

IDNG HR 575.1

Civilian Personnel

**Recruitment,
Relocation, and
Retention Incentives**

**Joint Force Headquarters
Idaho National Guard
Boise, Idaho 83705
28 February 2025**

SUMMARY of CHANGE

IDNG HR 575.1

Recruitment, Relocation, and Retention Incentives

This regulation is certified current as of 28 February 2025. Aside from the following administrative changes, no other changes were made to certify the currency of this regulation—

- Minor verbiage changes to ensure that the policy reflects the language as stipulated in CNGBI 1400.25 vol 575, 31 OCT 24 and in 5 CFR 575 (updated 23 JAN 2025)

Joint Force Headquarters

IDNG HR 575.1

Idaho National Guard
Boise, Idaho 83705
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Recruitment, Relocation and Retention Incentives

Summary. This Idaho National Guard (IDNG) Policy implements and supplements the directives of the Office of Personnel Management (OPM), Department of Defense (DoD), National Guard Bureau (NGB) and the law (5 CFR 575), which govern the payment of Recruitment, Relocation and Retention Incentives.

Applicability. This policy applies to federal employees (T32/T5) of the Idaho Army and Air National Guard employed under the authorities and provisions of 32 USC 709 and NOAA FY17 P.L. 114-328, Sections 932 and 1084.

Currency. This policy supersedes IDNG HR 575.1, dated 27 September 2023.

TIMOTHY J. DONNELLAN, Maj. Gen., IDNG
The Adjutant General

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Chapter 1

General Information

1-1. References.

- a. 5 U.S.C. 5753, Recruitment, Relocation and Retention Incentives
- b. 5 U.S.C. 5754, Retention Bonuses
- c. 5 CFR 530.203 (a), Administration of Aggregate Limitation on Pay
- d. 5 CFR 575, Recruitment, Relocation, and Retention Incentives (updated 23 JAN 25)
- e. DoD Instruction 1400.25, Volume 575, February 2, 2018, DoD Civilian Personnel Management System: Recruitment, Relocation, and Retention Incentives and Supervisory Differentials
- f. CNGBI 1400.25 Volume 575, 31 October 2024, National Guard Technician and Civilian Personnel Recruitment, Relocation and Retention Incentives and Supervisory Differentials
- g. CNGB Memo, 12 August 2016, Delegation of Authority for National Guard Technician Recruitment, Relocation, and Retention Incentives

1-2. Purpose.

- a. On 12 August 2016, the Chief, national Guard Bureau delegated to state Adjutants General the authority to approve and pay recruitment, relocation, and retention incentives to technicians. The Chief also delegated to the Directors of the Army National Guard and Air National Guard the authority to review these approved incentives for compliance with law and policy. The purpose of this plan is to satisfy the implementation requirements of this authority as applicable to Idaho National Guard technicians. It provides guidelines and procedures for requesting, processing, approving, and disapproving requests for recruitment, relocation, and retention incentives in order to recruit and retain technicians to and within the workforce.
- b. In the event of a conflict, the law, OPM regulations and DoD instructions take precedence.
- c. This chapter provides an overview and addresses the general requirements for all three incentives. Subsequent chapters provide guidance specific to each incentive.

1-3. Scope. This regulation applies to all permanents, indefinite, and term Employees (T32/T5) employed or newly appointed to the IDNG, paid under the General schedule (GS) and Federal Wage System (FWS). Temporary employees (T32/T5) are excluded from consideration for all incentives. All actions under this plan will be made without regard to race, color, religion, national origin, marital status, organizational membership, age, or non-disqualifying handicap.

1-4. Responsibilities.

a. The Adjutant General (TAG) is responsible for the policy establishment of this program and is the highest level of authority in the State for the application of this policy. TAG is the final approval authority for all incentives.

b. Supervisors and managers will submit incentive request to HRO for review.

c. HRO will review incentive requests to validate all requirements are met prior to final approval.

d. HRO will work directly with the supervisor if any additional information/documentation is needed for the incentive request prior to submitting for final approval.

