



ADS Chapter 460

Presidential Management Fellows Program

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ADS 460 - Presidential Management Fellows Program

460.1 OVERVIEW

Effective Date: 02/27/2013

The Presidential Management Fellows (PMF) Program is the Federal Government's flagship leadership and development program for individuals with advanced degrees. It is designed to attract to the Federal public service talented men and women who demonstrate academic excellence, possess management and leadership potential, and have a clear interest and commitment to public service. By developing a cadre of future Government leaders, the program helps Federal agencies meet their workforce planning and succession needs.

This chapter provides the mandatory policies and required procedures governing USAID's participation in the PMF Program. On December 27, 2010, President Obama incorporated the PMF Program into the new Pathways Programs established by [Executive Order \(E.O.\) 13562](#). The U.S. Office of Personnel Management (OPM) issued the final rule for the Pathways Programs effective July 10, 2012 ([77 FR 28194](#)). The Pathways Program requirements are found in [Part 362 of Title 5](#), Code of Federal Regulations (CFR). The appointing authorities for the Pathways Programs are found in [5 CFR 213.3402\(a\), \(b\), and \(c\)](#).

Current PMFs and PMFs appointed before January 24, 2013, (i.e., PMF 2011 and 2012 Classes) continue to be subject to the rules in effect when they became Finalists. Rules and other changes applicable to PMFs appointed after January 24, 2013 are highlighted in yellow in this chapter.

460.2 PRIMARY RESPONSIBILITIES

Effective Date: 12/31/2012

- a. The **U.S. Office of Personnel Management (OPM)** prescribes Pathways Program regulations and maintains oversight of the Program. OPM provides information to potential applicants on eligibility requirements and how to apply to the Pathways Programs and provides the Agency with a vehicle to publicize hiring under the Pathways authority. In addition OPM may determine the number of participants who may be noncompetitively appointed and/or converted to competitive service positions.
- b. The **Office of Personnel Management's (OPM's) PMF Program Office** is responsible for the program's overall management and for recruiting and assessing applicants, guiding participating agencies, and evaluating the program's effectiveness.
- c. The **Office of Human Resources, Office of the Director Division (OHR/OD)** is responsible for establishing the agency-wide policy for USAID's Presidential Management Fellows Program and the other Pathways Programs.

- d.** The **Office of Human Resources, Outreach and Marketing Branch (OHR/OD/OM)** is responsible for the implementation and administration of USAID's three Pathways Programs. The Chief, OHR/OD/OM, executes the Memorandum of Understanding with OPM for the administration and use of the PMF Program and other Pathways Programs.
- e.** The **PMF Coordinator, Civil Service Personnel Division, Office of Human Resources (OHR/CSP)** is responsible for administering the Agency's PMF Program, including coordinating recruitment and onboarding, and ensuring mentors are assigned and development plans are in place. The PMF Coordinator serves as a liaison with OPM by providing OPM with implementation updates, clarifying technical and programmatic issues, sharing best practices and lessons learned, and submitting applicable reports.
- f.** The **PMF Coach (or Coaches), provided by the Office of Human Resources (OHR)**, offers career enhancement guidance and liaises with the PMFs to ensure they complete mandatory requirements.
- g.** The **Office of Human Resources, Employee and Labor Relations Division (OHR/ELR)** is responsible for providing advice to managers relating to conduct and performance issues associated with the PMF Program and reviews, as necessary, recommendations for conversion of eligible PMFs to career or career conditional appointments in USAID.
- h.** The **Office of Civil Rights and Diversity (OCRD)** leads the Agency's diversity efforts and is responsible for working with OHR and Agency Bureaus/Independent Offices (B/IOs) to ensure that the PMF Program contributes to a fully diverse workforce.
- i.** **Bureaus/Independent Offices (B/IOs)** are responsible for assigning staff to the PMF Program, including a **Deputy Assistant Administrator (DAA)**, or equivalent, to serve as Bureau Representative for the PMF Program; hiring officials responsible for making PMF selections, and supervisors for each PMF in the B/IO.
- j.** The **Presidential Management Fellow (PMF)** is responsible for owning his or her individual learning, career development, and advancement. The PMF must carry out the terms of his or her PMF participant agreement and satisfactorily complete all program requirements.

Additional responsibilities of OPM and USAID for the Pathways Programs are specified in [460mab](#), the Pathways Program Memorandum of Understanding.

460.3 POLICY DIRECTIVES AND REQUIRED PROCEDURES

Effective Date: 12/31/2012

USAID administers the PMF Program, including all actions to evaluate, appoint, develop, and promote individuals, in accordance with merit principles and without regard to political,

religious or labor organization affiliation or non-affiliation, marital status, race, color, sex, sexual orientation, genetic information, national origin, non-disqualifying physical handicap or age. All actions concerning PMFs must be based solely on job-related criteria.

460.3.1 Eligibility for the PMF Program

Effective Date: 12/31/2012

An individual is eligible to apply for the PMF Program in two ways. First, an individual must have completed a qualifying advanced degree within the two-year period preceding the PMF Program announcement issued by OPM. The second way is to be a student currently attending a qualifying educational institution who expects to complete the advanced degree by August 31st of the academic year in which the competition is held.

OPM establishes qualification standards for the PMF Program and conducts assessments to determine which candidates will become PMF Finalists.

Complete information on the eligibility requirements and recruitment process for PMFs can be found at www.pmf.gov.

460.3.2 Selection of Presidential Management Fellows

Effective Date: 09/02/2011

Presidential Management Fellows must be selected in accordance with the numbers and occupational categories approved for the program by the Administrator or his or her designee. All selected candidates must meet the basic qualification requirements outlined in the position announcement. At least three finalists must be interviewed before one is selected for a PMF position.

USAID does not pay travel or transportation expenses for pre-employment interviews, travel for first appointment, or recruitment or relocation incentives for PMFs it selects.

Veterans' preference applies to selection for positions in the PMF Program. Selections must be made in accordance with the requirements of [5 CFR Part 302](#), veterans' preference laws, and OPM guidance issued as a Memorandum for Chief Human Capital Officers, dated February 9, 2009, on [Procedures for Passover of Compensably-Disabled Preference Eligibles in the Excepted Service](#). This includes, but is not limited to, ranked and unranked referral lists.

