



ADS Chapter 460

Presidential Management Fellows Program

Partial Revision Date: 11/23/2011
Responsible Office: HR
File Name: 460_112311

ADS 460 - Presidential Management Fellows Program

Table of Contents

<u>460.1</u>	<u>OVERVIEW</u>	<u>4</u>
<u>460.2</u>	<u>PRIMARY RESPONSIBILITIES</u>	<u>4</u>
<u>460.3</u>	<u>POLICY DIRECTIVES AND REQUIRED PROCEDURES</u>	<u>5</u>
<u>460.3.1</u>	<u>Selection of Presidential Management Fellows</u>	<u>5</u>
<u>460.3.2</u>	<u>Appointment of Presidential Management Fellows</u>	<u>6</u>
<u>460.3.3</u>	<u>Professional Development</u>	<u>8</u>
<u>460.3.3.1</u>	<u>Individual Development Plan (IDP)</u>	<u>10</u>
<u>460.3.3.2</u>	<u>Training</u>	<u>13</u>
<u>*460.3.3.3</u>	<u>Rotations</u>	<u>13</u>
<u>460.3.4</u>	<u>Performance Management</u>	<u>16</u>
<u>460.3.5</u>	<u>Promotions</u>	<u>17</u>
<u>460.3.6</u>	<u>Benefits</u>	<u>17</u>
<u>460.3.7</u>	<u>Certification of Completion</u>	<u>18</u>
<u>460.3.8</u>	<u>Conversion/Placement of Presidential Management Fellows</u>	<u>18</u>
<u>460.3.9</u>	<u>Movement to Other Positions Within USAID</u>	<u>18</u>
<u>460.3.10</u>	<u>Movement to and from Other USG Agencies</u>	<u>19</u>
<u>460.3.11</u>	<u>Withdrawal Readmission/Reappointment</u>	<u>19</u>
<u>460.3.12</u>	<u>Termination</u>	<u>20</u>
<u>460.4</u>	<u>MANDATORY REFERENCES</u>	<u>21</u>
<u>460.4.1</u>	<u>External Mandatory References</u>	<u>21</u>
<u>460.4.2</u>	<u>Internal Mandatory References</u>	<u>21</u>
<u>460.4.3</u>	<u>MANDATORY FORMS</u>	<u>22</u>

460.5 ADDITIONAL HELP.....22

460.6 DEFINITIONS.....22

**An asterisk and yellow highlight indicate that the adjacent material is new for this chapter or substantively revised. 3*

ADS 460 - Presidential Management Fellows Program

460.1 OVERVIEW

Effective Date: 09/02/2011

This chapter provides the mandatory policies, and required procedures governing all aspects of the USAID's participation in the Office of Personnel Management's Presidential Management Fellows (PMF) Program. The purpose of the PMF Program is to help Federal agencies meet their workforce planning and succession needs by attracting to Federal service outstanding individuals from a variety of academic disciplines and career paths who are committed to excellence in the leadership and management of public policies and programs. It is explicitly envisioned as one of the tools for developing the future cadre of Government leaders.

460.2 PRIMARY RESPONSIBILITIES

Effective Date: 09/02/2011

- a. The **U.S. Office of Personnel Management (OPM)** is responsible for developing, managing and evaluating the PMF Program. OPM's responsibilities are detailed in the [Presidential Management Fellows Program Guide for Agencies](#).
- b. The **Office of Personnel Management's (OPM's) PMF Program Office** is responsible for the program's overall management.
- c. The **Deputy Assistant Administrator for the Office of Human Resources (DAA/OHR)** has overall responsibility for USAID's Presidential Management Fellows Program.
- d. The **PMF Program Coordinator, Civil Service Personnel Division, Recruitment and Staffing Branch, Office of Human Resources (OHR/CSP/RS)** is responsible for the overall administration and development of the Agency PMF Program and serving as its principal point of contact.
- e. 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.

f. 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.

g. The Office of Civil Rights and Diversity (OCD) 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.

h. 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.