1-5. Description. Incentives are calculated as a percentage of basic pay. Basic pay includes a special rate or locality payment but excludes additional pay of any other kind. Incentives are not considered part of an employee's rate of basic pay for any purpose; however, an employee's aggregate compensation including basic pay, locality payment, incentives, and awards cannot exceed the rate for level 1 of the Executive Schedule on the last day of that calendar year in accordance with 5 CFR 530.203 (a).

1-6. Request Procedures.

a. Supervisors or nominative officials will submit written requests through command channels to the Human Resources Office.

b. In determining whether to request an incentive, the supervisor or nominating official must consider several factors on a case-by-case basis. The written request for an incentive includes an SF 52, Request for Personnel Action accompanied by a completed Incentive Nomination Request Form, specific to the incentive being requested (Recruitment, Retention or Relocation). The incentive nomination form summarizes the basis for determining the amount or percentage of the incentive, the timing of the incentive payments and the length of the service period.

1-7 Approval Criteria. Approval is contingent on the availability of funds, the impact on the IDNG and the written request submitted by the supervisor or nominating official. TAG, through the Human Resources Officer, will determine if a position is likely to be difficult to

fill in the absence of an incentive or that the unusually high or unique qualifications of an Employee (T32/T5) or a special need of the agency for an employee's services makes retention essential, and that the employee would be likely to leave the federal service or the IDNG in the absence of an incentive. Candidates must have successfully completed their trial or probationary period (of one year) and receive and maintain a current rating of record of at least "Fully Successful" or equivalent to be eligible for an incentive for recruitment, retention, and relocation.

1-8 Service Agreements.

a. All incentives must include a signed Service Agreement IAW reference e, with the exception noted in paragraph 4.c.(4) below. The agreement must specify the period of service in months and years, including beginning and ending dates, and the total amount of the incentive, method of payment, and timing and amounts of each payment. The agreement must also address the conditions under which the management official must terminate the agreement, such as if the employee is demoted or separated for cause, receives a rating of less than "Fully Successful," or otherwise fails to fulfill the terms of the agreement.

b. The agreement will also list conditions that may result in termination, such as insufficient funds, reassignment to a different type of position, or reduction in force. This includes specifying whether the incentive remains in force if an employee is promoted, moves to another position outside the occupational series, or moves from a Title 32 Dual Status position to a Title 5 NG excepted position or vice versa, within the IDNG. The agreement will also address the extent to which periods of time on detail, in a non-pay status, or in paid leave status are creditable toward completion of the service period. Note that IAW 5 CFR Part 353.107, Absent-US time (military service) is generally creditable toward completion of a service period.

c. The agreement will also identify the consequences of both employee and management decisions to terminate a service agreement, such as conditions under which the employee must repay any unearned portion of incentives already received IAW reference e.

d. IDNG Employees on a retention incentive which is paid in bi-weekly installments are not required to have a service agreement. However, the agency may use one to address specific situations as needed.

e. Employees may not file grievance or appeal decisions to reduce or terminate a retention incentive or to terminate a retention incentive service agreement. Employees may not file grievance or appeal decisions to terminate the relocation agreement. IAW section 575.111(c) of reference letter d, termination of a service agreement is not grievable or appealable.

Chapter 2

Recruitment Incentives

2-1. Description. The IDNG may pay a recruitment incentive to an individual who is newly appointed as an employee of the federal government to a position the agency has determined, in writing, is likely to be difficult to fill in the absence of the incentive.

2-2. Eligibility.

a. The determination to pay a recruitment incentive must be made on a case-by-case basis before the newly appointed employee enters on duty. In accordance with 5 CFR 575.102, newly appointed means:

(1) The first appointment, regardless of tenure, as an employee of the federal government

(2) An appointment of a former employee of the federal government following a break in service of at least 90 days

(3) An appointment as an employee of the federal government when the employee's federal service during the 90-day period immediately preceding the appointment was a time-limited or non-permanent appointment (e.g., a temporary or indefinite Employee).

(4) Other appointments as laid out in 5 CFR 575.102(1) (iii) to (vii)

b. Recruitment Incentives should be annotated on the job announcement.

