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MEMORANDUM

DATE: June 3, 2007

A.L.

TO: LIGO and Advanced LIGO Account Managers
FROM: A. Lazzarini
SUBJECT: Appropriate allocation of charges incurred for travel in support of fabricated equipment effort
Refer to: LIGO-070103-00-M

This memorandum is a reminder that Caltech has specific provisions regarding charges made in support of fabricating major equipment on *Fabricated Equipment Accounts*.

Namely, all travel that is undertaken in direct support of building a piece of fabricated equipment should be charged to the corresponding fabricated equipment account. The following guidelines are to be used to determine if any given trip may be considered part of a fabricated equipment development effort.

All personnel involved in fabrication of equipment should be familiar with the guidelines and should keep them in mind as they carry out their responsibilities. Supervisors who approve Travel Authorization Requests (TARs) should review each TAR to make sure these guidelines are followed.

Travel charges ALLOWED on fabrication accounts

If the individual is directly involved in any of the following,

- (i) designing or working with a vendor on a design;
- (ii) building (assembling, installing) the fabricated equipment item;
- (iii) debugging the system to make it work (commissioning);
- (iv) developing assembly, alignment or operational techniques,

then the effort is considered to be part of the equipment fabrication, and the supporting travel will be charged to the appropriate Caltech fabricated equipment account.

Travel charges NOT ALLOWED on fabrication accounts

If the individual is performing any of the following,

- (i) characterizing or measuring the performance once the item is *nominally* functioning;
- (ii) developing *new* basic techniques for future designs;
- (iii) training others to carry out *established* assembly techniques;
- (iv) *supervising* on-task designing, building, debugging, but *is not* directly and personally involved in the activity,

then such effort *may not* be considered as part of the equipment fabrication. Therefore, associated travel should be charged to his or her group's regular (operations) account.

If anyone has any questions, the person should contact Phil Lindquist.

CC: LIGO Document Control Center
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