USAID is required to select from the highest available preference category if at least three veterans' preference candidates are in that group. If a Selecting Official decides not to hire a veteran it contacted or a veteran who "Expresses an Interest" in a particular position, the Selecting Official must prepare a written justification as to why the veteran did not meet the criteria for the position.

In the PMF Program, “expresses an interest” means that he/she has initiated contact with the Agency in person or by other direct communication and asked for consideration for a specific position. This contact can include dropping off the Finalist’s resume at the annual PMF job fair, sending it by mail/e-mail, or delivering it in person at any Agency office that is considering appointing a Finalist. It may also include sending a letter to the agency asking for consideration. It does not mean an agency has to contact each veteran on the Finalist list before offering a job to a non-preference eligible.

Decisions must be qualification driven. The written justification accomplishes two objectives:

- Veterans are entitled, upon request, to obtain a copy of the reasons they were passed over in favor of a non-veteran. The written justification is intended to satisfy that obligation and thus should be written with the expectation that the individual that was passed over may request to review it; and
- Additionally, if OPM officials audit USAID’s PMF processes, the written justification serves as documentation that veterans who were part of the Agency’s applicant pool received proper consideration.

If a Selecting Official decides to pass over a preference eligible who has a compensable service-connected disability of 30 percent or more for a PMF position, the Agency must send a pass over request to OPM for adjudication.

460.3.3 Appointment of Presidential Management Fellows

Effective Date: 02/27/2013

The Agency appoints Fellows for a period of two years using the Schedule D excepted service appointing authority codified by OPM at [5 CFR 213.3402\(c\)](#). The provisions of [5 CFR part 302](#) and [5 CFR part 362, subpart D](#) govern PMF appointments, which are subject to the same requirements governing term, career, or career-conditional employment.

The provisions of the Reemployment Priority List (RPL), Career Transition Assistance (CTAP) Program and Interagency Career Transition Assistance Plan (ICTAP) **do not** apply to the initial appointment or conversions of PMF Programs participants to the competitive service.

USAID’s policy is to make initial appointment at the GS-9 or GS-11 level depending on the Agency’s need and the candidate’s education and specialized experience as described in OPM’s qualification standards for positions at each grade level. PMF positions can have a career ladder extending to GS-14. At any time during the program, PMF positions can be reclassified upward, commensurate with the level of work required, without further competition.

PMFs must be security cleared under [Executive Order \(EO\) 10450](#) prior to appointment. PMF positions are subject to random drug testing in accordance with [ADS 410, Drug Free Workplace Program](#). These requirements apply to PMFs who move to USAID from appointments at other USG agencies. (See section **460.3.11** below for further discussion of PMF transfers to and from other agencies.)

USAID can extend a PMF's appointment for up to a maximum of 120 days in rare or unusual circumstances or situations defined by the Agency as "life changing events." Such events may include, but are not limited to, events related to an extreme medical situation, death, divorce, birth of a child, or a unique educational opportunity. Requests for extensions must be sent to the PMF Coordinator, OHR/CSP, with a written justification stating the reason for requesting an extension and the proposed timeline for program completion. The justification must contain:

- The PMF's resume;
- The PMF's current job description and the target position description (if a career ladder position); and
- Supporting documentation verifying the event necessitating the extension.

The PMF's immediate supervisor must submit the request, which must be approved by the Bureau's AMS Officer.

The Agency enters into a written agreement with each PMF it appoints. Agreements must include expectations and define the following:

- A general description of the duties to be performed;
- Work schedules;
- Length of appointment and termination date;
- Mentorship opportunities;
- Training requirements;
- Evaluation procedures that will be used for the participant;
- Requirements for continuation and successful completion of the Program;
- Minimum eligibility requirements for noncompetitive conversion to term or permanent appointment in the competitive service under the PMF Program; and
- Any other requirements or expectations established by the Agency.

Note: PMFs in classes previous to 2013, can still apply for extensions of up to one year.

460.3.4 Training and Professional Development

Effective Date: 02/27/2013

PMFs are strongly encouraged to cooperate with, and participate in to the extent desired and time permits, the Agency PMF Community.

There are a number of developmental activities that are required under the PMF Program. During the Program, PMFs must:

In the first 45 days:

- Participate in the OPM-sponsored orientation program and complete USAID's New Employee Orientation;
- In coordination with their supervisor, set performance elements and standards (work objectives), record them on the [Annual Evaluation Form](#) (AEF), and complete Section 2 of the AEF (**Note: the performance elements and standards section of the AEF must be signed and dated within the first 30 calendar days of the evaluation cycle – see [ADS 462, Employee Evaluation Program, Civil Service](#) for further details**); and
- With the input and approval of their supervisor, and in consultation with the PMF Coordinator or their mentor, prepare an Individual Development Plan (IDP – sometimes referred to in the Agency as an Individual Learning and Training Plan or ILTP) that identifies specific developmental activities designed to impart the competencies of the occupation or functional discipline in which the Fellow is most likely to be placed (see section 460.3.3 for further details).

Throughout the Program:

- Complete 80 hours of formal interactive training each year that addresses the competencies identified in the IDP. This training does not have to be classroom training as previously defined in the program, but can include conferences and online training, as long as such training addresses IDP competencies. Mandatory federal training such as ethics and security training does not count;
- Complete at least six months of developmental and/or rotational assignments outside the home office (see section **460.3.4.3** below for further discussion of rotation length);
- As needed, revise and update the IDP to reflect changes in knowledge, skills and experience, as well as changes that may occur in the work situation;
- Complete rotation memoranda and all other documentation pertinent to the program;
- Inform the PMF Coordinator of rotations conducted and any changes in status or

office to assist in effectively tracking PMFs throughout the Agency;

- Inform OPM's PMF Program Office of successful placement and current contact information by updating the Information Worksheet under the "Resources" section of the [PMF Web site](#).

USAID strives to ensure the best possible professional and leadership development experience for each Fellow. Agency Bureaus and Independent Offices (B/IOs) work together with OHR to carry out the following responsibilities.