2-3. Request Procedures.

a. Supervisors or nominating officials will submit request through command channels to the Human Resources Office at the time of requesting advertisement of the position, indicating the request for a recruitment incentive in part D, Remarks by Requesting Office, of the SF52.

b. The supervisor or nominating official must specifically address the factors as outlined on the Recruitment incentive nomination form:

(1) The availability and quality of candidates possessing the competencies required for the position, including success of recent efforts to recruit candidates for the position or similar positions using indicators such as offer acceptance rates, proportion of positions filled, and the length of time required to fill similar positions.

(2) Salaries typically paid outside the federal government for similar positions.

(3) Recent turnover in similar positions.

(4) Employment trends and labor-market factors that may affect the agency's ability to recruit candidates for similar positions.

(5) The desirability of the duties, work or organizational environment, or geographic location of the position.

(6) Special or unique competencies required for the position.

(7) Agency efforts to use non-pay authorities, such as special training and work schedule flexibilities, to resolve difficulties alone or in combination with a relocation incentive.

(8) Other supporting factors.

c. IDNG HRO may determine that a position (or group of positions) is likely to be difficult to fill if OPM has approved use of a direct-hire authority applicable to the position (or group of positions) under 5 CFR 337(B).

2-4. Service Agreement. Before receiving a lump sum recruitment incentive, a potential Employee is required to sign a written service agreement to complete a specified period of service with the IDNG as indicated in paragraph 1-8. It will begin on the first day of the first full pay period following appointment with the IDNG and end on the last day of a pay period. If service with the IDNG does not begin on the first day of a pay period, the service period commencement date will be delayed so that a required service period begins on the first day of the first pay period beginning on or after the commencement of service in the IDNG. The service period may not be less than 6 months and may not exceed 4 years. However, the service agreement must specify that if an employee does not successfully complete the training or probationary period before the service period commences, the agency is not obligated to pay any portion of the recruitment incentive to the employee.

2-5. Payment. A recruitment incentive may not exceed 25 percent of the Employee's annual rate of basic pay in effect at the beginning of the service period multiplied by the number of years (including fractions of a year) in the service period, not to exceed four years. Thus, the total incentive cannot exceed 100 percent of the Employee's annual rate of basic pay at the beginning of the service period. The incentive may be paid as a one-time payment at the beginning of the service period, in installments (bi-weekly or otherwise) as outlined in a service, or as a final lump sum at the end of the full-service period.

a. For hourly rate employees who do not have a scheduled annual rate of basic pay, compute the annual rate by multiplying the applicable hourly rate in effect at the beginning of the service period by 2,087 hours.

b. For the purpose of determining the numbers of years in a service period, divide the total number of calendar days in the service period by 365 and round the result to two decimal places. For example, a service period covering 39 biweekly pay periods equals 546 days, and 546 days divided by 365 days equals 1.50 years.

c. Employees are entitled to installment payments even while the employee is in a non-pay status unless specifically addressed in the service agreement, as these payments are installments of the originally determined incentive total.

d. Retention incentives are calculated by multiplying the retention incentive percentage rate by the total basic pay earned by the employee during the full-service period, for lump sum payments, or by the amount earned during the installment period (such as bi-weekly). The percentage is fixed at the time of approval, but the amount paid may vary as pay earned changes due to periods of non-pay status and annual or other pay adjustments.

Chapter 3

Relocation Incentives

3-1. Description. The IDNG may pay a relocation incentive to a current federal employee of the IDNG or to an employee of another federal government agency who has accepted a position with the IDNG who must relocate to accept a position in a different geographic area provided the agency determines that the position is likely to be difficult to fill in the absence of an incentive.

