



Muon Department Meeting

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Department Meeting

March 6, 2023

Today's Meeting Agenda

- Safety update from DSO
 - Events, Incidents
 - Discussion
- General Updates
 - Safety
 - Finance
 - Charging Practices
 - Sole source
 - Goal Setting
 - Site Access
 - Mentoring and Internships
- AOB/Discussion

Safety

We want everyone to go home safely, without injury. Please prioritize protecting yourself and your colleagues

It's important to slow down or stop to address safety concerns.

If someone is concerned or confused, take the time to pause and work through the issue. If needed, update the work plan and seek approvals.

Nobody should give anyone a hard time for slowing down for these reasons

Tornado warning on February 27th

- Text alerts did not work as expected, Fermilab is working to fix the issue (e.g. see [friday's notification](#))

Reminder

If there is a warning **take the South stairs to the WH basement:**

- DO NOT take the elevator
- DO NOT take the inside atrium stairs

Reminder – Notable Changes to Charging Practices

- PPD FY23 charging practices are posted:
<https://ppd.fnal.gov/DivOffice/Admin%20Procedures/PPD%20Charging%20Practices.pdf>
- EDI & EPE
 - Separate task codes for each
 - No longer charged to Lab Committees & Groups
- Training
 - General training – **primary effort**
 - Discontinued usage of General Training task
 - Management-specific training – **Mgmt & Supervision task**
 - Job-specific training – **direct charge or primary effort**
 - On the job training – **direct charge or primary effort**
- Management & Supervision
 - Department Management & Supervision – **primary effort or Mgmt & Supervision task**
 - Management & Supervision of Experimental Ops, Collaborators, G&V – **direct charge**
- Business Development
 - New task!
- Engineering support, equipment support and tool support
 - Sometimes **direct charge**, sometimes **primary effort**, sometimes **burden pool**

DISCONTINUED 40PD.00.01 (old training)

For technical/software reasons, old codes don't get removed

Cleaning this up has been a burden for finance and administrative team

Definitions

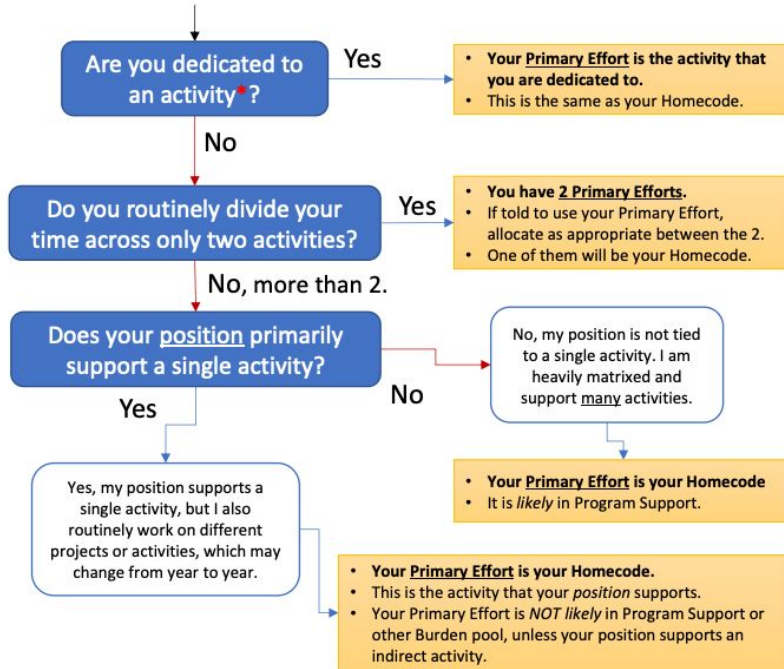
Direct charge - Charge to the project, program, or activity that supports, benefits, or causes the work.

Burden pool - Charge to the predominant indirect pool for your Division. For Programmatic divisions, this is Program

Primary Effort - The activity* the employee is dedicated to.

Reminder – Primary Effort code

- PPD Employees Only - What is my Primary Effort? What is my Homocode?