B/IOs with PMFs must:

- Ensure that B/IO leadership, hiring officials, supervisors, and PMFs are fully aware of and understand the PMF Program's intent and buy into its requirements (B/IOs are encourage to assign a DAA with overall responsibility for the program);
- Ensure that Bureau requests for PMFs are consistent with Agency/Bureau strategy and comply with PMF Program guidelines;
- Set clear expectations for the PMFs' role in the Bureau; and
- Provide advice and guidance to supervisors and managers, as necessary, on PMF Individual Development Plans (IDPs).

Hiring Officials must:

- Prepare, in collaboration with B/IO Administrative Management Services (AMS) staff and the Agency PMF Coordinator, the position description for recruitment of a PMF Finalist; participating in the PMF Job Fair; interviewing candidates; and selecting the PMF for the position;
- Assign each PMF a supervisor at the outset of the Fellowship and as needed when supervisors change positions or leave the Agency; and
- Work with the B/IO's AMS staff to submit reimbursement of the PMF fee to the OHR PMF Coordinator within 15 workdays of the PMF's EOD date.

PMF supervisors must:

- Work closely with the PMF on the development of the IDP;
- Ensure that the PMF has received his/her approved Position Description (PD) (for each grade level if the position is a career ladder);

- Be or become fully aware of the responsibilities associated with supervising and serving as Rating Officials for PMFs;
- Maintain contact with the PMF Coach and PMF Coordinator to remain abreast of the latest program changes;
- Advise the PMF on the B/IO's expectations and standards for the IDP;
- Review and approve the PMF's IDP within 30 days of completion of the IDP (this applies to each of the PMF's supervisors during the Program);
- Provide daily supervision and guidance to the PMF;
- Establish a performance plan with performance elements and standards and evaluating the PMF's performance in accordance with [ADS 462](#);
- Prepare recommendations to OHR for promotion, conversion or termination; and
- Ensure that PMFs complete mandatory PMF Program requirements, including: (a) at least 80 hours of formal interactive training each year of the program and (b) one developmental assignment of at least four consecutive months outside the home office during the two-year program and (c) short-term rotational assignments of varying lengths (depending on the length of the developmental assignment) during the two years. (See section **460.3.4.3** below for further discussion of requirements for developmental and rotational assignments).

OHR/OD must:

- Designate an Agency PMF Coordinator;
- Determine the number and occupational backgrounds of PMFs to be hired each fiscal year in consultation with appropriate Bureaus/Independent Offices (B/IOs); and
- Determine whether candidates have met the requirements for graduation and are eligible for conversion.

The PMF Coordinator, Civil Service Personnel Division, Office of Human Resources (OHR/CSP) must:

- Ensure that hiring Bureaus/Independent Offices (B/IOs) within USAID are aware of the commitments involved in hiring Fellows, including Full Time Equivalent (FTE) status, OPM reimbursement, starting grade and pay, Individual Development Plans (IDPs), and requirements for training, career development, promotion and

conversion;

- Work with USAID managers, hiring officials and supervisors to identify PMF positions and posting PMF jobs in OPM's Projected Positions System (PPS);
- Work with B/IO officials to ensure that approved Position Descriptions (PDs) are in place for target positions for each PMF (for career ladder positions, at each level of the position);
- Manage the PMF recruitment, selection, and staffing activities including proper processing of personnel actions;
- Track the status and location of current PMFs, and maintaining, with the assistance of the PMF Community at USAID, a searchable database of rotations completed by Fellows;
- With the assistance of the USAID Mentor Program Manager and/or the PMF Coach, facilitate the identification of mentors for each PMF within 90 days of the PMF's appointment. These mentors must be of managerial status and outside the PMF's chain of command.
- Verify the Fellow's completion of all graduate degree requirements;
- Facilitate reimbursement of PMF fees from Bureaus to OPM within 30 calendar days of appointment of the PMF;
- Act as overall policy/regulatory guidance interpreter and resource for Fellows, their supervisors, and Agency personnel;
- Assemble and forwarding a complete package of materials for review by the DAA/OHR to determine whether PMFs graduate from the program not less than 30 calendar days before each PMF's eligibility for conversion;
- Notify the Fellows of certifications for conversion to career or career conditional appointment with USAID, or of terminations of employment, no later than 30 calendar days prior to the expiration of each Fellow's appointment; and
- Notify the OPM PMF Program Office in a timely manner of any PMF change in status including appointment, movement between agencies (reappointments), certification, resignation, termination, readmission, and conversions or appointment to permanent positions.

The PMF Coach must:

- Assist supervisors and PMFs in completing Individual Development Plans (IDPs). Assist in assessing PMFs' skills and competencies. Help PMFs understand Agency precepts and competencies and integrate them into IDPs;
- Participate in training, orientation and job fair sessions for PMFs, supervisors, and others, as identified;
- Advise on training and rotation opportunities; and
- Prepare and submit to the PMF Coordinator (or Contracting Officer's Representative (COR) for his or her contract) an annual report outlining the progress and development status of each PMF, including the status of their meeting mandatory requirements.

The PMF Mentors must:

- Meet with their assigned PMF(s) within 30 days of being paired and, subsequently, at least once per quarter;
- Provide general advice and guidance in a confidential manner, particularly on training and rotational opportunities; and
- Respond in a timely fashion to all communications with the assigned PMF.

There are three core elements of the Presidential Management Fellow's professional development: an Individual Development Plan (IDP), training, and rotational assignments. The IDP outlines the training, rotations, and other efforts necessary for the PMF to acquire knowledge, skills and competencies for successful performance in the position hired for and for future career development and leadership responsibility. Each of these elements is discussed further in the sections below.

460.3.4.1 Individual Development Plan (IDP)

Effective Date: 02/27/2013

The appointing agency must approve an IDP for each of its Fellows that sets forth the specific developmental activities designed to impart the competencies of the occupation or functional discipline in which the Fellow is most likely to be placed. The IDP must:

- Set goals and objectives to ensure that the PMF is qualified at the General Service (GS) level of the target position upon completion of the program;
- Identify resources needed to execute the plan and familiarize the PMF with various components and operations of USAID and the U.S. Government (USG) as a whole;

- Address not only how the PMF will accomplish his or her career development for the target position but also how he or she will gain the expertise to function in a leadership/management role in the Government.