460.3 POLICY DIRECTIVES AND REQUIRED PROCEDURES

Effective Date: 09/02/2011

460.3.1 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.

In accordance with [5 CFR 302.304](#) and [302.401](#) and [5 CFR 362](#), PMF selections must take into account veterans' preference for all positions. USAID is required to select from the highest available preference category if at least three veterans' preference candidates are in that group. If the Agency decides not to hire a veteran it contacted or a veteran who "Expresses an Interest" in a particular position, the Agency 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.)

**An asterisk and yellow highlight indicate that the adjacent material is new for this chapter or substantively revised. 5*

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.

A veteran who has 10-point compensable preference based on a service-connected disability of 30% or more is entitled to advance notice of a proposed passover and has the right to respond to the appointing official's reasons for passover. The veteran must submit a response within 15 days of the notification. The appointing official must make a decision after considering any response submitted by the veteran and notify the veteran of the decision in writing.

USAID is permitted to fill PMF positions without regard to the agency's Reemployment Priority List (RPL), Career Transition Assistance Plan (CTAP) or the Interagency Career Transition Assistance Plan (ICTAP). However, USAID must clear its RPL, CTAP, and ICTAP before appointing a PMF graduate to a competitive service position or before reinstating a former career/career-conditional employee who did not complete the PMF Program.

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

460.3.2 Appointment of Presidential Management Fellows

Effective Date: 09/02/2011

In accordance with [5 CFR 362](#), individuals may be appointed to a Full Time Equivalent position as a Presidential Management Fellow at USAID if they are chosen by OPM as a finalist in the PMF Program and selected by USAID for appointment. In accordance with [5 CFR 362](#), USAID has 12 months after a PMF's selection as a finalist to appoint him or her to a position. The Agency makes every effort to appoint PMFs no later than December 31 (9 months after selection as a finalist). PMFs are appointed for two years.

USAID appoints the Fellow to an excepted position under Schedule A in accordance with [5 CFR 213.3102 \(hh\) \[Reserved\] \(ii\)](#). The initial appointment may be at the GS-9 or GS-11 level depending on the Agency's need and the candidate's education and/or 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.

**An asterisk and yellow highlight indicate that the adjacent material is new for this chapter or substantively revised. 6*

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

Fellows may extend their two-year appointment for up to one additional year. Requests for extension must be received at least 90 calendar days before the end of the appointment and must be approved in USAID by the Fellow's supervisor and the PMF Coordinator. The DAA/OHR has authority to approve extensions of Fellows up to 120 calendar days. The OPM Director/designee approves extension requests up to one year extension upon written request by OHR; such requests must be received at least 90 days before the end of the initial appointment (see [5 CFR 362.203](#)).

During the Program the PMF must:

- Successfully perform the duties and responsibilities of the position to which assigned as defined in an Annual Evaluation document prepared, monitored and evaluated by the supervisor;
- With the input and approval of the supervisor, prepare an IDP 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 (within 90 calendar days of the PMF's EOD);
- Working with the PMF Coach and PMF supervisor to ensure that an informal training on the PMF Program is provided to the supervisor within the first 30 days of assuming supervisory responsibility;
- Cooperate with, and participate in to the extent desired and time permits, the Agency PMF Secretariat;
- Complete 80 hours of formal classroom training each year including participation in the PMF orientation and graduation programs;
- Complete at least six months of developmental and/or rotational assignments outside the home office (see section **460.3.3.3** 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;

**An asterisk and yellow highlight indicate that the adjacent material is new for this chapter or substantively revised. 7*

- 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 the PMF Program Office of current contact information by updating the Information Worksheet under the “Forms” section of the PMF Web site; and
- Work closely with the Agency PMF Coordinator and supervisor to ensure that all requirements are met for OHR review at the end of the fellowship.

460.3.3 Professional Development

Effective Date: 09/02/2011

There are three core components to Presidential Management Fellows’ 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.

