



Welcome aboard! The following is an Onboarding Toolkit for new Agency PMF Coordinators. The Toolkit will help you orient to the Presidential Management Fellows (PMF) Program and help you understand your role and responsibilities as an Agency PMF Coordinator. Please note that hyperlinked items below will either take you to the appropriate section in this document (also showing a Page number) or take you to various webpages on the PMF website at www.pmf.gov where you can find the highlighted useful information. For a copy of this Toolkit, along with additional resources for agencies, please visit the “Agencies/Resources” section on the PMF website at <https://www.pmf.gov/agencies/resources/>.

1. I AM AN AGENCY PMF COORDINATOR—WHAT’S NEXT?

- a. [WELCOME LETTER FROM THE DIRECTOR](#) – Page 2
- b. [PROGRAM OVERVIEW AND GOALS](#)
- c. [BRIEF HISTORY OF THE PMF PROGRAM](#) – Page 3

2. ROLES AND RESPONSIBILITIES

- a. [BECOMING FAMILIAR WITH PROGRAM STAKEHOLDERS](#) – Page 4
- b. [RESPONSIBILITIES OF THE AGENCY PMF COORDINATOR](#) – Page 7
- c. [STEPS TO START MANAGING YOUR AGENCY’S PMF PROGRAM](#) – Page 8
- d. [AGENCY PMF COORDINATOR ADVISORY BOARD](#)

3. AGENCY RESOURCES

- a. [PMF PROGRAM LIFECYCLE](#) – Page 9
- b. [CURRENT PMFS: FREQUENTLY ASKED QUESTIONS](#)
- c. [AGENCIES: FREQUENTLY ASKED QUESTIONS](#)
- d. [PMF TALENT MANAGEMENT SYSTEM](#)
- e. [MEET THE PMF PROGRAM OFFICE STAFF](#)

4. KEY REMINDERS

- a. [AGENCY PMF COORDINATOR MONTHLY MEETINGS](#) – Page 11
- b. [AGENCY PMF COORDINATOR TRAINING](#) – Page 11
- c. [CONTACTING THE PMF PROGRAM OFFICE](#) – Page 11

APPENDIX

- a. [AGENCY PMF COORDINATOR CHECKLIST](#) – Page 12



Welcome Letter from the Director

Dear New Agency PMF Coordinator:

I want to take the opportunity to welcome you to the PMF Community and thank you for your willingness to take on this very important role for your agency! The Agency PMF Coordinator is critical to the success of the PMF Program across government and our program would not exist without you and the many people like you who agree to help be the PMF Champions at your agency.

We understand and appreciate that this role may be one of many responsibilities you are charged with, which is why we again thank you for your commitment and want to make sure our office is doing everything we can to support you in this new role. I think once you get started you will find out how special and valuable of a community the PMF Program has and that you will have an abundance of great individuals and networks to reach out to for assistance.

I also want to challenge and empower you to consider taking on this role as a new opportunity for your own leadership and professional development. You play a very important role for Fellows, Hiring Managers, and Supervisors at your agency to encourage participation in the PMF Program and help ensure that all stakeholders can have a positive experience. You have the power and the ability to help shape and drive how the PMF Program runs at your agency so that it can help meet your talent needs for your mission and drive how the Federal government brings in and develops future leaders. We know that this may seem daunting at first, and we're here to help. During your onboarding into the program we'll provide you with great contacts and examples of how Agency PMF Coordinators have been successful across government, which will give you a plethora of ideas of how you can do the same.

Again, welcome to the PMF Family!! Please do not hesitate to reach out to our office at any time if there is anything we can do to assist you. Thank you for your service and thank you for taking on this very important role for your agency!

