

**Attachments:** [FW Data Call Preliminary Identification of DOE Schedule F Positions.pdf](#)  
[Sched F Review - Field Template.xlsm](#)

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**From:** Capoferri, Anita

**Sent:** Tuesday, December 1, 2020 11:45 AM

**To:** Barrow, Lansen C <[Lansen.barrow@spr.doe.gov](mailto:Lansen.barrow@spr.doe.gov)>; Durant, James <[james.durant@science.doe.gov](mailto:james.durant@science.doe.gov)>; KNOWLES, LUCY M (SRS) <[lucy.knowles@srs.gov](mailto:lucy.knowles@srs.gov)>; Malie, Susan E <[susan.malie@netl.doe.gov](mailto:susan.malie@netl.doe.gov)>; Middleton, Brandon (EMCBC) <[brandon.middleton@emcbc.doe.gov](mailto:brandon.middleton@emcbc.doe.gov)>; Roy, Mell <[mell.roy@rl.doe.gov](mailto:mell.roy@rl.doe.gov)>; Thress, Don Frederick <[don.thress@science.doe.gov](mailto:don.thress@science.doe.gov)>; Trznadel, Reesha <[Reesha.Trznadel@hq.doe.gov](mailto:Reesha.Trznadel@hq.doe.gov)>; [whitete@id.doe.gov](mailto:whitete@id.doe.gov); Bremer, John D <[bremer@wapa.gov](mailto:bremer@wapa.gov)>; Jensen, Mary K <[mkjensen@bpa.gov](mailto:mkjensen@bpa.gov)>; Jourolmon, Leon <[leon.jourolmon@sepa.doe.gov](mailto:leon.jourolmon@sepa.doe.gov)>

**Cc:** Mendoza, Jennifer <[Jennifer.Mendoza@Hq.Doe.Gov](mailto:Jennifer.Mendoza@Hq.Doe.Gov)>; Park, Charles W. <[charles.park@hq.doe.gov](mailto:charles.park@hq.doe.gov)>

**Subject:** RE: Data Call: Preliminary Identification of DOE Schedule F Positions

My apologies – for some reason the attachments did not transmit with the original email.

Thanks,

Anita

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**From:** Capoferri, Anita

**Sent:** Tuesday, December 01, 2020 11:01 AM

**To:** Barrow, Lansen C <[Lansen.barrow@spr.doe.gov](mailto:Lansen.barrow@spr.doe.gov)>; Durant, James <[james.durant@science.doe.gov](mailto:james.durant@science.doe.gov)>; KNOWLES, LUCY M (SRS) <[lucy.knowles@srs.gov](mailto:lucy.knowles@srs.gov)>; Malie, Susan E <[susan.malie@netl.doe.gov](mailto:susan.malie@netl.doe.gov)>; Middleton, Brandon (EMCBC) <[brandon.middleton@emcbc.doe.gov](mailto:brandon.middleton@emcbc.doe.gov)>; Roy, Mell <[mell.roy@rl.doe.gov](mailto:mell.roy@rl.doe.gov)>; Thress, Don Frederick <[don.thress@science.doe.gov](mailto:don.thress@science.doe.gov)>; Trznadel, Reesha <[Reesha.Trznadel@hq.doe.gov](mailto:Reesha.Trznadel@hq.doe.gov)>; [whitete@id.doe.gov](mailto:whitete@id.doe.gov); Bremer, John <[bremer@wapa.gov](mailto:bremer@wapa.gov)>; Jensen, Mary K (BPA) - L-7 <[mkjensen@bpa.gov](mailto:mkjensen@bpa.gov)>; Jourolmon, Leon <[leon.jourolmon@sepa.doe.gov](mailto:leon.jourolmon@sepa.doe.gov)>

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**Subject:** Data Call: Preliminary Identification of DOE Schedule F Positions

All –

You may have been contacted by your Human Capital (HC) office to provide assistance in responding to the October 21, Executive Order (EO) 13957, *Creating Schedule F in the Excepted Service*. This EO establishes Schedule F in the excepted service, which will include positions that are of a confidential, policy-determining, policy-making, or policy-advocating character and are not normally subject to a change as a result of a Presidential transition. In order to meet the requirements outlined in EO 13957, DOE is conducting a preliminary review of its positions to determine whether they align with the Schedule F position characteristics. Certain positions [i.e., SES, excepted service (EJ/EK/EN/ER/ET pay plans), and Schedule C] have been excluded from Schedule F.

Each Head of Departmental Element is required to complete a data call listing all the encumbered and vacant positions within their program office, including field offices, and indicate whether and on what basis a position may be included in Schedule F. For your information, HC guidance on the EO and the DOE data call is attached.

**To ensure a uniform approach to the characterization of attorney positions and legal offices Department-wide, please assess your positions and provide the list of potential Schedule F positions within your office through the Office of the General Counsel rather than your respective program office. Please complete the attached electronic spreadsheet and provide it to Jennifer Mendoza by close of business Monday, December 7.**

**(b) (5)**

If you have any questions on how to complete the spreadsheet please contact Jennifer Mendoza; any other inquiries may be directed to me.

Thanks in advance for your assistance.

