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Welcome aboard! The following is an Onboarding Toolkit for new PMF Supervisors. This Toolkit will help you get oriented to the Presidential Management Fellows (PMF) Program and help you understand your role and responsibilities as a PMF Supervisor. 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 additional 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/>.

To send us any questions or feedback, please email pmf@opm.gov with the subject line of “Toolkit”.

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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 across all academic disciplines and from all segments of society. 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: to recruit top talent and develop 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.

By hiring Finalist(s), you have demonstrated your willingness to support the PMF Program and help build a cadre of talented future leaders 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

			
<p>EO 12008 (1977)</p> <ul style="list-style-type: none"> • Presidential Management Intern (PMI) Program • Attract exceptional management potential with special training in planning/managing public programs & policies • Schedule A 2-year appointments • Public management backgrounds 	<p>EO 12364 (1982)</p> <ul style="list-style-type: none"> • Candidates with a commitment/interest in analysis and management of public programs • Maximum of 200 PMIs selected yearly • Colleges and universities nominate • Opened to non-public policy students <p>EO 12645 (1988)</p> <ul style="list-style-type: none"> • Maximum of 400 PMIs selected yearly 	<p>EO 13318 (2003)</p> <ul style="list-style-type: none"> • Changes name to Presidential Management Fellows (PMF) Program • Senior PMF for those with degree plus experience • Schedule A or any agency excepted from competitive service • Expands training and development requirements 	<p>EO 13562 (2010)</p> <ul style="list-style-type: none"> • Places PMF within Pathways Programs • Schedule D Appointing Authority • Revokes Senior PMF • Optional for Agencies to convert • Extends eligibility to include recent graduates • Eliminates nomination process

“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 PMF Supervisor it is important to understand the roles of key stakeholders within your agency. These stakeholders will play a vital role in supporting you and helping you achieve success as a PMF Supervisor. It is important to maintain consistent communication with all stakeholders and communicate your needs. As you get oriented to this new role, we recommend that you set aside time to connect with each of these stakeholders to understand what their needs are in terms of the PMF Program, and to better understand how they can partner with you to help create and maintain a successful PMF Program experience for both you and your Fellow.

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 Programs. A PPO:
 - Coordinates the recruitment and onboarding 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.

- **Agency PMF Coordinator** – the Agency PMF Coordinator is the primary liaison between agencies that participate in the PMF Program and the PMF Program Office, and—alongside the PPO—is

responsible for the overall administration and development of the agency's PMF program. An Agency PMF Coordinator:

- Primary point of contact for PMF Program questions at their agencies, in consultation with the Pathways Programs Officer
 - Ensures that all Hiring Officials/Supervisors 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
 - Works with supervisors to identify and advertise PMF positions by posting PMF appointment opportunities in the PMF TMS (Talent Management System)
 - Notifies 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
 - Facilitates submission of the PMF placement fee to the PMF Program Office within 30 days after a Finalist has accepted a tentative PMF appointment offer
 - Works with Hiring Official/Supervisor to complete the PMF Participant Agreement and assignment of a Mentor
 - Engages with Fellow and Supervisor to review and acknowledge the PMF Participant Handbook (posted on the [Agencies/Resources](#) webpage); this supplements the PMF Program Office's [Orientation](#) for Fellows
 - Promotes interaction among regional Fellows
 - Acts 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
 - Works with the Supervisor and human resources staff to ensure proper processing of personnel actions within the agency
 - Provides the PMF Program Office with updated Coordinator contact information
 - Facilitates the agency's participation in any hiring fairs and/or agency meet-and-greets
 - Submits workforce planning and reporting requirements to the PMF Program Office
- **Human Resources (HR) Staff** – HR Staff assist the hiring officials/supervisors with onboarding of the PMF(s). An HR Staff member:
 - Prepares policies and criteria for the promotion of Fellows
 - Assists the Hiring Official/Supervisor and/or Agency PMF Coordinator with the agency's selection, appointment, and onboarding process (this includes an appointment opportunity posted in the PMF TMS)
 - Verifies the Finalist's completion of all graduate degree requirements before bringing them onboard as a Fellow
 - Ensures veterans' preference is applied throughout the selection process
 - Initiates background investigation and establishes Entrance on Duty (EOD) start date
 - Processes personnel transactions upon a PMF's initial appointment or reappointment, promotion, conversion, etc.