Sincerely,

Arianne Gallagher
Director, PMF Program
OPM's Center for Leadership Development





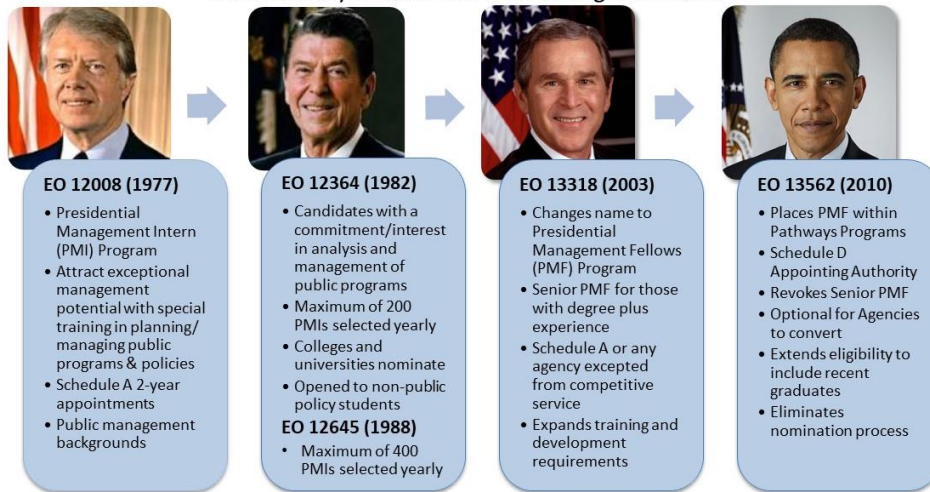
Brief History of the PMF Program

Bearing the Presidential Seal, the Presidential Management Fellows (PMF) Program is the Federal Government’s flagship leadership development program for advanced degree holders. It was established by Executive Order 12008 OF August 25, 1977, by President Jimmy Carter. It has gone through several changes over its more than 40-year history, but its essential mission remains the same: The program recruits top talent and develops a cadre of future government leaders. The PMF Program creates a lasting bond among Fellows and Alumni, and instills a spirit of public service, ultimately encouraging and leading to a career in government.

Below is a high-level overview of the changes made by Presidents Jimmy Carter, Ronald Reagan, George W. Bush, and Barack Obama.

The PMF Program Has a Rich History of Presidential Leadership and Commitment

Celebrating a 40+ year legacy of developing high potential graduate degree holders into visionary leaders who transform government



“The cause of public service deserves a program like this one, and by bringing into our government young people with good skills, creativity, willing attitudes, and a commitment to serving the nation, it can continue to serve as a bright hope for the future.”

- President Jimmy Carter, in his letter to OPM celebrating the 40th Anniversary of the PMF Program



Becoming Familiar with Program Stakeholders

As you begin your journey as a new Agency PMF Coordinator it is important to understand the role of the key stakeholders within your agency. These stakeholders will play a vital role in achieving success as an Agency PMF Coordinator. It is important to maintain consistent communication with all stakeholders and communicate your needs. We highly recommend you orient into this new role, that you set aside time to connect with each of these stakeholders, understand what their needs are in terms of the PMF Program and better understand how they can partner with you to help create and maintain a successful PMF Program at your agency.

Additional roles and details can be found under the “Agencies/Agency Responsibilities” section on the PMF website at <https://www.pmf.gov/agencies/agency-responsibilities/>.

Your Agency Stakeholders

- **Pathways Programs Officer (PPO)** – the PPO is responsible for administering the agency’s Pathways Program. Their role includes:
 - Coordinates the recruitment and on-boarding process for Pathways Participants
 - Coordinates the agency's Pathways Programs plan with agency stakeholders and other hiring plans
 - Serves as a liaison with the U.S. Office of Personnel Management (OPM) by providing updates on the agency's implementation of its Pathways Programs, clarifying technical or programmatic issues, sharing agency best practices, and other similar duties
 - Serves as OPM's primary contact on policies, procedures, and program changes for its Pathways Programs
 - Reports to OPM on the agency's implementation of its Pathways Programs and individuals hired under these Programs (e.g., workforce and succession planning)
 - Identifies the agency's designated Agency PMF Coordinator responsible for administering the agency's PMF Program and serving as a liaison with OPM
 - Ensures the timely submission of the PMF reimbursement fee to the PMF Program Office

NOTE: Some agency PPOs may also be designated as the Agency PMF Coordinator.

