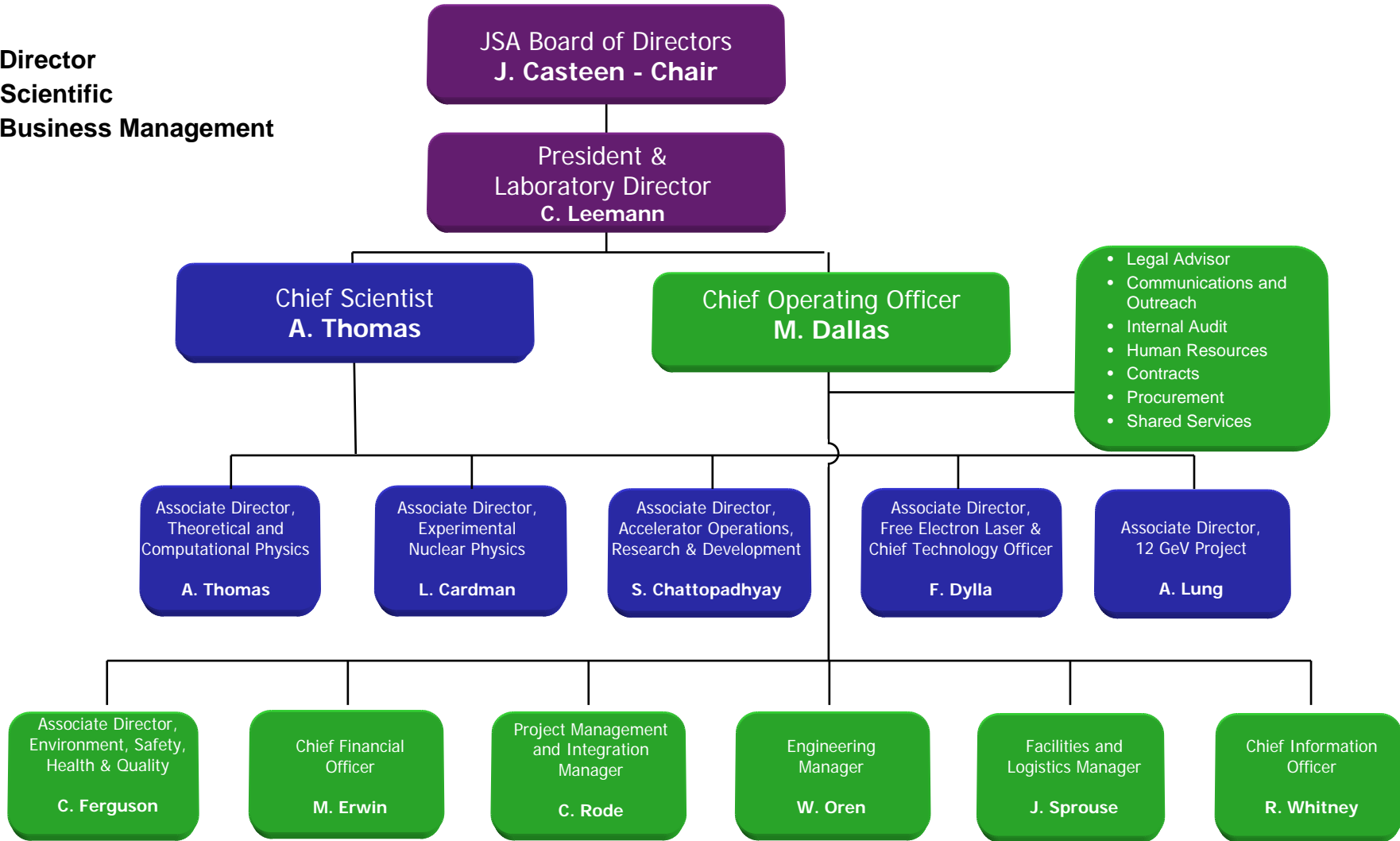
# JLab Transition Plan Overview

- Contract awarded April 12, 2006
  - ✓ 5 year base with 15 year award term
- Transition period starts on April 17, 2006. Transition will be completed on May 31, 2006
- JSA's vision for transition is to:
  - ✓ Ensure employees stay focused on safety.
  - ✓ Manage risk through a well thought out and executed Transition Plan and Process.
  - ✓ Provide timely, effective and ongoing communications with DOE, the incumbent workforce, the User Community, and all stakeholders to assure transition activities are well coordinated and aligned with ongoing TJNAF activities and scheduled events.
  - ✓ Execute our detailed JSA Transition Plan according to our master schedule that includes specific roles, responsibilities, milestones, and actions that lead to operational readiness.