Anita

**From:** [Ingram, Alexa](#)  
**To:** [Capoferri, Anita](#); [Park, Charles W.](#); [Singer, Emily](#)  
**Subject:** FW: Data Call: Preliminary Identification of DOE Schedule F Positions  
**Date:** Thursday, November 19, 2020 12:25:35 PM  
**Attachments:** [Schedule F - Data Call Instructions.pdf](#)

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FYI

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**From:** Chief Human Capital Officer <chco@hq.doe.gov>

**Sent:** Thursday, November 19, 2020 8:44 AM

**To:** Genatowski, Lane <lane.genatowski@hq.doe.gov>; Hendrickson, Randall <randall.hendrickson@hq.doe.gov>; Burnison, Melissa <melissa.burnison@hq.doe.gov>; Campos, James E. <james.campos@hq.doe.gov>; Capuano, Linda (EIA) <linda.capuano@eia.gov>; Cooper III, William S. <william.cooper@hq.doe.gov>; Garrish, Theodore <theodore.garrish@hq.doe.gov>; Smith, Charles <charles.r.smith@hq.doe.gov>; Reinke, Benjamin <benjamin.reinke@hq.doe.gov>; Andersen, Nicholas <nicholas.andersen@hq.doe.gov>; Simmons, Daniel <daniel.simmons@ee.doe.gov>; Winberg, Steven <steven.winberg@hq.doe.gov>; Frost, Kevin R. <kevin.frost@hq.doe.gov>; Baranwal, Rita <rita.baranwal@nuclear.energy.gov>; Hoffman, Patricia <pat.hoffman@hq.doe.gov>; Hairston, John L <jlhairston@bpa.gov>; Hobbs, Virgil <Virgil.Hobbs@Sepa.doe.gov>; Wech, Michael S <mike.wech@swpa.gov>; Gabriel, Mark A <gabriel@wapa.gov>; Ingstad, Cheryl <cheryl.ingstad@hq.doe.gov>; White, William <william.white@em.doe.gov>; Melendez, Carmelo <carmelo.melendez@hq.doe.gov>; Prochaska, Conner H. <conner.prochaska@hq.doe.gov>; Fall, Chris <chris.fall@hq.doe.gov>

**Cc:** Colgary, James <james.colgary@hq.doe.gov>; Varnasidis, Sophia <sophia.varnasidis@hq.doe.gov>; Cubbage, Thomas <thomas.cubbage@hq.doe.gov>; Ellis, Kristen <kristen.ellis@hq.doe.gov>; Moore, Erin <erin.moore@hq.doe.gov>; Burnette, Kendra <kendra.burnette@hq.doe.gov>; Windes, Marianna <marianna.windes@hq.doe.gov>; Collier, Loretta <loretta.collier@hq.doe.gov>; Wheeler, Tiffany <tiffany.wheeler@hq.doe.gov>; Turner, Lori A. <lori.turner@hc.doe.gov>; Brooks, Ahtora <ahtora.brooks@hq.doe.gov>

**Subject:** Data Call: Preliminary Identification of DOE Schedule F Positions

*Sent on behalf of Deputy Chief Human Capital Officer Erin Moore*

Colleagues,

On October 21, President Trump signed Executive Order (EO) 13957, [Creating Schedule F in the Excepted Service](#). This EO establishes Schedule F in the excepted service, which will include positions that are of a confidential, policy-determining, policy-making, or policy-advocating character and are not normally subject to a change as a result of a Presidential transition.

In order to meet the requirements outlined in EO 13957, DOE must conduct a preliminary review of its positions to determine whether they align with the Schedule F position characteristics. The positions identified during this preliminary review will be submitted to OPM, which retains final authority over which categories and types of positions will be placed in Schedule F. This initial review will focus on DOE mission-related policy-type of positions vice administrative policy positions (e.g., IT, Travel).

HC identified that your Departmental Element may have positions fitting the Schedule F criteria. By the end of the week, your Resource Managers will receive the attached instructions, which include more information on Schedule F position characteristics. They will also receive a certification

memorandum and an Excel spreadsheet for identifying potential Schedule F positions to help you complete this data call.

We are asking for completed certification memorandums and spreadsheets to be submitted to [Tiffany Wheeler](#), [Lori Turner](#), and [Ahtora Brooks](#) in the HC Policy Division by December 11, 2020.

If you have any questions in the meantime, please let me know.

[Thanks!](#)

[Erin Moore](#)  
[Deputy Chief Human Capital Officer](#)



## SCHEDULE F DATA CALL

On October 21, the President signed Executive Order (EO) 13957, [\*Creating Schedule F in the Excepted Service\*](#). Positions in the new Schedule F authority are considered to be of a confidential, policy-determining, policy-making, or policy-advocating character not normally subject to a change as a result of a Presidential transition.

As a result of the EO, the Office of the Chief Human Capital Officer (HC) will be developing a comprehensive Schedule F Excepted Service policy for implementation at the Department. However, the first requirement in the EO mandates that agencies submit an initial list of possible positions to the Office of Personnel Management (OPM) for approval within 90 days (January 19, 2021). Upon OPM approval, positions submitted for consideration may be converted from the competitive service or other excepted service (e.g., Schedule A) to Schedule F.

This initial submission is a preliminary draft for OPM to review. The Department will have the ability to amend its position list when it submits its final approval list to OPM in 210 days (May 19, 2021). OPM retains final authority over which categories and types of positions will be placed in Schedule F.

## POSITION CHARACTERISTICS FOR INCLUSION IN SCHEDULE F

Determinations that positions should be moved into the new Schedule F authority must be based on the position duties (i.e., position description (PD)) vice the duties the current incumbent is performing. If necessary, the PD may need to be updated to more accurately reflect the duties of the position if it is outdated. As outlined in EO 13957, below are characteristics indicating a position may belong in Schedule F:

- 1) Substantive participation in the advocacy for or the development or formulation of policy, especially:
  - Substantive participation in the development or drafting of regulations and guidance; or
  - Substantive policy-related work in an agency or agency component that primarily focuses on policy.
- 2) Supervision of attorneys.
- 3) Substantial discretion to determine the manner in which the agency exercises functions committed to the agency by law.
- 4) Viewing, circulating, or otherwise working with proposed regulations, guidance, executive orders, or other non-public policy proposals or deliberations generally covered by deliberative process privilege **and either**:
  - Directly reporting to or regularly working with an individual appointed by either the President or an agency head who is paid at a rate not less than that earned by employees at Grade 13 of the General Schedule; or
  - Working in the agency or agency component executive secretariat (or equivalent).
- 5) Conducting, on the agency's behalf, collective bargaining negotiations under chapter 71 of title 5, United States Code.