- Ensures a PMF 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. A CHCO/Deputy CHCO:
 - Serves as informal advisors to the PMF Program overall and often are strong supporters of the program; some are PMF Alumni
 - Works with key agency personnel to help them understand their human capital and leadership pipeline priorities and how best to leverage the PMF Program to meet them
- **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 PMF Supervisor

As a new PMF Supervisor, it is important to have a clear understanding of your responsibilities for managing your Fellow. 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. A Hiring Official/Supervisor:

- 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 PMF Participant Agreement has been completed (agencies may use the optional OPM Form 1301, PMF Participant Agreement, posted on the [Agencies/Resources](#) webpage)
- Works with the 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 in the development of the IDP
- 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



Steps to Start Managing Your PMF

Now that you are familiar with your role/responsibilities, here are some steps to begin managing your PMF:

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

Step 2: Meet with your Agency PMF Coordinator. The Agency PMF Coordinator is responsible for managing your agency's PMF Program to ensure that both the agency and the Fellow have a positive experience. Invite your Agency PMF Coordinator to the onboarding session with the Fellow to discuss the requirements of the PMF Program and to assist with any required employment documents. When there is a change in contact information, in a PMF's Supervisor, or other relevant changes during the fellowship, Agency PMF Coordinators are responsible for making updates in the PMF TMS. You can find your Agency PMF Coordinator by consulting the following list: <https://apply.pmf.gov/coordinators.aspx>.

Step 3: Use the PMF Supervisor Checklist to help manage your role and responsibilities (the checklist can be found in the Appendix).

Step 4: Attend PMF Program Office events for agency stakeholders. You will periodically be invited to attend PMF Program events (e.g., trainings, PMF Leadership Development Program sessions, etc.), and we encourage you to do so when you are available.

Step 5: Respond to correspondence from the PMF Program Office and provide feedback. We encourage you to respond when given opportunities to provide feedback on your experience as a Supervisor, which will help inform/determine potential changes to the PMF Program.

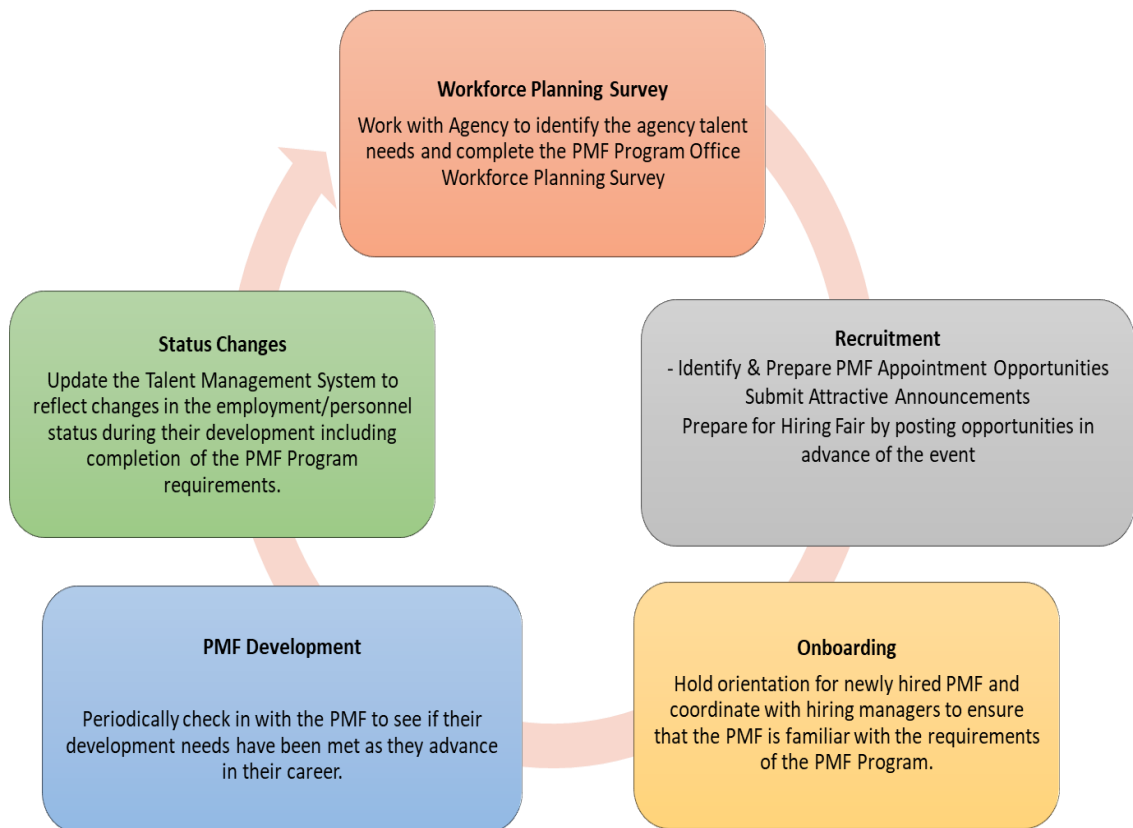
Step 6: Participate in the Workforce Planning Survey sponsored by the PMF Program Office. Your participation will help us identify your agency's talent needs for the next class of PMFs.



PMF Program Lifecycle

Below is an illustration of the PMF Program Lifecycle from the perspective of an agency participating in the PMF Program. All of 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 Fellow at your agency. You may need to consult with your Agency PMF Coordinator accordingly.