The B/IO’s DAA assigned to the Program must:

- Ensure that Bureau requests for PMFs are consistent with Agency/Bureau strategy and comply with PMF Program guidelines;
- Ensure that Bureau hiring officials, supervisors, and PMFs are fully aware of and understand the PMF Program’s intent and requirements;
- Set clear expectations for the PMFs’ role in the Bureau;
- Prioritize and facilitating Bureau rotation opportunities for PMFs; 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

**An asterisk and yellow highlight indicate that the adjacent material is new for this chapter or substantively revised. 8*

- 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;

The DAA/OHR 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 Program Coordinator, Civil Service Personnel Division, Recruitment and Staffing Branch, Office of Human Resources (OHR/CSP/RS) 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 Secretariat, a searchable database of rotations completed by Fellows;
- 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;
- Provide for an orientation on Agency mission and structure as early as possible for all newly hired Fellows;

**An asterisk and yellow highlight indicate that the adjacent material is new for this chapter or substantively revised. 9*

- 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;
- Provide written requests to OPM for PMF extensions exceeding 120 days; 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). Assisting in assessing PMFs' skills and competencies. Helping PMFs understand the precepts and competencies and integrate them into IDPs;
- Participate in training, orientation and job fair sessions for PMFs, supervisors, and others, as identified;
- Provide training to supervisors on the requirements of the PMF program within 60 days of a PMF's entry-on-duty date;
- Advise on training and rotation opportunities; and
- Prepare and submit to the PMF Coordinator (or Contracting Officer's Technical Representative (COTR) 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.

460.3.3.1 Individual Development Plan (IDP)

Effective Date: 09/02/2011

Requirements in [5 CFR 362.204\(a\)](#) state that the appointing agency will 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

**An asterisk and yellow highlight indicate that the adjacent material is new for this chapter or substantively revised. 10*

(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 90 calendar days of the entrance on duty date. The IDP should be completed in consultation with the supervisor 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 90 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;

**An asterisk and yellow highlight indicate that the adjacent material is new for this chapter or substantively revised. 11*

- A preliminary schedule for training, tasks and other activities;
- A timeframe for revisiting and revising the IDP. This should take place at least every six months. As significant changes to the IDP are made, they should be explained in writing and submitted to the PMF coach and OHR PMF Coordinator; and
- A means for tracking accomplishment of IDP objectives and progress to date.

Supervisors must:

- Work closely with the PMF on the development of the IDP, which must be prepared in collaboration with the PMF Coach within 90 calendar days of the PMF's entrance on duty (EOD) date;
- 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;
- Take the training on the PMF Program requirements offered by the Agency PMF Coach within 60 days of assuming responsibility for supervising a PMF;
- 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, Employee Evaluation Program, Civil Service](#);
- 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 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 [5 CFR 362.204\(b\)\(4\)](#) and section **460.3.3.3** below for further

**An asterisk and yellow highlight indicate that the adjacent material is new for this chapter or substantively revised. 12*

discussion of requirements for developmental and rotational assignments);

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.

460.3.3.2 Training

Effective Date: 09/02/2011

Training is a fundamental requirement of the PMF Program. In accordance with OPM regulations in [5 CFR 362.204\(b\) \(2\) \(i\)](#), USAID must provide each PMF at least 80 hours of formal classroom 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 required internal USAID training such as USAID ethics and security briefings.

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.

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.

***460.3.3.3 Rotations**

Effective Date: 11/23/2011

Rotations are an integral part of the PMF experience and essential in the development of well-rounded and versatile employees. There are two types of rotations: the developmental assignment and other rotational assignments. 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. Rotational assignments, by contrast, are of shorter duration (typically 1-2 months) and may be to occupations or functional areas different from the one in which the Fellow will most likely be placed.

*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.

**An asterisk and yellow highlight indicate that the adjacent material is new for this chapter or substantively revised. 13*

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 meet the criteria in [5 CFR 362.204\(b\)\(4\)\(i\)\(A\)](#). Developmental assignments 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).