## SCHEDULE F SPREADSHEET INSTRUCTIONS

For the initial assessment of your positions, recommendations for Schedule F positions must be based any of the above criteria and explained in the attached spreadsheet. When conducting your assessment, please consider the following:

- Limit your initial review to DOE mission-related policy positions (i.e., involving DOE-specific policy). At this time, do not include administrative policy positions (HR, IT, CF, Travel, etc.).
- Focus your review on higher-graded positions as they are most likely to meet the Schedule F criteria.
- Exclude Senior Executive Service (SES), Senior Level (SL), Scientific or Professional (ST), Excepted Service (EJ/EK/EN/ER/ET) and Schedule C positions in your review.

**Below are instructions for completing the Schedule F Spreadsheet:**

- The initial columns (columns A – L) are prepopulated with encumbered positions in your Departmental Element. SES/SL/ST/EJ/EK/EN/ER/ET and Schedule C positions are excluded at this time.
- List the number of positions in column M if more than 1 (this only applies to unencumbered positions that are manually added to the spreadsheet).
- If the position should be included in Schedule F, enter “Yes” in column N; otherwise, leave it blank. The remaining columns O and P must be completed if column N is populated as “Yes.”
  - Please select as many Schedule F criteria in column O from the drop-down box that apply to the specific position.
    - If you accidentally select Schedule F criteria that don’t apply to the position, you will need to delete the entire entry in the cell and start over with making selections from the drop-down. You cannot delete just one of the multiple criteria from the cell.
    - If the drop-down does not allow you to make multiple selections, go to *File → Enable Macros*. Once enabled, you should be able to select multiple criteria.
  - Please provide a brief description (a few bullets are sufficient) justifying why the position should be included in Schedule F in column P.
- Add any vacant positions for which you have approval to recruit/establish in accordance with the Managed Hiring Process and meet any of the Schedule F position characteristics described above.

Please obtain Head of Departmental Element and Under Secretary (if applicable) approval for these positions using the [Letter of Certification](#) form. Please submit the signed Letter of Certification and the completed electronic version of the spreadsheet (i.e., not scanned) to the HC Policy Division by close of business **December 11**. Negative responses must be submitted as well. Please send your materials to: [Tiffany Wheeler](#), [Lori Turner](#), and [Ahtora Brooks](#).



## Document 1 - Attachment 2

[illegible]

**From:** [Lucas, John T.](#)  
**To:** [Mendoza, Jennifer](#)  
**Cc:** [Capoferri, Anita](#)  
**Subject:** FW: Data Call: Preliminary Identification of DOE Schedule F Positions  
**Date:** Monday, December 7, 2020 11:26:35 PM  
**Attachments:** [FW Data Call Preliminary Identification of DOE Schedule F Positions.pdf](#)  
[Sched F Review Spreadsheet - Oak Ridge OCC.xlsm](#)

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Jennifer,

Here is the response from Don Thress, as we discussed. I am also copying Anita so that she can take a look at Don's analysis on the supervisory attorneys.

---

**From:** Thress, Don Frederick [mailto:Don.Thress@Science.doe.gov]  
**Sent:** Friday, December 04, 2020 1:11 PM  
**To:** Lucas, John T. <john.t.lucas@hq.doe.gov>  
**Subject:** FW: Data Call: Preliminary Identification of DOE Schedule F Positions

John:

Thanks for chatting with me this morning.

Attached is the completed spreadsheet (b) (5)

(b) (5) elow, as well, is some of my rationale (b) (5)  
Hope this helps and, if you need to speak with me today or on Monday, please don't hesitate to call me at (b) (6).

Sincerely,

Don

[Draft Message to Jennifer Mendoza](#)

Jennifer:

(b) (5)



(b) (5)

In closing, I hope this perspective aids the analysis. As always, please e-mail me or call me at (b) (6) if you have any questions or desire additional information.

Sincerely,

Don

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**From:** Capoferri, Anita <[anita.capoferri@hq.doe.gov](mailto:anita.capoferri@hq.doe.gov)>

**Sent:** Tuesday, December 1, 2020 11:45 AM

**To:** Barrow, Lansen C <[lansen.barrow@spr.doe.gov](mailto:lansen.barrow@spr.doe.gov)>; Durant, James

<[James.Durant@science.doe.gov](mailto:James.Durant@science.doe.gov)>; Knowles, Lucy M <[lucy.knowles@srs.gov](mailto:lucy.knowles@srs.gov)>; Malie, Susan E

<[susan.malie@netl.doe.gov](mailto:susan.malie@netl.doe.gov)>; Middleton, Brandon Murray <[brandon.middleton@emcbc.doe.gov](mailto:brandon.middleton@emcbc.doe.gov)>;

Roy, Mell J <[mell.roy@rl.doe.gov](mailto:mell.roy@rl.doe.gov)>; Thress, Don Frederick <[Don.Thress@Science.doe.gov](mailto:Don.Thress@Science.doe.gov)>; Trznadel,

Reesha (HQ) <[reesha.trznadel@hq.doe.gov](mailto:reesha.trznadel@hq.doe.gov)>; [whitete@id.doe.gov](mailto:whitete@id.doe.gov); Bremer, John D

<[bremers@wapa.gov](mailto:bremers@wapa.gov)>; Jensen, Mary K <[mkjensen@bpa.gov](mailto:mkjensen@bpa.gov)>; Jourolmon, Leon Nmn

<[leon.jourolmon@sepa.doe.gov](mailto:leon.jourolmon@sepa.doe.gov)>

**Cc:** Mendoza, Jennifer (HQ) <[jennifer.mendoza@hq.doe.gov](mailto:jennifer.mendoza@hq.doe.gov)>; Park, Charles W. (HQ)

