



**PMF** PRESIDENTIAL  
MANAGEMENT  
FELLOWS PROGRAM

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U.S. OFFICE OF PERSONNEL MANAGEMENT

# PARTICIPANT HANDBOOK

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## INTRODUCTION

This *PMF Program Participant Handbook* (the “Handbook”) provides an overview of the PMF Program, general guidance from the PMF Program Office, and the program requirements for Fellows, their Supervisors, and Agency PMF Coordinators. This Handbook is provided to fulfill the PMF Program Office’s [Orientation](#) Program for Fellows. This Handbook should be reviewed alongside the Pathways Participant Agreement and within 30-days of the Fellow onboarding at their agency.

For additional suggested activities to complete during a Fellow’s orientation and onboarding period, please refer to the “Current PMFs\Training and Development” (<https://www.pmf.gov/current-pmfs/training-and-development/>) section on the PMF website. Each Federal agency can determine whether these activities are required for Fellows, Agency PMF Coordinators, and Supervisors as part of the program.

This Handbook is posted as an Adobe (.pdf) file under the “Current PMFs\Resources” (<https://www.pmf.gov/current-pmfs/resources/>) and “Agencies\Resources” (<https://www.pmf.gov/agencies/resources/>) sections on the PMF website.

Throughout this Handbook you will see the following icons:



= Suggested tip for the subject discussed



= Frequently Asked Question (FAQ) on the subject discussed

### **Acknowledgement Receipt**

At the end of this Handbook is an Acknowledgement Receipt for the Fellow to sign and obtain signatures from their Supervisor and Agency PMF Coordinator. The Fellow may then upload a copy to their user account on the Apply Site of the PMF Talent Management System (PMF TMS) at <https://apply.pmf.gov>. We encourage Fellows to use obtaining signatures for the Acknowledgement Receipt as an opportunity for early engagement with their Supervisor and Agency PMF Coordinator to better understand roles and responsibilities, as well as any agency-specific requirements for the fellowship.

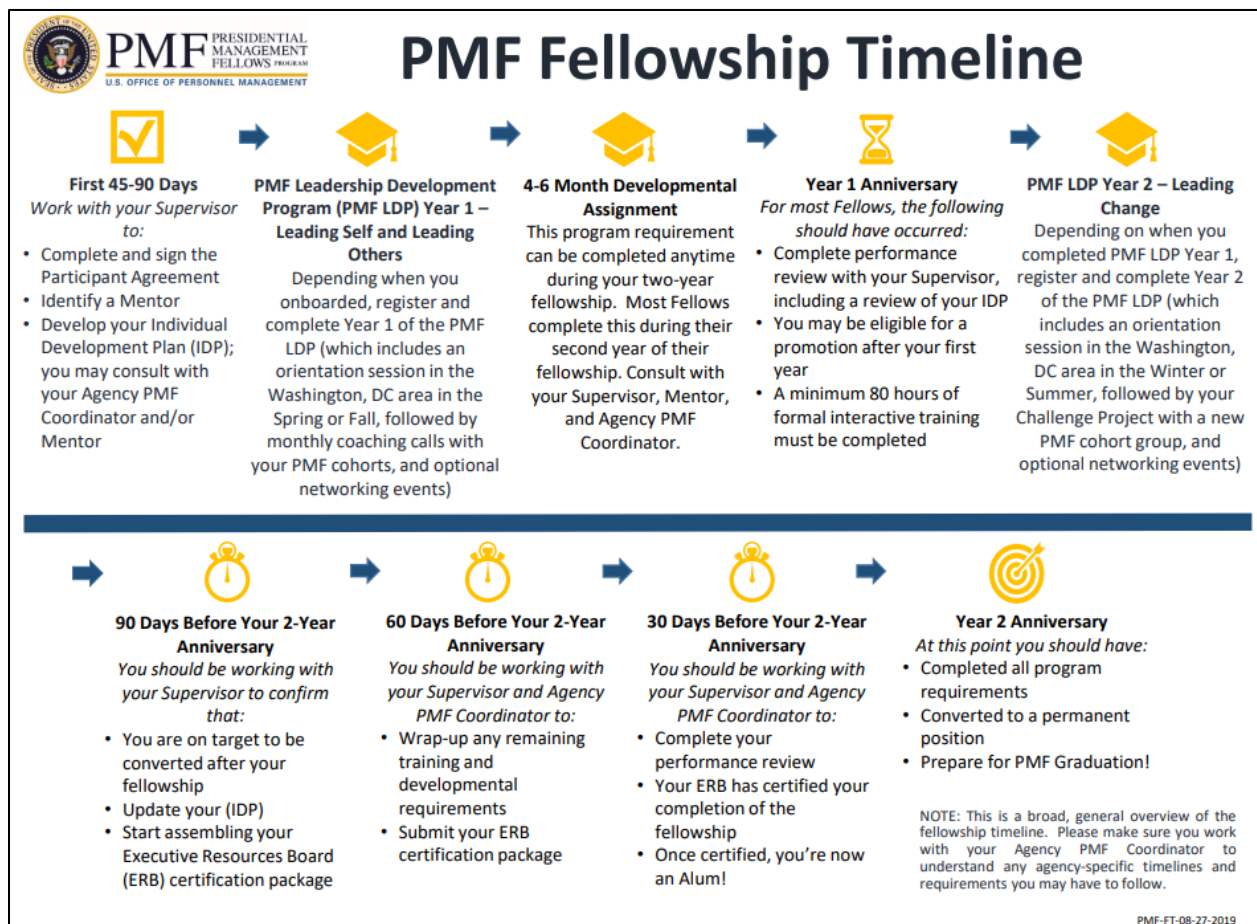
Once the acknowledgement receipt is uploaded, the Fellow may then count 1-hour of training and development time towards meeting the program requirements, while ensuring that it is recorded on their IDP (Individual Development Plan). The Agency PMF Coordinator may search and view whether the receipt has been uploaded in the Portal Site of the PMF TMS at <https://portal.pmf.gov>. Completing the Acknowledgement Receipt is optional but highly recommended. Having all parties review this Handbook, along with the Fellow’s agency policies and procedures while engaging in other onboarding activities and discussions, ensures a full understanding of the Program and the requirements, and helps establish clear expectations.

## Fellow's Checklist

A checklist for Fellows to use in maneuvering and tracking their progress from onboarding through conversion can be found under [Appendix A](#).

## PMF Fellowship Timeline

Below is a copy of the “PMF Fellowship Timeline”. A full-size, color version can be found under the “Current PMFs\Resources” (<https://www.pmf.gov/current-pmfs/resources/>) section on the PMF website and under [Appendix L](#). The Timeline depicts the typical 2-year fellowship, from onboarding through graduation, which is covered in greater detail throughout this Handbook.



## Roles and Responsibilities

Below is a list of roles and responsibilities covering Fellows, Supervisors, Mentors, HR Office Staff, Agency PMF Coordinators, and the PMF Program Office. These can also be found on the PMF website at <https://www.pmf.gov> and searching by stakeholder.

**Fellows** (<https://www.pmf.gov/current-pmfs/owning-your-experience/>)

Fellows are responsible for the following program requirements:

- Work with the Agency PMF Coordinator and Supervisor to complete the Pathways Participant Agreement.
- Work with the Supervisor to identify a Mentor. Work with the Mentor to discuss developmental and career goals for the fellowship and ask the Mentor to provide feedback on progress and development throughout the fellowship.
- Develop with their Agency Supervisor, and in consultation with the Agency PMF Coordinator and/or the Mentor, an IDP that identifies specific developmental activities designed to develop targeted competencies and skills during the fellowship. Refer to *Individual Development Plan* in [Chapter 2](#) (Program Requirements).
- Complete a minimum of 80 hours of formal interactive training each year of the fellowship (160 total hours).
- Complete a 4 to 6-month developmental assignment with full-time management and/or technical responsibilities consistent with the IDP. Refer to *Developmental Assignment* in [Chapter 2](#) (Program Requirements).
- Participate in optional PMF Program activities (e.g., Orientation, PMF Forums, and Graduation). Refer to [Chapter 2](#) (Program Requirements).
- Maintain current contact information via applicant account in the PMF TMS.
- Successfully perform the duties and responsibilities of the position to which assigned. Refer to *Performance Plan and Review* in [Chapter 2](#) (Program Requirements).

**Supervisors** (<https://www.pmf.gov/agencies/agency-responsibilities/hiring-official-supervisor/>)

Supervisors play a critical role in the PMF Program and most directly impact the overall experience for their Fellows by providing them with meaningful work and developmental opportunities. Supervisors in the PMF Program have the following responsibilities:

- Work with the Agency PMF Coordinator to post appointment and rotational opportunities to the PMF TMS (Talent Management System). Refer to the *PMF TMS* in [Chapter 5](#) (Resources). Work with the Agency HR Office to determine the position title, career ladder, grade level and description of both the initial position to hire the Fellow into and the Target position for the Fellow to convert into at the end of the fellowship.
- Recruit Finalists for PMF positions by reviewing Finalists' resumes, participating in the PMF Hiring Fair and other recruitment activities, and interviewing Finalists. Contact your Agency PMF Coordinator for access and assistance.
- Assign Fellows defined duties and responsibilities consistent with their position description and goals for their target position. Develop a Performance Plan for the Fellow, and coordinate onboarding activities with the Agency PMF Coordinator and the HR Office.

- Work with the Agency PMF Coordinator to reimburse the PMF Program Office the current PMF one-time placement fee within 30 days of Finalist's initial acceptance of an appointment offer.
- Work with the Agency PMF Coordinator to ensure the Fellow has a fully signed Pathways Participant Agreement.
- Facilitate the assignment of a Mentor for the Fellow within 90 days of the position start date.
- Develop an initial Individual Development Plan (IDP) with the Fellow within the first 45 days of appointment. In consultation with the Agency PMF Coordinator and/or Mentor, monitor and modify the IDP over time so that it addresses developmental requirements, and recommended activities that will prepare the Fellow to meet the requirements of the target position at the end of the two-year fellowship. Refer to *Individual Development Plans* in [Chapter 2](#) (Program, Training, and Developmental Requirements).
- Provide at least 80 hours of formal interactive training during each year of the fellowship. Costs for the PMF Program Office sponsored training (e.g., PMF Leadership Development Program events, PMF Forums) are included in the placement fee. Agencies bear the costs of travel and per diem for all PMF Program Office sponsored PMF events that take place in person. Refer to *Training and Development* in [Chapter 2](#) (Program Requirements).
- Provide Fellows with at least one developmental assignment of 4 to 6 months in duration, with management and/or technical responsibilities consistent with the Fellow's IDP. Work with the Agency PMF Coordinator to understand any agency-specific policies on rotations.
- Provide a reasonable amount of time during work hours for other PMF activities, as appropriate, such as optional rotational assignments of 1 to 6 months, attendance at PMF events, interviews and shadowing with senior leaders, meetings with Mentor, and the PMF graduation ceremony.
- Establish an annual performance plan and evaluation for the Fellow with performance elements and standards for the competencies expected and for duties assigned in their position, consistent with agency policies and procedures. Refer to *Performance Plan and Review* in [Chapter 2](#) (Program Requirements).
- Provide input to the Agency's Executive Resources Board (or equivalent) as needed to evaluate the Fellow's progress and certify whether he or she has successfully met the requirements of the Program. Determine whether to convert the Fellow to a term or permanent position in the competitive service (or similar for those in the excepted service).
- At OPM's request, make Fellows available to assist as feasible in the assessment process for subsequent PMF Classes.

## **PMF Supervisor Checklist**

A checklist for PMF Supervisors can be found under [Appendix C](#).

## **Mentors** (<https://www.pmf.gov/agencies/agency-responsibilities/mentor/>)

Mentoring is widely recognized as one of the best ways for Fellows to gain organizational knowledge and leadership development. The purpose of identifying and working with a Mentor is to establish a relationship with a managerial employee, outside of the Fellow's chain of command and within their agency, for counseling on a specific career path and for guidance on professional and educational questions.

Within the first 90 days of a Fellow's appointment, the agency must provide the Fellow a Mentor. The Mentor (and/or Agency PMF Coordinator) must consult the Fellow on the development of his/her IDP. Assignment of a Mentor should be discussed between the Fellow and his/her Agency Supervisor and is referenced in the Fellow's Pathways Participant Agreement. The Mentor may be included in the signing of any IDP and/or certification of program completion.

An optional OPM Form 1308, "PMF Mentoring Agreement", can be found under [Appendix F](#) and posted under the "Current PMFs\Resources" (<https://www.pmf.gov/current-pmfs/resources/>) section on the PMF website. Agencies may have their own policies, procedures, and/or agreements to follow.

## **HR Office Staff** (<https://www.pmf.gov/agencies/agency-responsibilities/hr-office/>)

The HR Office Staff are critical in assisting Hiring Officials, Supervisors, and Agency PMF Coordinators to identify and recruit for their talent needs, the onboarding of Fellows, and the conversion of Fellows. Responsibilities include:

- Preparing policies and criteria for the promotion of Fellows.
- Assisting the Hiring Official and/or Agency PMF Coordinator with the agency's selection, appointment, and on-boarding process. This includes an appointment opportunity posted in the PMF TMS.
- Verify the Finalist's completion of all graduate degree requirements before bringing onboard as a Fellow.
- Ensuring veterans' preference is applied throughout selection process.
- Initiate background investigation and establish Entrance on Duty (EOD) start date.
- Processing personnel transactions upon a PMF's initial appointment or reappointment, promotion, conversion, etc.
- Ensure a Pathways PMF Program Participant Agreement is completed between the Fellow, Supervisor, and HR.



## **PMF HR Checklist**

A checklist for HR staff can be found under [Appendix D](#).

### **Agency PMF Coordinators** (<https://www.pmf.gov/agencies/agency-responsibilities/agency-pmf-coordinator/>)

The primary responsibility of the Agency PMF Coordinator (“Coordinator”) is to act as a primary liaison and program facilitator for their Agency, with Finalists, with Fellows, and the PMF Program Office (OPM), collaborating with the agency’s Pathways Programs Officer, HR staff, and hiring officials. . Coordinator profiles (e.g., agency/sub-agency, name, phone number, and email address) are publicly listed on the PMF website. The Agency’s Pathways Programs Officer may also serve as the Agency PMF Coordinator. Agency responsibilities between the Coordinator and the Fellow’s supervisor should be well coordinated

It is important that Coordinators maintain regular contact with the PMF Program Office to receive important program updates, PMF TMS Release Notes, and email. Coordinators also will be provided access to the PMF TMS (Talent Management System).

The PMF Program Office allows up to two Agency-wide PMF Coordinator accounts for the PMF TMS: a primary and a secondary. The Agency-wide PMF Coordinator is responsible for maintaining any Sub-Agency PMF Coordinator accounts and should be restricted to a single user at the sub-agency level.

Changes of the Agency-wide PMF Coordinator shall be made using the “Agency PMF Coordinator Designation Template”, found under the “Agencies\Resources” (<https://www.pmf.gov/agencies/resources/>) section on the PMF website. The template provides instructions for how agencies submit changes to their Agency-wide PMF Coordinator, if occurring after the initial designation in the Agency’s Pathways MOU. By following these instructions and the template, a modification to the agency’s Pathways MOU is not necessary.



The PMF Program Office suggests agencies provide Coordinators a separate and dedicated program email address (e.g., pmf@agency.gov) and work phone number with voice mail specific to the agency’s participation in the PMF Program.

An Agency PMF Coordinator is also responsible for:

- Serving as their agency’s lead PMF Program contact, in consultation with the agency’s Pathways Programs Officer.
- Ensuring the agency provides information requested by OPM regarding workforce planning strategies.
- Ensuring that the agency adheres to all responsibilities outlined in the above “Responsibilities of the Participating Agency”. For example, there must be a

Pathways Memorandum of Understanding\Memorandum of Agreement (MOU/MOA) with OPM before the Fellow can be appointed.

- Ensuring that all hiring divisions within their agency are aware of the commitments involved in hiring Fellows, including: Full Time Equivalent (FTE) status, OPM reimbursement, starting grade and pay, Pathways Participant Agreement, Individual Development Plans (IDPs), Mentor assignment, training and developmental requirements, performance plan requirements and promotions and conversions.
- Working with agency managers, hiring officials, and supervisors to identify PMF positions and post PMF appointment opportunities to the PMF TMS (Talent Management System). Refer to the *PMF TMS* in [Chapter 5](#) (Resources).
- Recruiting Fellows to the agency by using the PMF TMS to access Finalists' resumes, post appointment opportunities, record PMF appointments, and submit status changes for Fellows; assist hiring officials with accessing Finalists' resumes and scheduling of interviews with Finalists; and coordinate the agency's participation in the PMF Hiring Fair.
- Notifying the PMF Program Office of any Fellow's change in status in a timely manner including appointment, movement between agencies (reappointments), appointment extensions, ERB certification, resignation, termination, readmission, and conversion; most of these can be processed in the PMF TMS.
- Facilitating payment of the PMF one-time placement fee to OPM upon acceptance of a Fellow's appointment. Financial instructions and forms can be found under the "Agencies\Resources" (<https://www.pmf.gov/agencies/resources/>) section on the PMF website.
- Assisting the Agency Human Resources personnel with the verification of the Finalist's completion of all advanced degree requirements prior to onboarding as a Fellow.
- Acting as a resource for Fellows and their Agency Supervisors by assisting with agency onboarding, providing guidance on IDP goals and objectives, clarifying responsibilities and commitments, identifying training opportunities, and responding to program-related questions. Refer to [Chapter 2](#) (Program Requirements).
- Working with agency's Executive Resources Board (or equivalent) to certify Fellow's completion of the Program and record the ERB decision in the PMF TMS. Refer to *Certification* in [Chapter 3](#) (Changes in Status).
- Working with the Supervisor and Human Resources personnel to ensure proper processing of personnel actions within the agency and notification of PMF status changes. See *Processing Personnel Actions* in Chapter 4 (Agency Selection and Appointment) and [Chapter 3](#) (Changes in Status).
- Providing the PMF Program Office with updated contact information in order to receive important updates on Finalists/Fellows and PMF events.

- Processing Agency user account requests and monitor appropriate access. This includes the establishment of Sub-Agency PMF Coordinator accounts, Agency HR Staff accounts, and Agency Hiring Official accounts. Refer to the *PMF TMS* in [Chapter 5](#) (Resources).
- Participating in an Agency PMF Coordinator orientation and meetings, offered by the PMF Program Office.

**PMF Program Office** (see “What Do We Do?” at <https://www.pmf.gov/about-us/meet-the-team/>)

The PMF Program Office is responsible for the overall management of the Program and will:

- Review all Memoranda of Understanding (MOUs) when eligible agencies wish to participate in the PMF Program and use the Scheduled D Hiring Authority, or Memoranda of Agreement (MOAs) when eligible excepted service agencies wish to participate in the PMF Program and use equivalent hiring authorities.
- Market the PMF Program to Federal agencies and to graduate schools.
- Develop and execute a strategy for attracting and recruiting interested individuals with diverse backgrounds into the PMF Program.
- Develop and conduct a rigorous application, assessment, and selection process to determine a pool of Finalists.
- Enable participating Federal agencies to access, search, and view the current list of Finalists.
- Deliver the PMF Leadership Development Program to all current Fellows who gain supervisory approval to participate, in addition to providing information on other available training opportunities for Fellows.
- Serve as a conduit for effective communication among all members of the PMF Program community: Agency PMF Coordinators, Pathways Programs Officers, supervisors, Human Resources personnel, academic institutions, non-profits, applicants, and Fellows.
- Provide agencies with access to systems and information needed to administer the Program in their agency.
- Evaluate the effectiveness of the PMF Program over time as part of a continuous process and program improvement organizational culture .

### **Meet the Team**

A current list of team members, their photos, and brief bios can be found under the “About Us\Meet the Team” (<https://www.pmf.gov/about-us/meet-the-team/>) section on the PMF website. We sincerely thank all team members for their contributions to this Handbook!

## **Contact Information**

If, after reading the relevant sections of the Handbook, additional questions arise about the PMF Program, first consult with the agency's designated Agency PMF Coordinator, Pathways Programs Officer, and/or a representative in the Human Resources Office. These individuals are often able to answer questions, provide assistance, and resolve problems. The PMF Program Office often cannot answer certain questions due to differing agency policies and procedures. Additional information may be found throughout the PMF website at <https://www.pmf.gov>; use the "Search" box appearing on all webpages.

The PMF Program Office can be contacted at:

U.S. Office of Personnel Management  
**Presidential Management Fellows Program**

1900 E Street, NW, Room 2469

Washington, DC 20415

Email: [pmf@opm.gov](mailto:pmf@opm.gov)

Web: <https://www.pmf.gov>

The PMF Program Office is administered government-wide from the U.S. Office of Personnel Management (OPM) and resides under the Federal Executive Institute (FEI), Center for Leadership Development (CLD), Human Resources Solutions (HRS).

Information about our Division and Center can be found at <https://www.opm.gov/about-us/our-people-organization/program-divisions/human-resources-solutions/>.

# CHAPTER 1: ONBOARDING

## Introduction

Once the Agency has recruited for their PMF, the onboarding process begins. Onboarding can be defined in many ways. The PMF Program office defines it as from the day the Finalist accepted the tentative PMF appointment offer through the 90-days after the PMF starts their fellowship. This Handbook will focus on the PMF's start date, leading to graduation.

Once a Finalist has accepted a tentative PMF appointment offer (job offer) and is recorded in the PMF TMS, his/her status changes to Fellow; however, the Finalist is not an actual Fellow until their Entry On Duty (EOD) start date (their first day reporting to the agency). The Agency PMF Coordinator is responsible for maintaining appointment information in the PMF TMS and should update the initial appointment to reflect the actual EOD date.