- **Hiring Official/Supervisor** – PMF Hiring Officials and Supervisors play a critical role in the PMF Program and directly impact the overall experience for their PMFs by providing developmental opportunities and meaningful work. Their role includes:
 - Works with the Agency PMF Coordinator to advertise PMF appointment opportunities in the PMF TMS (Talent Management System)
 - Recruits Finalists for PMF positions by posting appointment opportunities and interviewing Finalists
 - Assigns PMFs to specific positions with defined duties and career ladders
 - Ensures a Pathways PMF Program Participant Agreement has been completed (agencies may use the optional OPM Form 1301, PMF Participant Agreement, posted on the [Agencies\Resources](#) webpage)
 - Works with your Agency PMF Coordinator and finance office to submit the PMF reimbursement fee to the PMF Program Office within 30 days after a Finalist has accepted a tentative PMF appointment offer (the fee covers the recruitment, assessment, selection, and placement of Finalists into PMF appointments; PMF Program Office operations and support to stakeholders; various training and developmental opportunities for stakeholders; the PMF website and automated systems, such as the PMF TMS)
 - Assists with the assignment of a Mentor (a managerial employee outside the Fellow's chain of command) within 90 days of the PMF onboarding
 - Develops an Individual Development Plan (IDP) with the Fellow (within 45 days of onboarding) that addresses the target position, developmental requirements, and recommended activities. Supervisors may need to consult with the PMF's Mentor
 - Provides at least 80 hours of formal interactive training during each year of the fellowship. Tuition for PMF Program Office sponsored forums and training webinars are included in the placement fee and may be counted towards the 80 hours of annual training. Agencies bear the costs of travel and per diem for these events, as well as tuition and costs for additional outside training and development
 - Provides PMFs with at least one 4-6 month [developmental assignment](#).
 - Accommodates a reasonable amount of time during work hours for other PMF activities, as appropriate, such as PMF Forums and/or optional rotational opportunities of 1 to 6 months in other occupations or functional areas
 - Establishes a performance plan and annual evaluation for each PMF with performance elements and standards for the competencies expected and for duties assigned
 - Provides input to the agency's Executive Resources Board (or equivalent) as needed to evaluate the PMF's progress and certify whether the Fellow has successfully completed the Program

- **Human Resources (HR) Staff** – Assist the hiring officials/supervisors with onboarding of the PMF(s). Their role includes:
 - Prepares policies and criteria for the promotion of Fellows

- Assists the hiring official and/or Agency PMF Coordinator with the agency's selection, appointment, and on-boarding process (this includes an appointment opportunity posted in the PMF TMS)
 - Verifies the Finalist's completion of all graduate degree requirements before bringing onboard as a Fellow
 - Ensures veterans' preference is applied throughout the selection process
 - Initiates background investigation and establish Entrance on Duty (EOD) start date
 - Processes personnel transactions upon a PMF's initial appointment or reappointment, promotion, conversion, etc.
 - Ensures a Pathways PMF Program Participant Agreement is completed between the Fellow, Supervisor, and HR.
- **Agency Chief Human Capital Officer (CHCO)/Deputy Chief Human Capital Officer** – These individuals are the senior leaders in your agency responsible for management and oversight of human capital policy and operations. Your agency may refer to these individuals under different titles such as Director of Human Resources, etc.
 - CHCOs serve as informal advisories to the PMF Program overall and often are strong supporters of the program; some are or have been PMF alumni
 - Work with them to understand their key leadership pipeline priorities and how best to leverage the PMF Program for your agency
 - Coordinators are highly encouraged to establish a relationship with the CHCO office at their agency
- **Presidential Management Fellows** – Newly hired talent from a variety of academic disciplines at the graduate level who have a clear interest in, and commitment to, the leadership and management of public policies and programs. Fellows at your agency will be looking to you for guidance and direction on how to be successful during their fellowship. They will wish to communicate with you often to make sure they understand their responsibilities and duties in completing their fellowship requirements and that they are following proper procedures to document their experience in order to be best prepared for their Executive Resources Board (ERB), or equivalent, certification at the end of their fellowship. We highly recommend that you develop a method of outreach to your current Fellows at your agency and establish processes for onboarding and assistance of new Fellows (if these processes do not currently exist). This is a great opportunity to work with your HR office on developing an engaging and valuable way to connect with your Fellows.
- **PMF Alumni** – Many employees in your agency are PMF alumni and previously completed their PMF fellowship either at your agency or a different Federal agency. Many former Fellows could be in senior or managerial roles in your agency and could serve as advocates for the program, helping you spread awareness and interest for the program. PMF Alumni definitely want to

support you and be helpful to ensure your agency's PMF Program continues, so definitely work with your HR team to identify PMF Alumni in your organizations and ask for their assistance.

- **PMF Program Office (PMFPO)** – Provides guidance and oversees the government-wide administration of the PMF Program by recruiting, adjudicating, identifying and develop qualified PMF talent; we serve as a liaison to the Agency PMF Coordinators. We host and maintain the PMF TMS (Talent Management System) where you can search Finalist; post appointment, rotational, and training opportunities; manage your Fellows; query reports; and so much more! Using the PMF TMS fulfills the agency's regulatory obligation to inform the PMF Program Office (OPM) of recruitment efforts, participant status changes, and financials. We are here to assist you with whatever you need so do not hesitate to reach out to our office for help.