The PMF must complete an IDP within 45 calendar days of the entrance on duty date. The IDP **must** be completed in consultation with the supervisor, PMF mentor, and the PMF coach, and should be aligned with the Fellow's performance plan. The IDP must be reviewed and approved by the PMF's supervisor and AEF Rating Official and forwarded to the OHR PMF Coordinator within the 45 day timeframe.

The IDP must include:

- A brief description of the target position, consistent with the relevant Position Description and the performance elements and standards in the PMF's Annual Evaluation Form (AEF) Performance Plan. This description should include specific knowledge, skills and competencies needed to qualify for and perform in the target position;
- An outline of the knowledge, skills and competencies that will prepare the PMF for leadership/management positions within the Agency, including at least three of the following general management areas:
 - Personnel management
 - Leadership
 - Strategy and policy development
 - Budget and financial management
 - Information systems
 - Procurement and grants
 - Management or program analysis.
- A description of how the outlined knowledge, skills, and competencies will be acquired in the two-year PMF Program period. This should include a combination of training (including required training), specific tasks, rotational assignments, and other activities to enhance knowledge, skills and competencies;
- A preliminary schedule for training, tasks and other activities, which will be updated as needed; and
- A means for tracking accomplishment of IDP objectives and progress to date.

The accomplishment of the objectives of the IDP is one of the factors considered in reviewing the PMF's eligibility for conversion to a permanent position.

460.3.4.2 Training

Effective Date: 02/27/2013

Training is a fundamental requirement of the PMF Program. USAID must provide each PMF at least 80 hours of formal interactive training each year of the Fellowship.

Mandatory trainings include:

- a. Training required by OPM when provided and mandated;
- b. The USAID New Employee Orientation (NEO) that is available for the PMF as soon as possible after entrance on duty (EOD); and
- c. Other **mandatory annual** USAID training such as USAID ethics and security briefings; however, these cannot be counted towards the 80 hour requirement.

In addition, PMFs are encouraged to participate in other USAID trainings, including technical and program management trainings offered by B/IOs, classes offered by USAID University, training in the legislative process, and working groups related to Administration initiatives, as deemed appropriate or necessary. Other training opportunities which could count towards the required 80 hours include: conferences, online trainings, etc.

The PMFs' home offices are responsible for the cost of all trainings, including required trainings. Cost estimates of training not provided by USAID must be included in the IDP so that host offices can identify funds to cover this training.

460.3.4.3 Rotations

Effective Date: 02/27/2013

Rotations are an integral part of the PMF experience and essential in the development of well-rounded and versatile employees. **Rotational assignments are used to allow Fellows to gain a broader perspective of the Executive Branch of the Federal Government and the U.S. government (USG) foreign policy apparatus. Rotations provide an opportunity to gain management experience, work in specific occupational fields or learn about a program function from another perspective. There are two types of rotations: the developmental assignment and other short-term rotational assignments.**

The Developmental Assignment:

The developmental assignment is an assignment outside the home office lasting at least four consecutive months in a functional area related to the Fellow's target position. The developmental assignment must be full time with management 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 must be within the Fellow's organization, in another component of the agency, or in another Federal agency. [Note: PMFs appointed before January 24, 2013 are not restricted to developmental assignments only within the Federal government.]

Other Rotational Assignments:

Fellows can receive other short-term rotational assignments at the agency's discretion. These rotations are of shorter duration (typically 1-2 months) and can be in occupations or functional areas different from the one in which the Fellow will most likely be placed. These rotations can take Fellows to another bureau, division, office, program, another agency, or branch of the Federal Government, or even outside the Federal Government (to the private or non-profit sector, for example, as long as they are fulltime management and/or technical responsibilities consistent with the Fellow's IDP). Rotations outside the U.S. Government must be approved by the PMF Coordinator and the PMF's supervisor, and cleared by the Office of the General Counsel (GC).

USAID's policy is to approve, in addition to the mandatory developmental assignment, at least one short-term rotational assignment in occupations or functional areas different from the PMF's target position. These rotations can be for varying lengths of time (depending on the length of the developmental assignment), but the total amount of time spent in rotational assignments (including the developmental assignment) can be up to six months. The specific length and timing of each developmental assignment and rotation will depend on the nature of the assignment, the development objectives (DOs) (consistent with the IDP), and workload requirements of the home office.

All rotations (including developmental assignments) must:

- a. Be specifically linked to the IDP;
- b. Focus on developing the specific professional skills or fulfilling particular managerial competencies not just for the target position but for functioning in the Agency and the U.S. Government (USG) at large;
- c. Complement the PMF's existing knowledge or professional interest; and
- d. Allow PMFs to gain different perspectives on the Agency and the USG foreign policy apparatus.

For each rotation, the PMF must create a Rotation Memorandum signed by both the home office supervisor and the rotation supervisor, with at least two weeks' notice before the rotation begins that includes:

- The designation of the rotation supervisor;
- A specific description of the tasks to be performed;
- Provisions for reporting time and attendance to the home office, and any costs associated with the rotation; and
- The timing of the rotation.

PMFs must remain in their home office position for at least three months before rotating. This allows the PMF to complete OPM and USAID orientation training, become more familiar with the target position, and prepare his or her IDP, which must be completed before a rotation can be approved. Additionally, PMFs must spend at least the last month in the target position to prepare for graduation and conversion. Under exceptional circumstances PMFs may work with their supervisors to waive these requirements; deviations must be documented in the Rotation Memorandum.

For rotations exceeding 30 days, the host supervisor is responsible for preparing an [Appraisal Input Form \(AIF\)](#) and sending it to the home office supervisor within 30 days of completion of the rotation. For rotations of fewer than 30 days, the host supervisor should document the PMF's performance on the Rotation Memorandum or in a separate memo.

The rotation supervisor and management support staff are responsible for satisfying all logistical requirements such as space, computer, security clearance, etc., for all rotations.

The PMF supervisor in the home office is responsible for arranging coverage of the PMF portfolio while the PMF is on rotation. While rotations should be timed to mitigate disruption in the home office, mandatory rotations must still be completed regardless of coverage in the home office.