The Finalist can utilize the OPM Form 1306, PMF Appointment Intake Form, to submit initial or updated appointment information. The submission should be sent to the PMF Program Office and the Agency PMF Coordinator. The PMF Program Office may record any submission on behalf of the agency. The OPM Form 1306 can be found under the "Become a PMF\Resources" (<https://www.pmf.gov/about-us/meet-the-team/>) section on the PMF website. Once a Finalist is recorded as a Fellow, he/she may view and edit their appointment information on the Apply Site of the PMF TMS. For example, instead of filling out and submitting the OPM Form 1306 for each update (like work contact information, supervisor information, mentor information, etc.), the Fellow can edit that information instantly on-line.

At the start of their fellowship, the Fellow will be invited to participate in their Agency's Orientation. Orientation typically consists of the Fellow arriving at HR, participating in the Agency briefings, filling out paperwork, and connecting with their Supervisor.

During the next 90-days, the Fellow and Supervisor complete the Participant Agreement, discuss the Fellow's performance goals and appraisal, begin to shape the Fellow's IDP (Individual Development Plan), and facilitate the assignment of a Mentor. The Handbook goes into greater detail for each of these activities.

A Fellow is also eligible to attend the PMF LDP (Leadership Development Program); see more about the "PMF LDP (Leadership Development Program)" under [Chapter 2](#).

Soon after a Fellow onboards, he/she will eventually receive a Standard Form 50 (SF-50), Personnel Action. This important document states a personnel action that affects the Fellow's position or pay. Fellows should always retain a copy of their initial SF-50 for their files. The agency's Human Resources (HR) Office can go into greater detail on the method of delivery, explain the form, and assist with any questions.

The Fellow and the Agency PMF Coordinator should schedule to meet (in-person or remotely) for introductions and review of agency-specific requirements, policies, and/or procedures. Many agencies use an Intranet where agency-specific information can be found.

### **Placement Fee**

The PMF Program is administered by OPM government-wide on behalf of the Office of the President. The PMF Program Office receives no appropriated funds and is a fully cost-recoverable organization. The PMF Program Office recovers all program costs through reimbursement fees charged to agencies who participate in the PMF Program. A one-time placement fee is charged to each PMF appointment. The current fee can be found on the PMF website. The fee covers the costs associated with the recruitment, assessment, selection, and placement of Finalists into PMF appointments; PMF Program Office operations and support to stakeholders; various training and developmental opportunities for stakeholders; and, the PMF website and automated systems. It also includes the tuition for the Fellow to participate in the PMF LDP (Leadership Development Program), which is further explained under [Chapter 2](#).

Agencies can find additional guidance in our *PMF Reimbursement Process for Agencies*, along with associated financial forms, which are posted under the “Agencies/Resources” (<https://www.pmf.gov/agencies/resources/>) section on our website. The one-time placement fee is due within 30-days of a Finalist accepting a tentative PMF appointment offer.

It is critical to receive reimbursement as soon as possible. The bulk of the program costs are expended during the annual PMF application and assessment process and preparing for the PMF LDP. Fellows will not be able to participate in PMF Program Office sponsored training and developmental offerings until the placement fee is received; referred to as the *No Pay, No Play Policy*.

Agency PMF Coordinators can assist and monitor financial progress within the PMF TMS. The financial features associated to each PMF’s appointment in the PMF TMS appears as a color-coded status: Red means Outstanding, Yellow means In Progress, and Green means Paid. Agency PMF Coordinators can upload financial documents, record financial comments, and monitor the Fellow’s financial status. Certain events and status changes built into the PMF TMS will check the Fellow’s financial status (e.g., not allow a Fellow to receive confirmation of any training and development registrations unless a green financial status appears).

### **Pathways Participant Agreement**

The Pathways Participant Agreement is required under 5 CFR § 362.101 and 106. This is a written agreement between the Agency and each Pathways Participant (e.g., PMF), that clearly identifies expectations, including by not limited to: (a) A general description of duties; (b) Work schedules; (c) The length of the appointment and termination date; (d) Mentorship opportunities; (e) Training requirements as applicable; (f) Evaluation

procedures that will be used for the Participant; (g) Requirements for continuation and successful completion of the Program; and (h) Minimum eligibility requirements for noncompetitive conversion to term or permanent competitive service employment according to the requirements of the applicable Pathways Program.

Agencies may utilize any form or media for completing the Agreement and follow their policies regarding retention. Copies do not need to be submitted to the PMF Program Office nor uploaded into the PMF TMS. The PMF Program Office has created an optional *PMF Form 1301, PMF Participant Agreement*, which can be found under the "[Current PMFs/Resources](#)" and "[Agencies/Resources](#)" sections on the PMF website. A sample copy can be found under [Appendix E](#).

Agencies must also identify any agency-specific requirements a Fellow must complete for conversion in the Agreement. For example, if the Agency requires two rotations, it must be stated in the Agreement. Agencies must be consistent with their requirements and ensure all requirements apply to their Fellows.



If the Fellow's position included a recruitment incentive (e.g., Federal Student Loan Repayment Program, Relocation, etc.), a Continued Service Agreement may be required. Agencies may document any recruitment incentives in the Pathways Participant Agreement. Recruitment incentives are optional and are at the agency's discretion.

The Agreement is signed by the Fellow and their Supervisor and may also be signed by an HR Specialist. Check with the Agency PMF Coordinator for any other additional guidance. A new Agreement is needed for a Fellow's initial appointment, any reappointment, any reassignment, any reinstatement, or any readmission; see [Chapter 3](#) for more information on status changes.

### **Individual Development Plan (IDP)**

Per 5 CFR § 362.405(a), within 45-days of onboarding, the Fellow and their Supervisor must establish an Individual Development Plan (IDP). The IDP sets forth the specific developmental activities designed to impart the competencies of the occupation or functional discipline in which the Fellow will most likely be placed.

An optional *OPM Form 1302, PMF IDP*, can be found under the "[Current PMFs/Resources](#)" and "[Agencies/Resources](#)" sections on the PMF website. A sample copy can be found under [Appendix G](#).

Additional details about the IDP can be found in [Chapter 2](#).

### **Mentor**

Per 5 CFR § 362.405(b)(3) within 90-days of onboarding, the Agency must facilitate the assignment of a Mentor for the Fellow, who is a managerial employee outside the Fellow's chain of command and at their agency. The Fellow should consult with their Supervisor and Agency PMF Coordinator on this assignment. Fellows and agencies

may utilize the OPM Form 1308, *PMF Mentoring Agreement*; see below. Many agencies have specific policies and procedures regarding Mentors.

Assigning a Mentor to a Fellow is vital to Fellow's overall experience during their fellowship and beyond in their careers in the civil service. Both the Fellow and their Supervisor should discuss and facilitate the assignment of a Mentor. The intent is for the Fellow to be assigned a Mentor within their agency who is familiar with the agency's organization, structure, and mission.

A Mentor may be consulted and contribute to the Fellow's IDP and certification process. The Mentor should be familiar with the PMF Program requirements and readily available to advise and coach the Fellow throughout their 2-year fellowship.

Fellows and agencies may utilize the OPM Form 1308, *PMF Mentoring Agreement*, to establish an agreement between the Fellow, their Supervisor, and the Mentor. The agreement outlines the roles and expectations. The OPM Form 1308 can be found under the "[Current PMFs/Resources](#)" and "[Agencies/Resources](#)" sections on the PMF website; a copy can be found under [Appendix F](#).

Both the Fellow and their Agency PMF Coordinator may record Mentor contact information as part of their appointment information in the PMF TMS.

Review the roles and responsibilities of a Mentor under the [Introduction](#) in this Handbook.

## **Performance Plan**

Per 5 CFR § 362.105(i), the Fellow must be placed on a performance plan, establishing performance elements and standards that are directly related to acquiring and demonstrating the various leadership, technical, and/or general competencies expected of the Fellow, as well as the elements and standards established for the duties assigned in their Position Description (PD). The performance elements and standards relate to the current and/or target position.

Typically, the Fellow and their Supervisor would discuss their performance goals, their organization's mission and strategic plans, and include their IDP (Individual Development Plan). Both parties should also review the Fellow's PD review the Pathways Participant Agreement, and the PMF appointment opportunity announcement used to recruit the Fellow for the position.

During the certification process (more under [Chapter 2](#)), the Fellow's performance plan is also evaluated. A Fellow must be rated minimally successful, or higher, as part of meeting the Program requirements and potentially leading to conversion at the end of their fellowship.

If a Fellow withdraws from the Program for reasons that are related to misconduct, poor performance, or suitability, as determined by the agency, he or she will not be



readmitted to the Program at any time (5 CFR § 362.407(b); more under “Readmission” in [Chapter 3](#)). An agency may terminate a Fellow for reasons related to misconduct, poor performance, or suitability (5 CFR § 362.408(a)(1); more under “Terminations” in [Chapter 3](#)).

Since each agency has their own policies and procedures regarding performance plans, Fellows should consult with their Supervisor and Agency PMF Coordinator; this includes the agency’s definitions for each performance rating level.

### **Work Schedule**

A Work Schedule typically addresses the days/hours the Fellow is expected to work during a standard pay period. The Work Schedule would also address any telework options, alternative work schedules, and holidays. Most agencies have an automated payroll timekeeping system that the Supervisor will ensure the Fellow is aware of and how to use, including how to request leave (time off). And most agencies define their “core hours”; the time periods during the workday, workweek, or pay period that are within the tour of duty during which an employee is required by the agency to be present for work.

The Work Schedule should also be addressed in the Pathways Participant Agreement.

A Fellow is expected work full-time during their fellowship. The Program does not allow part-time work; however, depending on eligibility and need, the Fellow may need to adjust their Work Schedule due to leave, self/family emergency, etc. A Fellow should discuss such options with their Supervisor. See more below about leave options.

Some agencies require their employees, including Fellows, to be on-call as needed. For example, all employees of the Federal Emergency Management Agency (FEMA) are subject to deployment to disaster sites or emergency management operations. And most agencies define “core hours”, which is the designated period of the day when employees must be present for work (including telework). If applicable, the agency will inform the Fellow if there are other unique work schedules impacting their position (e.g., emergency staff, night differential, etc.).

The Fellow and Supervisor should address adjustments to the Work Schedule for the Fellow to meet training and developmental requirements; including full participation if enrolled in the PMF Program’s LDP (Leadership Development Program; see more about the “PMF LDP” under [Chapter 2](#)).

### **Leave**

There are several leave options available to Fellows; leave is “time off from work”. OPM has set policies and fact sheets about the different leave options; see OPM’s Pay & Leave webpage at <https://www.opm.gov/policy-data-oversight/pay-leave/work-schedules/>. However, each Agency is responsible for administering work scheduling policies and programs for its own employees.

For general information and fact sheets about military related leave issues, please see OPM's Military Related Leave Issues webpage at <https://www.opm.gov/policy-data-oversight/pay-leave/leave-administration/fact-sheets/military-related-leave-issues/>.

If a Fellow is called into active duty during their fellowship, there are provisions in the *Uniformed Service Employment and Reemployment Rights Act (USERRA)* that the Fellow's HR Office can explain. NOTE: If a Fellow is called into active duty and impacts their ability to meet the Program requirements (e.g., training and developmental requirements), he/she should consult with their Agency PMF Coordinator. See additional information under "Fellowship Extensions" in [Chapter 2](#).

In regards to leave for maternity, paternity, adoption, or foster care, and the Family Medical Leave Act (FMLA), review OPM's Handbook on Leave at <https://www.opm.gov/policy-data-oversight/pay-leave/leave-administration/fact-sheets/handbook-on-leave-and-workplace-flexibilities-for-childbirth-adoption-and-foster-care.pdf>. Fellows should check with their Supervisor, Agency PMF Coordinator, HR Office, or Administrative Staff on the agency's policies and procedures regarding leave. NOTE: If a Fellow is on extended leave during their fellowship that will prevent completion of program requirements or preparing for the certification process, please consult your Agency PMF Coordinator.

If a Fellow is on active duty or leave at the conclusion of their fellowship, including any fellowship extension, the Fellow and/or agency must proceed with the certification/ conversion process, resignation, or termination. A Fellow cannot remain on the agency's payroll beyond 2-years, plus any extension up to 120-days, if not being converted timely; this also includes any active military service, leave programs, and the FMLA.

## CHAPTER 2: PROGRAM REQUIREMENTS

This chapter provides a general overview of the PMF Program Requirements, all stemming from part 362 of title 5, Code of Federal Regulations (5 CFR 362). Agencies may either have agency-specific policies and procedures in such regards; Fellows and Supervisors should consult with their Agency PMF Coordinator.

Refer to the “PMF Fellowship Timeline” (found at [Appendix L](#)).

### **Participant Agreement**

Per the Pathways Programs regulations (5 CFR 362.106), a *Participant Agreement* means a written agreement between the agency and each Fellow.

Agencies must execute a written Participant Agreement with each Fellow that clearly identifies expectations, including but not limited to: (a) a general description of duties; (b) work schedules; (c) the length of the appointment and termination date; (d) mentorship opportunities; (e) training requirements as applicable; (f) evaluation procedures that will be used for the Participant; (g) requirements for continuation and successful completion of the Program; and (h) minimum eligibility requirements for noncompetitive conversion to term or permanent competitive service employment. Those agencies with additional program requirements should include those in their Participant Agreement and ensure the Fellow is fully aware.

The PMF Program Office has created and posted an optional PMF Form 1301, PMF Participant Agreement, under the “Current PMFs\Resources” (<https://www.pmf.gov/current-pmfs/resources/>) sections on the PMF website; see [Appendix E](#).

### **Mentor**

The Pathways Programs regulations (5 CFR 362.405) requires that within 90 days of a Fellow’s appointment, the agency must facilitate the assignment of a Mentor for the Fellow who is a managerial employee outside the Fellow’s chain of command. The Mentor may be consulted in the development of the Fellow’s Individual Development Plan (IDP) and the Mentor may be consulted during the Fellow’s certification process.

The agency’s Pathways Programs Officers and Agency PMF Coordinators are responsible for ensuring their Fellows are assigned a Mentor. The Pathways Participant Agreement emphasizes the assignment of a Mentor within 90 days of a Fellow’s appointment, the purpose and role of Mentors, and Mentors for Fellows must be current managerial employees inside of the participant’s agency.

Mentors should serve as advisors and trusted colleagues, not as supervisors. A formal mentoring process affords Fellows with professional development and guidance and capitalizes on the experiences of seasoned employees who are committed to developing a highly skilled and high-performing workforce.

An optional Mentoring Agreement OPM Form 1308 can be found under the "[Current PMFs\Resources](#)" and "[Agencies\Resources](#)" section on the PMF website.

### **Individual Development Plan**

Within 45 days of a Fellow onboarding, he/she must consult with their Supervisor to establish their Individual Development Plan (IDP). The IDP sets forth the specific training and developmental activities that are mutually agreed upon. In addition, the consultation must also include the Agency PMF Coordinator and/or the assigned Mentor.

Fellows and their Supervisors should use IDPs to negotiate expectations for attaining clearly defined learning objectives and competencies during the next two (or more) years through training and developmental assignments. IDP planning allows Supervisors to clarify employee performance plans, as well as staffing and budget plans. IDP planning allows Fellows to discern which developmental activities and experiences will be most appropriate for their career goals.

Fellows are expected to work with their Supervisors, Agency PMF Coordinators, and/or Mentors to determine the competencies and technical skills they will develop during their fellowship. These competencies and skills will prepare the Fellow for further opportunities at the end of the fellowship. The IDP should be consistent with the Pathways Participant Agreement.

IDPs should specify how and when the learning objectives will be met and determine how Fellows will be evaluated. IDPs should include PMF Program-sponsored trainings and activities, as well as agency-sponsored career development activities to enhance career and continuing education goals. Fellows are also encouraged to use IDPs to plan their longer-range career goals. The IDP should be aligned with the Fellow's performance plan, target position, and career development goals. See also *Performance Plan and Review* further below.

Each IDP should be individually tailored around the following elements:

- Career goals: A brief description of the Fellows short- and long-term career goals with required competencies and skills identified.
- Target Position: A brief description (with series, grade, and career ladder) of the target position, and the specific competencies and skills needed to qualify for the target position upon successful completion of the 2-year program.
- Learning Objectives: The learning objectives should include technical and general management/leadership areas, as well as specific skills and experiences.
- Details and Timeline: The IDP should clearly indicate when and how the learning objectives will be accomplished. The plan should outline the required 4-to-6-month developmental assignment as well as the 80 hours of formal interactive

training for each year of the fellowship.

- **Demonstrated Success:** The IDP should include a means for tracking accomplishment of all IDP objectives at the end of the two-year fellowship. The PMF's Supervisor, Fellow, Agency PMF Coordinator, and Mentor should be partners in determining that the objectives set forth in the IDP have been accomplished. Should events preclude a Fellow from attaining specific learning objectives by a particular date, alternative arrangements should be made with his or her supervisor in consultation with the Agency PMF Coordinator.
- The PMF Program Office created an optional OPM Form 1302, PMF IDP, which can be found on the PMF website for Fellows (<https://www.pmf.gov/current-pmfs/resources/>) and agencies (<https://www.pmf.gov/agencies/resources/>).



The IDP is a working document that should be updated as requirements have been completed. At each performance review it should be reviewed and discussed to ensure that the Fellow is being fully prepared for the target position.

### **Training and Development**

Training and development have always been considered a fundamental part of the PMF Program. Agencies are responsible for ensuring that Fellows receive at least 80 hours of formal interactive training each year of the fellowship. Specifically, 5 CFR 362.405(b)(2) states that for each Fellow, the appointing agency must provide a *minimum* of 80 hours per year of formal interactive training that addresses the competencies outlined in the IDP.



If a Fellow completes 100 hours of training during the first year of their 2-year fellowship, is he/she only required to do 60 hours during the second year for a total of 160 hours? No. Per the regulations, a Fellow must obtain 80 hours of formal interactive training each year of the fellowship. In most cases, Fellows complete their 2-year fellowship with more than 160 hours of training. Ultimately it is the ERB Chairperson who certifies completion of all training hours.

Formal interactive training is defined as training that includes sharing of ideas between instructor and students and student and fellow students. If other aspects of the PMF training requirements have been met (e.g., training that prepares the Fellow for his target position), on-line training may count as interactive training if there is the sharing of ideas in real time. On-line training will often have discussion boards, group projects, etc. Formal interactive training does not include on-line training in which the student goes through a series of slides or screens without any sharing of ideas. An agency may use on-line training if the training addresses the competencies outlined in the Fellow's IDP and will prepare the Fellow for his/her target position.

Formal interactive training may include professional conferences and meetings. Often, volunteer activities include a training component. Again, if the training meets other aspects of the PMF training requirements, this training may be counted towards the PMF requirement.

Agencies are responsible for covering the costs of travel, lodging and per diem, as well as tuition for each Fellow.

Additional information on training and development can be found under the “Current PMFs\Training and Development” section on the PMF website at <https://www.pmf.gov/current-pmfs/training-and-development/>.



Fellows should retain a copy of all training certificates; it is the Fellow's responsibility to collect and maintain any such certificates. Certificates are normally required when preparing for the agency's Executive Resources Board (ERB) certification process at the end of the fellowship. All training and developmental activities should be recorded on the Fellow's IDP.

## Training Opportunities

The Fellow and their Supervisor should discuss all training opportunities that would assist the Fellow in completing program requirements and applicable for the Fellow's current and/or target position.

The PMF Program Office has posted some training opportunities sponsored by the Federal Government under the “Current PMFs\Training and Development\Training” section on the PMF website at <https://www.pmf.gov/current-pmfs/training-and-development/training/>. These include: (1) the Federal Executive Institute (FEI), (2) the Center for Leadership Development(3) OPM's Lead Certificate Program, and (4) the Federal HR Institute; all of which can be found at <https://leadership.opm.gov>.

Both agencies and the PMF Program Office can post training opportunities on the PMF TMS for Finalists or Fellows. Similar to rotational opportunities, the training opportunity announces the basics (e.g., who, when, where, what, point of contact, and any registration cap), description of organization, description of opportunity, qualifications required, and how to participate instructions. Agencies can find a “PMF TMS Training Opportunity Template for Agencies” posted under the “Agencies\Resources” (<https://www.pmf.gov/agencies/resources/>) section on the PMF website.

## **PMF LDP (Leadership Development Program)**

The PMF Leadership Development Program (PMF LDP) is designed to support the PMF's leadership journey during their two-year fellowship. Participation in the PMF LDP counts towards their training and developmental requirements and is provided at no additional cost to the agency (other than potential travel costs for in-person sessions). Participation is optional and strongly encouraged. Participation is at the agency's discretion and at the discretion of the Fellow's supervisor and agency. Full program information can found under the “Current PMFs/Training and Development/Leadership Development Program” section on the PMF website at <https://www.pmf.gov>

*Value Proposition:* The Presidential Management Fellows Leadership Development

Program (PMF LDP) enables a resilient succession pipeline through supporting agencies in the development of their future leaders. Fellows are equipped to build and sustain a capacity to meet the strategic goals of their agency and the Executive Branch of the Federal Government.

*The PMF Program Leadership Development Goals:*

The PMF Leadership Development Program (LDP) was established to support a PMF's leadership journey during their two-year fellowship and provides 100+ hours of formal interactive training to meet Fellow's development toward fellowship requirements.

The program is designed to:

- Deliver a premier developmental experience that equips PMFs for future leadership roles in 21st-century government
- Cultivate a strong esprit de corps across each PMF Class through collaboration and relationship building
- Apply experiential learning methods to work-related projects
- Connect accomplished PMF Alumni with current PMFs to serve as mentors and guide

The goal of the PMF Program's Leadership Component is to provide a world-class, actionable leadership development experience for PMFs that fully prepares them to step into leadership roles upon completion of their Fellowship. Outcomes to achieve this goal were identified as follows:

- The PMF's experience depends critically on the ability of their Supervisors and their PMF Coordinators to support their leadership development.
- The Leadership Development Program must communicate and deliver the PMF Program's Value Proposition: *developing strong pipelines of outstanding leaders ready to assume significant roles in the Federal government following the successful completion of the Fellowship.*
- The Program must build leadership competencies through structured, cohort-based Learning Experiences that are rigorous, actionable, and memorable.
- The component should build strong communities to support the PMF Program.