Responsibilities of the Agency PMF Coordinator

As a new Agency PMF Coordinator, it is important to have a clear understanding of your responsibilities for managing the program within your agency.

- Primary point of contact for PMF Program questions at their agencies, in consultation with the Pathways Programs Officer
- Ensure that all hiring officials within their agency/sub-agency are aware of the commitments involved in hiring PMFs, including: Full-Time Equivalent (FTE) status, OPM reimbursement, starting grade and pay, Individual Development Plans (IDPs), training and developmental requirements, career ladders, promotions, and conversions
- Work with supervisors to identify and advertise PMF positions by posting PMF appointment opportunities in the PMF TMS (Talent Management System)
- Notify the PMF Program Office (via the PMF TMS) of any PMF change in status in a timely manner including appointments, movements between agencies (reappointments), extensions, certifications, resignations, terminations, and/or conversions
- Facilitate submission of the PMF placement fee to the PMF Program Office within 30 days after a Finalist has accepted a tentative PMF appointment offer
- Work with Hiring Official/Supervisor to complete the Pathways PMF Program Participant Agreement and assignment of a Mentor
- Act as a resource for PMFs and their supervisors by assisting with agency orientations, providing guidance on IDP goals and objectives, clarifying responsibilities and commitments, identifying training opportunities, and responding to program-related questions.
- Work with the supervisor and human resources staff to ensure proper processing of personnel actions within the agency.
- Provide the PMF Program Office with updated Coordinator contact information.
- Facilitate the agency's participation in any hiring fairs.
- Submit workforce planning and reporting requirements to the PMF Program Office.



Steps to Start Managing Your Agency's PMF Program

Now that you are familiar with your responsibilities as an Agency PMF Coordinator, here are some steps to begin managing the program within your agency.

Step 1: Get to know your stakeholders. See the [Becoming Familiar with Program Stakeholders](#) section of this Toolkit.

Step 2: Notify the PMF Program Office that you are the new Agency-wide PMF Coordinator and provide your contact information. Agency-wide PMF Coordinators maintain Sub-Agency PMF Coordinators within the PMF TMS. See our "Change to Agency PMF Coordinator Template" found on the [Agencies\Resources](#) webpage.

Step 3: Request access to the PMF Talent Management System (PMF TMS) and set up training with your Agency-wide PMF Coordinator or PMF Program Office to become familiar with the system. We will automatically arrange this upon receipt of a new Agency PMF Coordinator.

Step 4: Use the Agency PMF Coordinator Checklist to help manage your role and responsibilities. (See the [Agency PMF Coordinator Checklist](#) in Appendix 1).

Step 5: Work with your Agency stakeholders to identify what current and previous policies apply to the PMF Program at your agency. Communicate with other Agency PMF Coordinators to determine if any key policies or procedures are missing and could be added to complete or enhance the PMF Program at your agency and who in the agency you would need to work with to develop and implement those policies. Ask your Pathways Programs Officer or other Agency PMF Coordinators to share best practices. You can find a current list of all Agency PMF Coordinators at <https://apply.pmf.gov/coordinators.aspx>.

Step 6: Participate in the conference calls and respond to correspondence from the PMF Program Office, where applicable.

