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|  | **How an Excepted Service Agency Participates**  **in the PMF Program**  (UPDATED: 11-05-2024) |

**BACKGROUND:** President Obama issued Executive Order 13562 creating the Pathways Programs, of which the PMF Program is part. The Pathways Programs are early career talent programs, using the Schedule D Hiring Authority. OPM promulgated regulations into 5 CFR 362. The initial regulations published on May 11, 2012 can be found at <https://www.govinfo.gov/content/pkg/FR-2012-05-11/pdf/2012-11068.pdf> and the revised regulations published on April 12, 2024 can be found at <https://www.govinfo.gov/content/pkg/FR-2024-04-12/pdf/2024-06810.pdf>.

**REQUIREMENT:** Agencies interested in participating in the PMF Program must develop PMF Program policies as required (5 CFR 362.104). **Agencies outside of the Executive Branch or fully in the excepted service (e.g., outside of title 5, Code of Federal Regulations, or not having competitive service positions), require a Memorandum of Agreement (MOA) with OPM’s PMF Program Office to participate in the PMF Program.**

Agencies should familiarize themselves with the agency roles and responsibilities, which are referenced in the Pathways Programs final rule published on April 12, 2024 (see link above) and referenced under the “Agencies\Agency Responsibilities” section on the PMF website at <https://www.pmf.gov/agencies/agency-responsibilities.aspx>.

To identify participating agencies, see the current list of Agency PMF Coordinators at <https://apply.pmf.gov/coordinators.aspx>. Examples of non-Executive Branch and/or excepted service participating agencies include Library of Congress, FAA, FBI, ODNI, and TSA).

**PROCESS:**

1. To establish an agreement to use the PMF Program, start with the MOA template found below **(minus this page of instructions)**. The template reflects all program requirements as outlined in the Pathways Programs regulations (5 CFR 362) for use of the PMF Program. Agencies should edit the template to reflect their policies, procedures, and contacts. Highlightedtext indicates suggested language the initiating agency can edit or accept as written or populate accordingly. Final version text should be free of highlighted formatting.
2. Circulate the draft internally (e.g., HR Office, General Counsel).
3. Before finalizing and signing, send a draft to the PMF Program Office via email at [pmf@opm.gov](mailto:pmf@opm.gov) with the subject of “[Agency] MOA”; preferably as an MS Word file showing tracked changes.
4. The PMF Program Office will reply back with any comments, leading to a final draft.
5. The initiating agency signs the final version and returns it via email to the PMF Program Office at [pmf@opm.gov](mailto:pmf@opm.gov). (Electronic signatures preferred.)
6. Upon receipt, the PMF Program Office will obtain OPM approval and signature.
7. A fully executed copy will be returned to the initiating agency.
8. The PMF Program Office will then create an Agency PMF Coordinator user account in its PMF Talent Management System (TMS) and add the contact to the list of Coordinators, as applicable.
9. The PMF Program Office will reach out to the new Agency PMF Coordinator with onboarding and training.

**CONTACT INFORMATION:** The PMF Program Office can be reached by calling the office at 202-606-1040, or by sending an email to [pmf@opm.gov](mailto:pmf@opm.gov). The PMF Program website is <https://www.pmf.gov>.

**MEMORANDUM OF AGREEMENT**

**BETWEEN THE**

**[Agency Name]**

**AND THE**

**U.S. Office of Personnel Management**

**I. Introduction:**

This Memorandum of Agreement (MOA) between the [Agency’s Name] (“Agency”) and the U.S. Office of Personnel Management (OPM) provides a framework for cooperation between the two parties to participate in the Pathways Program’s Presidential Management Fellows (PMF) Program. This MOA covers all components of the Agency. The PMF Program Office resides under OPM’s Human Resources Solutions, Center for Leadership Development.

**II. Authority:**

This MOA is entered into pursuant to the provisions of 5 CFR part 362, subparts A and D, and Executive Order 13562. This MOA will be subject to review and renewal every three years from date of enactment.