*Competency Development*

PMF LDP curriculum is designed to teach to competencies under the OPM Executive Core Qualifications (ECQs). The competencies selected are specific to Fellows' development during their two-year journey and outlined in the PMF Journey Model.

Program Components

- Special Guest Speakers (senior leaders, PMF Alumni)
- Three Month Challenge Project directly from the President's Management Agenda (PMA)
- Quarterly Networking Events with other Fellows and Alumni (Developmental Hours)
- Coaching Cohorts for Competency Development
- 100 Developmental Hours (to fulfill 80 hours per year requirement)

- Federal Executive Institute Seasoned Faculty
- Customized curriculum designed for Fellows
- Immersion of change methodologies
- Leadership Assessment
- Onsite visits (may vary)

### *Eligibility*

Fellows who meet the following criteria can partake in the Leadership Development Program (LDP): (a) onboarded and began working at their agency, (b) have their supervisors' approval, and (c) the home agency has paid the reimbursement fee. Fellows must agree to fully participate in the program, which spans over the two-year fellowship. Fellows and their Supervisors are encouraged to review all components of the LDP during their one-on-one meetings and when completing the Individual Development Plan (IDP).

This program is offered at no additional cost to any agency that has signed a financial agreement for each Fellow they have hired. In 2019, The PMF Program Office conducted a cost- comparison analysis, researching similar programs measuring the same objectives and deliverables, determining the cost for an agency to conduct the level of development for each of their Fellows equates to \$15,000 per person.

### *Segment 1/Year 1: Leading Self/Leading Others*

Leading Self and Leading Others, focuses on the Fellows' needs in acclimating to the Federal environment, understanding the fundamental values and principles of democratic governance, and developing constructive relationships with a diverse range of stakeholders. This segment also gives Fellows an understanding of themselves as leaders and helps them identify their individual strengths and opportunities for growth. Based on this understanding, Fellows design their own leadership development roadmap to strengthen their skills in leading themselves and leading those around them. During this segment, Fellows are assigned to a Certified Federal Coach and work with them in a small group of 8 Fellows total, focusing on developing specific competencies.

### *Segment 2/Year 2: Leading Change*

Upon successfully completing Segment 1, Fellows are prepared to identify and lead change in their broader environments. Leading Change in Year 2 invites Fellows to select a specific Challenge Project and exposes them to a range of performance improvement disciplines and methods.. Fellows apply these disciplines and methods to a group project with other Fellows sponsored by a Federal agency that has a cross-government impact and scope.. Upon successfully completing their project, they are given an opportunity to brief on the success of their project to senior agency leadership and are awarded a certificate for the full completion of the PMF LDP.

Please refer to the “Become a PMF\Resources” section of the PMF website for additional information and associated resources:

- PMF LDP Brochure: <https://www.pmf.gov/media/5585304/PMF-LDP-Brochure-05-2020.pdf>



- b. PMF LDP Slides: <https://www.pmf.gov/current-pmfs/training-and-development/leadership-development-program/>
- c. PMF LDP Journey Model: <https://www.pmf.gov/media/5563904/pmf-ldp-journey-model-08-02-19.pdf>
- d. PMF LDP FAQs: <https://www.pmf.gov/media/5584089/pmf-ldp-web-faqs-04-29-2020.pdf>

### **Developmental Assignment**

Fellows are required to complete at least one developmental assignment of 4-6 months consistent with their IDP (Individual Development Plan) as part of the PMF Program requirements. Developmental assignments may or may not be continuous over the 4-6 months and must be recorded on their IDP.

Per the program regulations and guidance, the developmental assignment can only take place within the Fellow's organization, agency, or another Federal agency. A Federal agency is basically defined as those agencies within the Executive Branch and those agencies who participate in the PMF Program. Because the agency and supervisor will be without services during the rotational opportunity, but are still paying salary and benefits, there may be times when the agency will deny or adjust the Fellow's request regarding these opportunities.

Developmental Assignments are at the discretion of Fellow's home agency, including any outside of the organization. Agencies may restrict such rotations within their agency. PMFs are required to go through agency-specific procedures before pursuing them. More specifically, it is the Fellow's responsibility to initiate the approval process, if required by the agency, before making contacts or agreements to go on rotational opportunities.

When appropriate, a Fellow may participate in a rotational opportunity in Congress; however, such opportunity must be with a congressional committee, which would prevent any potential conflict of interest and be bipartisan. Fellows should consult with their supervisor, Agency PMF Coordinator, and perhaps their General Counsel or Ethics Officer, for any agency-specific policies and procedures for such rotations.

Visit the PMF website at <https://www.pmf.gov/current-pmfs/training-and-development/rotational-opportunities/> for details.

Additional information on Rotations is listed below under Optional Rotations

### **Optional Rotations**

The PMF regulations specify that in addition to the developmental assignment, Fellows may receive other short-term rotations of 1 to 6 months in duration, at their appointing agency's discretion, to occupations or functional areas different from the one in which Fellows will most likely be placed. **Rotations and developmental assignments are grouped together as Rotational Opportunities when advertised for Fellows on**

**the PMF Talent Management System (PMF TMS).** Optional Rotational Assignments do not have to relate or target position or IDP

While on a rotational opportunity, Fellows remain employed by their home agency and are not to be separated from Federal service. While on the rotational opportunity, salary and benefits continues to be paid by the appointing agency, although housing, transportation, training, or other expenses are sometimes paid by the agency hosting the Fellow for this period. Agencies that permit a Fellow to perform a rotational opportunity outside of the agency are encouraged to have an MOU with the hosting agency in place before the rotational opportunity begins.

The PMF Program Office has automated the process for hosting organizations to post rotational opportunities in the PMF TMS for current Fellows to search. All current Fellows can log into the PMF TMS, via their applicant user account, and search for opportunities. If the Fellow has opted-in to receive automated emails from the PMF TMS, he/she will receive an automated digest email the day after a rotational opportunity is posted live.

The PMF Program Office has developed a sample Memorandum of Understanding (MOU) template that Fellows and agencies may use. An MOU outlines the roles and responsibilities of all parties. The template is available under the “Current PMFs\Resources” (<https://www.pmf.gov/current-pmfs/resources/>) webpage. This form should be tailored to meet the needs of the specific assignment. Fellows are required to consult with their supervisor and/or Agency PMF Coordinator for assistance and follow agency's policies and procedure

### **Field Options**

An agency that hires Fellows in field locations outside the Washington, DC, Metropolitan Area, may promote interaction among regional Fellows with the agency Federal Executive Board (FEB) and permit Fellows to attend FEB-sanctioned activities. With a majority of Federal employees working outside the National Capital Region, FEBs are an excellent resource for these employees. More information on FEBs can be found at <https://www.feb.gov>.

### **Performance Plan and Review**

The Fellow's Supervisor is responsible for developing each Fellow's performance plan based on the Fellow's current Position Description (PD). Each Fellow must be placed on a performance plan establishing performance elements and standards that are directly related to acquiring and demonstrating the various leadership, technical, and/or general competencies expected of the Fellow as well as the elements and standards established for the duties assigned. Each Fellow must receive an annual performance evaluation in accordance with the agency's performance management program. The PMF Program Office recommends that the Fellow receive quarterly evaluations. The performance rating is derived from an evaluation of the Fellow's success in completing developmental activities designed to prepare the Fellow to meet the developmental and

performance expectations described in his/her performance plan. If a Fellow does not meet expectations (set forth in the performance plan) with regard to his/her developmental progress or assignments, the agency may take appropriate action.

Failure to meet the minimum standards outlined in the PD and performance plan can lead to warnings, termination, or other corrective action as appropriate. It is the responsibility of the employing agency to review and follow established regulations when addressing performance or conduct issues. Agency procedures should take into consideration the Fellow's IDP, performance plan, and performance reviews.

In addition, the Fellow's performance is reviewed during the certification process towards the end of the fellowship.

### **Agency-Specific Requirements**

In addition to the program regulations outlined in this Handbook and stemming from the Pathways Programs regulations, agencies may have agency-specific requirements. Any such requirements leading to conversion and completing the fellowship should be identified in the Participant Agreement.

Agencies have discretion to establish such requirements. If an agency does establish additional requirements, those requirements must apply to all Fellows within the agency.

Requirements from the agency's headquarters should be well defined and communicated across the agency, including the sub-agencies. A sub-agency should not exceed those requirements outlined by the agency (headquarters-level).

Fellows and Supervisors should consult with the Agency PMF Coordinator to ensure any such agency-specific requirements are identified and accounted for. Agency PMF Coordinators may also need to consult with their agency's Pathways Programs Officer, HR Office, and/or Chief Human Capital Office accordingly.

### **Certification**

Each Fellow must be certified in completing the program requirements during their 2-year fellowship, including any agency-specific requirements. Certification is performed by the agency's Executive Resources Board (ERB), or equivalent. The ERB has the responsibility for overseeing and establishing policy for executive merit staffing and for managing the executive resources of the agency as determined by the agency head.

The ERB certification process was designed to protect the prestige and competitive nature of the PMF Program while reinforcing the agency's commitment to succession planning. Upon a Fellow's completion of the Program, the appointing agency's ERB must evaluate each Fellow and determine whether it can certify in writing that he/she has met all of the requirements of the Program.

The agency must complete its evaluation, make a decision regarding certification of

successful completion, and notify the Fellow, no later than 30 calendar days prior to the expiration of the Fellow's appointment in the Program (e.g., by their 2-year anniversary date).

The PMF TMS will send an automated reminder email to the Fellow, Supervisor, and Agency PMF Coordinators 90-days prior to the Fellow's 2-year anniversary date to start preparing for the ERB certification process.

ERBs may also determine that a Fellow has not successfully completed the Program and will not be appointed upon completion. In this case, the Fellow's appointment expires. The Fellow may request reconsideration of that decision by the OPM Director, or designee. This must be submitted in writing within 15 calendar days of the date of the ERB's decision.

The ERB establishes its own procedures for conducting the review, but must consider whether: (1) the Fellow has met all of the requirements of the Program, (2) has demonstrated successful performance according to the individual's performance plan, and (3) has achieved the developmental expectations set forth in the Individual Development Plan (IDP). This may be conducted through a document review or other methods agreed upon by the ERB. The results of the ERB certification are to be entered into the PMF TMS by the Agency PMF Coordinator. Information is to include, at a minimum, the Fellow's agency/sub-agency, name, outcome of the ERB review (successfully completed or did not successfully complete/will not be converted), conversion date (if applicable), and contact information.

The PMF Program Office created the optional OPM Form 1303, PMF Executive Resources Board (ERB) Certification Form, that agencies may use. The OPM Form 1303 can be found under the various "Resources" sections on the PMF website at <https://www.pmf.gov>; a copy can be found under [Appendix G](#). Agencies may utilize alternative forms or memos and would retain such for their records. There is no need to submit certification documents to the PMF Program Office or upload into the PMF TMS.

A favorable certification is what leads to the noncompetitive conversion of the Fellow to a term or permanent position. A Fellow may only convert at the agency that conducted the favorable certification.

In addition, once the certification results are recorded in the PMF TMS, the Fellow will be sent an automated email welcoming him/her as part of the PMF Alumni Community. Once a Fellow is favorably certified, he/she is eligible to participate in Graduation and is considered an Alum.

### **Fellowship Extension**

Agencies have the authority to extend a Fellow's appointment for up to 120 days for rare and unusual circumstances. The agency's Pathways Programs MOU or PMF MOA defines the process and requirements for a fellowship extension. The Agency PMF Coordinator must ensure the agency's process for fellowship extensions are followed

and record any such fellowship extensions in the PMF TMS.

A Fellow who needs additional time or is unable to complete the program requirements should immediately consult with their Supervisor and Agency PMF Coordinator. All parties must follow fulfill the requirements outlined in the Participant Agreement.

The number of days to extend a Fellow cannot exceed 120 days. All parties should consider any impact due to the Fellow being on leave, travel, active military service, etc. The Fellow and their Supervisor are responsible for ensuring the Fellow completes all program (and any agency-specific) requirements during their 2-year fellowship.

If the Fellow is extended, the agency must still render an ERB decision 30-days prior to the Fellow's extended anniversary date.

### **Conversion**

The agency may noncompetitively convert, without a break in service, an ERB-certified Fellow to a competitive service term or permanent appointment. A Pathways Participant who is noncompetitively converted to a competitive service term appointment may be subsequently converted noncompetitively to a permanent competitive service position.

If initially appointed to an excepted service agency, the Fellow may, upon successful completion of the Program, be appointed to a permanent position.

Appointments must be effective on or before the expiration of the individual's PMF appointment, including extensions. No permanent appointments are allowed prior to full completion of the 2-year fellowship. A non-U.S. citizen Fellow must meet the citizenship requirement to be converted to a permanent position.

As referenced above, a Fellow may only convert at the agency that conducted the favorable certification. Agencies may **not** convert a Fellow from another agency.

Successful completion of the fellowship is regarded as completion of the probationary period. Converted Fellows served a 2-year trial period during their fellowship. Upon conversion, they have fulfilled any probation period.

Conversion is key! Once a favorably certified Fellow is converted, their fellowship time applies towards tenure status. For most Fellows who do not have prior government service or time, their time as a Fellow would be applied towards tenure status and would only need one additional year of continuous service to obtain Career Status and start earning additional annual leave per pay period.

Because conversion has no impact on pay, agencies should process the conversion personnel action on the Fellow's 2-year anniversary date (or, if applicable, their extended anniversary date).

If the agency is unable to convert a favorably certified Fellow, consult the Frequently Asked Questions (FAQs) posted on the PMF website. Practically all Fellows are converted at the end of their fellowship; however, there are occasions where an agency either loses funding, reorganizes, no longer has positions, etc. Fellows are not guaranteed a permanent position at the end of their fellowship.

If the agency is unable to convert the Fellow, the Fellow may resign, or the agency must terminate the position. In either case, the Agency PMF Coordinator must record any status changes in the PMF TMS.

### **Exit Survey**

After the Fellow has converted, the PMF Program Office *may* send an exit survey to the Fellow, their Supervisor, Mentor, and/or Agency PMF Coordinator.

The survey will be used to collect participant feedback, help improve the PMF Program, and retain program statistics. We greatly appreciate your participation!

## CHAPTER 3: CHANGES IN STATUS

### Promotions

The Pathways Programs regulations require agencies to establish policies and criteria for the promotions of Fellows. Agencies must develop promotion policies that include how and when promotion decisions will be made, the criteria upon which promotions will be granted, and qualifications for promotion to the next level. Agencies may then noncompetitively promote Fellows based on the terms of the promotion policy. In doing so, the agency must consider the qualifications and performance of the Fellow.

A Fellow's promotion may only occur if their position has promotion potential, meets the qualifications of the next higher grade, has a successful performance rating, and the Supervisor supports the promotion. Promotions are not guaranteed. A Fellow may receive a within-grade increase (WIGI), as in a step increase, versus a promotion. A WIGI is also at the discretion of the Supervisor.

Finalists may initially appoint at the GS-9, 11, or 12 (or equivalent). A Fellow may only promote as high as a GS-13 (or equivalent) during their fellowship. The PMF's career ladder should be clearly identified in their Position Description (PD) and Personnel Action reflecting the target level. The current or target position's full promotion must have been identified in the PMF appointment opportunity (e.g., job announcement).

Fellows are not subject to time-in-grade limits. Time-in-grade limits only apply to movement to or within the competitive service. However, Fellows must meet the qualifications requirements for promotion to the higher grade level (e.g., a minimum of one-year of specialized experience). Promotions are never guaranteed, and agencies must have an excepted service policy in place that covers promotions for positions in the excepted service.

Promotions on or after conversion to the competitive service are dependent upon on the agency's merit promotion plan, the position's career ladder and full performance level, the employee meeting the specialized experience requirement (generally 1 year of specialized experience), and his/her performance. While there is no presumption of promotion on or after conversion or appointment to a permanent position, Fellows who meet agency requirements for the next grade level may be noncompetitively promoted within their career ladders at the successful completion of the Program. In doing so, the agency must consider the qualifications and performance of the individual and the full performance level of the position to which the Fellow is being converted.

Upon initial appointment, the Agency PMF Coordinator records the appointment in the PMF TMS, as associated to the PMF appointment opportunity. There is no need to record or update appointment information when a Fellow is promoted. However, when the Agency PMF Coordinator records the conversion information (at the end of the Fellow's appointment), the PMF TMS will ask for the grade level upon conversion and the target grade level of the new position.

Since a promotion impacts pay, the effective date would start at the beginning of the pay period.

## **Reappointments**

The regulations refer to this as “movement between agencies”, but simply put, it’s referred to as a reappointment.

A Fellow may move to another agency if the agency meets all the requirements for participating in the PMF Program. The gaining agency must be an eligible Federal agency, as defined by the Pathways Programs regulations, and have an approved Memorandum of Understanding (MOU) or Memorandum of Agreement (MOA) with OPM for their participation in the Pathways Programs.

To move from one agency to another during the Program, the Fellow must separate from the current agency. The new employing agency must appoint the Fellow without a break in service.

The Fellow does not begin a new fellowship upon appointment by the new employing agency. Because there is no break in service, time served under the previous appointment will apply towards the completion of the fellowship with the new employing agency.

Any reappointment must be initiated by the losing Agency PMF Coordinator in the PMF TMS and the gaining Agency PMF Coordinator must accept it in the PMF TMS. Upon accepting, the PMF TMS will transfer the Fellow’s records to the newer agency/sub-agency.

The losing agency should process a “Termination-Appt In (agency)” personnel action effective on the day immediately preceding the day the employee is to enter on duty in the new employing agency. Agencies should not process the Termination-Appt In (agency) personnel action before receipt of evidence that the employee actually has been appointed in the other agency. More than 3 days off the roles constitutes a break in service. All separations are effective at the end of the day (midnight) unless an earlier time is indicated on the Standard Form 50.

A Fellow may only reappoint to a different position/agency he/she qualifies for. The new position cannot have a starting grade or promotion level higher than the Fellow’s current position (their initial appointment). This is because the Fellow did not initially compete for the newer position. For example, if the Fellow’s current position is a GS-11/12/13 (or equivalent), then he/she cannot reappoint to a position beyond a GS-13 (or equivalent).

If the Fellow obtains ERB certification in completing their program requirements at their existing agency, he/she **cannot** reappoint to another agency and convert. Conversion must take place at the agency who ERB certified the Fellow.



When a Fellow reappoints from one agency to another, the Fellow must still meet OPM qualification standards for the new position. The Fellow will then need to update his/her IDP for the new position, be assigned a new Mentor, sign a new Participant Agreement, and adjust his/her training and development for the newer target position.

As an example, if a Fellow at their current agency was on target for a Budget Analyst (e.g., has an IDP, target position, and training and development specifically for a Budget Analyst) and then reappoints to another agency for an HR Specialist position, all previous training and development for a Budget Analyst could no longer be valid as the newer position is in a different occupational group. The Fellow is to obtain training and development specific to the target position. In the example above, all time and development as a Budget Analyst may not carry over and the Fellow would need to obtain sufficient training and development as an HR Specialist before ERB certification and possible conversion. It is the responsibility of the gaining agency to determine what experience, training, and development, would carry over and be recognized as part of the Fellow's newer position and apply towards meeting program (and any agency-specific) requirements.

Advertising a PMF appointment opportunity for "reappointments" is not required. Only current Finalists can search for appointment opportunities. Fellows wishing to reappoint must find such opportunities on their own (e.g., networking with other Fellows, contacting program offices, contacting Agency PMF Coordinators, etc.). If a Fellow moves from one PMF position\agency to another within their agency, this would be processed as a reassignment. Agencies should follow their policies and procedures for reassignments in the excepted service. If there are no policies and procedures for such, the agency should create and apply consistently. If a Fellow is moving to a new position in an entirely different agency, this would be processed as a transfer.

A reappointment may impact the Fellow's ability to complete their fellowship and prepare for the certification and conversion process. Timing is key! Agencies should factor the timing of a reappointment to ensure the Fellow completes the fellowship and adheres to the agency's policies and procedures for certification and conversion.

It may or may not be appropriate to extend a Fellow's appointment (e.g., a fellowship extension for up to 120 days) to account for a reappointment. Both the losing and gaining Agency PMF Coordinators should address this and decide on an appropriate course of action.

## **Graduation**

The PMF Program Office sponsors a Graduation Ceremony for each class year of Fellows. Only favorably certified Fellows are eligible to participate. The ceremony is typically scheduled in late-Spring or early-Summer to accommodate as many graduates as possible from a given class year.

When the ceremony is scheduled, the PMF Program Office will invite Fellows to RSVP. Fellows would typically have the option to attend in-person to obtain their Certificate of

Completion or may request a certificate to be mailed to their home address. The PMF Program Office only honors requests for a certificate to be mailed for up to one year after the ceremony for that class. Certificates are mailed to the Fellow's home mailing address.

The ceremony typically takes place in Washington, DC. Graduating Fellows may have the option to invite guests (e.g., co-workers, spouse, family, etc.); however, typically space is limited.

Additional information about the Graduation Ceremony will be posted to the PMF website. Agencies are expected to fully support the participation of their graduating Fellows.

### **Resignations**

A Fellow may resign from their position at any time. The Fellow's Agency PMF Coordinator must record a resignation status change in the PMF TMS. Upon the effective date and submission, the PMF TMS will lock the Fellow's records in the PMF TMS and deactivate their applicant user account on the Apply Site of the PMF TMS.