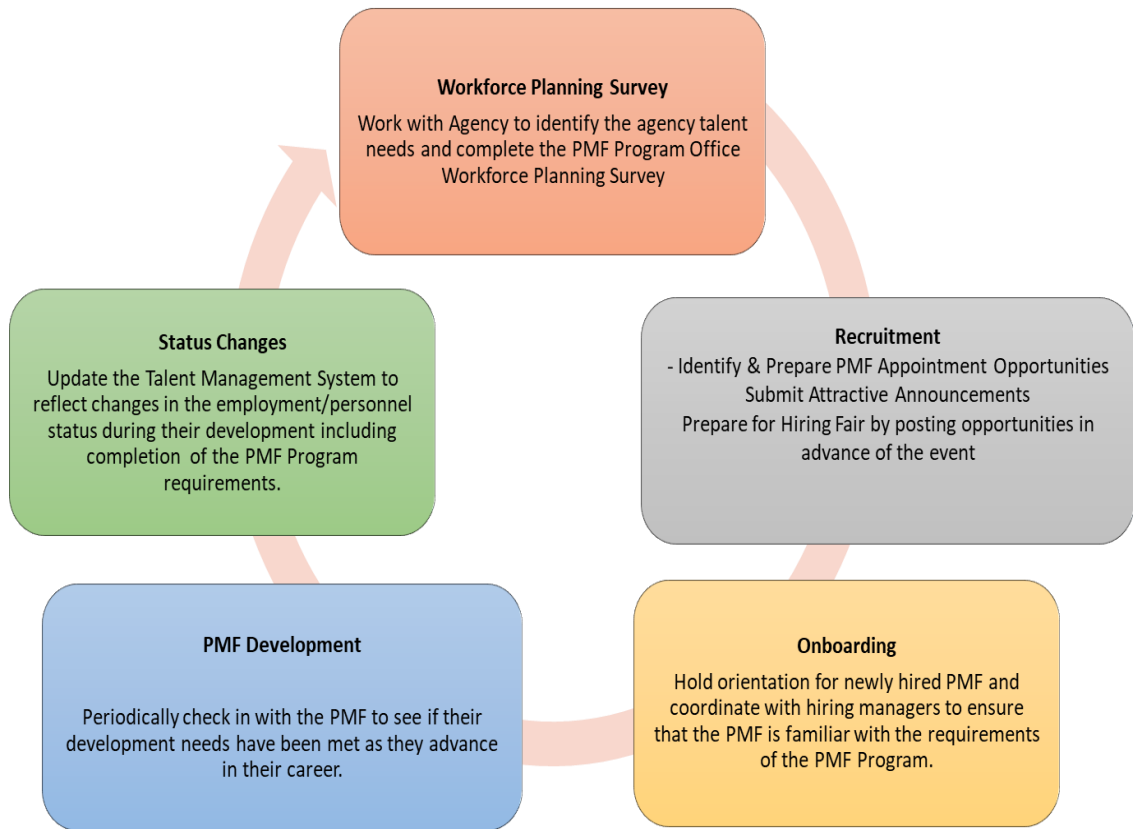
Step 7: Plan to attend PMF trainings sponsored by the PMF Program Office. Your participation will provide you with a perspective on what training the PMF Program Office offers to Fellows and will enable you to promote it to hiring officials and supervisors at your agency.



PMF Program Lifecycle

Below is an illustration of the PMF Program Lifecycle from the perspective of an agency participating in the PMF Program. All the steps below could occur year-round and/or during critical timeframes aligned to your agency’s operations. You should review this illustration and determine when and how these steps can be conducted in managing your agency’s PMF Program.

PMF Program Lifecycle: Agency Preparation



Other Resources to Help Orient Yourself to the PMF Program Lifecycle:

1. [Participant Timeline](#) – This document illustrates the typical timeline a participant would follow in navigating through the PMF Program from starting out as an applicant to finishing the program and becoming a PMF alum.

2. [PMF Application Timeline](#) – This document outlines the typical PMF application timeline. The start of each application season typically begins in late September/early October each year and Finalists are typically announced the week of Thanksgiving.
3. [PMF Fellowship Timeline](#) – This document depicts the timeline that every PMF experiences during their two-year fellowship, including key milestones and deadlines for major areas of their fellowship requirements.



Key Reminders

✓ **Agency PMF Coordinator Monthly Meetings**

The PMF Program Offices will notify you of our monthly meetings, conducted by conference call/webinar. The meetings are design to share current updates on program activities and gain your input in current and future program matters.

✓ **Agency PMF Coordinator Training**

The PMF Program Office and the Agency PMF Coordinator Advisory Council works in collaboration to identify and sponsor training opportunities for all Agency PMF Coordinators.

✓ **Contacting the PMF Program Office**

The following resources are designed to assist you in your daily work with the PMF Program Office:

PMF Program Office email: pmf@opm.gov

PMF Program Office phone: 202-606-1040

Website: <http://www.pmf.gov>

PMF TMS (Portal Site for Agencies): <http://portal.pmf.gov>



Agency PMF Coordinator Checklist

The following checklist is a management tool for all Agency PMF Coordinators to use as they administer the PMF Program requirements.