- Homocodes are *usually* the same as your Primary Effort. If you aren't sure, then confirm your homocode with ppdkronos@fnal.gov.
 - Primary Efforts and Homocodes should be reevaluated periodically by the Field Financial Manager (FFM) with input from division management.
 - See PPD Labor Charging Practices for when to use your Primary Effort.
- * What is an "activity"?**
If the effort falls within one of the following groupings, then it is a single activity.
- 1) Task code
 - 2) Project (big-P) or Program
 - 3) FWP or other defined scope of work (SPP, CRADA, etc.)
 - 4) B&R or Burden pool

Example	Primary Effort(s)
Postdoc split between core research and AI/ML, with occasional work on EDI	2 Primary Efforts - both core research and AI/ML
Research department head	Research B&R (homocode)
Engineer working on many different projects	Homocode
Technician working on a single project for an extended period, with occasional work on EPE	Project
Group lead split between a project and facility operations	2 Primary Efforts - both the project and facility operations
Deputy department head working on 2 different projects plus operations	Homocode

- Reminders:**
- Charge to the project, program, or activity that supports, benefits, or causes the work.
 - Use charging practice guidelines for other specific activities - such as serving on reviews, EDI/EPE, management time, and business development.
 - If none of the above apply and the appropriate code cannot be identified, then that's usually when someone will need to know and use their Primary Effort(s).


PPD Charging Practices

PPD Charging Practices		
effective FY23		
Can an activity* be identified that either: Directly benefits from the time worked? -or- Is the cause of the time worked? If yes, then that activity is where the effort should be charged. If no, use the following guidelines.		
Definitions		
Direct charge - Charge to the project, program, or activity that supports, benefits, or causes the work.		
Burden pool - Charge to the predominant indirect pool for your Division. For Programmatic divisions, this is Program Support.		
Primary Effort - The activity* the employee is dedicated to. For more help identifying primary effort, see the "What is my Primary Effort?" tab.		
Reviews		
Type of effort	Where to charge	Notes and Examples
Internal PPD Specific Reviews	40PD_40PD.00.04_Intrnl PPD Spec Rvws	Serving as a reviewer on internal reviews specifically related to PPD-hosted activities and projects. Includes projects such as: HL LHC Det. Upgrade, Mu2e, SCDMS, ADMX, CMB-S4. Not to be used for M&S or travel costs.
Internal non-PPD Reviews	40PD_40PD.00.05_Intrnl non-PPD Rvws	Serving as a reviewer on internal reviews for non-PPD-hosted projects, programs, experiments or operations. Such as: LBNF, PIP-II, LCLS II, HL LHC AUP, ND, and SBN. Not to be used for M&S or travel costs.
External Reviews	40PD_40PD.00.06_External Reviews	Serving as a reviewer on external reviews for non-Fermilab projects or committees. Includes activities such as serving on DOE comparative review panels, DOE-wide ECA reviews, reviews of SBIR proposals, etc. Travel allowed. Should not be used for white papers related to your B&R.
Engineering Design Reviews	Direct charge where the related engineering labor was charged	Serving as a reviewer for on engineering design reviews for projects, programs, or other activities.
Prep for Reviews (you are being reviewed)	Direct charge	Preparation to be reviewed by DOE or internal reviews of Fermilab projects/programs/activities. Includes prep for comparative reviews of your B&R.
Labwide Committees & Working Groups	40PD_40PD.00.03_Lab Committee & Grps	Serving on labwide committees such as LDRD, Wilson and Lederman Fellows, EAG, and standing ES&H committees. Also includes working groups or user testing to benefit labwide initiatives such as BPS, climate survey improvements, and WH space planning. Excludes programs led by or coordinated with the Office of EDI or EPE. Not to be used for M&S or travel costs.
EDI and EPE		
Type of effort	Where to charge	Notes and Examples
Equity, Diversity, and Inclusion (EDI)**	40PD_40PD.00.20_PPD EDI**	Existing EDI Office programs including: EDI task force, LRGs, Inclusion Matters. Must be coordinated with Central Office. See EDI website for a complete list. ** Not to be used for M&S or travel costs.
Education and Public Engagement (EPE)**	40PD_40PD.00.19_PPD EPE**	Existing EPE Office programs including: Open house, Saturday Morning Physics, Ask-a-Scientist, educational engagement. Must be coordinated with Central Office. See EPE website for a complete list. ** Not to be used for M&S or travel costs.
Training		
Type of effort	Where to charge	Notes and Examples
General Training	Primary Effort	General training requirements/courses common across the lab and included on ITNA training plan. Includes all safety training offered labwide such as: CPR, GERT, radworker, crane, LOTO, forklift, electrical, tech shop, etc. Includes labwide licensed general software training such as: Office, Windows, MacOS, Unix. Includes "Stepping up" training for non-managers.
Management-specific training	40PD_40PD.00.02_PPD Mgmt & Suprvsn	General management & supervision courses such as: Fermilab functions, Interaction Management, Managing Within the Law, etc. Must either have direct reports or be listed on the org chart as Assistant Division Head, Department Head, Deputy Department Head, or Associate Department Head.
Job specific training	Direct charge. If a direct charge cannot be identified, then use Primary Effort.	Job specific training, including on-the-job training, targeted training and professional development. Includes training such as: experiment DAQ operation or analysis software, engineering design software, cryogenic controls, scintillator extrusion and testing, and GD&T spatial analyzer. Also, training in the operation of specific machines such as: component measuring machines, wire bonders, laser tracking interferometers, routers, lathes, mills, and dicing machines.
Training No-Show Fees	Primary Effort	No-show fees for any missed training courses are charged to the employee's primary effort code.