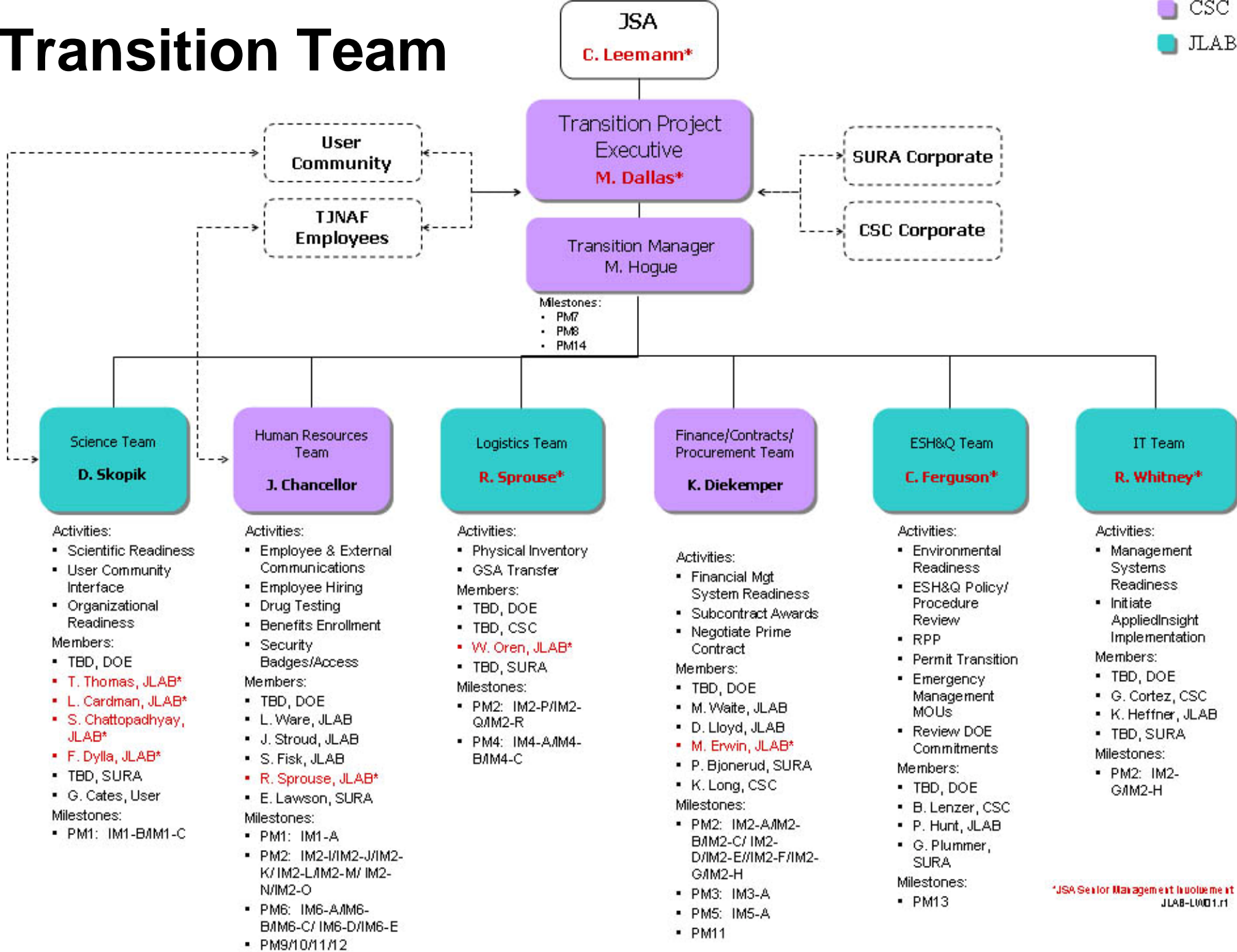


# Organization Structure

- Director
- Scientific
- Business Management



# Transition Team



# Transition Team

- Dedicated Full-Time Transition Leadership
  - ✓ **Transition Project Executive** – *Mike Dallas*: Responsible for the overall transition and JSA's readiness to assume management and operational control.
  - ✓ **Transition Manager** – *Michael Hogue*: Directs day-to-day activities of transition and coordinate and integrate each of the specialized teams.
- Experienced Functional Team Leads
  - ✓ **Science Team Lead** – *Dennis Skopik*: Ensures readiness to assume scientific responsibility, organizational readiness, and acts as the main interface with the User Community during transition.
  - ✓ **Human Resources Team Lead** – *Jennifer Chancellor*: Hires all employees, coordinating benefit rollover, conducting employee orientations, coordinating new security badges/facility access as required, and providing overall communications with incumbent employees and external stakeholders.
  - ✓ **Logistics Team Lead** – *Rusty Sprouse*: Conducts physical inventory with the TJSO, transfers GSA leases to JSA, and facilitates other miscellaneous logistical items as they arise.



# Transition Team

- Experienced Team Leads *(continued)*
  - ✓ **Finance/Contracts/Procurement Team Lead**– *Kay Diekemper*: Ensures financial management system readiness, negotiates and awards all subcontracts with associated flowdown clauses, establishes required purchase orders, collects and dispositions other formal and informal agreements, and negotiates the prime contract including the PEMP. Assists in recruiting and hiring a Contracts Manager.
  - ✓ **ESH&Q Team Lead** – *Craig Ferguson*: Ensures ESH&Q program readiness and facilitates updates to environmental, safety and health regulatory commitments.
  - ✓ **IT Team Lead** – *Roy Whitney*: Ensures critical hardware and software components are operational to support all business management systems prior to contract star and lays the foundation to implement AppliedInsight and a centralized work management system.
- Specialized Teams