Rotations Outside USAID/Washington

Rotations to field Missions are encouraged to the extent possible to gain insights about USAID operations in the field. These rotations are contingent on the availability of the funds necessary to support them and on the workload of the host Mission. In order to meet IDP and career development objectives (DOs), PMFs may pursue rotation opportunities outside USAID that offer exposure to perspectives from USAID implementing partners, the legislative branch, and other relevant entities.

For any rotation outside the Agency, a Memorandum of Understanding (MOU) between USAID and the host organization is required. (See section **460.5** for sample MOUs.)

The home and host office supervisors must approve all rotations. The PMF Coordinator's approval is also required for rotations outside USAID, which require these additional clearances:

- For rotations outside of the U.S. Government, USAID's Office of the General Counsel (GC);
- For overseas rotations, the relevant Regional Security Officer and Chief of Mission or designee (since PMFs fall under Chief of Mission authority).

Rotations to USAID from Other Agencies

PMFs from other agencies often desire to complete rotations at USAID. In these cases the receiving Bureau/Independent Office (B/IO) or USAID Mission must evaluate the cost implications of initiating a Secret-level security clearance (if the PMF does not have one from the sending agency) and other logistical arrangements, against the PMF's potential contributions to the Bureau. These rotations must meet the requirements of the PMF's home agency and USAID, and the terms of the agreement between agencies must be documented in the Rotation Memorandum along with the standard contents (timing and other provisions) outlined above.

460.3.5 Performance Management Effective Date: 02/27/2013

The [ADS 462, USAID Employee Evaluation Program \(EEP\), Civil Service \(CS\)](#), governs performance management of Presidential Management Fellows. The policies and guidelines in this ADS chapter provide a systematic process by which the Agency involves its employees in improving Agency organizational effectiveness. See the [EEP Guidebook Part 2, Civil Service](#), for detailed information on the annual evaluation process.

The [Annual Evaluation Forms \(AEFs\)](#) for all PMFs (all years of the PMF Program) must include in the section describing the employee's role in the organization language related to the professional development element of the PMF Program. Thus, after a short statement describing the employee's role and work, the following language should be inserted: "The employee develops and updates an Individual Development Plan (IDP) and performs periodic self-assessment so that efforts are targeted towards mastering core program skills and knowledge. Performance Standards: 1) IDP updated jointly with supervisor and coach to address needed competencies for performance precepts; 2) Calendar of rotations, activities and trainings prepared and periodically updated; and 3) Majority of skills, trainings and competencies identified in the IDP are met to the extent possible within the PMF's work situation.

The Rating Official of Record is the official who is the PMF's home supervisor on the last day of the Civil Service rating cycle. That supervisor must complete the final AEF

regardless of the number of days the employee has been under his or her supervision. The minimum appraisal period is 90 days. PMFs who are on active performance plans for 90 days or more will receive AEFs. The Rating Official of record must use [Appraisal Input Forms \(AIFs\)](#) and other 360 degree information to complete the final AEF.

Each of the PMF's supervisors must complete an AIF if the employee has been supervised for at least 30 calendar days. The AIF records both critical and non-critical Performance Elements and Standards. Should a PMF rotation last fewer than 30 days, the supervisor may use a Rotation Memo to assess the PMF's performance. The Rotation Memo must be forwarded to the PMF's home supervisor for use in the final AEF.

If a Fellow does not meet expectations (set forth in the AEF work plan) with regard to his/her developmental progress or assignments, the agency will take action such as warnings, opportunity for corrective action, or termination, as appropriate, in accordance with the policies in [ADS 462](#). (See section **460.3.12** below for discussion of termination.)

460.3.6 Promotions

Effective Date: 02/27/2013

Fellows who meet Agency requirements for performance at the next higher level in their career ladder can be non-competitively promoted to the higher grade up to the GS-13 prior to their conversion to the competitive service. **PMFs in career ladder positions that extend to GS-14 can be promoted above the GS-13 only after they have converted to the permanent position and have served the required time-in-grade. PMFs in positions that do not exceed GS-13 must compete for promotion in accordance with the Agency's Merit Staffing Program (see [ADS 418](#)).** Although OPM allows agencies to offer accelerated promotions for these excepted service appointments, USAID follows the competitive service regulations for PMF promotions. Note: [5 CFR 362.405\(c\)](#) does not confer entitlement to promotion.

Fellows must meet the following Agency requirements for promotion:

- Received at least a "fully successful" AEF rating of record;
- Completed satisfactorily one year of service at his/her current grade;
- Demonstrated the ability to perform satisfactorily at the next higher grade and be recommended for promotion by the supervisor of record; and
- Completed the requisite 80 hours of training for that year.

If a PMF is recommended for promotion, the promotion action will be effected in accordance with USAID's Civil Service Merit Promotion system (see [ADS 418, Merit Staffing Program for Civil Service \(CS\) Employees](#)), including time-in-grade requirements. If a PMF is recommended for promotion after meeting the performance

and training requirements and completing one year in the program, the promotion will be effective on the one-year completion date. Note that the salary increment will be in effect in the first full pay period following OHR receipt and approval of the request for promotion action. PMFs should work closely with their Bureau supervisors and AMS office to make sure that promotion requests are forwarded to OHR well in advance of the one-year anniversary date.

The Office of Human Resources (OHR) makes the final decision on promotion, based upon the recommendation of the supervisor, successful completion of relevant PMF Program requirements, and the AEFs. The PMF's B/IO submits this documentation in a memorandum to the Agency PMF Coordinator. (See Additional Help Document d, below, for a sample promotion memorandum.)

460.3.7 Benefits

Effective Date: 09/02/2011

PMFs are covered by Civil Service (CS) laws governing benefits, including retirement (see [ADS 476, Benefits](#)).

PMFs earn and accrue leave based on CS rules and regulations (see [ADS 480, Leave](#) and [ADS 481, Family and Medical Leave \(FML\)](#)).

PMFs are eligible for awards based upon USAID's Employee Evaluation Program, CS, and the USAID Awards Program (see [ADS 462](#) and [ADS 491, USAID Awards Program](#)).

Additional information on benefits can be found on the OHR Web site at: <https://pages.usaid.gov/HCTM/what-we-provide>.