Management and Supervision		
Type of effort	Where to charge	Notes and Examples
Department Management & Supervision	If the group being managed has one Primary Effort, then Direct charge to that Primary Effort, otherwise 40PD_40PD.00.02_PPD Mgmt & Suprvsn	Applies to Department Heads, Deputy/Associate/Assistant Division Heads, and Supervisors. Includes ITNA reviews for employees, department review & approval, workplace conduct matters, recruiting, and operations management.
Management & Supervision - Experimental Operations, Collaborators, Guests & Visitors	Direct charge	Experimental operations management and non-employee support planning and non-employee ITNA reviews.
Business Development & Project Development		
Type of effort	Where to charge	Notes and Examples
Business Development & Project Development	Direct charge. If a direct charge cannot be identified, then use 40PD_40PD.00.21_Business Development (G&A)	Developing future project estimates, SPP/CRADA/Reimbursement related to assessing feasibility and defining scope, cost, and schedule. Only charge G&A if the effort cannot be billed directly to a project working on FOA, ECA, or LDRD proposals, which should be charged to the project.
Support Services and Other Support Activities		
Type of effort	Where to charge	Notes and Examples
Project Support Services	Direct charge	Project-dedicated support services - Administrative, Project Support
Engineering Support, Tool Support, and Equipment Support	Direct charge if available. If the group being supported has one Primary Effort, then direct charge to that Primary Effort, otherwise Burden pool	Support and maintenance of tools, software, and equipment
Building-related		
Type of effort	Where to charge	Notes and Examples
Building Management	40PD_40PD.01.02.02_DDOD Bldg Mgmt	PPD building management activities such as ES&H compliance, overseeing space allocation and usage, and tracking and over
Building Improvements & Cleanup	40PD_40PD.01.02.03_DDOD Clnup BMod	PPD building improvement activities such as upgrades and modernization and work space cleanup of PPD areas.
Building Maintenance	40PD_40PD.01.02.04_DDOD Bldg Repair	PPD building maintenance activities such as general building physical equipment.
Janitorial Requests (Clorica)	40PD_40PD.01.01.22_Janitorial Requests	Special janitorial requests of PPD-owned areas including detail kitchens/break rooms, water coolers, air compressors, blinds, dumpsters and secure shred bins. M&S only, no personnel co
Meetings & Conferences		
Type of effort	Where to charge	Notes and Examples
All-Hands Meetings	Primary Effort	All-hands meetings for Fermilab or an organization
Conferences, Workshops, & Colloquia	Direct charge. If a direct charge cannot be identified, then use Primary Effort.	Conference, Colloquia and Workshop Activities - such as Conf
Meetings not categorized elsewhere	Direct charge. If a direct charge cannot be identified, then use Primary Effort.	Department, group, or other meetings not listed elsewhere b
Division Office Only		
Type of effort	Where to charge	Notes and Examples
Division Management	40PD_40PD.01.01.01_PPDO Div Office Mgmt	Applies to Chiefs, Division Heads, Deputy/Associate/Assistant supervision activities necessary to operate a division. Not for project management or experimental operations management
Division Support Services	Admin - 40PD_40PD.10.02.01_SS Admin Support Finance - 40PD_40PD.01.03.01_PPDO Financial Mgmt	Division support services including Administrative, Budget, Fin

New Sole Source

- Went “live” in November?
- No official communication was issued
 - Old forms not being rejected...yet
 - Needs REQUESTOR to sign, no longer Division Head
 - More sections to be filled out by Requestor

 **Fermi Research Alliance LLC**
Non-Competitive / Sole Source Justification Form

Purpose: A "Justification for Other Than Competition" is required for all procurement requests in excess of \$10,000.00 when only one source will be solicited to satisfy the project requirements and recommends that a solicitation only be issued to the source identified below. This form shall be used to evaluate the critical information necessary to determine if the procurement need qualifies as an authorized sole source procurement. The ability to execute these agreements is derived from our authority with our approved procurement system so please take the form and information seriously.

Instructions: The requestor/Requestor from the Division/Project shall complete Sections #1-4 below with supporting information attached as necessary. Please contact your procurement specialist if you have questions about completing this form. Note: Complete information is necessary to evaluate and determine whether a sole source is appropriate.