A Fellow who resigns from their position will lose any time towards meeting the probationary requirements and tenure status.

### **Terminations**

Fellows are at will employees. An agency may terminate a Fellow at any time during their fellowship. The Fellow's appointment expires at the end of the 2-year fellowship period, plus any fellowship extension up to 120 days. If the Fellow has not completed the fellowship or obtain a favorable certification, the Fellow's appointment terminates.

Regarding the certification process, if the ERB (or equivalent) decides not to certify a Fellow, the Fellow may request reconsideration of that determination by the OPM Director, or designee. The reconsideration must be requested in writing, with appropriate documentation and justification, within 15 calendar days of the date of the agency's decision. The Fellow may continue in the Program pending the outcome of his/her request for reconsideration, and the agency must continue to provide appropriate developmental activities during this period. The determination of OPM shall be final and not subject to further review or appeal. The Fellow's request should be submitted directly to the PMF Program Office at OPM.

Upon termination, the Agency PMF Coordinator must record a termination status change in the PMF TMS. Upon the effective date and submission, the PMF TMS will lock the Fellow's records in the PMF TMS and deactivate their applicant user account on the Apply Site of the PMF TMS.

## **Readmission**

If a Fellow withdraws from the PMF Program (e.g., resigns from their position) for reasons that are **not** related to misconduct, poor performance, or suitability, he/she may petition the original employing agency for readmission and reappointment into the PMF Program. Such a petition must be in writing and include appropriate justification. The agency may approve or deny the request for readmission. An agency must submit written notification of approved readmission requests to OPM, via the PMF Program Office, prior to onboarding. The individual's status in the PMF Program upon readmission and reappointment must be addressed as part of the agency's submission. The OPM Director, or designee, may overrule the agency's decision to readmit and reappoint, and the OPM decision is not subject to appeal.

If a Fellow withdraws from the PMF Program for reasons that **are** related to misconduct, poor performance, or suitability, as determined by the agency, he/she will **not** be readmitted to the Program at any time. Agencies are reminded to properly record a Fellow's withdrawal on their last Personnel Action and in the PMF TMS.

A readmission must be recorded by the Agency PMF Coordinator within the PMF TMS.

## **Reinstatement**

A Fellow who held a permanent appointment in the competitive service in an agency immediately *before* entering the PMF Program, and who withdraws (e.g., resigns) from the Program for reasons that are **not** related to misconduct, poor performance, or suitability, may, at the employing agency's discretion, be placed in a permanent competitive service position, as appropriate, in that agency. The employing agency's determination in this regard is not subject to appeal.

The Agency PMF Coordinator must inform the PMF Program Office if and when a reinstatement occurs. Since such allowance is rare, there is no on-line method to record in the PMF TMS.

A Fellow who held a career or career-conditional appointment before entering the Program may also seek reinstatement in a Federal agency. Reinstatement eligibility is the ability of former permanent, competitive service employees, on career or career-conditional appointments, to re-enter the Federal Government competitive service workforce. Reinstatement eligibility does not guarantee the former Fellow a job. It simply allows individuals to re-enter the Federal Government workforce by submitting a resume and verification of their reinstatement eligibility when vacancy announcements are open to applicants outside the agency's workforce. Reinstatement eligible candidates are responsible for doing their own job searches.

A person is eligible for reinstatement without time limitation if they have worked in a permanent Federal competitive service job *and* have veterans' preference or career (permanent) tenure. Those with career-conditional tenure are eligible for reinstatement for three years following the date of separation from Federal Government employment.

There are some provisions for extending this three-year limit – agency Human Resources Offices can provide information on this intervening service as well as on documents that are required to verify the reinstatement eligibility.

An agency must clear its RPL (Reemployment Priority List), CTAP (Career Transition Assistance Plan), and ICTAP (Interagency Career Transition Assistance Plan) before reinstating a former PMF to a career or career-conditional appointment, unless the employee meets one of the exceptions provided in 5 CFR 330.

### **Deceased**

If a PMF becomes deceased, the Agency PMF Coordinator can record such as a status change in the PMF TMS. This is treated as a final status change and will disable the following: (1) deactivates the PMF's user account in the Apply Site of the PMF TMS, (2) removes the PMF from automated emails and notifications from the PMF TMS, and (3) removes the PMF from broadcast emails from the PMF Program Office. Recording this status change is only applicable for active PMFs. If the agency is aware of a PMF Alum who is still employed with them and becomes deceased, please notify the PMF Program Office so we can adjust our Alumni records.

## **CHAPTER 4: PMF ALUMNI, AMBASSADORS, AND SUCCESS STORIES**

Since the program's inception in 1978, over 10,000 individuals have entered Federal service either as Presidential Management Interns or Presidential Management Fellows (when the program was subsequently renamed in 2003). PMI and PMF Alumni have risen to the highest levels of government, serving as agency heads, ambassadors, and members of the Senior Executive Service (SES). Since the beginning, the intent of the program has remained the same: to recruit and develop tomorrow's Federal Government leaders. This chapter outlines three fundamental things related to PMF Alumni: 1) how "alumni" is defined for the PMF Program, 2) the primary ways PMF Alumni engage with the program after completing the fellowship, and 3) how success stories are gathered and posted to the PMF website.

### **PMF Alumni**

PMF Alumni are defined as Presidential Management Fellows (PMFs) who have been certified for successful program completion by their agency's Executive Resources Board (or equivalent). PMF Alumni may or may not have been converted to a permanent position upon completion of their fellowship. Upon certification, Fellows can expect to receive an automated email from the PMF Program Office welcoming them into the PMF Alumni community.

PMF Alumni continue to have access to the Apply Site of the PMF Talent Management System (PMF TMS) upon completion of their fellowship. The User Dashboard will reflect their status as alumni. As alumni, they also have access to "Alumni Engagement Opportunities," which are opportunities to advocate and support the PMF Program in a variety of ways. Similar to Appointment Opportunities for Finalists and Rotational Opportunities for Fellows, an automated digest email will be sent to alumni the day after an Alumni Engagement Opportunity is posted providing additional details on the opportunity. Alumni can "opt-out" of receiving these emails at any time by clicking "Manage Settings" on the User Dashboard of the Apply Site.

Agencies that would like to solicit the support of PMF Alumni for an event or agency effort can find a "PMF TMS Alumni Engagement Opportunity Template" posted under the "Agencies\Resources" (<https://www.pmf.gov/agencies/resources/>) section on the PMF website.

### **PMF Ambassadors**

The PMF Ambassadors Program is a volunteer network of PMF Alumni and current Fellows who are available to engage academic institutions and prospective applicants about the program. The PMF Program Office works closely with PMF Ambassadors, providing them with resources to support outreach efforts and recruitment goals by sharing their first-hand experience with the fellowship. For these volunteers, it is also an excellent leadership opportunity and an opportunity to give back to the program. Ambassadors carry out a wide variety of activities, such as conducting information

sessions, serving on career panels, hosting brown bags, or serving as mentors for graduate students.

The PMF Program Office recruits PMF Ambassadors in advance of each application cycle, and Ambassadors support outreach efforts through the end of that cycle (i.e. until the application for a given year has closed).

More information on the PMF Ambassadors Program (<https://www.pmf.gov/current-pmfs/pmf-ambassadors/>) can be found on the website.

### **PMF Success Stories**

The PMF Program Office continually seeks to highlight the success stories of PMF Alumni and current Fellows. These stories help bring the program to life for potential applicants and help all PMF Program stakeholders better understand the impact alumni and Fellows make across the Federal Government and beyond. Success stories that are currently posted on the PMF website can be found at <https://www.pmf.gov/success-stories.aspx>.

PMF Alumni and current Fellows who would like to submit a success story can do so using OPM Form 1304, which can be found under the “Current PMFs\Resources” (<https://www.pmf.gov/current-pmfs/resources/>) section on the PMF website. Also refer to the “PMF Success Story Submission Form” under [Appendix M](#). Once the form has been filled out and signed, it should be sent via email to [pmf@opm.gov](mailto:pmf@opm.gov).

## CHAPTER 5: RESOURCES

The following are resources for Fellows, Supervisors, and Agency PMF Coordinators.

### **PMF Website**

The PMF website, at <https://www.pmf.gov>, is the one-stop-shop for all information and resources related to the PMF Program. The website is organized by audience. For example, the “Become a PMF” section is for prospective applicants and Finalists, “Current PMFs” is for current Fellows, and “Agencies” is for all agency personnel to include Supervisors, Agency PMF Coordinators, and HR staff.

Each audience has a section for resources and frequently asked questions (FAQs).

### **PMF TMS (Talent Management System)**

The PMF TMS is separated into two sites: (1) the “Apply Site”, used by applicants, Finalists, Fellows, and Alum; and (2) the “Portal Site”, which is the site for agency users and the PMF Program Office.

The Apply Site is used by prospective applicants to create applicant user accounts and to apply to the annual PMF application; Finalists to search for appointment opportunities and manage their documents; Fellows to search for rotational and training opportunities, manage their appointment information, manage their registrations and confirmations for events via the Events Management System; and, for Alumni to search for alumni engagement opportunities and manage their settings.

Fellows can also perform the following actions on the Apply Site: submit name changes, update their personal contact information, update their appointment information (e.g., work contact information, supervisor, and mentor), manage their permissions and settings, search for rotational and training opportunities, register and view their events, and upload the acknowledgement receipt for this Handbook.

The Portal Site is used by the PMF Program Office to manage participants and the program. The Portal Site is also used by agency users to search and view Finalists, post and manage opportunities, manage their Fellows, query reports, manage agency users, manage their Agency Profile Page, and submit their workforce planning statistics.

Both the Apply and Portal Sites include a “Resources” section containing documents or links relevant to the audience.

### **Social Media**

The only official social media presence the PMF Program has is the “Presidential Management Fellows Alumni – Official” LinkedIn page. All PMI and PMF Alumni are welcome to join this page. Once the PMF Program Office can verify their status as alumni, their “request to join” is approved. Additionally, Fellows are invited to join this

page upon certification (i.e. once they are considered alumni) and are given instructions for how to do so in the automated email that is sent to Fellows once certified. This site is owned by OPM and managed by the PMF Program Office.

There are also several informal PMF group pages on social media and PMF listservs that are operated by and for Fellows and PMF Alumni. These can be found on Facebook, LinkedIn, Slack, and Groups.io, among other places. Fellows may find these groups useful for connecting with their colleagues, learning about opportunities across Federal agencies (e.g. rotational), gaining insight and advice when moving to a new duty location, and professional networking. While these sites are not OPM-sanctioned, many Fellows find them to be a valuable resource.

### **Presidential Management Alumni Association (PMAA)**

The Presidential Management Alumni Association (PMAA) is a 501(c)(3) nonprofit organization, separate and distinct from the PMF Program, created to improve, expand, and promote the alumni community as well as the PMF Program. They are dedicated to supporting alumni excellence and achievement, advocating for the PMF program, and holding up public service as a noble and necessary profession. To learn more about PMAA, including how to become a member and subscribe to their newsletter, visit <https://pmaa.us>.

### **Office Hours**

The PMF Program Office hosts monthly office hours virtually the second Thursday of every month from 3:00-4:00pm (ET) for all our stakeholders. See our “News & Events” posting covering this at <https://www.pmf.gov/news-events/introducing-pmf-office-hours/>.



## APPENDICES

### **Appendix A: Fellow's Checklist**

The Fellow may use the following checklist to track their progress from onboarding through conversion. Also refer to the "PMF Fellowship Timeline" under [Appendix L](#).

#### **First 45-90 Days:**

<input checked="" type="checkbox"/> :	<b>ACTION:</b>
	Complete and sign the Participant Agreement
	Review the Participant Handbook with your Supervisor and Agency PMF Coordinator, obtain signatures on the Acknowledgement Receipt, and submit via the Apply Site of the PMF TMS
	Work with your Supervisor to establish your Performance Plan
	Work with your Supervisor to identify a Mentor
	Work with your Supervisor, in consultation with your Agency PMF Coordinator and/or Mentor, to establish your Individual Development Plan (IDP)
	Check the PMF website for the next offering of the PMF LDP (Leadership Development Program) for Year 1
	Review your appointment information as recorded on the Apply Site for accuracy

#### **PMF LDP Year 1:**

<input checked="" type="checkbox"/> :	<b>ACTION:</b>
	Based on your start date, register and complete Year 1 of the PMF LDP, which includes:
	- Orientation Session
	- Coaching Sessions
	- Leadership Potential Assessment
	- Networking Events
	Record your PMF LDP sessions on your IDP

#### **4-6 Month Developmental Assignment:**

<input checked="" type="checkbox"/> :	<b>ACTION:</b>
	Consult with your Supervisor, Mentor, and Agency PMF Coordinator to plan for your developmental assignment
	Monitor the PMF TMS for rotational opportunities
	Account for any impact on your PMF LDP participation
	Record your rotations on your IDP

#### **Year 1 Anniversary:**

<input checked="" type="checkbox"/> :	<b>ACTION:</b>
	Review your IDP with your Supervisor and adjust accordingly
	- Have you minimally completed 80 hours of formal interactive training during your first year (which should be recorded on your IDP)?
	Keep track of your progress in meeting the training and developmental requirements for Year 1
	Complete the PMF LDP Year 1
	Complete your annual performance review with your Supervisor

## PMF LDP Year 2:

<input checked="" type="checkbox"/>	<b>ACTION:</b>
	Register and complete Year 2 of the PMF LDP, to include:
	- Orientation Session
	- Challenge Project
	- Networking Events
	Record your PMF LDP sessions on your IDP

## 90 Days Before Your 2-Year Anniversary:

<input checked="" type="checkbox"/>	<b>ACTION:</b>
	Start preparing for the ERB certification process
	Update your IDP
	Plan for any remaining training hours to minimally complete 80 hours for Year 2
	Ensure you are on target to complete program requirements and convert
	Assemble all supporting documents for the ERB package (check with your Agency PMF Coordinator)

## 60 Days Before Your 2-Year Anniversary:

<input checked="" type="checkbox"/>	<b>ACTION:</b>
	Wrap-up any remaining training and developmental requirements
	Submit your ERB package (check with your Agency PMF Coordinator)

## 30 Days Before Your 2-Year Anniversary:

<input checked="" type="checkbox"/>	<b>ACTION:</b>
	Complete your annual performance review with your Supervisor
	Monitor the ERB's certification decision
	Wrap-up any remaining commitments from PMF LDP Year 2

## Year 2 Anniversary:

<input checked="" type="checkbox"/>	<b>ACTION:</b>
	Upon favorable certification and recorded, you're now a PMF Alum!
	Monitor your Personnel Actions for conversion
	Monitor the PMF website for information about your Graduation Ceremony
	Maintain your contact information on the Apply Site as a PMF Alum

## Exit Survey:

<input checked="" type="checkbox"/>	<b>ACTION:</b>
	Monitor any emails from the PMF Program Office inviting you to complete any exit survey

## **Appendix B: Pathways Programs Regulations**

Only Subparts A and D apply to the PMF Program, which appears below. A full copy of the Pathways Programs regulations can be found under the “Agencies\Resources” (<https://www.pmf.gov/agencies/resources/>) section on the PMF website.

### **Subpart A – General Provisions**

- §362.101 Program administration.
- §362.102 Definitions.
- §362.103 Authority.
- §362.104 Agency requirements.
- §362.105 Filling positions.
- §362.106 Participant Agreement.
- §362.107 Conversion to the competitive service.
- §362.108 Program oversight.
- §362.109 Reporting requirements.
- §362.110 Transition.

### **Subpart D – Presidential Management Fellows Program**

- §362.401 Definitions.
- §362.402 Program administration.
- §362.403 Announcement, eligibility, and selection.
- §362.404 Appointment and extension.
- §362.405 Development, evaluation, promotion, and certification.
- §362.406 Movement between agencies.
- §362.407 Withdrawal and readmission.
- §362.408 Termination and reduction in force.
- §362.409 Conversion to the competitive service.

### **Subpart A – General Provisions**

#### **§362.101 Program administration.**

(a) The Pathways Programs authorized under Executive Order 13562 consist of the following three Programs:

- (1) The Internship Program;
- (2) The Recent Graduates Program; and
- (3) The Presidential Management Fellows (PMF) Program.

(b) An agency may rename the Programs specified in paragraphs (a)(1) through (3) of this section, provided that the agency-specific name includes the Pathways Program name identified in paragraph (a) of this section, e.g., Treasury Internship Program.

(c) Agencies must provide for equal employment opportunity in the Pathways Programs without regard to race, ethnicity, color, religion, sex (including pregnancy and gender identity), national origin, age, disability, sexual orientation, genetic information, or any other non-merit-based factor.

### **§362.102 Definitions.**

For the purposes of this part:

*Advanced degree* means a professional or graduate degree, e.g., master's, Ph.D., J.D.

*Agency* means an agency as defined in 5 U.S.C. 105, and the Government Printing Office.

*Certificate program* means post-secondary education, in a qualifying educational institution, equivalent to at least one academic year of full-time study that is part of an accredited college-level, technical, trade, vocational, or business school curriculum.

*Director* means the Director of OPM or his or her designee.

*OPM* means the Office of Personnel Management.

*Participant Agreement* means a written agreement between the agency and each Pathways Participant.

*Program Participant or Pathways Participant* means any individual appointed under a Pathways Program.

*Qualifying educational institution* means—

(1) A public high school whose curriculum has been approved by a State or local governing body, a private school that provides secondary education as determined under State law, or a homeschool that is allowed to operate in a State; and

(2) Any of the following educational institutions or curricula that have been accredited by an accrediting body recognized by the Secretary of the U.S. Department of Education:

(i) A technical or vocational school;

(ii) A 2-year or 4-year college or university;

(iii) A graduate or professional school (e.g., law school, medical school); or

(iv) A post-secondary homeschool curriculum.

### **§362.103 Authority.**

An agency may make an appointment under this part to a position defined in §213.3402 of this chapter, provided a Memorandum of Understanding between the head of the agency or his or her designee and OPM is in effect.

### **§362.104 Agency requirements.**

(a) *Memorandum of Understanding.* In order to make any appointment under a Pathways authority, a Memorandum of Understanding (Pathways MOU) must be in effect between the head of an agency, or his or her designee, and OPM for the administration and use of Pathways Programs, to be re-executed no less frequently than every 2 years.

(b) The Director may revoke an agency's Pathways MOU when agency use of these Programs is inconsistent with Executive Order 13562, this part, or the Pathways MOU.

(c) The Pathways MOU must:

(1) Include information about any agency-specific program labels that will be used, subject to the Federal naming conventions identified in §362.101 (e.g., OPM Internship Program);

(2) State the delegations of authority for the agency's use of the Pathways Programs (e.g., department-wide vs. bureaus or components);

(3) Include any implementing policy or guidance that the agency determines would facilitate successful implementation and administration for each Pathways Program;

(4) Prescribe criteria and procedures for agency-approved extensions for Recent Graduates and PMFs, not to exceed 120 days. Extension criteria should be limited to circumstances that would render the agency's compliance with the regulations impracticable or impossible;

(5) Describe how the agency will design, implement, and document formal training and/or development, as well as the type and duration of assignments, and necessary exceptions for short term temporary work, such as summer jobs;

(6) Include a commitment from the agency to:

(i) Provide to OPM any information it requests on the agency's Pathways Programs;

(ii) Adhere to any caps on the Pathways Programs imposed by the Director;

(iii) Provide information to OPM about opportunities for individuals interested in participating in the Pathways Programs, as required by this part;

(iv) Ensure adherence to the requirements for accepting applications, assessing applicants, rating and ranking qualified candidates, and affording veterans' preference in accordance with the provisions of part 302; and

(v) Provide a meaningful onboarding process for each Pathways Program;

(7) Identify the agency's Pathways Programs Officer (PPO), who:

(i) Must be in a position at the agency's headquarters level, or at the headquarters level of a departmental component, in a position at or higher than grade 12 of the General Schedule (GS) (or the equivalent under the Federal Wage System (FWS) or another pay and classification system);

(ii) Is responsible for administering the agency's Pathways Programs, including coordinating the recruitment and onboarding process for Pathways Programs Participants, and coordinating the agency's Pathways Programs plan with agency stakeholders and other hiring plans (e.g., merit promotion plans, plans for hiring people with disabilities);

(iii) Serves as a liaison with OPM by providing updates on the agency's implementation of its Pathways Programs, clarifying technical or programmatic issues, sharing agency best practices, and other similar duties; and

(iv) Reports to OPM on the agency's implementation of its Pathways Programs and individuals hired under these Programs, in conjunction with the agency's Pathways MOU; and

(8) Identify the agency's PMF coordinator responsible for administering the agency PMF Program and serving as a liaison with OPM.

### **§362.105 Filling positions.**

(a) *Workforce Planning.* Before filling any positions under these Programs, agencies should include measures in their workforce planning to ensure that an adequate number of permanent positions will be available to convert Pathways Participants who successfully complete their Programs.

(b) *Announcements.* When an agency accepts applications from individuals outside its own workforce, it must provide OPM information concerning Pathways Programs job opportunities as provided in each Pathways Program. For the purposes of this paragraph, "agency" means an Executive agency as defined in 5 U.S.C. 105 and the Government Printing Office. An Executive department may treat each of its bureaus or components (first major subdivision that is separately organized and clearly distinguished from other bureaus or components in work function and operation) as a separate agency or as part of one agency, but must do so consistent with its Delegated Examining Agreement.

(c) *Appointments.* (1) Agencies must fill positions under the Pathways Programs using the excepted service appointing authority provided by §213.3402 (a), (b), or (c) of this chapter, as applicable.

(2) Agencies must follow the procedures of part 302 of this chapter when filling a position under a Pathways Program.