460.3.8 Certification of Completion

Effective Date: 09/02/2011

USAID's Office of Human Resources certifies that Fellows have successfully completed the PMF program as outlined in [5 CFR 362.405\(d\)](#). Approximately one month before the second anniversary of the PMFs Entrance on Duty date, OHR will:

- Consider whether the Fellow has met all the requirements of the program as outlined in the program regulations found at [5 CFR 362](#);
- Consider whether the Fellow has performed successfully by reviewing the IDP, the supervisor's recommendations to the Board and Annual Evaluation Forms; and decide regarding certification of successful completion.

PMFs should be working with the Agency PMF Coordinator and supervisor throughout the two-year period to ensure that all requirements are met for OHR review at the end of the fellowship.

460.3.9 Conversion/Placement of Presidential Management Fellows

Effective Date: 12/31/2012

Subject to any OPM-imposed conversion limitations, USAID has authority to noncompetitively convert any PMF who has met all Program requirements to a position in the competitive service under a term or permanent appointment. However, service in the PMF Program confers no right to further employment in the competitive or excepted service. Hiring officials are strongly encouraged to complete this conversion process for successful PMF graduates.

Pathways participants converted to term appointments may be subsequently converted noncompetitively into permanent competitive service positions before the term appointment expires.

USAID will convert to noncompetitive positions those PMFs who successfully complete the Program and who became Finalists before July 10, 2012, when Pathways Program regulations went into effect.

The provisions of the Reemployment Priority List (RPL), Career Transition Assistance (CTAP) Program and Interagency Career Transition Assistance Plan (ICTAP) **do not** apply to conversions of PMF Program participants to the competitive service.

In accordance with OPM guidance, if agencies plan to convert PMFs, their workforce plans must ensure there are sufficient numbers of permanent positions to allow for the conversion of Program participants who successfully complete their Program requirements. Bureaus and Independent Offices must plan their PMF requests carefully and work closely with OHR to ensure that this OPM requirement is met.

Upon conversion to the CS, the employee becomes a career employee if the three-year Federal service requirement for status is met; otherwise, the employee becomes a career-conditional employee. Once a PMF is noncompetitively appointed to a career-conditional position, he or she does not serve a probationary period and acquires competitive status immediately.

Prior periods of Federal employment count for annual and sick leave accrual as well as for retirement credit.

460.3.10 Movement to Other Positions Within USAID

Effective Date: 09/02/2011

PMFs may be transferred to other positions within USAID if the receiving position is

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Text highlighted in yellow indicates that the adjacent material is new or substantively revised.

designated as an approved PMF position. The responsible OHR Specialist will request a release date from the supervisor, through the Administrative Office, for the PMF. PMFs selected for reassignment must be released from their present positions 30 calendar days from the date OHR requests a release date. Movement of PMFs within USAID must be handled in a consultative manner so that staffing disruptions within USAID are minimized, i.e., losing offices have as much notice as possible to find replacement staffing. Generally, the receiving office should consult directly with the losing office before there is a request for release date.

460.3.11 Movement to and from Other USG Agencies

Effective Date: 09/02/2011

A PMF can move to another USG agency at any time during his or her appointment in the Program as long as the other agency meets all the requirements for participating in the PMF Program. To move during the Program, the PMF must separate from USAID. To accomplish this, USAID will process a Termination-Appointment action effective the day immediately preceding the day the employee is to enter duty in the new employing agency. The new employing agency must appoint the participant without a break in service under the appropriate Fellow appointing authority. Because there is no break in service, time served under the program with USAID applies towards the completion of the program with the new employing agency; however the moving PMF must complete the gaining agency's PMF requirements within his or her remaining time in the Program. If the move takes place within six months of the initial PMF appointment, the losing agency can request reimbursement from the gaining Agency.

The gaining agency must notify OPM when appointing a Fellow currently appointed in another agency.

Conversely, PMFs can move from other USG agencies to USAID during their appointments. When a B/IO agrees to accept a PMF from another agency, the B/IO AMS office must notify the PMF Coordinator who will generate a request for release of the PMF and a personnel action to appoint the PMF to a USAID PMF position.

460.3.12 Withdrawal Readmission/Reappointment

Effective Date: 09/02/2011

A PMF may withdraw from the program at any time by resigning from his or her appointment. Such withdrawal will be treated as a resignation from the Federal service. The following policies pertain to requests for readmission or reappointment.

1. A PMF 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 be placed in a permanent competitive service position in that agency. USAID must notify OPM when a PMF withdraws from the program.

2. If a PMF withdraws from the program for reasons that are related to misconduct, poor performance, or suitability, as determined by USAID, he or she will not be readmitted to the program at any time.
3. If a PMF withdraws from the program for reasons that are not related to misconduct, poor performance, or suitability, he or she may petition USAID for readmission and reappointment to the program as outlined below.

If a Fellow withdraws from the PMF Program for reasons not related to misconduct, poor performance, or suitability, he or she may petition USAID in writing for readmission and reappointment to the Program at the same grade level within the next two years. To apply for readmission as a PMF to USAID, the PMF must:

- Have separated from the program as a PMF at USAID; and
- Contact the former B/IO to permit readmission and reappointment, or apply for a PMF position with another B/IO within USAID.

All requests for readmission and reappointment must be approved by the PMF Coordinator, who must submit a written request to OPM for final approval.

Note: OPM Director's/designee's final determination is not subject to appeal.

460.3.13

Termination

Effective Date: 02/27/2013

PMF appointments expire at the end of the two-year fellowship period. At that time, if the Fellow has not been granted an extension or has not successfully completed the program and been converted, the Fellow's appointment terminates. USAID can terminate a PMF for misconduct, poor performance, or suitability issues, under the applicable provisions of title 5.

USAID will not convert Fellows who demonstrate ongoing performance or conduct problems. After appropriate performance management actions have been taken and documented, and USAID decides not to certify a Fellow, the Agency will notify the Fellow no fewer than 30 calendar days prior to the end of the fellowship. If USAID is asked for a reference on a Fellow whose termination was due to performance or conduct reasons, the Agency will be forthcoming with the prospective employing agency about the issues surrounding the decision to terminate the employee.