<[charles.park@hq.doe.gov](mailto:charles.park@hq.doe.gov)>

**Subject:** RE: Data Call: Preliminary Identification of DOE Schedule F Positions

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<[susan.malie@netl.doe.gov](mailto:susan.malie@netl.doe.gov)>; Middleton, Brandon (EMCBC) <[brandon.middleton@emcbc.doe.gov](mailto:brandon.middleton@emcbc.doe.gov)>; Roy, Mell <[mell.roy@rl.doe.gov](mailto:mell.roy@rl.doe.gov)>; Thress, Don Frederick <[don.thress@science.doe.gov](mailto:don.thress@science.doe.gov)>; Trznadel, Reesha <[Reesha.Trznadel@hq.doe.gov](mailto:Reesha.Trznadel@hq.doe.gov)>; [whitete@id.doe.gov](mailto:whitete@id.doe.gov); Bremer, John <[bremer@wapa.gov](mailto:bremer@wapa.gov)>; Jensen, Mary K (BPA) - L-7 <[mkjensen@bpa.gov](mailto:mkjensen@bpa.gov)>; Jourolmon, Leon <[leon.jourolmon@sepa.doe.gov](mailto:leon.jourolmon@sepa.doe.gov)>

**Cc:** Mendoza, Jennifer <[Jennifer.Mendoza@Hq.Doe.Gov](mailto:Jennifer.Mendoza@Hq.Doe.Gov)>; Park, Charles W.

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**Cc:** Colgary, James <james.colgary@hq.doe.gov>; Varnasidis, Sophia <sophia.varnasidis@hq.doe.gov>; Cubbage, Thomas <thomas.cubbage@hq.doe.gov>; Ellis, Kristen <kristen.ellis@hq.doe.gov>; Moore, Erin <erin.moore@hq.doe.gov>; Burnette, Kendra <kendra.burnette@hq.doe.gov>; Windes, Marianna <marianna.windes@hq.doe.gov>; Collier, Loretta <loretta.collier@hq.doe.gov>; Wheeler, Tiffany <tiffany.wheeler@hq.doe.gov>; Turner, Lori A. <lori.turner@hc.doe.gov>; Brooks, Ahtora <ahtora.brooks@hq.doe.gov>

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*Sent on behalf of Deputy Chief Human Capital Officer Erin Moore*

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**Below are instructions for completing the Schedule F Spreadsheet:**

- The initial columns (columns A – L) are prepopulated with encumbered positions in your Departmental Element. SES/SL/ST/EJ/EK/EN/ER/ET and Schedule C positions are excluded at this time.
- List the number of positions in column M if more than 1 (this only applies to unencumbered positions that are manually added to the spreadsheet).
- If the position should be included in Schedule F, enter “Yes” in column N; otherwise, leave it blank. The remaining columns O and P must be completed if column N is populated as “Yes.”
  - Please select as many Schedule F criteria in column O from the drop-down box that apply to the specific position.
    - If you accidentally select Schedule F criteria that don’t apply to the position, you will need to delete the entire entry in the cell and start over with making selections from the drop-down. You cannot delete just one of the multiple criteria from the cell.
    - If the drop-down does not allow you to make multiple selections, go to *File → Enable Macros*. Once enabled, you should be able to select multiple criteria.
  - Please provide a brief description (a few bullets are sufficient) justifying why the position should be included in Schedule F in column P.
- Add any vacant positions for which you have approval to recruit/establish in accordance with the Managed Hiring Process and meet any of the Schedule F position characteristics described above.

Please obtain Head of Departmental Element and Under Secretary (if applicable) approval for these positions using the [Letter of Certification](#) form. Please submit the signed Letter of Certification and the completed electronic version of the spreadsheet (i.e., not scanned) to the HC Policy Division by close of business **December 11**. Negative responses must be submitted as well. Please send your materials to: [Tiffany Wheeler](#), [Lori Turner](#), and [Ahtora Brooks](#).



Org Code	Last Name	First Name	Official Position Title	Occupational Series	Grade Level	Bargaining Unit Position	Number of positions	Include in Schedule F?	Schedule F Criteria, indicate as many as may apply (i.e. policy-determining, policy-making, policy-advocating, confidential)	Brief description of factors demonstrating confidential, policy-determining, policy-making, or policy-advocating character
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(b) (5)



**From:** [White, Tyler E](#)  
**To:** [Capoferri, Anita](#)  
**Cc:** [Mendoza, Jennifer](#)  
**Subject:** RE: Data Call: Preliminary Identification of DOE Schedule F Positions  
**Date:** Monday, December 7, 2020 10:25:20 AM  
**Attachments:** [Copy of Copy of Sched F Review - OCC DOE-ID.xlsm](#)

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Ms. Capoferri,

I've attached the spreadsheet for the Idaho office. Hopefully I filled it out correctly; although for some reason I couldn't edit anything in the 'J' column.

(b) (5)

Thank you and let me know if you need anything else.

Tyler White  
Chief Counsel  
U.S. Department of Energy  
Idaho Operations Office

[whitete@id.doe.gov](mailto:whitete@id.doe.gov)  
(208) 526-0804 (office)

---

**From:** Capoferri, Anita <[anita.capoferri@hq.doe.gov](mailto:anita.capoferri@hq.doe.gov)>  
**Sent:** Tuesday, December 1, 2020 9:45 AM  
**To:** Barrow, Lansen C <[lansen.barrow@spr.doe.gov](mailto:lansen.barrow@spr.doe.gov)>; Durant, James <[james.durant@science.doe.gov](mailto:james.durant@science.doe.gov)>; KNOWLES, LUCY M (SRS) <[lucy.knowles@srs.gov](mailto:lucy.knowles@srs.gov)>; Malie, Susan E <[susan.malie@netl.doe.gov](mailto:susan.malie@netl.doe.gov)>; Middleton, Brandon (EMCBC) <[brandon.middleton@emcbc.doe.gov](mailto:brandon.middleton@emcbc.doe.gov)>; Roy, Mell <[mell.roy@rl.doe.gov](mailto:mell.roy@rl.doe.gov)>; Thress, Don Frederick <[don.thress@science.doe.gov](mailto:don.thress@science.doe.gov)>; Trznadel, Reesha <[reesha.trznadel@hq.doe.gov](mailto:reesha.trznadel@hq.doe.gov)>; White, Tyler E <[whitete@id.doe.gov](mailto:whitete@id.doe.gov)>; Bremer, John D <[bremer@wapa.gov](mailto:bremer@wapa.gov)>; Jensen, Mary K <[mkjensen@bpa.gov](mailto:mkjensen@bpa.gov)>; Jourolmon, Leon <[leon.jourolmon@sepa.doe.gov](mailto:leon.jourolmon@sepa.doe.gov)>  
**Cc:** Mendoza, Jennifer <[jennifer.mendoza@hq.doe.gov](mailto:jennifer.mendoza@hq.doe.gov)>; Park, Charles W. <[charles.park@hq.doe.gov](mailto:charles.park@hq.doe.gov)>  
**Subject:** RE: Data Call: Preliminary Identification of DOE Schedule F Positions

My apologies – for some reason the attachments did not transmit with the original email.