(3) Appointments are subject to all the requirements and conditions governing term, career, or career-conditional employment, including investigation to establish an appointee's qualifications and suitability.

(d) *Eligibility.* Except as set forth in this section, eligibility requirements for appointment under a Pathways Program are specified in each Pathways Program.

(e) *Citizenship.* (1) An agency may appoint a non-citizen provided that:

(i) The Pathways Participant is lawfully admitted to the United States as a permanent resident or is otherwise authorized to be employed; and

(ii) The agency is authorized to pay aliens under the annual Appropriations Act ban and any agency-specific enabling and appropriation statutes.

(2) A Pathways Participant must be a United States citizen to be eligible for noncompetitive conversion to the competitive service.

(f) *Employment of relatives.* In accordance with part 310 of this chapter, a Pathways Participant may work in the same agency with a relative when there is no direct reporting relationship and the relative is not in a position to influence or control the Participant's appointment, employment, promotion or advancement within the agency.

(g) *Length of Appointments.* Except as provided in subpart B, Recent Graduate and PMF appointments under this authority may not exceed 2 years plus any agency-approved extension of up to 120 days.

(h) *Terminations.* An agency may terminate a Pathways Participant for reasons including misconduct, poor performance, or suitability under the provisions of this chapter.

(i) *Performance and progress evaluation.* Each Participant must be placed on a performance plan, as prescribed by part 430 of this chapter or other applicable law or regulation, establishing performance elements and standards that are directly related to acquiring and demonstrating the various leadership, technical, and/or general competencies expected of the Participant, as well as the elements and standards established for the duties assigned.

(j) *Compensation.* The rules for setting pay upon the initial appointment of a Participant are governed by the pay administration rules of the pay system or pay plan of the Participant's position under the Pathways program. In determining the Participant's compensation, agencies may also use any applicable pay flexibilities available under that pay system or pay plan (e.g., recruitment, relocation, and retention incentives under part 575 of this chapter; student loan repayments under part 537; and, for General Schedule positions, special rates under part 530, subpart C, and the superior qualifications and special needs pay setting authority and the maximum payable rate rule under part 531, subpart B).

### **§362.106 Participant Agreement.**

Agencies must execute a written Participant Agreement with each Pathways Participant that clearly identifies expectations, including but not limited to:

- (a) A general description of duties;
- (b) Work schedules;
- (c) The length of the appointment and termination date;
- (d) Mentorship opportunities;
- (e) Training requirements as applicable;
- (f) Evaluation procedures that will be used for the Participant;
- (g) Requirements for continuation and successful completion of the Program; and
- (h) Minimum eligibility requirements for noncompetitive conversion to term or permanent competitive service employment according to the requirements of the applicable Pathways Program.

### **§362.107 Conversion to the competitive service.**

(a) Subject to any limits on conversion imposed by the Director, and in accordance with the provisions of each Pathways Program, an agency may noncompetitively convert an eligible Pathways Participant to a term or permanent competitive service position.

(b) A Pathways Participant who is noncompetitively converted to a competitive service term appointment may be subsequently converted noncompetitively to a permanent competitive service position.

(c) *Noncompetitive conversion.* (1) An Intern may be converted to a position within the employing agency or any other agency within the Federal Government.

(2) A Recent Graduate or Presidential Management Fellow may be converted within the employing agency. Agencies may not convert Recent Graduates or Presidential Management Fellows from other agencies.

(d) The provisions of the career transition assistance programs in subparts B, F and G of part 330 of this chapter do not apply to conversions made under this part.

(e) Time spent serving as a Pathways Participant counts towards career tenure when the individual is noncompetitively converted to a permanent position in the competitive service upon completion of the Program, with or without an intervening term appointment, and without a break in service of one day.

(f) Though Pathways Participants are eligible for noncompetitive conversion to the competitive service upon successful completion of their Program and any other applicable conversion requirements, service in a Pathways Program confers no right to further employment in either the competitive or excepted service. An agency wishing to convert a Pathways Participant must therefore execute the required actions to do so.

#### **§362.108 Program oversight.**

(a) The Director may establish caps on the number of Pathways Participants who may be appointed or converted in any Pathways Program within a specific agency or throughout the Federal Government.

(b) The Director may establish such caps based on agency or Government-wide use of the Pathways Programs, input from the Executive agencies, and consideration of the following:

(1) Agency MOU compliance;

(2) Agency approach to entry-level hiring;

(3) Agency engagement in sound workforce planning to ensure that an adequate number of permanent positions will be available to which Pathways Participants who successfully complete their Programs can be converted;

(4) Agency record in using the Pathways Programs as a supplement to competitive examining, rather than as a substitute for it;

(5) Agency record of publicizing their positions in the Pathways Programs and recruiting and selecting from a broad array of sources; and

(6) Any other information the Director deems relevant.

(c) In the event the Director determines that any caps would be appropriate, OPM will publish notice of such caps in a manner chosen by the Director.

#### **§362.109 Reporting requirements.**

Agencies must provide information requested by OPM regarding workforce planning strategies that includes:

(a) Information on the entry-level occupations targeted for filling positions under this part in the coming year;



(b) The percentage of overall hiring expected in the coming year under the Internship, Recent Graduates, and Presidential Management Fellows Programs; and

(c) For the previous year:

(1) The number of individuals initially appointed under each Pathways Program;

(2) The percentage of the agency's overall hires made from each Pathways Program;

(3) The number of Pathways Participants, per Program, converted to the competitive service; and

(4) The number of Pathways Participants, per Program, who were separated.

### **§362.110 Transition.**

OPM will provide written guidance for the orderly transition of employees currently appointed as students under the Student Educational Employment Program and current PMFs to the applicable Pathways Program and may revise that guidance as necessary.

## **Subpart D – Presidential Management Fellows Program**

### **§362.401 Definitions.**

For purposes of this subpart:

*Agency PMF Coordinator* is an individual, at the appropriate agency component level, who coordinates the placement, development, and other Program-related activities of PMFs appointed in his or her agency. The agency Pathways Programs Officer may also serve as the PMF Coordinator.

*Executive Resources Board (ERB)* has the same meaning as specified in §317.501(a) of this section; in those agencies that are not required to have an ERB pursuant to that section, it means the senior agency official or officials who have been given responsibility for executive resources management and oversight by the agency head.

*Presidential Management Fellow (PMF) or Fellow* is an individual appointed, at the GS-9, GS-11, or GS-12 level (or equivalent under a non-GS pay and classification system such as the Federal Wage System), in the excepted service under §213.3402(c) of this chapter.

### **§362.402 Program administration.**

(a) The Director may determine the number of Fellows who may be appointed during any given year. This determination will be based on input from the Chief Human Capital Officers Council, as well as input from agencies not represented on the Council.

(b) Thereafter, subject to the provisions and requirements of this chapter, an agency may appoint individuals selected by the Director as Fellows finalists according to its short-, medium-, and long-term senior leadership and related (senior policy, professional, technical, and equivalent) recruitment, development, and succession requirements.

(c) The Director will establish the qualification requirements for evaluating applicants for the PMF Program.

(d) An agency that hires Fellows in field locations outside the Washington, DC, Metropolitan Area may:

(1) In advance of making the appointment, discuss whether the finalist wants to do a developmental rotation to agency headquarters and, if so, make a commitment to allow and fund such a rotation, to the maximum extent practicable, in accordance with §362.405(b) of this part; and

(2) Promote interaction among regional Fellows with the agency Federal Executive Board (FEB) and permit Fellows to attend FEB-sanctioned activities in that region.

#### **§362.403 Announcement, eligibility, and selection.**

(a) OPM will announce the opportunity to apply for the PMF Program and conduct a competition for the selection of finalists as set forth in this section.

(b) A Presidential Management Fellow is an individual who, within the previous 2 years, completed an advanced degree from a qualifying educational institution.

(c) An individual may apply for the PMF Program if:

(1) The individual has obtained an advanced degree within the 2-year period preceding the Program announcement described in paragraph (a) of this section, or

(2) The individual is still a student attending a qualifying educational institution, as defined in paragraph (2)(iii) of the definition of *Qualifying educational institution* in §362.102, and he or she expects to complete a qualifying advanced degree by August 31 of the academic year in which the competition is held.

(d) An individual may apply for the PMF Program more than once as long as he or she meets the eligibility criteria. However, if an individual becomes a finalist and subsequently applies for the Program during the next open announcement, the individual will forfeit his or her status as a finalist.

(e) OPM will select Fellow finalists based on an OPM evaluation of each candidate's experience and accomplishments according to his or her application and the results of a rigorous structured assessment process.

(f) OPM will publish and provide participating agencies the Fellow finalists list for appointment consideration.

#### **§362.404 Appointment and extension.**

(a) *Appointments.* (1) An agency may make 2-year appointments to the PMF Program, pursuant to a Pathways MOU executed with the OPM, under Schedule D of the excepted service in accordance with part 302 of this chapter.

(2) An agency must appoint a PMF using the excepted service appointing authority provided by §213.3402(c) of this chapter.

(3) OPM will establish an eligibility period during which agencies may appoint Fellow finalists.

(b) *Extension.* An agency may extend a Fellow's appointment for up to 120 days to cover rare or unusual circumstances or situations. The agency's Pathways MOU must identify the criteria for approving

extensions.

(c) *Grade.* An agency may appoint a Fellow at the GS-9, GS-11, or GS-12 level or equivalent depending on his or her qualifications.

(d) *Trial period.* The duration of the PMF appointment in the excepted service is a trial period.

#### **§362.405 Development, evaluation, promotion, and certification.**

(a) *Individual Development Plans.* An agency must approve, within 45 days, an Individual Development Plan (IDP) for each of its Fellows that sets forth the specific developmental activities that are mutually agreed upon by each Fellow and his or her supervisor. The IDP must be developed in consultation with the Agency PMF Coordinator and/or the mentor assigned to the Fellow under paragraph (b)(3) of this section.

(b) *Required developmental activities.* (1) OPM will provide an orientation program for each class or cohort of Fellows and will provide information on available training opportunities known to it.

(2) The agency must provide each Fellow a minimum of 80 hours of formal interactive training per year that addresses the competencies outlined in the IDP. Mandatory annual training, such as information security and ethics training, does not count towards the 80-hour requirement.

(3) Within the first 90 days of a Fellow's appointment, the agency must assign the Fellow a mentor, who is a managerial employee outside the Fellow's chain of command.

(4) The agency must provide each Fellow with at least one rotational or developmental assignment with full-time management and/or technical responsibilities consistent with the Fellow's IDP. With respect to this requirement:

(i) Each Fellow must receive at least one developmental assignment of 4 to 6 months in duration, with management and/or technical responsibilities consistent with the Fellow's IDP. As an alternative, a Fellow may choose to participate in an agency-wide initiative or other Presidential or Administration initiative that will provide the Fellow with the experience he or she would have gained through the 4 to 6-month developmental assignment; and

(ii) The developmental assignment may be within the Fellow's organization, in another component of the agency, or in another Federal agency.

(5) The Fellow may receive other short-term rotational assignments of 1 to 6 months in duration, at the agency's discretion.

(6) Upon the request of OPM, the appointing agency must make Fellows available to assist in the assessment process for subsequent PMF classes. Any interactive training provided to a Fellow in connection with assisting OPM in the assessment process may be counted toward the minimum 80-hour training requirement in paragraph (b)(2) of this section.

(c) *Promotion.* An agency may promote any Fellow who meets the qualification requirements for the position. This provision does not confer entitlement to promotion.

(d) *Certification of completion.* (1) Upon completion of the Program, the agency's ERB must evaluate each Fellow and determine whether it can certify in writing that the Fellow met all of the requirements of the Program, including the performance and developmental expectations set forth in the individual's performance plan and IDP. The ERB may consult the Fellow's mentor in reaching its

determination.

(2) The ERB must notify the Fellow of its decision regarding certification of successful completion.

(3) ERB certifications must be forwarded to OPM.

(4)(i) If the ERB decides not to certify a Fellow, the Fellow may request reconsideration of that determination by the Director. Such reconsideration must be requested in writing, with appropriate documentation and justification, within 15 calendar days of the date of the agency's decision. The Director's decision on reconsideration is not subject to appeal.

(ii) The Fellow may continue in the Program pending the outcome of his or her request for reconsideration. The agency must continue to provide appropriate developmental activities during this period.

#### **§362.406 Movement between agencies.**

(a) At any time during his or her appointment in the Program, a Fellow may move to another agency covered by this part, as long as the agency meets all the requirements for participating in the PMF Program. To move from one agency to another during the Program, the Fellow must separate from the current agency. The new employing agency must appoint the Participant without a break in service.

(b) The Fellow does not begin a new Program period upon appointment by the new employing agency. Because there is no break in service, time served under the previous Program appointment will apply towards the completion of the Program with the new employing agency.

(c) An agency must notify OPM when appointing a Fellow currently appointed in another agency.

(d) If the move occurs within the first 6 months of the Fellow's appointment, the original appointing agency may request reimbursement of one-quarter of the placement fee from the new appointing agency.

#### **§362.407 Withdrawal and readmission.**

(a) *Withdrawal.* (1) A Fellow may withdraw from the Program at any time. Such withdrawal will be treated as a resignation from the Federal service; however, any obligations established upon admission and appointment (for example, as a result of accepting a recruitment incentive under part 575 of this chapter) still apply.

(2) A Fellow who held a permanent appointment in the competitive service in an agency immediately before entering the Program, and who withdraws from the Program for reasons that are not related to misconduct, poor performance, or suitability, may, at the employing agency's discretion, be placed in a permanent competitive service position, as appropriate, in that agency. The employing agency's determination in this regard is not subject to appeal.

(3) An agency must notify OPM when a Fellow withdraws from the Program.

(b) *Readmission.* (1) If a Fellow withdraws from the Program for reasons that are related to misconduct, poor performance, or suitability, as determined by the agency, he or she will not be readmitted to the Program at any time.

(2) If a Fellow withdraws from the Program for reasons that are not related to misconduct, poor performance, or suitability, he or she may petition the employing original agency for readmission and reappointment to the Program. Such a petition must be in writing and include appropriate justification. The

agency may approve or deny the request for readmission. An agency must submit written notification of approved readmission requests to OPM. The individual's status in the Program upon readmission and reappointment must be addressed as part of the agency's submission. The Director may overrule the agency's decision to readmit and reappoint, and the Director's decision is not subject to appeal.

**§362.408 Termination and reduction in force.**

(a) *Termination.* (1) An agency may terminate a Fellow for reasons related to misconduct, poor performance, or suitability.

(2) As a condition of employment, a Fellow's appointment expires at the end of the 2-year Program period, plus any agency-approved extension, unless the Participant is selected for noncompetitive conversion. If an agency does not convert a Fellow at the end of the Program, as provided in §362.409 of this part, or extend the individual's initial appointment under §362.404, the appointment expires when certification for Program completion is denied or when the Director denies the agency's request for an extension.

(3) The agency must provide written notification to OPM when a Fellow is terminated for any reason.

(b) *Reduction in force.* Fellows are in the excepted service Tenure Group II for purposes of §351.502 of this chapter.

**§362.409 Conversion to the competitive service.**

(a) A Fellow must complete the Program within the time limits prescribed in §362.404 of this part, including any agency-approved extension. At the conclusion of that period, the Fellow may be converted, as provided in paragraph (b) of this section.

(b) An agency may convert, without a break in service, an ERB-certified Fellow to a competitive service term or permanent appointment.

## Appendix C: PMF Supervisor Checklist

 <p><b>PMF</b> PRESIDENTIAL MANAGEMENT FELLOWS PROGRAM U.S. OFFICE OF PERSONNEL MANAGEMENT</p>	<h1>PMF Supervisor Checklist</h1>
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The following checklist is a tool for PMF Supervisors to use in supporting their Fellow and completing the PMF Program requirements at their agency and may not be all inclusive. Supervisors may want to modify this checklist to fit their needs and any agency-specific requirements. This checklist can be found under the [Agencies\Resources](#) section on the PMF website at <https://www.pmf.gov>.

### Recruiting for a Fellow:

<input checked="" type="checkbox"/> :	ACTION:
	Work with Agency PMF Coordinator and HR staff to identify and advertise PMF positions
	Coordinate with Agency PMF Coordinator and HR staff to ensure that position descriptions are properly classified and completed for the new positions
	Work with Agency PMF Coordinator and HR staff to prepare for the hiring fair (see resources posted on the “Agencies\Find Candidates\Hiring Event” webpage at <a href="https://www.pmf.gov/agencies/find-candidates/hiring-event/">https://www.pmf.gov/agencies/find-candidates/hiring-event/</a> )
	Work with HR staff, Agency PMF Coordinator, and Pathways Programs Officer to participate in a hiring fair for PMF hiring at your agency
	Coordinate with Agency PMF Coordinator to gain access to the PMF TMS to search and review Finalists, including their resume and transcripts
	Coordinate with Agency PMF Coordinator and HR staff to schedule and carry out interviews with Finalists

### Prior to Fellow’s First Day:

<input checked="" type="checkbox"/> :	ACTION:
	Work with Agency PMF Coordinator to reimburse the PMF Program Office with the one-time placement fee
	Prepare for Fellow’s onboarding. For example, address performance plan, position description, any agency-specific policies and forms, fare subsidy, workstation, desk phone, mobile phone, supplies, travel card, IT security awareness training, agency orientation, etc.

### Fellow’s First Day:

<input checked="" type="checkbox"/> :	ACTION:
	Meet and greet with the Fellow on first day and introduce to coworkers
	Ensure Fellow has met the Agency PMF Coordinator
	Ensure a Pathways Participant Agreement (specific to the PMF Program, see <a href="#">Appendix E</a> ) has been completed
	Continue agency’s onboarding process

**Fellow's First 45 Days:**

<input checked="" type="checkbox"/>	<b>ACTION:</b>
	Develop an Individual Development Plan (IDP) with the Fellow
	Establish a performance plan and annual evaluation
	Assist with the assignment of a Mentor (a managerial employee outside the Fellow's chain of command); inform Agency PMF Coordinator of Mentor's contact information
	Engage with Fellow and Agency PMF Coordinator to ensure the <i>PMF Participant Handbook</i> has been completed; sign Acknowledgement Receipt at end of Handbook

**Throughout Fellow's First Year:**

<input checked="" type="checkbox"/>	<b>ACTION:</b>
	Provide Fellow with at least one 4 – 6-month developmental assignment
	If applicable, support the Fellow in completing any optional short-term rotations
	Provide at least 80 hours of formal interactive training
	Provide a reasonable amount of time during work hours for other PMF activities
	Support the Fellow's enrollment and full participation in Year 1 of the PMF LDP (Leadership Development Program) and any associated activities
	Conduct performance appraisal for first year and make any adjustments to IDP

**Throughout Fellow's Second Year:**

<input checked="" type="checkbox"/>	<b>ACTION:</b>
	Provide Fellow with at least one 4 – 6-month developmental assignment (if not done already)
	If applicable, support the Fellow in completing any optional short-term rotations
	Provide at least 80 hours of formal interactive training
	Provide a reasonable amount of time during work hours for other PMF activities
	Support the Fellow's enrollment and full participation in Year 2 of the PMF LDP (Leadership Development Program) and any associated activities
	Conduct performance appraisal for first year

**90 Days Before Fellow's 2-Year Anniversary:**

<input checked="" type="checkbox"/>	<b>ACTION:</b>
	Start preparing for the ERB certification process
	Is the Fellow's IDP current?
	Is the Fellow on target to complete all program, and any agency-specific, requirements?
	Is a fellowship extension needed? If so, check with Agency PMF Coordinator
	Does the Fellow's agency/organization intend to convert to a term or permanent position?
	Check with Agency PMF Coordinator on process for preparing for the certification process
	Complete Fellow's performance appraisal; which is factored into the certification process

	Submit certification package and recommendation for conversion
	Work with HR Office to process conversion Personnel Action
	Will Fellow be due a promotion upon conversion? If so, work with HR Office for Personnel Action.
	Upon a Fellow's favorable certification and recorded in the PMF TMS, the Fellow becomes a member of the PMF Alumni Community.

**Fellow's Conversion:**

<input checked="" type="checkbox"/>	<b>ACTION:</b>
	Congratulate Fellow
	Follow-up with Fellow and HR Office to ensure correct Personnel Actions were processed
	Support the Fellow's participation in their Class Graduation Ceremony
	Upon a Fellow's conversion, complete the PMF Program's Exit Survey (if applicable)



**Appendix D: PMF HR Staff Checklist**

	<h2>PMF HR Staff Checklist</h2>
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The following checklist is a tool for all HR (Human Resources) staff to use in administering the PMF Program requirements at their agency and may not be all inclusive. HR staff may want to modify this checklist to fit their needs. This checklist can be found under the [Agencies \Resources](#) section on the PMF website at <https://www.pmf.gov>.