In order to be retained in the program, PMFs must meet all performance expectations during the appointment. USAID supervisors and others must review and follow established regulations and the policies in [ADS 462](#) when addressing performance ([5 CFR Part 430](#)) or conduct ([5 CFR Part 752](#)) issues. USAID's PMF Program Coordinator must notify the OPM PMF Program Office in writing of a decision to terminate a PMF.

USAID's termination procedures will take into consideration the Fellow's AEF and performance reviews. USAID must identify the problematic issues and attempt to resolve performance or conduct issues before the end of the two year fellowship by following the employee evaluation program guidelines in [ADS 462](#) and the [Employee Evaluation Program Guidebook Part 2, Civil Service](#)). Procedures for performance and conduct issues and disciplinary actions include counseling the employee, providing a reasonable timeframe for demonstrating acceptable performance and/or taking corrective actions, and other measures as outlined in [ADS 462](#) and the regulations cited above.

PMFs who are denied certification may request reconsideration of the Agency's decision 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 PMF may continue in the Program pending the outcome of his or her request for reconsideration, and USAID will continue to provide appropriate developmental activities during this period. **OPM's determination is final and not subject to further review or appeal.**

460.4 MANDATORY REFERENCES

460.4.1 External Mandatory References

Effective Date: 09/02/2011

- a. [5 CFR 213, Excepted Service](#)
- b. [5 CFR 302, Employment in the Excepted Service](#)
- c. [5 CFR 315, Career or Career Conditional Employment](#)
- d. [5 CFR 315.708, Conversion based on service in the PMF Program](#)
- e. [5 CFR 362, Subpart D, Presidential Management Fellows Program](#)
- f. [5 CFR 430, Performance Management](#)
- g. [5 CFR 752, Adverse Actions](#)
- h. [Executive Order 13562 dated December 27, 2010](#)
- i. [Executive Order 13318 dated November 21, 2003](#)
- j. [Executive Order 10450 dated April 27, 1953](#)
- k. [PMF Guide for Agencies](#)

460.4.2 Internal Mandatory References

Effective Date: 12/31/2012

- a. [ADS 410, Drug-Free Workplace Program](#)
- b. [ADS 413mab, Overview of the Pathways Programs](#)
- c. [ADS 418, Merit Staffing Program for Civil Service \(CS\) Employees](#)
- d. [ADS 460mab, Pathways Program Memorandum of Understanding](#)
- e. [ADS 462, Employee Evaluation Program, Civil Service](#)
- f. [ADS 476, Benefits](#)
- g. [ADS 480, Leave](#)
- h. [ADS 481, Family and Medical Leave \(FML\)](#)
- i. [ADS 491, USAID Awards Program](#)

460.4.3 Mandatory Forms

Effective Date: 09/02/2011

- a. [Annual Evaluation Forms \(AEFs\)](#)
- b. [Appraisal Input Forms \(AIFs\)](#)

460.5 ADDITIONAL HELP

Effective Date: 09/02/2011

- a. [ADS 460saa, Sample Individual Development Plan](#)
- b. [ADS 460sab, Sample Internal Rotation Memo](#)
- c. [ADS 460sac, Sample External Rotation Memos](#)
- d. [ADS 460sad, Sample Memoranda for Recommendation of Promotion and Graduation](#)
- e. [ADS 460sae, PMF Supervisors' Overview Guidance](#)
- f. [OPM PMF Program Brochure](#)

460.6 DEFINITIONS

Effective Date: 09/02/2011

The terms and definitions listed below have been incorporated into the ADS Glossary. See the [ADS Glossary](#) for all ADS terms and definitions.

Developmental Assignment

An assignment lasting at least four consecutive months during the fellowship in a functional area related to the Fellow's target position. The developmental assignment must be full time with management or technical responsibilities consistent with the Fellow's IDP and must be outside the PMF's home office. (Chapter 460)

Individual Development Plan (IDP)

A realistic, well-researched, clearly written tool for charting a successful two year Presidential Management Fellow experience. It is a tool for Fellows and their supervisors to negotiate expectations for attaining clearly defined learning objectives and competencies during the two year PMF Program through training and development assignments. (Chapter 460)

Presidential Management Fellow

Individuals who 1) complete a graduate course of study at a qualifying college or university, 2) receive the nomination of the dean or academic director, 3) successfully complete an Office of Personnel Management administered assessment process, 4) are selected by the Office of Personnel Management as a finalist, and 5) are selected by the Agency for appointment. (Chapter 460)

Presidential Management Fellow Program

A Federal Government program to attract 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. (Chapter 460)

Projected Positions System (PPS)

An easy-to-use, online system that can assist Presidential Management Fellow finalists to identify projected agency positions by agency, subagency, location, positions title, job type and date posted. Federal agencies post position information specifically for PMF finalists, and the positions are not open to the general public. The PPS also profiles agencies that participate in the PMF Program. (Chapter 460)

Rotational Assignments

Short-term assignments used to allow Fellows to gain a broader perspective of the Executive Branch of the Federal Government and the U.S. government foreign policy apparatus. Rotations can take Fellows to another bureau, division, office, program, another agency or branch of the Federal Government, or even outside the federal government (to the private or non-profit sector, for example). Rotations provide an

opportunity to gain management experience, work in specific occupational fields or learn about a program function from another perspective. (Chapter 460)

Target Position

The permanent full time position the Presidential Management Fellow is expected to encumber upon conversion to permanent status at the completion of the Fellowship. This can be the initial position for which the Fellow is hired. (Chapter 460)

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Eligibility

- Individuals must have completed a qualifying advanced degree within the two-year period preceding the PMF Program announcement issued by OPM.
- Students currently attending a qualified educational institution expecting to complete the advanced degree by August 31st of the academic year in which the competition is held.

Appointment of Fellows

- Fellows will be appointed at the GS-9 or GS-11 level depending on the Agency's need and candidates education and specialized experience as described in OPM's qualification standards for positions at each grade level.
- Can have career ladder extending to GS-14.
- PMF positions can be reclassified upwards without any need of competition.