ACCESS TO THE PMF TALENT MANAGEMENT SYSTEM (TMS) AND GETTING STARTED

- Notify the PMF Program Office of your appointment as a new Agency PMF Coordinator
- Gain access to the PMF TMS from the PMF Program Office or your agency's Agency-wide PMF Coordinator
- Notify the PMF Program Office if there is a problem with accessing the Portal Site of the PMF TMS
- Read FAQs and go over resources posted on the "Agencies\Resources" webpage at <https://www.pmf.gov/agencies/resources/>
- Set up reminders in order to monitor changes to PMF employment status and record updates in the PMF TMS

WORKFORCE PLANNING

- Notify all relevant stakeholders of your current role as the Agency PMF Coordinator and provide contact information
- Identify HR staff contacts that will assist with the human resources processing of PMF recruitment efforts and personnel actions
- Schedule a meeting with the Pathway Programs Officer to discuss the requirements and current hiring policies relating to the PMF Program
- Engage current and potential hiring managers in a discussion on funding a PMF during the agency's workforce planning phase
- Meet with new hiring managers to discuss the requirements of the PMF Program to include Full-Time Equivalent (FTE) status, OPM reimbursement, starting grade and pay, Individual Development Plans (IDPs), training and developmental requirements, career ladders, promotions, and conversions
- Respond to the PMF Program Office's annual survey on workforce planning

RECRUITMENT

- Follow up with current and potential supervisors to identify and advertise PMF positions
- Coordinate with supervisors/hiring manager and HR staff to ensure that position descriptions are properly classified and completed for the new positions
- Update your Agency Profile Page on the PMF TMS, which appears on the *Explore* page for Finalists to learn more about your agency and see current opportunities
- Prepare supervisors and HR staff for the hiring fair (see resources posted on the “Agencies\Find Candidates\Hiring Event” webpage at <https://www.pmf.gov/agencies/find-candidates/hiring-event/>)
- Work with HR staff and Pathways Programs Officer to coordinate a hiring fair for PMF hiring at your agency
- Coordinate HR staff access to the PMF TMS to post PMF appointment opportunities (job opportunity announcements), manage applicants, and record initial appointments
- Coordinate hiring managers, supervisors and other HR staff access to the PMF TMS to search and review Finalists, including their resume and advanced degree transcript
- Coordinate and schedule interviews for hiring managers and Finalists

PMF ONBOARDING

- Plan a meeting with hiring officials to go over the requirements of the PMF Program
- Meet with HR staff to ensure that personnel actions are completed for the new hire (e.g. SF 50s, IT security requirements, background investigations, etc.); onboarding process
- Meet with the newly hired PMF to go over program requirements (both from the PMF Program and any agency-specific). Offer your commitment to assist the PMF with program requirements during their two-year fellowship.
- Coordinate with the hiring manager and the PMF to complete the Pathways PMF Program Participation Agreement
- Facilitate submission of the PMF placement fee to the PMF Program Office by working with your agency finance officer (see the “Agencies\Resources” webpage at <https://www.pmf.gov/agencies/resources/> for the “PMF Reimbursement Process for Agencies” and Financial Forms (e.g., Interagency Agreement and Funding Document))
- Update the PMF TMS to reflect the new PMF appointment and any updates
- Review the “Agencies\Resources” section on the PMF website at <https://www.pmf.gov/agencies/resources/> to see other agency best practices

PMF DEVELOPMENT

Coordinate a meeting with the supervisor and the PMF to discuss PMF Program requirements, including – but not limited to – the following:

- Introduce your agency's mission and structure
- Review any agency-specific program requirements
- Follow up to ensure that the Pathways PMF Program Participant Agreement is completed
- Assign the Fellow a mentor within 90 days of appointment
- Provide guidance on IDP goals and objectives (reference the optional OPM Form 1302, PMF Individual Development Plan (IDP), developmental assignments and rotational opportunities, training, and PMF LDP (Leadership Development Program), all found under the “Current PMFs\Training and Development” webpage at <https://www.pmf.gov/current-pmfs/training-and-development/>)
- Clarify the agency’s responsibilities and commitments to challenging work assignments, rotational opportunities, and the certification/conversion process
- Explain your agency’s promotion policies and procedures
- Assist hiring managers and PMFs to prepare for the Executive Resources Board (ERB), or equivalent, certification process; start 90 days prior to the PMF’s second year anniversary
- Share your agency’s policies, procedures, and forms used in relation to the PMF Program
- Schedule quarterly check in meetings with PMFs to touch base on their development

CHANGE IN PMF EMPLOYMENT STATUS

Explain the following changes in employment status to PMFs (referencing the agency responsibilities and frequently asked questions previously outlined), and record any status changes in the PMF TMS:

- Fellowship Extensions
- Reappointments
- Resignations; explaining that if a Fellow withdraws from the program, it is treated as a resignation and their time does not count toward tenure status or the probationary period
- Termination; including OPM and agency authority, timely notice
- Certification; agency should render a decision 30 days prior to second year anniversary
- Conversion to a term or permanent position in the competitive service