In accordance with requirements in [5 CFR 362.204\(b\)\(4\)\(i\)\(B\)](#), 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) cannot be less than 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

**An asterisk and yellow highlight indicate that the adjacent material is new for this chapter or substantively revised. 14*

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

**An asterisk and yellow highlight indicate that the adjacent material is new for this chapter or substantively revised. 15*

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.

460.3.4 Performance Management

Effective Date: 09/02/2011

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 addition to work-related performance elements, a professional development element as follows, " Develop and update an Individual Development Plan (IDP) and perform 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.)

**An asterisk and yellow highlight indicate that the adjacent material is new for this chapter or substantively revised. 16*

460.3.5 Promotions

Effective Date: 09/02/2011

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. Promotions above the GS-13 can occur only after the PMF has converted to the permanent position and has served the required time-in-grade. Note: Although OPM allows agencies to offer accelerated promotions for these excepted service appointments, USAID follows the competitive service regulations for PMF promotions.

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.

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.)

460.3.6 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 \(FML\)](#)).

**An asterisk and yellow highlight indicate that the adjacent material is new for this chapter or substantively revised. 17*

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 <http://inside.usaid.gov/HR/benefits/index.cfm>. [Note: This Web site is only available on the USAID intranet.]

460.3.7 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 362.204](#). 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.

460.3.8 Conversion/Placement of Presidential Management Fellows

Effective Date: 09/02/2011

Presidential Management Fellows (PMFs) who successfully complete the two-year program and are certified by OHR must be appointed without competition to a full-time, permanent position in the competitive service (usually the target position for which the PMF was hired). All PMFs must meet the citizenship requirements of the program. Unless the PMF has been approved for an extension, the conversion from the program must take place exactly two years from the EOD date. Appointments must be effective on or before the expiration of the PMF appointment, including extensions, if applicable.

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. Other Federal employment time counts for annual and sick leave as well as for retirement credit.

460.3.9 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 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

**An asterisk and yellow highlight indicate that the adjacent material is new for this chapter or substantively revised. 18*

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.

460.3.10 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. 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.

The OPM Program Officer must be notified of the planned movement of the PMF to 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.

460.3.11 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 career or career-conditional appointment in any USG 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 selected for placement in a career or career-conditional position. 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

**An asterisk and yellow highlight indicate that the adjacent material is new for this chapter or substantively revised. 19*

If Fellows withdrew from the PMF Program for reasons not related to misconduct, poor performance, or suitability, they may be readmitted 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.

460.3.12 Termination

Effective Date: 09/02/2011

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, the Fellow's appointment terminates.

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.

**An asterisk and yellow highlight indicate that the adjacent material is new for this chapter or substantively revised. 20*

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

Effective Date: 09/02/2011

460.4.1 External Mandatory References

Effective Date: 09/02/2011

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

460.4.2 Internal Mandatory References

Effective Date: 09/02/2011

- a. [ADS 410, Drug-Free Workplace Program](#)
- b. [ADS 418, Merit Staffing Program for Civil Service \(CS\) Employees](#)
- c. [ADS 462, Employee Evaluation Program, Civil Service](#)
- d. [ADS 476, Benefits](#)

**An asterisk and yellow highlight indicate that the adjacent material is new for this chapter or substantively revised. 21*

- e. [ADS 480, Leave](#)
- f. [ADS 481, Family and Medical Leave \(FML\)](#)
- g. [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. [Sample Individual Development Plan](#)
- b. [Sample Internal Rotation Memo](#)
- c. [Sample External Rotation Memos](#)
- d. [Sample Memoranda for Recommendation of Promotion and Graduation](#)
- e. [PMF Supervisors' Overview Guidance](#)
- f. [OPM PMF Program Brochure](#)

460.6 DEFINITIONS

Effective Date: 09/02/2011

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.

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

**An asterisk and yellow highlight indicate that the adjacent material is new for this chapter or substantively revised. 22*

competencies during the two year PMF Program through training and development assignments.

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.

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.

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.

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.

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.

460_112311