3-2. Eligibility.

a. Relocation incentives may be paid to an employee of the federal government who must relocate to a different geographic area without a break in service to accept a position in the IDNG or to an employee of the IDNG who must relocate to a different geographic area (permanently or temporarily) to accept a position. 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. If the worksite of the new position is less than 50 miles from the worksite of the position held immediately before the move, but the Employee must relocate (i.e., establish a new residence) to accept the position, the Human Resources Officer may waive the 50-mile requirement. In all cases, an employee must establish a residence in the new geographic area before the agency may pay the employee a relocation incentive.

b. The determination to pay a relocation incentive must be made on a case-by-case basis before the Employee's date of assignment to the position at the new duty station.

c. To receive a relocation incentive, the employee must have a rating of record of at least "Fully Successful" or equivalent for the position held immediately before the move.

d. Recruitment Incentives should be annotated on the job announcement.

e. A relocation incentive may be paid only if the employee maintains residency in the new geographic area for the duration of the service agreement.

f. The IDNG may commence a relocation incentive service agreement during a period of employment established under a service agreement for a previously authorized retention incentive or for which an employee is receiving previously authorized retention incentive payments without a service agreement under 5 CFR part 575, subpart C. The service period under such a relocation incentive service agreement and the service period required by the retention incentive service agreement, if applicable, must be fulfilled concurrently.

3-3. Request Procedures.

a. Supervisors or nominating officials will submit request through command channels to the Human Resources Office at the time of reassignment request or position advertisement, indicating the request for a relocation incentive in part D, Remarks by Requesting Office, of the SF52. Recruitment Incentives should be annotated on the job announcement.

b. The supervisor or nominating official must specifically address the factors as outlined on the Relocation incentive nomination form:

(1) The availability and quality of candidates possessing the competencies required for the position, including success of recent efforts to recruit candidates for the position or similar positions using indicators such as offer acceptance rates, proportion of positions filled, and the length of time required to fill similar positions.

(2) Salaries typically paid outside the Federal Government for similar positions.

(3) Recent turnover in similar positions.

(4) Employment trends and labor-market factors that may affect the agency's ability to recruit candidates for similar positions.

(5) The desirability of the duties, work or organizational environment, or geographic location of the position.

(6) Special or unique competencies required for the position.

(7) Agency efforts to use non-pay authorities, such as special training and work schedule flexibilities, to resolve difficulties alone or in combination with a relocation incentive.

(8) Other supporting factors

3-4. Service Agreement.

Before receiving a lump sum relocation incentive, an Employee is required to sign a written agreement to complete a specified period of service with the IDNG at the new duty station. The service period may not exceed 4 years. It will begin on the first day of the first full pay period following appointment with the IDNG or date of assignment to the position at the new duty station and end on the last day of a pay period. A service agreement is not required for a relocation incentive that is distributed in bi-weekly payments. If an authorized HRO employee terminates a service agreement, the employee is entitled to all relocation incentive payments attributable to completed service and to retain any portion of a relocation incentive payment he or she received that is attributable to uncompleted service. A terminated employee is entitled to retain relocation incentive payments previously paid by the agency that are attributable to the completed portion of the service period.

3-5. Payment. A relocation incentive may not exceed 25 percent of the Employee's annual rate of basic pay in effect at the beginning of the service period multiplied by the number of years (including fractions of a year) in the service period (not to exceed 4 years). Thus, the total incentive cannot exceed 100 percent of the Employee's annual rate of basic pay at the beginning of the service period. The incentive may be paid in bi-weekly installments throughout the service period, as an initial lump-sum payment at the commencement of the service period or as a final lump-sum payment upon completion of the full-service period.

Chapter 4

Retention Incentives – Individual

4-1. Description. The IDNG may pay a retention incentive to a current Employee if the agency determines that the unusually high or unique qualifications of the Employee or a special need of the agency for the employee's services makes it essential to retain the Employee and that the Employee would be likely to leave the Federal service in the absence of a retention incentive. An individual retention incentive up to 25 percent of an

Employee's annual rate of basic pay may be offered to an employee to retain their services in their current position.

4-2. Eligibility. A retention incentive will not be offered or authorized for an individual prior to employment with the IDNG. An Employee currently serving under an agreement for a recruitment or relocation incentive is not eligible for a retention incentive.