**Recruiting for a Fellow:**

<input checked="" type="checkbox"/> :	ACTION:
	Work with Agency PMF Coordinator and Supervisor to identify and advertise PMF positions
	Coordinate with Agency PMF Coordinator and Supervisor to ensure that position descriptions are properly classified and completed for the new positions
	Work with Agency PMF Coordinator and Supervisor to prepare for the hiring fair (see resources posted on the “Agencies\Find Candidates\Hiring Event” webpage at <a href="https://www.pmf.gov/agencies/find-candidates/hiring-event/">https://www.pmf.gov/agencies/find-candidates/hiring-event/</a> )
	Work with Supervisor, Agency PMF Coordinator, and Pathways Programs Officer to participate in a hiring fair for PMF hiring at your agency
	Coordinate with Agency PMF Coordinator to gain access to the PMF TMS to post PMF appointment opportunities (job opportunity announcements), manage applicants, and record initial appointments
	Coordinate with Agency PMF Coordinator to gain access to the PMF TMS to search and review Finalists, including their resume and transcripts
	Coordinate with Agency PMF Coordinator and Supervisor to schedule and carry out interviews with Finalists

**Prior to Fellow’s First Day:**

<input checked="" type="checkbox"/> :	ACTION:
	Make final, official appointment offer
	Schedule orientation
	Coordinate with Fellow’s Supervisor of orientation and onboarding
	Arrange for Fellow to obtain PIV card

**Fellow’s First Day:**

<input checked="" type="checkbox"/> :	ACTION:
	Meet and greet the Fellow
	Conduct Fellow’s orientation and supply with onboarding paperwork
	Ensure a Pathways PMF Program Participant Agreement has been completed
	Connect the Fellow to their Supervisor

**Throughout Fellow's 2-Year Appointment:**

<input checked="" type="checkbox"/>	<b>ACTION:</b>
	Inform Fellow's Supervisor if and when Fellow is eligible for a step increase or promotion
	Process any requests for Personnel Actions (e.g., promotion, conversion)
	Ensure Fellow obtained a favorable ERB certification for the noncompetitive conversion to a term or permanent position at the conclusion of fellowship

## Appendix E: PMF Form 1301, PMF Participant Agreement

Below is an image of the *Pathways Participant Agreement* specific to the PMF Program. The PMF Program Office created PMF Form 1301 as an alternative form agencies may use and can be found under the “Agencies\Resources” (<https://www.pmf.gov/agencies/resources/>) section on the PMF website. NOTE: This agreement is required per the Pathways Programs regulations and also applies to any PMF reappointments.



Your Agency/Sub-Agency Name Here

Presidential Management Fellows (PMF)  
Program Participant Agreement

Your Agency Logo Here

The PMF Program is under the auspice of the [Pathways Programs](#). Executive Order 13562 of December 27, 2010, created the Pathways Programs, consisting of government-wide student programs. Regulations were issued by the U.S. Office of Personnel Management (OPM) on May 11, 2012. One of the regulatory requirements is for a Pathways participant (including Finalists and Fellows) to enter into a Participant Agreement with the hiring agency; this includes any PMF reappointing from one agency to another.

Section §362.106 of title 5, Code of Federal Regulations, states: Agencies must execute a written Participant Agreement with each Pathways participant that clearly identifies expectations. General PMF Program requirements are identified below; however, the appointing agency should identify any other additional requirements and work assignments below. The Fellow's work assignments should be consistent with their performance plan and position description. All training and development should be captured on the Fellow's Individual Development Plan (IDP). Upon appointment, the Fellow should work with their Supervisor on identifying assignment of a Mentor. This agreement fulfills the regulatory requirements and may be tailored to fit the hiring agency's requirements. The PMF Program Office created this optional form that agencies may use, or they can produce and use their own form. Agencies in the excepted service or outside of the Executive Branch must have an approved Memorandum of Agreement (MOA) with OPM and may need to tailor their Participant Agreement accordingly.

Supplemental information should be discussed with the Fellow to include: copy of Position Description, Performance Plan, and draft IDP. Supervisors should consult with the designated Agency PMF Coordinator or Pathways Programs Officer for any questions. Additional PMF Program information can be found on the PMF website at [www.pmf.gov](http://www.pmf.gov).

Appointee's Full Name:			
Appointing Agency/Sub-Agency:			
<b>Appointment Date(s):</b>		<b>Work Schedule:</b> Include any telework options.	
Entrance on Duty (EOD) Start Date (mm/dd/yyyy):			
Program Not to Exceed (NTE) Date (mm/dd/yyyy):			
Position Title:		Position Series, Grade (e.g., GS-0343-09):	
<b>Fellow's Responsibilities (Duties):</b>		<b>Supervisor/Hiring Official Responsibilities:</b>	
<ol style="list-style-type: none"> <li>Adhere to the Presidential Management Fellows Program requirements</li> <li>Adhere to an established work schedule</li> <li>Perform successfully, the assigned duties listed in your Position Description</li> <li>Observe all workplace rules and agency policies</li> <li>Select a Mentor within 90 days of your date of hire</li> <li>Create an Individual Development Plan (IDP) with assistance from your Supervisor and Coordinator/Mentor               <ol style="list-style-type: none"> <li>IDP must include at least 80 hours of formal interactive training</li> <li>IDP must be completed within 45 days of your date of hire</li> <li>IDP must be reviewed each year</li> </ol> </li> <li>Participate in agency training classes or programs</li> <li>Complete a 4-6 month developmental assignment</li> <li>Attend regularly scheduled meetings with Mentor</li> <li>Inform PMF Program Office of any changes in contact information (both personal and work)</li> <li>Follow any other agency requirements outlined on next page, if applicable.</li> </ol>		<ol style="list-style-type: none"> <li>Complete Participant Agreement with each Fellow</li> <li>Provide information on the Presidential Management Fellows Program requirements</li> <li>Establish a mutually agreeable work schedule</li> <li>Identify performance goals and evaluation criteria</li> <li>Assist Fellow with the selection of a Mentor within 90 days of date of hire               <ol style="list-style-type: none"> <li>Mentor must be at the managerial level outside of the Fellow's chain of command</li> </ol> </li> <li>Help Fellow create an IDP which must be completed 45 days from date of hire</li> <li>Provide information on any special training requirements</li> <li>Ensure Fellow participates in at least 80 hours of formal interactive training per year, for a total of 160 hours</li> <li>Provide Fellow a 4-6 month developmental assignment               <ol style="list-style-type: none"> <li>Optional for short-term rotational opportunities</li> </ol> </li> <li>Supervise daily work activities</li> <li>Identify performance goals and evaluation criteria</li> <li>Identify any other agency requirements outlined on next page, if applicable.</li> </ol>	

PMF Form 1301


AS OF: 08/2017

<b>Additional PMF Program Requirements/Duties:</b> Provide additional agency requirements, if any.	
<b>Work Assignments:</b> Provide a brief description of duties or attach a copy of the Fellow's Position Description (PD).	
<b>Mentorship Opportunities:</b> Identify procedures for assignment of a Mentor below.	
<b>Minimum Eligibility Requirements for Conversion to a Term or Permanent Position:</b> In addition to the minimum requirements below, the appointing agency should enter any additional requirements. Conversion is not guaranteed.	
<b>Minimum Requirements:</b>	<b>Agency Requirements (if any):</b>
<ol style="list-style-type: none"> <li>1. U.S. Citizenship</li> <li>2. Successfully completed all PMF Program requirements</li> <li>3. Meet the OPM Qualification Standards for the position to which the Fellow may be converted</li> <li>4. Maintain acceptable performance under the agency's approved performance management system</li> <li>5. Obtain ERB, or equivalent, certification prior to conversion</li> </ol>	
<b>Recruitment Incentives (Optional):</b> Identify any incentives and procedures below.	
<b>Other Program/Appointment Requirements (if any):</b>	
<b>Signatures:</b> The Fellow acknowledges that as a condition of employment, a Fellow's appointment expires at the end of the 2-year fellowship, plus any agency-approved extension, unless the Fellow is certified for completing PMF Program requirements and selected for noncompetitive conversion to a term or permanent position, per 5 CFR 362..	
Fellow:	
Print Name	Signature
Supervisor/Hiring Official:	
Print Name	Signature
HR Approving Official:	
Print Name	Signature

A signed copy should be provided to the Fellow, Supervisor, Agency PMF Coordinator, HR Office, and Mentor. A copy of this form can be found under the "Agencies/Resources" section on the PMF website at [www.pmf.gov](http://www.pmf.gov). This optional form is subject to change and appointing agencies may customize to fit their program requirements.

## Appendix F: OPM Form 1308, PMF Mentoring Agreement

Below is a copy of the OPM Form 1308, *PMF Mentoring Agreement*.

 <p><b>PMF</b> PRESIDENTIAL MANAGEMENT FELLOWS PROGRAM U.S. OFFICE OF PERSONNEL MANAGEMENT</p>	<p><b>Presidential Management Fellow (PMF) Mentoring Agreement</b></p>
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### PRIVACY ACT STATEMENT:

**Authority:** The Pathways Programs regulations (5 CFR 362.405) requires (1) within 90 days of a Fellow's appointment, the agency must assign the Fellow a Mentor, who is a managerial employee outside the Fellow's chain of command (5 CFR 362.405); (2) the Mentor may be consulted in the development of the Fellow's Individual Development Plan (IDP) (5 CFR 362.405(a)); and (3) the Mentor may be consulted during the Fellow's certification process (5 CFR 362.405(d)(1)). The U.S. Office of Personnel Management (OPM) published a *Pathways Programs Handbook* ("Handbook") in August 2016 (which can be found under the "Agencies/Resources" section on the PMF website at [www.pmf.gov](http://www.pmf.gov)). The Handbook makes the following references to Mentors in the PMF Program: (1) the agency's Pathways Programs Officers and Agency PMF Coordinators are responsible for ensuring their Fellows are assigned a Mentor, (2) the Pathways Participant Agreement emphasizes the assignment of a Mentor within 90 days of a Fellow's appointment (5 CFR 362.106), (3) the purpose and role of Mentors, and (4) Mentors for Fellows must be current managerial employees inside of the participant's agency.

**Purpose:** This Mentoring Agreement is used to set forth the expectations and relationship between a Fellow and his/her Mentor. Mentors should serve as advisors and trusted colleagues, not as supervisors. A formal mentoring process affords Fellows with professional development and guidance and capitalizes on the experiences of seasoned employees who are committed to developing a highly-skilled and high-performing workforce. This optional OPM Form 1308 can be found under the "Current PMFs/Resources" and "Agencies/Resources" sections on the PMF website at [www.pmf.gov](http://www.pmf.gov).

**Routine Uses:** See below for the roles and expectations for all parties. Having access to Mentors does not guarantee a Fellow's promotion. It does, however, afford direction in their careers to new and/or junior employees by providing them with an opportunity to benefit from their Mentors' knowledge, talent, and guidance. The agreement takes effect upon all signatures. Fellows participating in any training and developmental activities should adjust their schedules and engage with their Mentors accordingly.

**Disclosure:** Use of this agreement and furnishing this information is optional; however, agencies may have their own equivalent to use. This agreement ensures all parties are familiar with the roles and expectations outlined. Agencies may have their own policies and procedures regarding the assignment of Mentors. If there any questions or changes to the agreement, please contact the Agency PMF Coordinator.

**INSTRUCTIONS:** Pursuant to this agreement, the Fellow must have signed a Pathways Participant Agreement, which clearly identifies expectations of all parties and what is expected of a Fellow in order to achieve possible noncompetitive conversion at the end of their fellowship (5 CFR 362.106). Within 90 days of a Fellow's onboarding, the Fellow's Supervisor is to assist their Fellow with the selection of a Mentor, which must be at the managerial level outside of the Fellow's chain of command and within the Fellow's agency. All parties (e.g., the Fellow, Supervisor, and Mentor) may utilize this form and submit the final to the Agency PMF Coordinator for recordkeeping. The Fellow should retain a copy for their records and possible inclusion as part of the certification process upon completing the fellowship.

Fellow's Name (first and last):			Fellow's Class Year (yyyy):	
Fellow's Work Phone Number (### ### ####):			Fellow's Work Email Address:	
Fellow's Agency/Sub-Agency/Organization:				
Fellow's Pay Plan/Grade and Position Title (e.g., GS-0343-09, Program Analyst):				
Fellowship Entry on Duty Start Date (mm/dd/yyyy):			Fellowship Anticipated to End (mm/dd/yyyy):	
Fellow's Supervisor's Name (first and last):			Supervisor's Title:	
Supervisor's Work Email Address:			Supervisor's Phone Number (### ### ####):	
Agency PMF Coordinator (e.g., Name, Email Address, and Phone Number):				
Mentor's Name and Title:				
Mentor's Work Email Address:			Mentor's Phone Number (### ### ####):	

**ROLES AND EXPECTATIONS:**

The Mentor agrees to the following:

1. Review the PMF Participant Agreement with the Fellow to ensure his/her understanding of the expectations and possible noncompetitive conversion at the end of their fellowship.
2. Consult the Fellow and/or Supervisor in the development of the Fellow's Individual Development Plan (IDP).
3. Meet with the Fellow at an agreed upon frequency and method throughout the fellowship.
4. If requested and appropriate, consult with the agency's Executive Resources Board (ERB), or equivalent, to assist in rendering the decision on whether or not the Fellow has successfully completed all program and agency requirements.
5. Inform all parties (e.g., the Fellow, Supervisor, and Agency PMF Coordinator) when unable to continue their mentoring of the Fellow (e.g., due to new position, reorganization, retirement, etc.).







The Fellow agrees to the following:

1. To work with their Supervisor in pursuit of being assigned a Mentor.
2. To be respectful of the Mentor's position and advice.
3. Support the Mentor's consultation with the Fellow's IDP and certification process.
4. Inform their Supervisor of the agreed upon frequency and method in meeting with their Mentor.
5. Inform their Supervisor when their Mentor is no longer available or of any other changes.

The Supervisor agrees to the following:

1. To assist the Fellow in their assignment of a Mentor.
2. Support the Fellow meeting with and consulting with their Mentor throughout their fellowship.
3. Consult with the Mentor, when appropriate and applicable, on development of the Fellow's IDP.
4. Seek feedback, as appropriate, from the Mentor when conducting the Fellow's performance appraisal.

**SIGNATURES:** Electronic signatures are preferred.

<b>PMF's Signature:</b> 	<b>Date:</b> 
<b>PMF Supervisor's Signature:</b> 	<b>Date:</b> 
<b>Mentor's Signature:</b> 	<b>Date:</b> 

**CLEAR**

## **Appendix G: OPM Form 1302, PMF Individual Development Plan (IDP)**

Below is an image of the *OPM Form 1302*. This form is optional for participating agencies to use and can be found under the “Agencies\Resources” and “Current PMFs\Resources” sections on the PMF website at <https://www.pmf.gov>. Agencies may have alternative formats.

### **Presidential Management Fellows (PMF) Individual Development Plan (IDP)**

#### **PRIVACY ACT STATEMENT:**

**Authority:** 5 CFR 362.405 requires all Presidential Management Fellows to maintain an Individual Development Plan during their two year appointment.

**Purpose:** The form is used to set forth the specific developmental activities designed to impart the competencies of the occupation or functional discipline in which a Fellow is likely to be placed. The form is designed to capture a Fellow's training and development over a two year period.

**Routine Uses:** The information will be used by the Fellow, his/her supervisor, and appropriate agency personnel to document and track the Fellow's training and development. In addition, the form is to be included in a Fellow's certification package when presented to the agency's Executive Resources Board, or equivalent, as part of the PMF Program's requirements for completion of the fellowship.

**Disclosure:** Use of this form and furnishing this information is optional; however, Fellows are required to prepare and maintain an Individual Development Plan. Failure to furnish this information may delay or prevent the completion of the fellowship, which may prevent continued employment or conversion to a term or permanent position. Agencies may use alternative formats.

#### **INSTRUCTIONS FOR PREPARING THE PMF IDP:**

This IDP form is based on the Pathways Programs regulations, specifically pertaining to the PMF Program. 5 CFR 362.405 requires that an agency must approve, within 45 days of a PMF's start date, an Individual Development Plan (IDP) for each of its Fellows that sets forth the specific developmental activities that are mutually agreed upon by each Fellow and his or her supervisor. The IDP must be developed in consultation with the Agency PMF Coordinator and/or the Mentor assigned to the Fellow. The agency's Executive Resources Board (ERB), or its equivalent, must certify whether Fellows have successfully completed the Program as outlined in 5 CFR 362.405. The ERB can establish its own procedures for conducting the review, but must consider whether: (1) the Fellow has met all of the requirements of the Program, as outlined in the Program regulations found at 5 CFR 362, (2) has demonstrated successful performance according to the individual's performance plan, and (3) has achieved the developmental expectations set forth in the IDP.

Both the Fellow and supervisor should review the IDP periodically and make adjustments as needed. The IDP should be consistent with the Fellow's Pathways Participant Agreement and Position Description. Appointing agency may have additional requirements; consult with the Agency PMF Coordinator for any details. A completed copy must be included in the ERB certification package. Attach additional sheets if necessary. Fellows may need to collect and save any certificates of completion, or equivalent, as proof of training. Use of this form is optional; agencies may use alternative formats.

PART I – Completed by Fellow. Self-explanatory.

PART II – Completed by Fellow and supervisor. Self-explanatory.

PART III – Completed by Fellow. Use this section to track the Fellow's training and learning activities during their two year fellowship. Requirements in 5 CFR 362.405(b) states each Fellow must acquire at least 80 hours of interactive training each year, for a total of 160 hours during fellowship. Activities should prepare and qualify the Fellow for the target position at the end of their fellowship. Copies of any certificates of completion, or equivalent, should be retained as proof of completion.

PART IV – Completed by Fellow and supervisor. Requirements in 5 CFR 362.405(b)(4) state each Fellow must receive at least one developmental assignment of 4 to 6 months in duration, with management and/or technical responsibilities, either within the Fellow's organization, agency or to another Federal Agency.

PART V – Completed by Fellow and supervisor. Fellows are encouraged to serve optional assignments and/or rotations during their fellowship. There are no PMF regulatory limits to the number of such activities during the fellowship.

PART VI – Review of IDP and collection of signatures. Completed IDP should be included in Fellow's ERB certification package for conversion.

**PART I – TO BE COMPLETED BY PRESIDENTIAL MANAGEMENT FELLOW (FELLOW)**

PMF's Name (Last, First, MI): \_\_\_\_\_ PMF Class Year: \_\_\_\_\_ Initial Plan Date (mm/dd/yyyy): \_\_\_\_\_

PMF's Entry On Duty (EOD) Start Date (mm/dd/yyyy): \_\_\_\_\_ PMF's Expected Date of Program Completion (mm/dd/yyyy): \_\_\_\_\_

Agency: \_\_\_\_\_ Sub-Agency/Office: \_\_\_\_\_ Work Phone Number (###-###-####): \_\_\_\_\_

Current Title/Series/Grade, or Equivalent (e.g., Program Analyst, GS-0343-09): \_\_\_\_\_ Work Email Address: \_\_\_\_\_

Supervisor's Name (Last, First): \_\_\_\_\_ Supervisor's Title: \_\_\_\_\_

Supervisor's Work Phone Number (###-###-####): \_\_\_\_\_ Supervisor's Work Email Address: \_\_\_\_\_

Mentor's Name (Last, First): \_\_\_\_\_ Mentor's Work Email Address: \_\_\_\_\_

Agency PMF Coordinator Name (Last, First): \_\_\_\_\_ Coordinator Work Email Address: \_\_\_\_\_

**PART II – TARGET POSITION TO BE CONVERTED INTO AT THE END OF THE 2 YEAR FELLOWSHIP**

Target Position Title/Series/Grade, or Equivalent (e.g., Program Analyst, GS-0343-13): \_\_\_\_\_

*Brief description of target position:*

*Qualifications of target position:*

*Target competencies/learning objectives for target position (e.g., competencies, technical skills, goals):*

**PART III – TRAINING AND LEARNING ACTIVITIES** (PMF Program requires at least 80 hours of formal interactive training each year of the fellowship)

**First Year:**

Activity	Competencies and/or Learning Objectives	Source	Costs:		Training Hours	Dates (mm/dd/yyyy):	
			Tuition	Travel		Planned	Completed
<b>Totals:</b>			\$0.00	\$ 0.00	0		

**Second Year:**

Activity	Competencies and/or Learning Objectives	Source	Costs:		Training Hours	Dates (mm/dd/yyyy):	
			Tuition	Travel		Planned	Completed
<b>Totals:</b>			\$0.00	\$ 0.00	0		



Specific projects that will be undertaken include:

[Empty text box for specific projects]

**PART VI – SIGNATURES**

Typed Name of Fellow (Last, First, MI)	Signature of Fellow	Date (mm/dd/yyyy)
Typed Name of Supervisor (Last, First, MI)	Signature of Supervisor	Date (mm/dd/yyyy)
<i>If Applicable:</i>		
Typed Name of Mentor	Signature of Mentor	Date (mm/dd/yyyy)
Typed Name of Agency PMF Coordinator	Signature of Agency PMF Coordinator	Date (mm/dd/yyyy)

**PART IV – DEVELOPMENTAL ASSIGNMENT**

Developmental assignment beginning on (mm/dd/yyyy) \_\_\_\_\_, ending on (mm/dd/yyyy) \_\_\_\_\_, for a total of \_\_\_\_\_ months.

Agency: \_\_\_\_\_ Sub-Agency/Office: \_\_\_\_\_

Supervisor's Name on Assignment: \_\_\_\_\_ Supervisor's Title: \_\_\_\_\_

Supervisor's Work Email Address: \_\_\_\_\_ Supervisor's Work Phone Number (###-###-####): \_\_\_\_\_

Specific skills, competencies, and/or goals that will be addressed during the developmental assignment include:

[Empty text box for developmental assignment details]

Specific projects that will be undertaken during the developmental assignment include:

[Empty text box for developmental assignment projects]

**PART V – OPTIONAL ROTATION(S)**

Rotation beginning on (mm/dd/yyyy) \_\_\_\_\_, ending on (mm/dd/yyyy) \_\_\_\_\_, for a total of \_\_\_\_\_ month(s).

Agency/Sub-Agency/Office of Rotation: \_\_\_\_\_

Supervisor's Name (for Rotation): \_\_\_\_\_ Supervisor's Work Email Address: \_\_\_\_\_

Specific skills, competencies, and/or goals that will be addressed include:

[Empty text box for optional rotation details]

## **Appendix H: Sample Rotational Memorandum of Understanding (MOU)**

Below is a *sample* Memorandum of Understanding (MOU) that may be used for Fellows who complete a rotational opportunity outside of their agency. This is only a sample and agencies should follow their internal policies and procedures for such opportunities.