  - ✓ Established with representatives from DOE, SURA and CSC personnel with valuable transition and operational experience in each respective team function.
- Transition Team Support
  - ✓ **Transition Coordinator** – *Linda Wierenga*
  - ✓ **Transition Admin Support** – *Jacquie Bacon*



# Transition Operations Center

- Located in Newport News at the ARC - - Rooms 351 and 342.
- Phone Number is 249-3060.
- Operational five days a week (Monday through Friday).
- Serves as the “nerve center” for the transition process and is where we will track all transition activities, milestones, schedules and human resource data.
- Will provide employees, the User’s and TJSO a single point of contact to gather information on the transition progress.



# Communication/Interfaces

- The Human Resources Team will:
  - ✓ By the third day of transition, establish a transition section on the TJNAF website ([www.jsallc.org](http://www.jsallc.org)) and post a written status of transition activities including:
    - Messages to staff from the Transition Project Executive or the Transition Manager
    - Updates of the TJNAF Master Transition Schedule
    - Other pertinent schedule data such as employee orientations, etc.
    - A current list of all Transition Team members with their contact information
    - A Q&A section for employee questions with answers from the Transition Manager.
  - ✓ Establish a transition hot-line phone number for Q&A (1-866-822-3608) and post on website.
  - ✓ From the daily status meetings, develop regular written communications for incumbent employees, TJSO, the User Community, the local and regional community and JSA's owners.
  - ✓ By the seventh day of transition, conduct management training for TJNAF managers on the new contract, new JSA joint venture and associated governance structure, any key policy changes, and on the Transition Plan and associated expectations.
  - ✓ Conduct employee orientations to explain JSA's mission, organization structure, refresher on standard operating practices, focus on safety, and any other changes resulting from the transition from SURF to JSA.