4-3. Request Procedures.

a. Supervisors or nominating officials will submit written requests through command channels to the Human Resources Officer. The supervisor or nominating official must specifically address the factors as outlined on the incentive nomination form:

b. The unusually high or unique qualifications of the employee. These typically refer to an employee's competencies (knowledge, skill, ability).

c. The special needs of the organization to retain the services that make retention essential.

d. Is there a high risk that the employee would be likely to leave Federal service in the absence of a retention incentive.

e. Employment trends and labor-market factors such as the availability and quality of candidates in the labor market possessing the competencies required for the position and who, with minimal training, cost, or disruption of service to the public, could perform the full range of duties and responsibilities of the employee's position at the level performed by the employee.

f. The success of recent efforts to recruit candidates and retain employees with competencies similar to those possessed by the employee for positions similar to the position held by the employee.

g. Special or unique competencies required for the position.

h. Agency efforts to use non-pay authorities to help retain the employee instead of or in addition to a retention incentive, such as special training and work scheduling flexibilities or improving working conditions.

i. The desirability of the duties, work or organizational environment, or geographic location of the position.

j. The extent to which the employee's departure would affect the agency's ability to carry out an activity, perform a function, or complete a project that the agency deems essential to its mission.

k. Salaries typically paid outside the Federal Government for similar positions.

l. Other supporting factors.

4-4. Service Agreement. A service agreement is not required for a retention incentive that is distributed in bi-weekly payments and each biweekly installment payment is at the full retention incentive percentage rate established for the employee. An employee will be required to sign a service agreement to complete a specified period of service with the IDNG prior to receiving a lump-sum payment at the end of the service period. The period of service will begin on the first day of the first full pay period following final approval (TAG's signature) of the incentive and end on the last day of a pay period.

4-5. Payment.

a. The IDNG will establish a single retention incentive rate for the Employee, expressed as a percentage of the Employee's rate of basic pay, not to exceed 25 percent. The incentive may be paid either in biweekly installments along with basic pay or in a single lump sum upon completion of the full period of service required by a service agreement. A retention incentive will not be paid as an initial lump sum payment at the start of a service period or in advance of fulfilling the service period for which the retention incentive is received.

b. A retention incentive paid as a single lump sum payment upon completion of the full period for service required by a service agreement is derived by multiplying the retention incentive percentage rate established for the Employee by the rate of basic pay earned by the Employee during the full-service period.

c. A retention incentive that is paid in biweekly installments is derived by multiplying the retention incentive percentage rate by the rate of basic pay the Employee earned during the installment period (pay period).

4-6. Annual Review for Continuation. Retention incentives that are paid in biweekly installments expire one year or 26 pay periods after implementation. Continuation beyond one year requires a recertification to determine if the incentive is still warranted, should be increased, or reduced (see Appendix E, NGB Annual Incentive Recertification Request Form). Supervisors will ensure recertification is received by the Human Resources Officer no later than 30 days prior to the anniversary date. Retention incentives that are not recertified 30 days prior to the anniversary date will be terminated on the anniversary date.

4-7. Increase, Reduction or Termination. Retention incentives that are paid in biweekly installments may be increased, decreased or terminated at any time based upon the management needs of the agency or at the request of the supervisor as outlined in paragraph 1-7.

Chapter 5

Retention Incentives - Group

5-1. Description.

a. The IDNG may approve a retention incentive for a group or category of employees when the agency determines:

(1) Given the agency's mission requirements and employees' competencies, the agency has a special need for the employees' services that makes it essential to retain the employees in their current positions; and

(2) There is a high risk that a significant number of the employees in the group would be likely to leave for different positions in the Federal service in the absence of a retention incentive.

b. A group retention incentive up to 10 percent of each individual Employee's annual rate of basic pay may be offered to a designated and approved group of employees to retain their services in their current positions.

5-2. Eligibility. A retention incentive will not be offered or authorized for an individual prior to employment with the IDNG. An Employee currently serving under an agreement for a recruitment or relocation incentive is not eligible for inclusion in the group retention incentive.

5-3. Request Procedures.

a. The supervisor or nominating official must specifically address the factors below as justification for Retention Incentives:

(1) The unusually high or unique qualifications that make it essential to retain the employees of that group or category. These typically refer to an employee's competencies (knowledge, skill, ability).

(2) The special needs of the organization to retain the services that make retention essential.

(3) Is there a high risk that a significant number of employees in the group would be likely to leave Federal service in the absence of a retention incentive.