Section #1 – Requestor & Defined Need

Requestors Name: Click or tap here to enter text. **DP:** Click or tap here to enter text.
Date: Click or tap to enter a date. **Supplier/Subcontractor Name:** Click or tap here to enter text.
Est Value: Click or tap here to enter text **Type of Justification(individual/class):** Choose an item.
Description of Procurement Need: Requestor to provide a description of the good or service or the requisition number if details are provided in the requisition.
Click or tap here to enter text.

Section #2 – Requestor – FAR Valid Circumstance

The requestor must select an appropriate circumstance applicable to this procurement need. Please check all appropriate circumstances that apply

<input type="checkbox"/>	Circumstances Permitting Other than Full and Open Competition
<input type="checkbox"/>	Only one responsible source – There is only one entity that provides these goods and
<input type="checkbox"/>	Standardized parts only compatible with existing equipment
<input type="checkbox"/>	Follow-on work for continued development or enhancement of goods or services and source other than the incumbent supplier would result in substantial duplication of cost recovered or would cause unacceptable delays in fulfilling program needs
<input type="checkbox"/>	Unusual or Compelling Urgency – Emergency Condition Exists - FRA/Gov./Employ financial health/safety injury unless FRA eliminates competition. These conditions do not include (natural disaster/weather/etc.)
<input type="checkbox"/>	To establish or maintain essential engineering, research, or development capabilities at educational or other nonprofit institution (Fermilab and FRA don't qualify)
<input type="checkbox"/>	Government Directed Law/Statute etc.
<input type="checkbox"/>	R&D – Identified Source is acknowledged to be the leader in the field of expertise and valid literature, symposia presentations, etc. (only valid for R&D work and not for other (Must be documented in Section #3 in accordance with FAR)

FL-57,

Section #3 – Requestor Justification

3 a. Please describe how your selected circumstance from Section #2 applies to this specific procurement need. Procurement will use this section to determine whether your need appropriately matches the circumstance allowable under FAR and our prime contract.
Click or tap here to enter text.

Requestor Signature: _____ **Date:** Click or tap to enter a date.

Section #4 – Requestor - Market Conditions

- Describe the efforts FRA has expended to locate additional sources or foster competition to satisfy this requirement. What were the results of those efforts? [Click or tap here to enter text.](#)
- What harm will come to FRA/DOE if this action is solicited competitively? [Click or tap here to enter text.](#)

If this is a class justification, what is FRA doing to facilitate competition in the future? If FRA is not attempting to facilitate competition in the future, why not? [Click or tap here to enter text.](#)

Goal Setting and Performance Reviews

- We discussed this in December, and then the rollout of changes was paused
- From Feb 13 Fermi today:
 - *It is time to document goals into FermiWorks as a supplement to the individual goal setting conversations that have occurred between managers and employees. If discussions have not yet taken place for FY23, please schedule those meetings now.*
 - Individual goals are set to meet Lab objectives/pillars along with documenting key, on-going responsibilities and career development opportunities. We encourage the use of SMART goals which are: Specific, Measurable, Action-oriented, Realistic/Relevant and Timebound. Incorporating these criteria when setting goals makes them clear and more likely that they will be achieved.*
 - Employee instructions are located [here](#) for adding or editing goals in FermiWorks. Manager instructions are located [here](#) for assigning departmental goals. (Services password is required).*
- We would like everyone to spend a little time over the next week thinking about their goals for 2023
 - All-Hands meeting with Lia will highlight some of the pillars and more specific items in the lab plan
 - The department established Mu2e (project) deliverables as a high priority for everyone's research fraction in 2023. We should have specific goals tied to this
 - Discuss progress with your group leaders

Site Access

Users/Business Visitors coming on site

- Please direct colleagues to <https://get-connected.fnal.gov/accessandbadging/access/> for the most up-to-date information about site access
- If visitors require help with a particular booking, please help connect them to Sonya and/or Latoya well in advance of their trip
- Communication
 - A common pinch point in the system is waiting for a point of contact to approve
 - New collaborators/advisors should communicate with their point of contact so approvers know who they are
 - Anyone can check the status of a request via the open Fermilab Site Access Request Status: https://fermi.servicenow.com/access_request_status.do
 - Another common pinch point for foreign nationals is waiting for their “host” to generate/approve an FNSP
 - This is not always the same person as the point of contact
 - This step is not streamlined - involves receiving a pdf via email, filling it out, and returning it via email
 - Lots of opportunities to miss a communication or for an email to get lost/ not sent, etc

Site Access Snapshot

Request Date: 2023-02-24 00:13:30 CST
Current Step: Pending FermiWorks
Date Entered to Step: 2023-03-01 12:12:24 CST
Time in current step (days): 4
Point of Contact Name: Brendan Kiburg

Fermilab Site Access Request Status

This page is used to get basic information about a Site Access Request and where it is in the approval process. Please enter a Requested Item (RITM) number—This can be found on the initial email sent upon submitting the request—and complete the reCAPTCHA challenge to continue.