Thanks,  
Anita

---

**From:** Capoferri, Anita

**Sent:** Tuesday, December 01, 2020 11:01 AM

**To:** Barrow, Lansen C <[Lansen.barrow@spr.doe.gov](mailto:Lansen.barrow@spr.doe.gov)>; Durant, James <[james.durant@science.doe.gov](mailto:james.durant@science.doe.gov)>; KNOWLES, LUCY M (SRS) <[lucy.knowles@srs.gov](mailto:lucy.knowles@srs.gov)>; Malie, Susan E <[susan.malie@netl.doe.gov](mailto:susan.malie@netl.doe.gov)>; Middleton, Brandon (EMCBC) <[brandon.middleton@emcbc.doe.gov](mailto:brandon.middleton@emcbc.doe.gov)>; Roy, Mell <[mell.roy@rl.doe.gov](mailto:mell.roy@rl.doe.gov)>; Thress, Don Frederick <[don.thress@science.doe.gov](mailto:don.thress@science.doe.gov)>; Trznadel, Reesha <[Reesha.Trznadel@hq.doe.gov](mailto:Reesha.Trznadel@hq.doe.gov)>; [whitete@id.doe.gov](mailto:whitete@id.doe.gov); Bremer, John <[bremer@wapa.gov](mailto:bremer@wapa.gov)>; Jensen, Mary K (BPA) - L-7 <[mkjensen@bpa.gov](mailto:mkjensen@bpa.gov)>; Jourolmon, Leon <[leon.jourolmon@sepa.doe.gov](mailto:leon.jourolmon@sepa.doe.gov)>  
**Cc:** Mendoza, Jennifer <[Jennifer.Mendoza@Hq.Doe.Gov](mailto:Jennifer.Mendoza@Hq.Doe.Gov)>; Park, Charles W. <[charles.park@hq.doe.gov](mailto:charles.park@hq.doe.gov)>

**Subject:** Data Call: Preliminary Identification of DOE Schedule F Positions

All –

You may have been contacted by your Human Capital (HC) office to provide assistance in responding to the October 21, Executive Order (EO) 13957, *Creating Schedule F in the Excepted Service*. This EO establishes Schedule F in the excepted service, which will include positions that are of a confidential, policy-determining, policy-making, or policy-advocating character and are not normally subject to a change as a result of a Presidential transition. In order to meet the requirements outlined in EO 13957, DOE is conducting a preliminary review of its positions to determine whether they align with the Schedule F position characteristics. Certain positions [i.e., SES, excepted service (EJ/EK/EN/ER/ET pay plans), and Schedule C] have been excluded from Schedule F.

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(b) (5)

If you have any questions on how to complete the spreadsheet please contact Jennifer Mendoza;

any other inquiries may be directed to me.

Thanks in advance for your assistance.

Anita

Org Code	Last Name	First Name	Official Position Title	Occupational Series	Grade Level	Bargaining Unit Position	Number of positions	Include in Schedule F?	Schedule F Criteria, indicate as many as may apply (i.e. policy-determining, policy-making, policy-advocating, confidential)	Brief description of factors demonstrating confidential, policy-determining, policy-making, or policy-advocating character
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**From:** [Bremer, John](#)  
**To:** [Capoferri, Anita](#)  
**Cc:** [Mendoza, Jennifer](#)  
**Subject:** RE: [EXTERNAL] RE: Data Call: Preliminary Identification of DOE Schedule F Positions  
**Date:** Monday, December 7, 2020 1:53:41 PM  
**Attachments:** [Copy of Sched F Review - Field Template WAPA SWPA.xlsm](#)

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Jennifer,

Attached, please find the spreadsheet that covers both WAPA and SWPA.

Thanks, and take care,

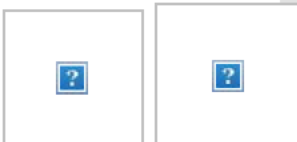
John

John D. Bremer

Southwestern Power Administration | General Counsel

Western Area Power Administration | General Counsel & Senior Vice President

(O) 720.962.7019 | (C) (b) (6) | (F) 720.962.7009 | [bremer@wapa.gov](mailto:bremer@wapa.gov)



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---

**From:** Capoferri, Anita <[anita.capoferri@hq.doe.gov](mailto:anita.capoferri@hq.doe.gov)>

**Sent:** Tuesday, December 1, 2020 9:45 AM

**To:** Barrow, Lansen C <[lansen.barrow@spr.doe.gov](mailto:lansen.barrow@spr.doe.gov)>; Durant, James

<[james.durant@science.doe.gov](mailto:james.durant@science.doe.gov)>; KNOWLES, LUCY M (SRS) <[lucy.knowles@srs.gov](mailto:lucy.knowles@srs.gov)>; Malie, Susan E <[susan.malie@netl.doe.gov](mailto:susan.malie@netl.doe.gov)>; Middleton, Brandon (EMCBC) <[brandon.middleton@emcbc.doe.gov](mailto:brandon.middleton@emcbc.doe.gov)>; Roy, Mell <[mell.roy@rl.doe.gov](mailto:mell.roy@rl.doe.gov)>; Thress, Don Frederick <[don.thress@science.doe.gov](mailto:don.thress@science.doe.gov)>; Trznadel, Reesha <[reesha.trznadel@hq.doe.gov](mailto:reesha.trznadel@hq.doe.gov)>; whitete@id.doe.gov; Bremer, John <[Bremer@WAPA.GOV](mailto:Bremer@WAPA.GOV)>; Jensen, Mary K <[mkjensen@bpa.gov](mailto:mkjensen@bpa.gov)>; Jourolmon, Leon <[leon.jourolmon@sepa.doe.gov](mailto:leon.jourolmon@sepa.doe.gov)>

**Cc:** Mendoza, Jennifer <[jennifer.mendoza@hq.doe.gov](mailto:jennifer.mendoza@hq.doe.gov)>; Park, Charles W. <[charles.park@hq.doe.gov](mailto:charles.park@hq.doe.gov)>

**Subject:** [EXTERNAL] RE: Data Call: Preliminary Identification of DOE Schedule F Positions

My apologies – for some reason the attachments did not transmit with the original email.