**III. Terms. Under this MOA:**

1. The “Agency” agrees to:
   1. Adopt all Agency responsibilities and duties included in 5 CFR part 362, subparts A and D, Executive Order 13562, and as listed under the “Agencies\Agency Responsibilities” section on the PMF website at <https://www.pmf.gov/>, except when these directly conflict with Law, or are not consistent with Agency policy.
   2. Follow PMF Program Rules and Regulations, but will appoint Fellows using the Agency’s appointment authorities at levels equivalent to those provided in the Pathways Programs regulations. The Agency will refer to each Finalist as a Presidential Management Fellow (PMF; Fellow) during the term of the fellowship.
      1. Initial appointment of PMFs will be at the GS-09, GS-11, or GS-12 level or equivalent, depending on the PMF’s qualifications.
      2. The duration of a PMF’s fellowship is a 2-year appointment.
   3. Verify the Finalist’s completion of all advanced degree requirements upon appointment as a PMF.
   4. Designate an Agency PMF Coordinator for the Agency who is responsible for administering the Agency’s PMF Program who will serve as a liaison with OPM and program participants, and who will follow the Agency PMF Coordinator responsibilities as identified in 5 CFR part 362, subpart A, listed on the PMF website, and listed in any PMF Program guidance.
   5. The designated Agency PMF Coordinator will work with the Agency’s human resources staff and hiring officials regarding workforce planning strategies. The Agency PMF Coordinator will compile this information and report to OPM upon request.
   6. Within 30 days of a Finalist accepting a tentative PMF appointment offer, reimburse OPM’s PMF Program Office the one-time placement fee for costs associated with the Program. The placement fee covers the application and assessment process, adjudication of veterans’ preference, training tuition for program office sponsored events, on-line systems (e.g., the PMF Talent Management System), support for agencies, and general program administrative support for program participants. Instructions on the reimbursement process and financial forms can be found under the “Agencies\Resources” section on the PMF website at [www.pmf.gov](http://www.pmf.gov).
   7. Provide a meaningful on-boarding process for each newly hired PMF.
   8. Establish Pathways PMF Program policies as stipulated in the Pathways Programs regulations (5 CFR part 362 subpart A). Policies to include PMFs requesting a part-time work schedule for up to 6 months during their fellowship.
   9. Use the following criteria and process for a fellowship extension of PMFs:
      1. Criteria: Extensions of PMFs must not exceed 120 days. Extensions will only be granted when circumstances exists that render the Agency’s compliance with the Pathways requirements impracticable or impossible, for example if a PMF [had a medical problem that resulted in a prolonged absence].
      2. Process: Supervisors may request extensions for PMFs by forwarding a request to the [Director for Human Resources/Agency PMF Coordinator at least 45 workdays] in advance of the expiration of the PMF’s appointment. The request should indicate the reason(s) for the request. The [Director for Human Resources/Agency PMF Coordinator] will notify the supervisor and PMF of their decision at least [15 workdays] in advance of the expiration of the PMF’s appointment. If an extension is approved, the Agency PMF Coordinator is to record the fellowship extension in the PMF Program’s Talent Management System (PMF TMS) as the method for informing OPM and the Agency will proceed with certification of program requirements 30 days prior to the PMF’s extended appointment.
   10. Document the formal training and/or development for its PMFs.
   11. Provide information to OPM about appointment opportunities for Finalists seeking PMF positions and rotational or training opportunities for PMFs. The Agency’s designated Agency PMF Coordinator will post all appointment opportunities in the PMF TMS.
   12. Ensure adherence to the requirements for accepting applications, assessing applicants, rating and ranking qualified Finalists/PMFs, and affording veterans’ preference in accordance with the Agency’s policy for noncompetitive hiring actions if applicable and appropriate for the Agency.
   13. Certify each PMF’s completion of the Program by senior officials who have been given executive resources management and oversight responsibility by the Agency.
   14. Convert or appoint PMFs who successfully complete the Program into a term or permanent position without further competition.
   15. Notify PMF within 60-days from the end of their fellowship if the agency will not be converting.
   16. Notify the PMF Program Office of any PMF change in status, to include appointment, reappointment, and extension of appointment, displacement, certification of completion of program, resignation, termination, death, readmission, and/or conversion. Such changes in status are recorded in the PMF TMS by the Agency PMF Coordinator.
   17. Within the first 90 days of a PMF’s fellowship:
       1. Assign each PMF a Mentor, who is a managerial employee outside of the PMF’s chain of command.
       2. Ensure that each PMF has an Individual Development Plan (IDP), or equivalent Agency document, that sets forth the specific developmental activities that are mutually agreed upon by the PMF and their supervisor.
       3. The IDP, or equivalent document, will be developed in consultation with the Agency PMF Coordinator and/or the Mentor assigned to the PMF.
   18. Provide each PMF a minimum of 80 hours of formal interactive training per year (for a minimum of 160 hours during the course of the fellowship) that addresses the competencies outlined in the IDP, or equivalent document.
   19. Provide each PMF with at least one developmental assignment with full-time management and/or technical responsibilities consistent with the PMF’s IDP, or equivalent document, and target position. With respect to this requirement:
       1. Each PMF will receive at least one developmental assignment of 4 to 6 months in duration (does not need to be consecutive months),
       2. The developmental assignment may be within the PMF’s organization, in another component of the Agency, or in another Federal Agency, and
       3. The PMF may receive other short-term rotational assignments of 1 to 6 months in duration at the Agency’s discretion.
   20. Upon the request of OPM, the Agency will make PMFs available to assist in the assessment process for subsequent PMF classes.
       1. Any interactive training provided to the PMF may be counted toward the training requirements.
   21. Provide PMFs at least 30 calendar days’ notice if they will be separated during their PMF appointment. PMFs who receive such notice [will also receive in the notice information informing them that they may seek an impartial review of the planned separation from the Director for Human Resources Services. If they seek review of the planned separation, the Director for Human Resources Services will meet with the PMF and consider any documents submitted by the PMF. The Director for Human Resources Services will provide a decision within 15 workdays of the request for review.]
2. OPM will:
   1. Manage the PMF Program through OPM’s PMF Program Office.
   2. Market the PMF Program to Federal Agencies and to academic institutions.
   3. Develop a strategy for attracting and recruiting eligible individuals with broad educational backgrounds from academic institutions located across the United States and internationally for the PMF Program.
   4. Develop and conduct a rigorous application and assessment process to determine a pool of Finalists. This includes the adjudication of applicants, eligibility requirements, and claims for veterans’ preference.
   5. Provide structured training and development programs and activities.
   6. Serve as a conduit for effective communication among all members of the PMF Program community to include Agency PMF Coordinators, Supervisors, Agency Hiring Officials, Agency Human Resources Staff, Academic Institutions, Applicants, Finalists, Fellows, and Alumni.
   7. Provide Agency with access to systems and information needed to administer the Program.
   8. Evaluate the effectiveness of the PMF Program.
3. This MOA is limited to the Agency and OPM, in accordance with Presidential Management Fellows Program Rules and Regulations in 5 CFR part 362, subparts A and D, and Executive Order 13562.
4. Implementation of this MOA will be initiated immediately upon the signature of both parties.
5. This MOA supersedes any prior agreements between the parties concerning this matter.