*Request Number:

In order to combat SPAM, we need to verify that you are not a program. Please click on the "I'm not a robot" checkbox. You may need to complete a reCAPTCHA challenge.



The following table lists all of the workflow steps for the entered Site Access Request. The highlighted row is where the request is in the current process.

Step#	Step	Maximum expected duration	Description	Progress
1	Initial Review	<3 day	Validating the submitted data.	Completed
2	Point of Contact Approval	<1 day	Waiting for point of contact approval. If you have any queries, please contact your Fermilab Point of Contact.	Completed
3	Foreign National Access Program	<45 days	Waiting for Foreign National Access Program approval. Please contact fnap-request@fnal.gov	Completed
4	Institution Manager Review	<5 days	Validating the agreements for the home institution. Please contact Campus Access at campusaccess@fnal.gov.	Completed
5	Pending FermiWorks	<4 days	FermiWorks Onboarding and Documentation Review: - Onboarding by the requestor should take less than 1 hour to complete. - Fermi staff then confirms the data entered and submits their task.	Current
6	Indico registration approval	<2 days	Waiting for the Indico registration approval.	
7	Invitation Process	<1 day	You should have received the invitation letter. If not please contact Campus Access at campusaccess@fnal.gov	
8	Complete	0	Your request has been successfully completed.	

Additional Help

To contact the support team for this request, enter your question below:

*Name

*Email

*Message

Please provide a brief description of your issue.

If things appear stuck, please message the support team

If you are still having issues, please contact department management

Mentoring and Internships

- Several messages have circulated in the last few months about mentoring opportunities for summer interns
- Usually there is a message shortly before the deadline, but all deadline info is here: <https://internships.fnal.gov/>
- **Suggestion: if you are considering a student, keep a list of potential projects!**

Graduate Programs <https://internships.fnal.gov/graduate-programs/>

Internship program	Application requirements	Application period	Program dates	Internship deliverables
Accelerator Engineering Fellowships for Underrepresented Minorities (ASPIRE)	<ul style="list-style-type: none"> Online application Unofficial transcript Two letters of recommendation 	October 1st 2022 – January 31st 2023	May 22nd 2023 – August 30th 2024	<ul style="list-style-type: none"> Presentation abstract Oral presentation (Seminar) Oral presentation (Seminar) Written research project report
Computational Science Graduate Fellowship (CSGF)	<ul style="list-style-type: none"> Official transcript Program of Study References Permanent Resident Alien (PRA) – copy of the front and back of card 	Fellowship Application Open	Open for Fall 2023 & Summer 2024 Attendance	<ul style="list-style-type: none"> Written research report
Fermilab Computational Science Internship	<ul style="list-style-type: none"> Online application Resume Unofficial transcript Proficiency questionnaire Two letters of recommendation 	Jan 31, 2023 – Feb 24, 2023	June 5 – Sep 1, 2023	<ul style="list-style-type: none"> Oral presentation Poster presentation
GEM – Graduate Fellowships in Engineering and	<ul style="list-style-type: none"> Register with eGEM Online GEM application 	Now Closed	May 22-Aug. 11, 2023	<ul style="list-style-type: none"> Undergraduate Lecture Series Presentation abstract (150 words) Oral presentation

<https://internships.fnal.gov/high-school-student-programs/>

High School Students

Internship program	Application requirements	Application period	Program dates	Internship deliverables
TARGET	<ul style="list-style-type: none"> Online application Unofficial transcript Two letters of recommendation 	Dec 15, 2022 – Feb 1, 2023	Jun 26 – Aug 4, 2023	<ul style="list-style-type: none"> Oral presentation Exit surveys
VALOR Program Summer Applications for JROTC cadets	<ul style="list-style-type: none"> Online application Unofficial Transcript 	Summer JROTC Application: Dec 15, 2022 – March 15, 2023	Summer: June 26 – August 4, 2023 Fall: August 8, 2022 – January 5, 2023 Spring: September 5 – November 25, 2022 Application: June 23, 2022 – July 22, 2022	<ul style="list-style-type: none"> Oral Presentation Exit Survey

Open Discussion

What concerns or questions do you have?

How are things going for people?

What ideas do you have for improvements?