Thanks,  
Anita

---

**From:** Capoferri, Anita

**Sent:** Tuesday, December 01, 2020 11:01 AM

**To:** Barrow, Lansen C <[Lansen.barrow@spr.doe.gov](mailto:Lansen.barrow@spr.doe.gov)>; Durant, James

<[james.durant@science.doe.gov](mailto:james.durant@science.doe.gov)>; KNOWLES, LUCY M (SRS) <[lucy.knowles@srs.gov](mailto:lucy.knowles@srs.gov)>; Malie, Susan E

<[susan.malie@netl.doe.gov](mailto:susan.malie@netl.doe.gov)>; Middleton, Brandon (EMCBC) <[brandon.middleton@emcbc.doe.gov](mailto:brandon.middleton@emcbc.doe.gov)>;

Roy, Mell <[mell.roy@rl.doe.gov](mailto:mell.roy@rl.doe.gov)>; Thress, Don Frederick <[don.thress@science.doe.gov](mailto:don.thress@science.doe.gov)>; Trznadel,

Reesha <[Reesha.Trznadel@hq.doe.gov](mailto:Reesha.Trznadel@hq.doe.gov)>; [whitete@id.doe.gov](mailto:whitete@id.doe.gov); Bremer, John <[bremer@wapa.gov](mailto:bremer@wapa.gov)>;

Jensen, Mary K (BPA) - L-7 <[mkjensen@bpa.gov](mailto:mkjensen@bpa.gov)>; Jourolmon, Leon <[leon.jourolmon@sepa.doe.gov](mailto:leon.jourolmon@sepa.doe.gov)>

**Cc:** Mendoza, Jennifer <[Jennifer.Mendoza@Hq.Doe.Gov](mailto:Jennifer.Mendoza@Hq.Doe.Gov)>; Park, Charles W.

<[charles.park@hq.doe.gov](mailto:charles.park@hq.doe.gov)>

**Subject:** Data Call: Preliminary Identification of DOE Schedule F Positions

All –

You may have been contacted by your Human Capital (HC) office to provide assistance in responding to the October 21, Executive Order (EO) 13957, *Creating Schedule F in the Excepted Service*. This EO establishes Schedule F in the excepted service, which will include positions that are of a confidential, policy-determining, policy-making, or policy-advocating character and are not normally subject to a change as a result of a Presidential transition. In order to meet the requirements outlined in EO 13957, DOE is conducting a preliminary review of its positions to determine whether they align with the Schedule F position characteristics. Certain positions [i.e., SES, excepted service (EJ/EK/EN/ER/ET pay plans), and Schedule C] have been excluded from Schedule F.

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(b) (5)

If you have any questions on how to complete the spreadsheet please contact Jennifer Mendoza; any other inquiries may be directed to me.

Thanks in advance for your assistance.

Anita

Org Code	Last Name	First Name	Official Position Title	Occupational Series	Grade Level	Bargaining Unit Position	Number of positions	Include in Schedule F?	Schedule F Criteria, indicate as many as may apply (i.e. policy-determining, policy-making, policy-advocating, confidential)	Brief description of factors demonstrating confidential, policy-determining, policy-making, or policy-advocating character
----------	-----------	------------	-------------------------	---------------------	-------------	--------------------------	---------------------	------------------------	--	--

(b) (5)



**From:** [Middleton, Brandon \(EMCBC\)](#)  
**To:** [Mendoza, Jennifer](#)  
**Subject:** RE: Data Call: Preliminary Identification of DOE Schedule F Positions  
**Date:** Monday, December 7, 2020 6:00:18 PM  
**Attachments:** [CBCOCCGS-15.xlsm](#)

---

Jennifer:

Please see attached in response to Anita's request. Thank you.

Brandon

---

**From:** Capoferri, Anita <[anita.capoferri@hq.doe.gov](mailto:anita.capoferri@hq.doe.gov)>  
**Sent:** Tuesday, December 1, 2020 11:45 AM  
**To:** Barrow, Lansen C <[lansen.barrow@spr.doe.gov](mailto:lansen.barrow@spr.doe.gov)>; Durant, James <[james.durant@science.doe.gov](mailto:james.durant@science.doe.gov)>; KNOWLES, LUCY M (SRS) <[lucy.knowles@srs.gov](mailto:lucy.knowles@srs.gov)>; Malie, Susan E <[susan.malie@netl.doe.gov](mailto:susan.malie@netl.doe.gov)>; Middleton, Brandon <[Brandon.Middleton@emcbc.doe.gov](mailto:Brandon.Middleton@emcbc.doe.gov)>; Roy, Mell <[mell.roy@rl.doe.gov](mailto:mell.roy@rl.doe.gov)>; Thress, Don Frederick <[don.thress@science.doe.gov](mailto:don.thress@science.doe.gov)>; Trznadel, Reesha (HQ) <[reesha.trznadel@hq.doe.gov](mailto:reesha.trznadel@hq.doe.gov)>; whitete@id.doe.gov; Bremer, John D <[bremer@wapa.gov](mailto:bremer@wapa.gov)>; Jensen, Mary K <[mkjensen@bpa.gov](mailto:mkjensen@bpa.gov)>; Jourolmon, Leon (HQ) <[leon.jourolmon@sepa.doe.gov](mailto:leon.jourolmon@sepa.doe.gov)>  
**Cc:** Mendoza, Jennifer (HQ) <[jennifer.mendoza@hq.doe.gov](mailto:jennifer.mendoza@hq.doe.gov)>; Park, Charles W. (HQ) <[charles.park@hq.doe.gov](mailto:charles.park@hq.doe.gov)>  
**Subject:** RE: Data Call: Preliminary Identification of DOE Schedule F Positions

My apologies – for some reason the attachments did not transmit with the original email.