This document is a *sample* Memorandum of Understanding (MOU) for Fellows and agencies to use for developmental assignments or rotations (combined as “rotations”), where applicable. The sample is meant to be a guide for creating an MOU when an agency-specific format may not be available. Additional information about PMF rotations can be found at <https://www.pmf.gov/current-pmfs/training-and-development/rotational-opportunities/>. **The MOU should be tailored to meet the needs of the specific assignment and agency policies.** Fellows should consult with their Supervisor and/or Agency PMF Coordinator for assistance.

# **S A M P L E**

## **MEMORANDUM OF UNDERSTANDING BETWEEN**

[Name of Employing Agency]

**AND**

[Name of Gaining Agency]

**REGARDING**

[Full Name of Fellow]  
**Presidential Management Fellow**

### **I. INTRODUCTION**

The **[Name of Gaining Agency]** (Gaining Agency) hereby enters into an understanding regarding the temporary rotation (Rotation) for **[Fellow’s Name]**, a Presidential Management Fellow (PMF or Fellow) employed by **[Name of Employing Agency]** (Employing Agency). The Rotation shall be made on a non-reimbursable basis, whereby the Employing Agency will continue to pay the Fellow’s salary and benefits in accordance with the provisions set forth herein. The Employing Agency will not be obligated for any additional funds during the period of the Rotation, unless expressly stated below.

### **II. AUTHORITIES**

The Gaining Agency has authority to provide a Rotation for the Fellow employed by the Employing Agency pursuant to 5 USC 3341 and in accordance with the Individual Development Plan (IDP) approved for the Fellow pursuant to 5 CFR §362.405 (for PMFs under the Pathways

Programs regulations). The Rotation must consist of full-time management and/or technical responsibilities consistent with the Fellow's IDP.

### **III. PURPOSE**

This document constitutes an agreement between the Employing Agency and the Gaining Agency. The purpose of this Memorandum of Understanding (MOU) is to provide for the assigning, tracking, and accounting of personnel on a Rotation and to set forth the roles and responsibilities of the Employing Agency, the Gaining Agency, and the Fellow.

### **IV. GENERAL INFORMATION**

**A.** The Fellow has accepted a Rotation in the [**Name of Office**] in the Gaining Agency. The office is located at: [**full address**]. The supervisor for the Fellow during the Rotation will be [**First and Last Name**].

**B.** The start date of Rotation will be [**mm/dd/yyyy**].

**C.** The end date of the Rotation will be [**mm/dd/yyyy**].

NOTE: The length of the temporary Rotation at the Gaining Agency generally should not exceed 120 days and may be renewed upon the written consent of the parties. In order for the Rotation to qualify as the Fellow's Developmental Assignment, it must be at least 4 months (120 days) in duration.

**D.** This Rotation may be extended for [**## days/weeks**] upon the written mutual consent of the Employing Agency and the Gaining Agency. The duration of the Rotation at the Gaining Agency, however, should not exceed 6 months.

**E.** The Fellow will remain on the rolls of the Employing Agency in the permanent position of record during the Rotation. The Employing Agency retains the right to affect such personnel actions as necessary and required in accordance with its personnel management policies.

**F.** Position title of record for the Fellow is: [**Position Title**].

**G.** The Grade/Band of the Fellow is: [**Grade/Band Level; e.g., GS-11 (or equivalent)**].

**H.** Duty Location of the Fellow at the Employing Agency is: [**Employing Agency Duty Location**].

**I.** Duty Location of the Fellow at the Gaining Agency is: [**Gaining Agency Duty Location**].

**J.** If a specific security clearance is required, this agreement is contingent upon the Fellow's successful adjudication and receipt of a [**Name of Clearance**]. The Gaining Agency will be responsible for the costs of obtaining the security clearance if the present clearance does not satisfy requirements.

## V. RULES, REGULATIONS, AND POLICIES

### A. PMF Regulations.

The training and development requirements for all Fellows can be found under 5 CFR §362.405, of which a copy can be found on the last page of this MOU. A full copy of the PMF Program regulations can be found under the “About Us\Policy” section on the PMF website at <https://www.pmf.gov>.

### B. RESPONSIBILITIES OF THE PARTIES [This section should be modified as necessary to meet the requirements of the Employing or Gaining Agency.]

#### A. Time and Attendance.

The Fellow’s time and attendance will be maintained by the Gaining Agency and the Employing Agency. The Gaining Agency timekeeper will report the Fellow’s time and attendance to a contact identified in section VIII. of this MOU, on a biweekly basis and will advise the Employing Agency by **[time and day]** of every pay period of the hours worked and type and amount of any leave used during that period.

The Fellow will not be permitted to perform the duties of the Rotation on Federal holidays, or to work in excess of 40 hours per week, without prior, written permission from the Fellow’s first-line supervisor at the Employing Agency. Failure to abide by this provision may constitute grounds for terminating this MOU immediately.

#### B. Fellow’s Performance Evaluation.

Upon the request by the Employing Agency, using the performance plan issued to the Fellow, the Gaining Agency will provide in writing a descriptive evaluation of the Fellow’s performance and submit it to the Employing Agency within **[##]** weeks of the end of the rotation period and, in any event, no later than **[Month Day]** of the calendar year.

#### C. The Gaining Agency agrees to perform the following responsibilities:

- Provide technical and operational support to the Fellow for all Gaining Agency activities
- Provide office space and administrative support to the Fellow while assigned to the Gaining Agency
- Provide Fellow with the following duties and tasks:
  - **[List Rotation Duties]**
- **[List Any Additional Responsibilities, as appropriate]**

#### D. The Employing Agency agrees to perform the following additional responsibilities:

- **[List Responsibilities]**

## VII. TRAVEL AND TRAINING [This section should be modified as necessary to meet the requirements of the Employing or Gaining Agency.]

- A. [Include information on how costs related to training and travel will be handled during the rotation. For example: All travel and training required by the Fellow at the Gaining Agency during the rotation will be paid by the Gaining Agency.]**

**VIII. CONTACTS**

The contacts of each party to this agreement (if applicable) are:

	<b>Name and Title</b>	<b>Phone Number</b>	<b>E-mail Address</b>	<b>Location</b>
	<b>Presidential Management Fellow</b>			
	<b>Employing Agency Supervisor</b>			
	<b>Gaining Agency Supervisor</b>			
	<b>Agency PMF Coordinator for Employing Agency</b>			
	<b>Agency PMF Coordinator for Gaining Agency</b>			
	<b>Employing Agency Timekeeper</b>			
	<b>Gaining Agency Timekeeper</b>			
	<b>[Other, as needed]</b>			

The parties agree that if there is a change regarding the information in this section, the party making the change will notify the other party in writing of such change within two business days.

**IX. PERIOD OF AGREEMENT AND MODIFICATION/TERMINATION [This section should be modified as necessary to meet the requirements of the Employing or Gaining Agency.]**

This MOU will become effective when signed by all parties. The MOU will terminate on [mm/dd/yyyy].

**NOTE:** The duration of the Rotation may be amended at any time by the mutual written consent of the parties. Any party may terminate this MOU by providing [##] days' prior written notice to the other party.

Modification of this MOU will be achieved by executing a separate, subsequent agreed upon written document containing either amendments (changing or eliminating existing provisions) or addenda (adding new provisions).

**X. OBLIGATIONS AND EXPENDITURES**

Nothing in this MOU requires the parties to obligate or expend appropriated funds.

**XI. THIRD PARTY RIGHTS**

This MOU shall not be construed to provide a private right or cause of action for or by any person or entity.

**XII. OTHER PROVISIONS [This section should be modified as necessary to meet the requirements of the Employing or Gaining Agency.]**

Should disagreement arise on the interpretation of the provisions of this MOU, or any amendments thereto, that cannot be resolved at the operating level, the area(s) of disagreement shall be stated in writing by each party and presented to the other party for consideration. If agreement on interpretation is not reached within thirty days, the parties shall forward the written presentation of the disagreement to respective higher officials for appropriate resolution.

**[The following paragraph is to be used only when the MOU is with another Federal Government partner:]**

Nothing herein is intended to conflict with current Employing Agency or Gaining Agency directives. If the terms of this MOU are inconsistent with existing directives of either of the agencies entering into this MOU, then those portions of this MOU which are determined to be inconsistent shall be invalid; the remaining terms and conditions not affected by the inconsistency, however, shall remain in full force and effect. At the first opportunity for review of the MOU, all necessary changes will be accomplished by either an amendment to this MOU or by entering into a new MOU, whichever is deemed expedient to the interest of both parties.

**XIII. SIGNATURES**

[Employing Agency Official's Name]  
[Position Title]  
[Employing Agency]

\_\_\_\_\_  
Signature

[Employing Agency Official's Name]  
Agency PMF Coordinator

\_\_\_\_\_  
Signature

[Employing Agency]

[Gaining Agency Official's Name]

[Position Title]

[Gaining Agency]

\_\_\_\_\_  
Signature

[Gaining Agency Official's Name]

Agency PMF Coordinator

[Gaining Agency]

\_\_\_\_\_  
Signature

[Fellow's Name]

[Position Title]

[Employing Agency]

\_\_\_\_\_  
Signature

**Reference:** A copy of the PMF Program regulations pertaining to a Fellow's training and development requirements appears below:

**5 CFR §362.405: Development, evaluation, promotion, and certification.**

(a) *Individual Development Plans.* An agency must approve, within 45 days, an Individual Development Plan (IDP) for each of its Fellows that sets forth the specific developmental activities that are mutually agreed upon by each Fellow and his or her supervisor. The IDP must be developed in consultation with the Agency PMF Coordinator and/or the mentor assigned to the Fellow under paragraph (b)(3) of this section.

(b) *Required developmental activities.*

(1) OPM will provide an orientation program for each class or cohort of Fellows and will provide information on available training opportunities known to it.

(2) The agency must provide each Fellow a minimum of 80 hours of formal interactive training per year that addresses the competencies outlined in the IDP. Mandatory annual training, such as information security and ethics training, does not count towards the 80-hour requirement.

(3) Within the first 90 days of a Fellow's appointment, the agency must assign the Fellow a mentor, who is a managerial employee outside the Fellow's chain of command.

(4) The agency must provide each Fellow with at least one rotational or developmental assignment with fulltime management and/or technical responsibilities consistent with the Fellow's IDP. With respect to this requirement:

(i) Each Fellow must receive at least one developmental assignment of 4 to 6 months in duration, with management and/or technical responsibilities consistent with the Fellow's IDP. As an alternative, a Fellow may choose to participate in an agency-wide initiative or other Presidential or Administration initiative that will

provide the Fellow with the experience he or she would have gained through the 4-to-6-month developmental assignment; and


(ii) The developmental assignment may be within the Fellow's organization, in another component of the agency, or in another Federal agency.

(5) The Fellow may receive other short-term rotational assignments of 1 to 6 months in duration, at the agency's discretion.



## **Appendix I: OPM Form 1303, PMF Executive Resources Board (ERB) Certification Form**

Below is a sample PMF ERB (Executive Resources Board) certification form that agencies may use in processing a Fellow's ERB certification and conversion. The PMF Program Office created the *OPM Form 1303* and can be found under the "Agencies\ Resources" (<https://www.pmf.gov/agencies/resources/>) section on the PMF website. The form is optional and agencies may want to utilize a different format. The form also enables agencies to identify when a Fellow resigns, terminates, or there fellowship is extended. The Agency PMF Coordinator must record any results and status changes in the PMF TMS.

	<b>Presidential Management Fellows (PMF) Program Executive Resources Board (ERB) Certification Form</b>
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### **PRIVACY ACT STATEMENT:**

**Authority:** 5 CFR 362.405 requires all Presidential Management Fellows to obtain ERB certification in meeting program requirements prior to conversion to the competitive service.

**Purpose:** The agency's ERB, or its equivalent, must certify whether a Presidential Management Fellow (PMF; Fellow) has successfully completed the Program as outlined in 5 CFR 362.405. For those agencies not required to have an ERB, equivalent means the senior agency official or officials who have been given responsibility for executive resources management and oversight by the agency head.

The ERB certification process was designed to protect the prestige and competitive nature of this Presidential program while reinforcing the agency's commitment to succession planning. Guidance in 5 CFR 362.405(d)(1) specifies that, upon a Fellow's completion of the Program, the appointing agency's ERB must evaluate each Fellow and determine whether it can certify in writing that the Fellow met all of the requirements of the Program, including the performance and developmental expectations set forth in the individual's performance plan and Individual Development Plan (IDP).

**Routine Uses:** The information will be used by the Fellow, his/her supervisor, and appropriate agency personnel to document and track the Fellow's program requirements. In addition, this form may be used to document the ERB's decision and used to authorize the Fellow's conversion to the competitive service.

**Disclosure:** Use of this form and furnishing this information is optional; agencies may utilize alternative formats. Failure to furnish this information may delay or prevent the certification and conversion of the Fellow.

### **BACKGROUND AND INSTRUCTIONS FOR PREPARING THE ERB CERTIFICATION FORM:**

The agency must complete its evaluation, make a decision regarding certification of successful completion, and notify the Fellow, no later than 30 calendar days prior to the expiration of the Fellow's appointment in the Program. The ERB may also determine that a Fellow has not successfully completed the Program and will not be appointed upon completion.

The Fellow's appointment expires at the end of the 2-year fellowship period. At that time, if the Fellow has not been granted an extension or has not successfully completed the Program, the Fellow's appointment terminates.

According to 5 CFR 362.408, if an agency ERB does not certify successful completion of the program and as a result does not convert the Fellow at the end of the Program or extend the individual's initial appointment, the appointment expires when certification for Program completion is denied. The agency must provide written notification to OPM, via the PMF Program Office, when a Fellow is terminated for this or any reason. The Agency PMF Coordinator would record such status change in the PMF TMS.

Fellows must meet the agency's certification of program completion or they cannot be converted to the competitive service. Guidance in 5 CFR 362.405(d)(4)(i) and (ii) states that if the ERB decides not to certify a Fellow, the Fellow may request reconsideration of that determination by the OPM Director, or designee. Such reconsideration must be requested in writing, with appropriate documentation and justification, within 15 calendar days of the date of the agency's decision. The Fellow may continue in the Program pending the outcome of his or her request for reconsideration, and the agency must continue to provide appropriate developmental activities during this period. The determination of OPM shall be final and not subject to further review or appeal.

The agency ERB can establish its own procedures for conducting the review, but must consider whether: (1) the Fellow has met all of the requirements of the Program, as outlined in the Program regulations found at 5 CFR 362, (2) has demonstrated successful performance according to the individual's performance plan, and (3) has achieved the developmental expectations set forth in the Individual Development Plan (IDP). This may be conducted through a document review or other methods agreed upon by the ERB. The results of the ERB certification are to be forwarded to OPM (via the PMF Program Office) the Agency PMF Coordinator recording in the PMF TMS.

Fellows reappointed late in their tenure to a new agency or position, and/or needing additional time to satisfy developmental requirements for the target position, may require an extension. Agencies have the authority to extend a PMF appointment up to 120 days to give agencies greater flexibility to satisfy this certification obligation; however, rendering an ERB decision 30 days prior to the extended appointment still applies and extensions should be used for rare and unusual circumstances and in accordance with the agency's Pathways Memorandum of Understanding (MOU).

The Fellow, Fellow's Supervisor, Agency PMF Coordinator, and ERB Chairperson (or equivalent) should fill this form out. A Fellow's Mentor may be consulted as well.

<b>PART I – FELLOW:</b> This section should be filled out by the Fellow or the Agency PMF Coordinator, and submitted to the Fellow's Supervisor to fill out PART II. (NOTE: Check with the Agency PMF Coordinator for any agency-specific policies and procedures.)			
1. Full Name (last, first, middle initial):		2. Entry On Duty (EOD) (Start Date of Fellowship) (mm/dd/yyyy):	
3. PMF Class (year of becoming a Finalist):		4. Agency/Sub-Agency/ Office (do not abbreviate):	
5. Work Phone Number:		6. Fellow's Work Email Address:	
7. Title/Series/Grade (e.g., Program Analyst, GS-0343-09):	7a. At Initial Appointment:		
	7b. At Present:		
8. Before routing to Supervisor, Fellow is to attach copies of: <input type="checkbox"/> Individual Development Plan (IDP) <input type="checkbox"/> Performance evaluation/rating (for each year) <input type="checkbox"/> Other documentation (e.g., developmental assignment evaluations, training certificates, etc.), if applicable			


<b>PART II – FELLOW'S SUPERVISOR:</b> This section should be filled out by the Fellow's Supervisor and then submitted to the Agency PMF Coordinator to fill out PART III. Please indicate whether or not this PMF is a reappointment from another agency.			
1. Supervisor's Full Name, Title and Organization:			
2. Supervisor's Phone Number:		3. Supervisor's Email Address:	
<input type="checkbox"/> 4a. YES (training completed as indicated in attached IDP) <input type="checkbox"/> 4b. TENTATIVE (will be completed prior to conversion date) <input type="checkbox"/> 4c. NO (training hours have not been fully met)			
5. Has this Fellow completed at least one 4-6 month developmental assignment (not to be confused with rotations), in accordance with 5 CFR 362.405(b)(4)? (Developmental assignment(s) should be listed on Fellow's attached IDP.)			<input type="checkbox"/> YES <input type="checkbox"/> NO
6. Has this Fellow performed satisfactory or better during his/her fellowship? (See attached evaluation/rating.)			<input type="checkbox"/> YES <input type="checkbox"/> NO
7. Was this PMF reappointed from another agency? <input type="checkbox"/> NO <input type="checkbox"/> YES, if so indicate agency and original EOD.	7a. Original appointed agency/sub-agency (if reappointment occurred during fellowship):	7b. Verified Original Entry on Duty Date (Start Date of Fellowship) (mm/dd/yyyy):	
8. Indicate your <i>recommendation</i> for ERB certification or agency action, and submit to the Agency PMF Coordinator for next steps. Consult with your Agency PMF Coordinator for any questions.		<input type="checkbox"/> 8a. RECOMMEND Certification (requirements completed satisfactorily) <input type="checkbox"/> 8b. DO NOT RECOMMEND Certification (note reasons below) <input type="checkbox"/> 8c. OTHER (note resignation, termination, or other information below) Note: If an extension is needed, follow your agency's PMF extension procedures.	
9. COMMENTS: If recommending against certification, provide the reason(s) to the right. Indicate date (mm/dd/yyyy) and GS Grade (or equivalent) that the Fellow resigned or was terminated, if applicable.			
10. If ERB certified, Fellow will be:	<input type="checkbox"/> 10a. CONVERTED, without a break in service, to a competitive service term or permanent appointment. <input type="checkbox"/> 10b. APPOINTED to a permanent position in an excepted service agency. <input type="checkbox"/> 10c. OTHER:		
11a. Supervisor's Signature:		11b. Date (mm/dd/yyyy):	

<b>PART III – AGENCY PMF COORDINATOR:</b> This section should be filled out by the Agency PMF Coordinator and submitted with attached documentation to the ERB, or equivalent, for review and certification. The ERB Chairperson must notify the Fellow, Supervisor, Human Resources Office, and the Agency PMF Coordinator of its decision. The Agency PMF Coordinator must submit decision to OPM (via the PMF Program Office). Recording should be done in the PMF Program's Talent Management System (PMF TMS). Note deadlines for notifying Fellow of any actions.			
1. Coordinator's Name:		2. Coordinator Role:	<input type="checkbox"/> 2a. Agency-wide PMF Coordinator <input type="checkbox"/> 2b. Sub-Agency PMF Coordinator
3. Coordinator's Phone Number:		4. Coordinator's Email Address:	
5. Indicate your <i>recommendation</i> for ERB certification or agency action and submit to the ERB, or equivalent, as appropriate:	<input type="checkbox"/> 5a. RECOMMEND Certification (requirements completed satisfactorily) <input type="checkbox"/> 5b. DO NOT RECOMMEND Certification (note reasons below) <input type="checkbox"/> 5c. OTHER (note resignation, termination, or other information below) Note: If extension is needed, follow your agency's PMF extension procedures.		
6. COMMENTS: If recommending against certification, provide the reason(s) to the right. Indicate date (mm/dd/yyyy) and GS Grade (or equivalent) that the Fellow resigned, or was terminated, if applicable.			
7. Has the Fellow's agency processed and submitted appointment reimbursement to the PMF Program Office at OPM for this PMF appointment (reimbursement is due within 30-days upon a Fellow's initial appointment)?	<input type="checkbox"/> YES <input type="checkbox"/> NO		
8a. Agency PMF Coordinator's Signature:	8b. Date (mm/dd/yyyy):		

<b>PART IV – EXECUTIVE RESOURCES BOARD:</b> This section should be filled out by the agency's ERB Chairperson, or equivalent, to indicate results of ERB certification process. Upon decision, please forward to the Agency PMF Coordinator for further processing.			
1. ERB Chairperson's Full Name, Title and Organization:			
2. ERB Chairperson's Phone:		3. ERB Chairperson's Email Address:	
4. ERB Decision:	<input type="checkbox"/> 4a. CERTIFY Satisfactory Completion (5 CFR 362.405). The ERB has found this Fellow satisfactorily meets all program requirements, demonstrated successful performance, achieved the developmental expectations set forth in his/her attached Individual Development Plan, and is now certified to be non-competitively converted to a permanent or term appointment in the competitive service. <input type="checkbox"/> 4b. DENY CERTIFICATION. The ERB has found that this Fellow has NOT satisfactorily met all program requirements, demonstrated successful performance, and/or achieved the developmental expectations set forth in his/her attached Individual development Plan and is NOT certified to be non-competitively converted to a permanent or term appointment in the competitive service for the reasons below. The Fellow will <u>not</u> be converted to the competitive service and the fellowship appointment will expire.		
5. COMMENTS: If recommending against certification, provide the reason(s) to the right.			
6a. ERB Chairperson's (or equivalent) Signature:	6b. ERB's Decision Date (mm/dd/yyyy):		

## Appendix J: OPM Form 1310, PMF Leadership Development Program (LDP) Participant Agreement

Below is a copy of the OPM Form 13010, PMF LDP (Leadership Development Program) Participant Agreement.