# Transition Milestones

- Performance Milestone 1 “Assume Control of Scientific Research Programs and Facilities”
  - Interim Milestone 1-A “Hire Science Key Personnel”
  - Interim Milestone 1-B “Conduct Town Hall Meeting with User Community”
  - Interim Milestone 1-C “Provide Letter to Government Indicating Readiness to Assume Control of Scientific Research Programs”
- Performance Milestone 2 “Ensure Management Systems are Adequate”
  - Interim Milestone 2-A “Company Name Changes on Financial Documents”
  - Interim Milestone 2-B “Provide Special Financial Institution Account Agreement”
  - Interim Milestone 2-C “Establish Contracts Office”
  - Interim Milestone 2-D “Obtain Interim Approval or Consent on Purchasing System”
  - Interim Milestone 2-E “MOUs/Informal Agreements Collected and Transferred”
  - Interim Milestone 2-F “Develop/Negotiate PEMP”
  - Interim Milestone 2-G “Load/Test AppliedInsight”



# Transition Milestones

- Performance Milestone 2 “Ensure Management Systems are Adequate” *(Continued)*
  - Interim Milestone 2-H “Load/Test Maximo”
  - Interim Milestone 2-I “Offer Letters to TJNAF Employees”
  - Interim Milestone 2-J “Update Employee Personnel Data Sheets”
  - Interim Milestone 2-K “Submit Request to Certify JSA Compensation Systems”
  - Interim Milestone 2-L “List of Top 5 Compensated Employees Submitted”
  - Interim Milestone 2-M “Submit Human Resources Compensation Plan”
  - Interim Milestone 2-N “Submit Employee Benefits Value Study Measure and Employee Benefits Cost Comparison Method”
  - Interim Milestone 2-O “Update JI Visa Program”
  - Interim Milestone 2-P “Submit Property System for Recertification and Approval”
  - Interim Milestone 2-Q “Conduct Wall-to-Wall Property Inventory”
  - Interim Milestone 2-R “Execute New Lease with GSA”



# Transition Milestones

- Performance Milestone 3 “Assume Responsibility for Existing Regulatory and Commercial Agreements”
  - Interim Milestone 3-A “Assume 50% of Existing Regulatory and Commercial Agreements”
- Performance Milestone 4 “Conduct Property Inventory”
  - Interim Milestone 4-A “Meet with CO to Agree on Plan for Physical Inventory”
  - Interim Milestone 4-B “Conduct Physical Inventory”
  - Interim Milestone 4-C “Sign Inventory Accountability”
- Performance Milestone 5 “Assume Some Level of Management on Any Litigation”
  - Interim Milestone 5-A “Certify No Litigation to Transfer”



# Transition Milestones

- Performance Milestone 6 “Conduct Workforce Planning”
  - Interim Milestone 6-A “Transfer Joint Appointees”
  - Interim Milestone 6-B “Develop Incentives and Compensation Strategy”
  - Interim Milestone 6-C “Develop Terms and Conditions of Employment for Bargain Unit Workforce (Not Applicable to TJNAF)”
  - Interim Milestone 6-D “Strategy for Meeting Section H Clause “Workforce Transition, Contractor Compensation, Benefits and Pensions”
  - Interim Milestone 6-E “Transition Pension and Health/Welfare Benefits”
- Performance Milestone 7 “Open Transition Operations Center and Conduct Kick-Off Meeting”
- Performance Milestone 8 “Meet with CO to Finalize and Approve Transition Plan”
- Performance Milestone 9 “Develop Transition Web Site”



# Transition Milestones

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- Performance Milestone 10 “Establish Q&A for Web, E-mail, Phone”
- Performance Milestone 11 “Conduct Management Training”
- Performance Milestone 12 “Conduct Employee Orientations”
- Performance Milestone 13 “Conduct Pre-Existing Condition Assessment/Hazards Analysis Survey”
- Performance Milestone 14 “Provide Letter to CO Notifying JSA Readiness to Assume Operational Control”



# Transition to JSA – How does it affect me?

- Attend employee orientation
- Receive and sign offer letter
- Update employee data sheet
- Complete new confidentiality agreement
- Transfer of benefits to JSA - no new enrollment required - no changes to current plan
- Receive new badge
- Receive management training (if applicable)



# Next 45 Days

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- Stay focused on safety and performance
- Check website frequently for updates and information about the transition
- Use the toll-free hotline to get quick responses to questions
- Attend transition meetings as requested
- Let's work together to make this a seamless transition