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Anita

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**To:** Barrow, Lansen C <[Lansen.barrow@spr.doe.gov](mailto:Lansen.barrow@spr.doe.gov)>; Durant, James <[james.durant@science.doe.gov](mailto:james.durant@science.doe.gov)>; KNOWLES, LUCY M (SRS) <[lucy.knowles@srs.gov](mailto:lucy.knowles@srs.gov)>; Malie, Susan E <[susan.malie@netl.doe.gov](mailto:susan.malie@netl.doe.gov)>; Middleton, Brandon (EMCBC) <[brandon.middleton@emcbc.doe.gov](mailto:brandon.middleton@emcbc.doe.gov)>; Roy, Mell <[mell.roy@rl.doe.gov](mailto:mell.roy@rl.doe.gov)>; Thress, Don Frederick <[don.thress@science.doe.gov](mailto:don.thress@science.doe.gov)>; Trznadel, Reesha <[Reesha.Trznadel@hq.doe.gov](mailto:Reesha.Trznadel@hq.doe.gov)>; [whitete@id.doe.gov](mailto:whitete@id.doe.gov); Bremer, John <[bremer@wapa.gov](mailto:bremer@wapa.gov)>; Jensen, Mary K (BPA) - L-7 <[mkjensen@bpa.gov](mailto:mkjensen@bpa.gov)>; Jourolmon, Leon <[leon.jourolmon@sepa.doe.gov](mailto:leon.jourolmon@sepa.doe.gov)>  
**Cc:** Mendoza, Jennifer <[Jennifer.Mendoza@Hq.Doe.Gov](mailto:Jennifer.Mendoza@Hq.Doe.Gov)>; Park, Charles W. <[charles.park@hq.doe.gov](mailto:charles.park@hq.doe.gov)>  
**Subject:** Data Call: Preliminary Identification of DOE Schedule F Positions

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(b) (5)										

**From:** [Capoferri, Anita](#)  
**To:** [Mendoza, Jennifer](#)  
**Subject:** FW: Data Call: Preliminary Identification of DOE Schedule F Positions  
**Date:** Tuesday, December 8, 2020 8:02:49 AM  
**Attachments:** [Sched F Review - Field Template Hanford OCC Nov 2020.xlsm](#)

---

**From:** Roy, Mell [mailto:mell.roy@rl.doe.gov]  
**Sent:** Tuesday, December 08, 2020 7:03 AM  
**To:** Capoferri, Anita <anita.capoferri@hq.doe.gov>  
**Subject:** RE: Data Call: Preliminary Identification of DOE Schedule F Positions

Greetings Anita.

Please see the attached.

Thank you.

---

**From:** Capoferri, Anita <[anita.capoferri@hq.doe.gov](mailto:anita.capoferri@hq.doe.gov)>  
**Sent:** Tuesday, December 1, 2020 8:45 AM  
**To:** Barrow, Lansen C <[lansen.barrow@spr.doe.gov](mailto:lansen.barrow@spr.doe.gov)>; Durant, James <[james.durant@science.doe.gov](mailto:james.durant@science.doe.gov)>; KNOWLES, LUCY M (SRS) <[lucy.knowles@srs.gov](mailto:lucy.knowles@srs.gov)>; Malie, Susan (NETL) <[susan.malie@netl.doe.gov](mailto:susan.malie@netl.doe.gov)>; Middleton, Brandon (EMCBC) <[brandon.middleton@emcbc.doe.gov](mailto:brandon.middleton@emcbc.doe.gov)>; Roy, Mell <[mell.roy@rl.doe.gov](mailto:mell.roy@rl.doe.gov)>; Thress, Don Frederick <[don.thress@science.doe.gov](mailto:don.thress@science.doe.gov)>; Trznadel, Reesha (HQ) <[reesha.trznadel@hq.doe.gov](mailto:reesha.trznadel@hq.doe.gov)>; [whitete@id.doe.gov](mailto:whitete@id.doe.gov); Bremer, John D <[bremer@wapa.gov](mailto:bremer@wapa.gov)>; Jensen, Mary K <[mkjensen@bpa.gov](mailto:mkjensen@bpa.gov)>; Jourolmon, Leon <[leon.jourolmon@sepa.doe.gov](mailto:leon.jourolmon@sepa.doe.gov)>  
**Cc:** Mendoza, Jennifer (HQ) <[jennifer.mendoza@hq.doe.gov](mailto:jennifer.mendoza@hq.doe.gov)>; Park, Charles W. <[charles.park@hq.doe.gov](mailto:charles.park@hq.doe.gov)>  
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Anita

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**Cc:** Mendoza, Jennifer <[Jennifer.Mendoza@Hq.Doe.Gov](mailto:Jennifer.Mendoza@Hq.Doe.Gov)>; Park, Charles W. <[charles.park@hq.doe.gov](mailto:charles.park@hq.doe.gov)>

**Subject:** Data Call: Preliminary Identification of DOE Schedule F Positions

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You may have been contacted by your Human Capital (HC) office to provide assistance in responding to the October 21, Executive Order (EO) 13957, *Creating Schedule F in the Excepted Service*. This EO establishes Schedule F in the excepted service, which will include positions that are of a confidential, policy-determining, policy-making, or policy-advocating character and are not normally subject to a change as a result of a Presidential transition. In order to meet the requirements outlined in EO 13957, DOE is conducting a preliminary review of its positions to determine whether they align with the Schedule F position characteristics. Certain positions [i.e., SES, excepted service (EJ/EK/EN/ER/ET pay plans), and Schedule C] have been excluded from Schedule F.