USAID MISSION

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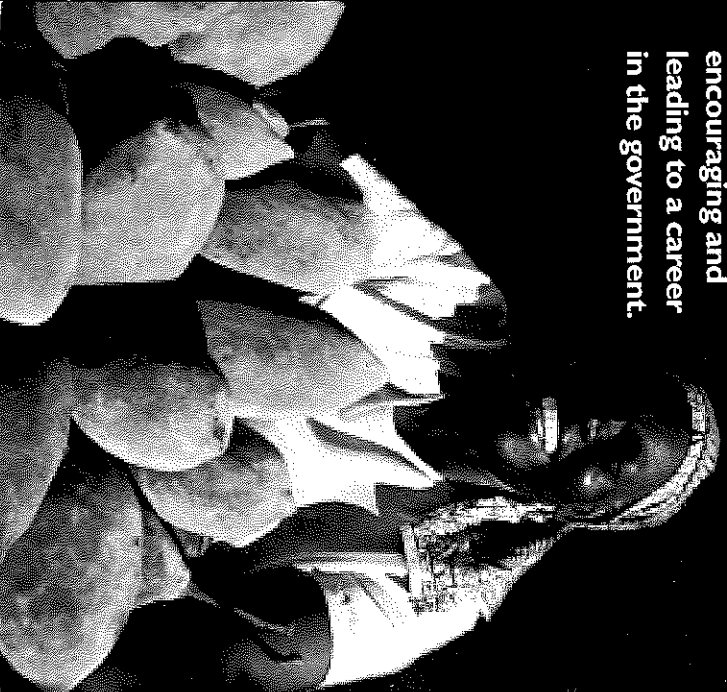
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FROM THE AMERICAN PEOPLE

USAID PRESIDENTIAL MANAGEMENT FELLOWS PROGRAM



WHAT IS PMF

Bearing the Presidential moniker, the PMF Program is a flagship leadership development program at the entry level for advanced degree candidates. It was created more than three decades ago by Executive Order and has gone through many changes over the years. The Program attracts and selects the best candidates possible, but is really designed with a more narrow focus—developing a cadre of potential government leaders. It provides some sustenance during the first years of employment and encourages development of leadership capabilities. The PMF Program inculcates a lasting bond as well as a spirit of public service, ultimately encouraging and leading to a career in the government.



Promotions

- Fellows who meet Agency requirements for performance at the next higher level in their career ladder can be non-competitively promoted to the higher grade up to GS-13.
- PMFs who are in a career ladder positions that extend to GS-14 can be promoted above the GS-13 level only after they have converted to the permanent position and have served the required time-in-grade.
- PMFs in positions that do not exceed GS-13 must compete for promotion in accordance with the Agency's Merit Staffing Program.

Training

- Training is a fundamental requirement.
- At least 80 hours of formal interactive training each year is required.
- PMFs are encouraged to participate in other trainings which can count towards the 80 hours required.

Rotations

- Rotations are an integral part of the PMF experience and essential in the development of well-rounded and versatile employees.
- Rotational assignments are used to allow Fellows to gain a broader perspective of the Executive branch of the Federal government.



Photo: Noah Seibert

- Rotations provide an opportunity to gain management experience, work in specific occupational fields or learn about a program function from another perspective.
- The developmental assignment is an assignment outside the home office lasting at least 4 consecutive months in a functional area related to the fellows target position.
- Developmental assignments must be fulltime with management or technical responsibilities consistent with the fellows Individual Learning & Training Program (ILTP).

PMF WELCOME PACKET FOR 2015

- 1. USAID Organization**
- 2. Automated Directives System**
- 3. USAID PMF Policy – ADS 460**
- 4. Individual Development Plans**
- 5. USAID Employee Evaluation Program, Civil Service**
- 6. USAID Training Opportunities**
- 7. Other Topics that May Impact PMFs**
- 8. PMF Frequently Asked Questions**

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From the Chair

Dear Fellow PMFs,

Welcome to our inaugural newsletter! I'm pleased to tell you that we've already had quite a year: in late February, we hosted a brownbag discussion on PMF rotations targeted at the 2014 PMF class, and a group of us toured the West Wing; and in March, we cheered on 2012 PMFs at the PMF graduation ceremony.

We've got a lot more planned in 2015 – including barbecues, professional development events, and more. The PMF community is only as good as the PMFs in it so we welcome your active involvement!

Ted Senasu, Chair, SenasuTT@state.gov

Upcoming Events and Links

- Friday, April 3 | 12:00-1:00 :
First Friday Lunch
- Wednesday, April 8 | 12:00-1:00: PMFAC Meeting
- Wednesday, April 22 | 12:00-1:00: PMFAC Meeting
- The 2015 PMF Class Finalist List is nearly 600 strong and can be found [here](#).

Pictured: Natalie Meyer (2013) and Laura Garnett (2014) on the PMF organized White House tour



Social and Professional Development Committee

The Social and Professional Development Committee is hard at work planning a series of events for the upcoming months, including:

- Game Night with State and USAID PMFs
- Diplomatic Reception Room Tour
- Conversion Workshop: Paperwork and Process

We're looking for volunteers to help stage and organize events, especially people looking to take the lead in planning one-off events.

If you're looking to get involved, contact David at MeyerDK@state.gov.

Diversity and Outreach Committee

The Diversity and Outreach Committee is seeking to increase public awareness of the PMF program, directing efforts towards diversifying PMFs at Department of State.

In April, the Committee will host a Google Hangout for PMF Finalists, where current PMFs will be invited to share their stories and answer questions from the 2015 class. We are also planning a post-Job Fair Happy Hour to welcome PMF Finalists DC. Keep your eyes peeled for the calendar invites.

Get involved by contacting Jeny at MillsJA@state.gov!

Civil Service Development Committee

The Civil Service Professional Development Committee works with the PMF community and Department/USAID leadership to encourage innovative solutions to civil service challenges and educate the PMF community about professional development opportunities for civil servants at the Department and USAID.

The Committee is working on our 2015 survey of the PMF community, which we hope to send out in May. The results from our [2014 survey](#) were used to shape PMF Advisory Council programming decisions and featured prominently in the PMF Advisory Council's 2014 QDDR submission.

Want to learn more? Contact Elizabeth Vish at VishEP@state.gov