(4) Employment trends and labor-market factors such as the availability and quality of candidates in the labor market possessing the competencies required for the position and who, with minimal training, cost, or disruption of service to the public, could perform the full range of duties and responsibilities of the employee's position at the level performed by the employee.

(5) The quality of the potential sources of employees that are identified in any agency succession plan (e.g. succession plans required for leadership positions), who possess the competencies required for the position, and who, with minimal training, cost and disruption of service to the public, could perform the full range of duties and responsibilities of the employee's position at the level performed by the employee.

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

(7) Special or unique competencies required for the position.

(8) Agency efforts to use non-pay authorities to help retain the employee instead of or in addition to a retention incentive, such as special training and work scheduling flexibilities or improving working conditions.

(9) The desirability of the duties, work or organizational environment, or geographic location of the position.

(10) The extent to which the employee's departure would affect the agency's ability to carry out an activity, perform a function, or complete a project that the agency deems essential to its mission.

(11) Salaries typically paid outside the Federal Government for similar positions.

(12) Other supporting factors.

5-4. Service Agreement. A service agreement is not required for a group retention incentive that is distributed in bi-weekly payments. A group of employees will be required to sign a service agreement to complete a specified period of service with the IDNG prior to receiving a lump-sum payment at the end of the service period. The period of service will begin on the first day of the first full pay period following final approval (TAG's signature) of the incentive and end on the last day of a pay period.

5-5. Payment.

a. The IDNG will establish a single retention incentive rate for the Employees, expressed as a percentage of the Employee's rate of basic pay, not to exceed 10 percent. The incentive may be paid either in biweekly installments along with basic pay or in a single lump sum upon completion of the full period of service required by a service agreement. A group retention incentive will not be paid as an initial lump sum payment at the start of a service period or in advance of fulfilling the service period for which the retention incentive is received.

b. A group retention incentive paid as a single lump sum payment upon completion of the full period for service required by a service agreement is derived by multiplying the retention incentive percentage rate established for the Employee by the rate of basic pay earned by the Employee during the full-service period.

c. A group retention incentive that is paid in biweekly installments is derived by multiplying the retention incentive percentage rate by the rate of basic pay the Employee earned during the installment period (pay period).

5-6. Annual Review for Continuation. Group retention incentives that are paid in biweekly installments expire one year or 26 pay periods after implementation. Continuation beyond one year requires a recertification to determine if the incentive is still warranted, should be increased, or reduced (see Appendix E, NGB Annual Incentive Recertification Request Form). Supervisors will ensure recertification is received by the Human Resources Officer no later than 30 days prior to the anniversary date. Group retention incentives that are not recertified 30 days prior to the anniversary date will be terminated on the anniversary date.

5-7. Increase, Reduction or Termination. Retention incentives that are paid in biweekly installments may be increased, decreased or terminated at any time based upon the management needs of the agency or at the request of the supervisor as outlined in paragraph 1-7.

Appendix A
Request Memorandum Example

ORIGINATING ACTIVITY LETTERHEAD

OFFICE SYMBOL

Date

MEMORANDUM THRU

IDNG Human Resources Office, Supervisory HR Specialist (Manpower), 4794 General Manning Ave, Boise, Idaho 83705-8112

IDNG Human Resources Office, Director HRO, 4794 General Manning Ave, Boise, ID 83705

Office of the Commanding General-Army/Air, 4040 Guard Street, Boise, Idaho 83705-5004

Assistant Adjutant General-Army/Air, 4040 Guard Street, Boise, Idaho 83705-5004

FOR The Adjutant General, 4040 Guard Street, Boise, Idaho 83705-5004

Subject: Incentive Request for **(Employee's Name, Position Title, or Group Name/Category)**

1. In accordance with IDNG HR 575.1, this office requests a **(type of incentive and amount/percentage)** for **(Employee's Name/Group Name)** due to **(his, her or their)** unusually high or unique qualifications **or** a special need of the agency for the Employee's services that makes it essential to retain the Employee(s).
2. **(Document the basis for determining the amount or percentage of the incentive, the timing of the incentive payments and the length of the service period if required.)**

Encl

SIGNATURE BLOCK

1. **(Relocation, Recruitment, Retention or Group Retention)** Incentive Form