**IV. MOA Administration:**

The points of contact for coordination of review, modification, and approval of this MOA are:

1. For the Agency:

[Approving Official’s First and Last Name]

[Approving Official’s Title]

[Agency’s Name]

[Agency’s Street Address]

[Agency’s City, State, and ZIP Code]

[Approving Official’s Email Address]

[Approving Official’s Office Phone Number]

1. For OPM:

U.S. Office of Personnel Management

Susan Toman-Jones, Director

Presidential Management Fellows Program

1900 E Street, NW, Room 2469

Washington, DC 20415

Email: pmf@opm.gov

Office: 202-606-1040

1. Designated Agency PMF Coordinator for the Agency:

[First and Last Name]

[Agency’s Street Address]

[Agency’s City, State, and ZIP Code]

[Coordinator’s Work Email Address]

[Coordinator’s Office Phone Number]

**V. Effective Date:**

This MOA will become effective upon signature of both parties.

This MOA will expire on the third anniversary of its effective date. This MOA may be terminated at any time by either party with 30 days advance written notice.

**VI. Signatures:** Requesting agency signs first and submits to OPM for signature. Electronic signatures are preferred.

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Rebecca S. Ayers, PhD Date

Deputy Associate Director,

Human Resources Solutions\Center for

Leadership Development

U.S. Office of Personnel Management

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[Approving Official’s First and Last Name] Date

[Approving Official’s Title]  
[Agency Name]