	<b>Presidential Management Fellows (PMF) Program Leadership Development Program (LDP) Participant Agreement</b>
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### PRIVACY ACT STATEMENT:

**Authority:** The PMF Program is under the auspice of the Pathways Programs (5 CFR 362). The PMF Program regulations identify a variety of training and developmental requirements for each PMF to successfully complete during their 2-year fellowship, leading to noncompetitive conversion at the end of their fellowship (§362.405(d)). In particular, each PMF must complete: (1) an Individual Development Plan (IDP) that outlines their training and development plan, including relevant competencies, during their fellowship (§362.405(a)); and (2) the agency must provide each Fellow a minimum of 80 hours of formal interactive training per year that addresses the competencies outlined in their IDP, for a minimum total of 160 hours that should be recorded on their IDP (§362.405(b)(2)).

**Purpose:** The PMF Program Office sponsors a PMF Leadership Development Program (LDP) that spans over the Fellow's 2-year fellowship that is designed to support the Fellow's leadership journey. The PMF LDP curriculum is divided into two parts: Year 1: Leading Self and Leading Others, and Year 2: Leading Change. Full participation counts towards meeting the Fellow's training and developmental requirements. The LDP has an estimated value of \$15,000. There is no additional tuition costs to agencies as the tuition for the LDP is included in the one-time placement fee agencies pay the PMF Program Office in covering the program expenses. This optional Agreement is used to set forth the expectations between the Fellow and their Supervisor for the Fellow's full participation in the LDP. Additional information about the PMF LDP can be found on under the "Current PMFs/Training and Development/Leadership Development Program" section on the PMF Program website at [www.cmf.gov](http://www.cmf.gov). The webpage also includes program highlights, eligibility, how to register, and an anticipated timeline. This Agreement can also be found under the "Resources" sections for "Current PMFs" and "Agencies" on the PMF website.

**Routine Uses:** This Agreement ensures all parties are familiar with the expectations outlined below and recognize the level of commitment needed to receive the full value and experiences of the training; see below for the expectations for all parties. Completion of the LDP does not guarantee the Fellow will meet all program and agency requirements, promotion, and/or conversion. All parties should check with their agency on any other policies and procedures. The agreement should be in place prior to a Fellow's participation in the LDP.

**Disclosure:** Use of this agreement and furnishing this information is required by the PMF Program Office. Parties must consider the LDP's curriculum and any impact for if and when a Fellow is unable to fully participate as a result of a rotation, extended leave, change in operating status, workload, etc. During the LDP, participating Fellows are assigned a Coach, assigned to a team of other participating Fellows, complete a leadership assessment, and work on a challenge project. Any delay or alteration to a Fellow's participation will impact their experience and number of hours obtained; which may impact other participating Fellows. The Fellow should add all LDP components, and the number of training hours obtained to their IDP; see below for the curriculum and potential number of training and developmental hours. Fellows will receive a certificate of completion at the conclusion. Fellows should review their IDP with their Supervisor to ensure their schedules do not conflict with LDP events. NOTE: The curriculum, timeline, and number of hours are subject to change.

**INSTRUCTIONS:** The Fellow and their Supervisor should review this agreement, sign below, and retain the original. Fellows will be provided separate instructions on when and how to upload a signed copy to the PMF TMS (Talent Management System). It is optional to also consult and include the Agency PMF Coordinator and/or the Fellow's Mentor. Check with the Agency PMF Coordinator for any other policies and procedures that should be followed.

Fellow's Name (first and last):		Fellow's Class Year (yyyy):	
Fellow's Agency/Sub-Agency/Organization:			
Supervisor's Name (first and last):		Supervisor's Work Email Address:	

**EXPECTATIONS:** The PMF LDP curriculum is outlined below. The Fellow agrees to complete the requirements of Years 1 and 2, noting the time commitment involved, and accounting for the impact of any extended leave, rotation(s), change in operating status, workload, etc. The Fellow should inform the PMF Program Office of any changes in status/contact information during their participation in the PMF LDP. It is the responsibility of the Fellow to monitor any communications throughout their participation (e.g., when on a rotation).

### Year 1: Leading Self and Leading Others

Prework:	On-Site and/or Virtual:	Postwork:	Competencies:	Hours:
<p>Fellows are required to participate in a one-hour informational webinar prior to the On-Site; Supervisors and Coordinators are also invited.</p> <p>Fellows are responsible for completing the Leadership Potential Assessment (LPA) approximately one month prior.</p>	<p>3-Day On-Site: 1-day is conducted at the White House Complex with Administration Notable Leaders and a network reception, and 2 days at Mt. Vernon with senior faculty and a review of the Leadership Potential Assessment (LPA). Supervisors are invited to attend the full day at the White House Complex and Agency PMF Coordinators are invited to the networking reception. All attendees are notified of the delivery method (onsite or virtual) the session will be conducted.</p>	<p>Fellows are assigned to sub-cohort Coaching groups to meet for a total of 9 Competency Development Coaching sessions. Each session lasts up to 90 minutes per session and counts towards the training and developmental hours Fellows obtain.</p>	<p>The following competencies are covered during Year 1:</p> <ul style="list-style-type: none"> <li>- Conflict Management</li> <li>- Continual Learning</li> <li>- Creativity/ Innovation</li> <li>- Developing Others</li> <li>- Flexibility</li> <li>- Influencing/Negotiating</li> <li>- Public Service Motivation</li> <li>- Resilience</li> </ul>	37*

**Year 2: Leading Change**

<b>Prework:</b>	<b>On-Site and/or Virtual:</b>	<b>Postwork:</b>	<b>Competencies:</b>	<b>Hours:</b>
<p>Fellows are required to attend and participate in a one-hour informational webinar and a meeting with Goal Leads to finalize Challenge Project selection, prior to the On-Site; Supervisors and Agency PMF Coordinators are also invited.</p> <p>Year 2 includes a Challenge Project for each Fellow to participate as a team. Fellows will receive details during their Year 2 On-Site.</p>	<p>Fellows are exposed to a curriculum that focuses on driving key outcomes that support the President's Management Agenda (PMA): (1) develop leadership competencies by obtaining knowledge in methods and application; (2) work in teams with Goal Leaders across Federal Government that will focus on a real-life challenges; (3) teach methods to focus on real issues within Federal Government; and, (4) enable Fellows to partake in action learning and results-oriented change initiatives.</p> <p>The curriculum includes the following methodologies: (a) Human Centered Design, (b) Lean Six Sigma and, and (c) Change Management.</p>	<p><b>Challenge Project:</b> Fellows will have up to 10 weeks (24 hours) to work within a Cohort Group with their PMF colleagues and Goal Leads to complete the designated Challenge Project, using methodologies learned during the On-Site.</p> <p><b>Challenge Project Presentations:</b> Fellows are required to present their Challenge Project findings at OPM in front of a panel of Senior Leaders and/or Goal Leads. Leadership will provide feedback on projects and presentation delivery.</p>	<p>The following competencies are covered during Year 2:</p> <ul style="list-style-type: none"> <li>- Decisiveness</li> <li>- Flexibility</li> <li>- Partnering</li> <li>- Political Savvy</li> <li>- Problem Solving</li> <li>- Team Building</li> </ul>	<b>64</b>
<b>Total Potential Hours:</b>				<b>101**</b>

\* Those Fellows who serve as Coaching Session Team Leads during Year 1 may receive an additional 10 training hours.

\*\* The full potential training and developmental hours a Fellow may obtain is 119 (including if a Fellow serves as a Coaching Session Team Lead during Year 1 and participates in Networking Events, as explained below); the total number of potential hours would fulfill approximately 75% of the total number of required training and developmental hours each Fellow must completed during their fellowship.

**Additional Bonus Hours:** The PMF Program hosts optional quarterly Networking Events (approximately 4 times per year). The Networking Events are conducted at various locations with the participation of agencies government-wide. Fellows can earn up to 1-2 training and developmental hours per event (for approximately 8 additional bonus hours) and should record on their IDP.

**Eligibility to Participate:** (1) The PMF has onboarded and started their fellowship, (2) the Agency PMF Coordinator has accurately entered the Fellow's appointment information in the PMF TMS (Fellows can verify by viewing their appointment information on the Apply Site of the PMF TMS), and (3) the agency has submitted reimbursement for the one-time placement fee to the PMF Program Office for the Fellow's initial appointment (Agency PMF Coordinators can view the financial status of their PMFs in the PMF TMS).

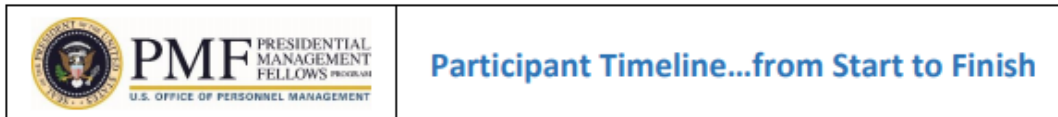
**SIGNATURES:** Electronic signatures are preferred. All parties are to sign to acknowledge expectations and retain the original. Fellows are to upload a signed copy in the PMF TMS. Please check with your Agency PMF Coordinator for any other additional requirements.

<b>PMF's Signature:</b>	<b>Date:</b>
<b>Supervisor's Signature:</b>	<b>Date:</b>

**CLEAR**

## Appendix K: Participant Timeline

Below is an image of the *Participant Timeline* that outlines the typical timeline for participants (e.g., from Applicant to Finalist to Fellow to Alum). This timeline is posted under the “Become a PMF\Resources” (<https://www.pmf.gov/become-a-pmf/resources/>) section on the PMF website.



The illustration below shows the typical timeline a participant would follow in navigating through the PMF Program. Additional information can be found on the PMF website at <https://www.pmf.gov>.

### 1. Application

- a. **Prepare:** Prepare in August/September with the application launching near the beginning of October; see the PMF website for exact dates as these are subject to change. Follow the steps below to prepare for the application and assessment process.
  - i. Review the “Become a PMF” section on the PMF website at [www.pmf.gov](http://www.pmf.gov). This section provides a general overview of the PMF Program, eligibility, application process, assessment process, finding a PMF position, resources, and FAQs.
  - ii. Review the “Assessment Preparation Guide”, under the “Become a PMF\Assessment Process” webpage.
  - iii. Assemble your resume, transcripts (and/or alternatives), and any other supporting documentation (e.g., for claiming a reasonable accommodation, Indian Preference, and/or Veterans’ Preference).
- b. **PMF Application Announcement:** During the application period, search for the Job Opportunity Announcement (JOA) officially announcing the PMF application. The link will be posted on the PMF website during the application period. Review the entire announcement and click the link to start the application process.
  - i. NOTE: The JOA is only searchable when the application opens. The application opens and closes at Noon (ET) on dates advertised. Applicants should review all instructions and are strongly encouraged to apply early.
- c. **PMF Talent Management System (TMS):** Via the Apply Site of the PMF TMS, create an applicant user account.
  - i. The link to the Apply Site is embedded into the JOA.
- d. **Start Application Process:** Follow the instructions and steps for completing an application, including the uploading of documents.
- e. **On-Line Assessment:** Complete the entire on-line assessment; which is part of the application.
- f. **Finish Application Process:** Certify and submit your complete application by the closing date/time of the JOA.
- g. **Adjudication Process:** Shortly after the application closes, the PMF Program Office will start reviewing applications for eligibility, completeness, academic institution accreditation, claims for preferences, and assessment scores; this is referred to as the adjudication process which can take up to 2 weeks to complete.
- h. **Selection Process:** Based on the adjudication process and assessment score results, the PMF Program Office will select and announce Finalists. Finalists are announced approximately near the end of November.

### 2. Finalists

- a. **Informational Webinar:** Finalists will be invited to participate in an informational webinar to further explain the program requirements and next steps.
- b. **Find a Job:** Finalists should thoroughly review the “Become a PMF\Find a Job” webpage which explains the following:

- i. Placement Eligibility: Explains the 12 months of appointment eligibility.
  - ii. Next Steps: Explains the next steps all Finalists should follow, including the searching and applying for PMF appointment opportunities in the PMF TMS.
  - iii. Agency PMF Coordinators: Explains the role of Coordinators and how to contact them.
  - iv. Update Contact Information: How to update your personal contact information during your eligibility period.
  - v. Update Your Resume: Explains how to upload an updated resume.
  - vi. Withdrawal: Explains the withdrawal process.
  - vii. Background Investigation: Explains the background investigation process and common forms.
  - viii. Upon Appointment: Explains what to do upon accepting a PMF appointment offer.
  - ix. Appointment Eligibility Extensions: Explains this type of extension and the process involved.
- c. **Hiring Fair:** The PMF Program works with agencies to sponsor various hiring events throughout the year to assist Finalists with placements. Finalists will be informed when events are scheduled and information will be posted to the "Become a PMF\Find a Job\Hiring Event" webpage.
- d. **Offer Acceptance:** Finalists should quickly decide on whether or not to accept a PMF appointment offer once it has been made. Once a Finalist accepts and starts a PMF appointment, his/her status changes to Fellow.

### 3. Fellows

- a. **Onboarding:** This is the process for starting your PMF appointment and consists of the following:
- i. Passing your background investigation and/or security clearance.
  - ii. Reporting to your agency for orientation and starting your fellowship.
  - iii. Both the Fellow and Supervisor sign a Participant Agreement within 45 days.
  - iv. Reviewing and completing paperwork for benefits (e.g., health, dental, vision, long-term care, and life insurance; Thrift Savings Plan; tax withholdings; etc.).
  - v. Meeting with your Supervisor and colleagues.
  - vi. Initial discussion with Supervisor about your performance plan and Individual Development Plan (IDP). Fellows must perform satisfactory or better during their fellowship.
  - vii. Assignment of a Mentor within 90 days (assignments are determined by the agency).
- b. **Current PMFs:** Fellows should thoroughly review the "Current PMFs" section on the PMF website, which covers the following:
- i. **Owning Your Experience:** Provides a general overview of the program requirements for Fellows.
  - ii. **Orientation:** Explains how Fellows should register and participate in an orientation webinar.
  - iii. **Training and Development:** Review information about your IDP (Individual Development Plan), Rotational Opportunities, Training, and the PMF LDP (Leadership Development Program); all found under the "Current PMFs\Training and Development" section on the PMF website.
    - 1. This section covers the program requirements that all Fellows must complete during their 2-year fellowship.
    - 2. **Training:** A minimum of 80 hours of formal, interactive training for each year of the fellowship, for a total of 160 hours

3. **Development:** Complete at least one 4-6 month developmental assignment either within the Fellow's organization, agency, or at a different agency. The Fellow's agency is responsible for communicating its policies and procedures regarding developmental assignments). The work must be in the occupation or functional discipline in which the Fellow will most likely be placed, with full-time management and/or technical responsibilities consistent with the IDP.
  4. **Optional Rotations:** Fellows may complete other rotations at the discretion of their Supervisor and agency.
  5. **NOTE:** Fellows should consult with their Supervisor and Agency PMF Coordinator on their participation in the PMF LDP; which spans over the 2-year fellowship and is highly recommended for every PMF. To take full advantage, both the Fellow and Supervisor should fully commit to the program and associated activities. Any and all training received counts towards the Fellow's training requirements; which can be over 100 hours. There are no additional costs with the PMF LDP other than potential travel for Fellows outside of the Washington, DC metro area.
    - iv. **Resources:** This section provides a number of forms and documents pertaining to Fellows.
    - v. **FAQs:** This section lists Frequently Asked Questions pertaining to Fellows.
  - c. **Certification:** All Fellows must obtain certification from their agency's Executive Resources Board (ERB) in completing all program requirements. Some agencies may also have additional requirements that need to be met.
  - d. **Conversion:** Those Fellows who obtain a favorable certification are eligible a non-competitive conversion to a term or permanent position with their agency.
    - i. **Resignation:** If a Fellow is either no longer interested or unable to complete their fellowship, or is not able to convert, he/she may resign from their position.
    - ii. **Termination:** The agency may terminate a Fellow for reasons related to performance, conduct, or suitability, or is unable to convert the Fellow to a term or permanent position.
  - e. **Fellowship Extension:** An agency may extend a Fellow's 2-year fellowship for up to 120 days for rare and unusual circumstances.
    - i. This is at the agency's discretion and the agency may have specific policies and procedures in such regards.
  - f. **Graduation:** Those Fellows who obtain a favorable certification for completing the program requirements are eligible to participate in their class graduation ceremony. Those Fellows either not interested or unable to participate have up to 1 year to request a certificate to be mailed to their home address.
4. **Alumni**
- a. A certified Fellow is instantly considered an Alum.
  - b. Alumni may continue to participate in the PMF Program by monitoring Alumni Engagement Opportunities and advocating for the PMF Program.
  - c. Alumni can maintain their contact information and join the PMF Program's Alumni Facebook page.




## Appendix L: PMF Fellowship Timeline

Below is an image of the *PMF Fellowship Timeline* that outlines the typical PMF fellowship timeline. This timeline is posted under the “Become a PMF\Resources” (<https://www.pmf.gov/become-a-pmf/resources/>) section on the PMF website.



## Appendix M: OPM Form 1304, PMF Success Story Submission Form

Below is an image of the *OPM Form 1304*, which is used by former and current Fellows to submit a success story to be published to the PMF website. This form is posted under the “Current PMFs\Resources” section on the PMF website at <https://www.pmf.gov/current-pmfs/resources/>.

	<b>Presidential Management Fellows (PMF) Success Story Submission Form for Fellows</b>
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**PRIVACY ACT STATEMENT AND INSTRUCTIONS:**

**Authority:** 5 CFR 362 promulgates Executive Order 13562, placing the Presidential Management Fellows (PMF) Program under the Pathways Programs. The U.S. Office of Personnel Management (OPM) administers the PMF Program government-wide. The PMF Program is to attract to the Federal service outstanding men and women from a variety of academic disciplines and career paths, who have a clear interest in, and commitment to, excellence in the leadership and management of public policies and programs.

**Purpose:** This PMF Success Story Submission Form is used to collect success stories from current and former PMFs.

**Routine Uses:** These stories are to highlight the success of PMFs during and after their fellowship and publish to the PMF website and/or other PMF Program marketing and outreach material.

**Disclosure:** Use of this form and furnishing this information is optional. All submissions must include the Authorization and Release signature (below). The PMF Program Office reserves the right to edit, deny, and/or approve any submissions.

**Current/Former Fellows:** This form can be found under the “Current PMFs\Resources” section on the PMF website at [www.pmf.gov](http://www.pmf.gov). Fill out the information below and send via email to [pmf@opm.gov](mailto:pmf@opm.gov) with the subject of “Success Story”. Please include a photo. Photographs should be related to the submitter and/or story being submitted. If a photo is not received, the agency logo of the current/former PMF may be used.

Current/Former PMF First and Last Name:		Class Year:	
Work Phone Number (with area code):			
Work Email Address:			
Agency/Sub-Agency:			
Work or Home Mailing Address:			
Success Story (please limit to 3-5 paragraphs; add a separate page if additional space is needed):			

**AUTHORIZATION AND RELEASE:** I hereby authorize and consent that the U.S. Office of Personnel Management, a Federal Agency, its legal representatives, successors or assigns, shall have the absolute right to copyright, publish, use, sell or assign any and all photographic portraits or pictures, or any part thereof, they have taken or made of me or I have submitted to them, or in which I may be included in whole or in part, whether apart from or in connection with, illustrative or written printed matter, story or news item, for the PMF Success Stories. I hereby waive all claims for any compensation for such use or for damages. I hereby waive any right that I may have to inspect and/or approve the finished product or the advertising copy that may be used in connection therewith or the use to which it may be applied. I hereby warrant that I am of full age and have every right to contract in my own name in the above regard. I state further that I have read the above authorization and release, prior to its execution, and that I am familiar with the contents thereof.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date (mm/dd/yyyy)

<b>OFFICE USE ONLY:</b> Date and initial each below.			
PMFPO Received:		PMFPO Posted:	
		File Reference:	

## ACKNOWLEDGEMENT RECEIPT FOR THE PMF PARTICIPANT HANDBOOK

As covered under the **Introduction** of the *PMF Participant Handbook*, the Fellow should engage with their Supervisor and Agency PMF Coordinator in reviewing the *Handbook* and the equivalency of their agency's policies and procedures. This fulfills the PMF Program Office's Orientation Program.

All parties should sign this acknowledgement receipt (electronic signatures are acceptable) and the Fellow should upload a copy through their applicant user account on the Apply Site of the PMF TMS (Talent Management System). **Fellows should only upload the receipt page, not the entire Handbook.** Agency PMF Coordinators can monitor and view any such submission as part of the Fellow's records on the Portal Site of the PMF TMS. Upon submission, the Fellow may count 1-hour of training and development time on their IDP (Individual Development Plan).

**FELLOW:**

Name (first and last):		Class Year (xxxx):	
Agency/Sub-Agency:			
Office:			
Work Email Address:			
Work Phone Number:		Start Date:	
Signature:		Date:	

**SUPERVISOR:**

Name (first and last):			
Work Email Address:			
Signature:		Date:	

**AGENCY PMF COORDINATOR:**

Name (first and last):			
Work Email Address:			
Signature:		Date:	



# PMF PRESIDENTIAL MANAGEMENT FELLOWS PROGRAM

U.S. OFFICE OF PERSONNEL MANAGEMENT

## U.S. Office of Personnel Management

PMF Program Office  
1900 E Street, NW, Room 2469  
Washington, DC 20415  
<https://www.pmf.gov>

*A Call to Lead, A Call to Serve*

PMF-PART-HANDBOOK, 06/01/2021