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.
4. **[Agency PMF Advisory Board](#)** – The PMF Program Office established an Agency PMF Advisory Board. The Board is composed of representatives from a variety of PMF stakeholders, including hiring officials for the purpose of providing insights to existing practices and recommending new approaches in the spirit of building and supporting the PMF Program Office.
5. **[PMF Supervisor Checklist](#)** – This Checklist is a tool for PMF Supervisors to use in managing their Fellow(s) at their agency. A copy of the Checklist is included in the Appendix at the end of this Toolkit.
6. **[PMF Participant Handbook](#)** – Upon a Finalist onboarding as a Fellow, he/she is asked to review this Handbook and engage with their Supervisor and Agency PMF Coordinator, and obtain signatures. The Fellow can then upload the acknowledgement receipt at the back of the Handbook to their user account on the Apply Site of the PMF TMS (Talent Management System). Upon submission, this fulfills the PMF Program’s equivalent of an orientation for Fellows and allows for one hour for formal, interactive training for the Fellow to record on their Individual Development Plan (IDP).
7. **[PMF Agency Brochure](#)** – This brochure is a resource that presents the value proposition of the PMF Program for Federal agencies, what agencies should do if they would like to hire a PMF, and a high level overview of the program. It is a trifold document that should be printed front to back.
8. **[PMF Reimbursement Process for Agencies](#)** – These are instructions on how to submit reimbursement for the one-time placement fee for an initial PMF appointment and using the FS Forms 7600 A & B; the financial forms can also be found under the “Agencies/Resources” section on the PMF website at <https://www.pmf.gov/agencies/resources/#Financial>.
9. **[PMF Leadership Development Participant Agreement](#)** – This Agreement (OPM Form 1310) is used to set forth the expectations between the Fellow and their Supervisor for the Fellow’s full participation in the PMF Leadership Development Program (PMF LDP). Information about the PMF LDP can be found on the PMF website at <https://www.pmf.gov/current-pmfs/training-and-development/leadership-development-program/>.

Other tools have been developed with the help of agency stakeholders and can be found on the PMF website at <https://www.pmf.gov/agencies/resources/>.



Key Reminders

✓ **PMF Program Office Hours**

The PMF Program Office hosts office hours every other month, usually the second Thursday, from 3:00-4:00pm (ET), for all stakeholders to present their questions and concerns. See the posting about office hours under the “News & Events” section on the PMF website at <https://www.pmf.gov/news-events/introducing-pmf-office-hours/>.

✓ **Consult Your Agency PMF Coordinator**

To see a list of current Agency PMF Coordinators, go to <https://apply.pmf.gov/coordinators.aspx>.

✓ **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>



The following checklist is a management tool for all new PMF Supervisors to use as they manage their Fellows in the PMF Program. The Checklist is also posted under the “Agencies/Resources” section on the PMF website at <https://www.pmf.gov/agencies/resources/>; check the website for any updates. Please consult your Agency PMF Coordinator as there may be policies and procedures specific to your agency.

	<h2 style="margin: 0;">PMF Supervisor Checklist</h2>
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The following checklist is a tool for PMF Supervisors to use in administering the PMF Program requirements and may not be all inclusive. Supervisors may want to modify this checklist to fit their needs and check with their [Agency PMF Coordinator](#). This checklist can be found under the [Agency/Resources](#) section on the PMF website at www.pmf.gov and in the “PMF Participant Handbook” posted under the same webpage.

Recruiting for a Fellow:

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

Prior to Fellow’s First Day:

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

Fellow's First Day:

<input checked="" type="checkbox"/>	ACTION:
	Meet and greet the Fellow on first day and introduce to coworkers
	Ensure Fellow has met the Agency PMF Coordinator
	Ensure a Pathways PMF Program Participant Agreement has been completed
	Continue agency's onboarding process

Fellow's First 45 Days:

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

Throughout Fellow's First Year:

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

Throughout Fellow's Second Year:

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

90 Days Before Fellow's 2-Year Anniversary:

<input checked="" type="checkbox"/>	ACTION:
	Start preparing for the ERB certification process

	Is the Fellow's IDP current?
	Is the Fellow on target to complete all program, and any agency-specific, requirements?
	Is a fellowship extension needed? If so, check with Agency PMF Coordinator.
	Does the Fellow's agency/organization intend to convert to a term or permanent position?
	Check with Agency PMF Coordinator on process for preparing for the certification process
	Complete Fellow's performance appraisal, which is factored into the certification process
	Submit certification package and recommendation for conversion
	Work with HR Office to process conversion Personnel Action
	Will Fellow be due a promotion upon conversion? If so, work with HR Office for Personnel Action.
	Upon a Fellow's favorable certification and recorded in the PMF TMS, the Fellow becomes a member of the PMF Alumni Community.

Fellow's Conversion:

<input checked="" type="checkbox"/>	ACTION:
	Congratulate Fellow
	Follow-up with Fellow and HR Office to ensure correct Personnel Actions were processed
	Support the Fellow's participation in their Class Graduation Ceremony