Each Head of Departmental Element is required to complete a data call listing all the encumbered and vacant positions within their program office, including field offices, and indicate whether and on what basis a position may be included in Schedule F. For your information, HC guidance on the EO and the DOE data call is attached.

**To ensure a uniform approach to the characterization of attorney positions and legal offices Department-wide, please assess your positions and provide the list of potential Schedule F positions within your office through the Office of the General Counsel rather than your respective program office. Please complete the attached electronic spreadsheet and provide it to Jennifer Mendoza by close of business Monday, December 7.**

(b) (5)

If you have any questions on how to complete the spreadsheet please contact Jennifer Mendoza; any other inquiries may be directed to me.

Thanks in advance for your assistance.

Anita

Org Code	Last Name	First Name	Official Position Title	Occupational Series	Grade Level	Bargaining Unit Position	Number of positions	Include in Schedule F?	Schedule F Criteria, indicate as many as may apply (i.e. policy-determining, policy-making, policy-advocating, confidential)	Brief description of factors demonstrating confidential, policy-determining, policy-making, or policy-advocating character
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**From:** [Capoferri, Anita](#)  
**To:** [Mendoza, Jennifer](#)  
**Subject:** FW: Sched F Review - Field Template (004).xlsm  
**Date:** Tuesday, December 8, 2020 8:03:20 AM  
**Attachments:** [Sched F Review - Field Template \(004\).xlsm](#)

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**From:** Durant, James [mailto:James.Durant@science.doe.gov]  
**Sent:** Friday, December 04, 2020 6:11 PM  
**To:** Capoferri, Anita <anita.capoferri@hq.doe.gov>  
**Cc:** Donham, Kim <kim.donham@science.doe.gov>; Dobbs, Mike <mike.dobbs@science.doe.gov>  
**Subject:** Sched F Review - Field Template (004).xlsm

Anita, I hope you had a good weekend. Attached is our completed Schedule F Review for my office.  
Per our conversation, (b) (5)

[Redacted]

I am available for comment.

James

(b) (6)

Org Code	Last Name	First Name	Official Position Title	Occupational Series	Grade Level	Bargaining Unit Position	Number of positions	Include in Schedule F?	Schedule F Criteria, indicate as many as may apply (i.e. policy-determining, policy-making, policy-advocating, confidential)	Brief description of factors demonstrating confidential, policy-determining, policy-making, or policy-advocating character
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(b) (5)



**From:** [Malie, Susan \(NETL\)](#)  
**To:** [Mendoza, Jennifer](#)  
**Subject:** Copy of Sched F Review - Field Template.xlsm  
**Date:** Monday, December 7, 2020 11:52:33 AM  
**Attachments:** [Copy of Sched F Review - Field Template.xlsm](#)

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Hello Jennifer,

Attached please find the completed "preliminary" Schedule F template. Please let me know if additional information is required. Thank you,

Susan

Org Code	Last Name	First Name	Official Position Title	Occupational Series	Grade Level	Bargaining Unit Position	Number of positions	Include in Schedule F?	Schedule F Criteria, indicate as many as may apply (i.e. policy-determining, policy-making, policy-advocating, confidential)	Brief description of factors demonstrating confidential, policy-determining, policy-making, or policy-advocating character
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(b) (5)

**From:** [Jensen, Mary K \(BPA\) - L-7](#)  
**To:** [Mendoza, Jennifer](#)  
**Cc:** [Capoferri, Anita](#)  
**Subject:** Schedule F for Bonneville OGC  
**Date:** Friday, December 4, 2020 4:45:33 PM  
**Attachments:** [OGC Sched F Review - Field Template.xlsm](#)

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Jennifer,

As requested by Anita, here is my submittal of attorneys on my staff who fall into the Schedule F category. Please let me know if I can be of further assistance.

Regards,  
Mary

Mary K. Jensen  
Executive Vice-President and General Counsel  
Bonneville Power Administration  
[mkjensen@bpa.gov](mailto:mkjensen@bpa.gov)

(b) (6)

Org Code	Last Name	First Name	Official Position Title	Occupational Series	Grade Level	Bargaining Unit Position	Number of positions	Include in Schedule F?	Schedule F Criteria, indicate as many as may apply (i.e. policy-determining, policy-making, policy-advocating, confidential)	Brief description of factors demonstrating confidential, policy-determining, policy-making, or policy-advocating character
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(b) (5)

**From:** [KNOWLES, LUCY M \(SRS\)](#)  
**To:** [Mendoza, Jennifer](#)  
**Subject:** FW: Copy of Sched F Review - Field Template.xlsm-Savannah River  
**Date:** Friday, December 4, 2020 5:55:47 AM  
**Attachments:** [Copy of Sched F Review - Field Template.xlsm](#)

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Schedule F Review from Savannah River OCC

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**From:** MOZONE, RHONDA <Rhonda.Mozone@srs.gov>  
**Sent:** Thursday, December 3, 2020 6:46 PM  
**To:** KNOWLES, LUCY M <lucy.knowles@srs.gov>  
**Subject:** Copy of Sched F Review - Field Template.xlsm

Hi Lucy,

Schedule F Criteria (b) (5)

Please let me know if I need to correct it.

Thanks,

*Rhonda Mozone  
Program Analyst  
Savannah River Site  
S&K Logistics Services, LLC  
Contractor to:  
U.S. Department of Energy  
Office of Chief Counsel (OCC)  
Building: 730-B-RM-342  
Phone: 803-952-6935  
Fax: 803-952-9523  
Email: [rhonda.mozone@srs.gov](mailto:rhonda.mozone@srs.gov)*

Org Code	Last Name	First Name	Official Position Title	Occupational Series	Grade Level	Bargaining Unit Position	Number of positions	Include in Schedule F?	Schedule F Criteria, indicate as many as may apply (i.e. policy-determining, policy-making, policy-advocating, confidential)	Brief description of factors demonstrating confidential, policy-determining, policy-making, or policy-advocating character
<div style="font-size: 48pt; font-weight: bold;">(b) (5)</div>										