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Overview Guidance for Supervisors of Presidential Management Fellows

Additional Help for ADS Chapter 460

Reference Issuance Date: 09/02/2011

Responsible Office: HR

File Name: 460sae_090211

OVERVIEW GUIDANCE FOR SUPERVISORS OF

PRESIDENTIAL MANAGEMENT FELLOWS

AT USAID

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INTRODUCTION

The purpose of the Presidential Management Fellows (PMF) Program is to attract to the Federal service 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. Since 1977, the PMF Program has helped agencies meet their workforce and succession planning needs by attracting outstanding masters, law, and doctoral-level graduate students to the Federal service.

Outstanding individuals who have recently received or are to shortly receive an advanced degree oriented toward public management are eligible to apply for participation in the Program. Students who are scheduled to complete requirements for a graduate (masters, law, or doctoral-level) degree during the current academic year, from September 1 to August 31, from an accredited academic institution are eligible to apply. Eligible students apply online through the Office of Personnel Management's (OPM's) PMF Web site (www.pmf.gov).

Applicants must be competitively nominated by the dean or academic director of the degree granting program of an accredited college or university. Nomination criteria should include demonstration of:

- Breadth and quality of accomplishments,
- Capacity for leadership, and
- Commitment to a career in the analysis and management of public policies and programs.

OPM administers a rigorous assessment process during which candidates are evaluated based on specific competencies. The following competencies are typical of those used in the PMF assessment process:

- Problem Solving
- Interpersonal and Team Skills
- Resilience
- Demonstrated Leadership
- Adaptability
- Oral Communication
- Written Communication

During the OPM application review and rating process, OPM rates and ranks PMF candidates using a two-phase structured assessment process. The first phase of this process is a review and evaluation by OPM assessors of the candidate's Accomplishment Record that is submitted as part of the application. From this list, OPM designates semi-finalists who are then invited to an in-person assessment center. The candidates who participate must also complete additional assessment exercises. The candidate's performance is evaluated by OPM-trained panels of agency assessors, and successful candidates are designated as PMF finalists.

From January to March, USG agencies are urged to post available PMF jobs in OPM's Projected Positions Systems. Beginning in March, OPM makes lists of PMF finalists and their résumés available to agencies. Generally, in April, OPM hosts the annual job fair for agencies and PMF finalists to facilitate the process matching finalists to identified PMF jobs within the agencies such as USAID.

Agencies have 12 months to hire Fellows from the pool of finalists. Once the PMFs enter duty with the USG, agencies assist Fellows along their two-year developmental journey in the Program. It is the responsibility of both Fellows and agency supervisors to negotiate the developmental activities and work responsibilities that will prepare the Fellow for a targeted position at the conclusion of the Program.

PERFORMANCE MANAGEMENT

The performance management of Presidential Management Fellows is implemented in accordance with the USAID Employee Evaluation Program, Civil Service, to provide a systematic process by which the Agency involves its employees in improving Agency organization effectiveness ([ADS 462](#)). Additional information about performance management is contained in the [Employee Evaluation Program Guidebook, Part 2](#).

The Annual Evaluation Forms (AEFs) for all PMFs (all years of the PMF Program) are to include the following in Section 3.2 "Technical Expertise" under "Further specification of performance standard":

- 1) Develop and update with the supervisor and coach an Individual Development Plan (IDP) and perform periodic self-assessment so that efforts are targeted toward mastering core program skills and knowledge; 2) Develop and update a calendar of rotations, activities and trainings; and 3) Complete the majority of rotations, activities and trainings identified in the IDP.

The home supervisor is the Rating Official of record on the last day of the Civil Service rating cycle and s/he should complete the final AEF regardless of the number of days the employee has been under his/her supervision. The Rating Official of record must use self-assessments, Appraisal Input Forms (AIFs) and other 360 degree information to complete the final AEF.

In accordance with ADS 462, all raters of the PMFs must complete an Appraisal Input Form when either the supervisor or employee changes assignment or responsibility and when the employee has been supervised for at least 30 calendar days (for example, a PMF rotation). The AIF records Performance Elements and Standards and optional Performance Elements and Standards.

INDIVIDUAL DEVELOPMENT PLANS

The Individual Development Plan will be used to:

- Set goals and objectives to ensure that the Presidential Management Fellow is qualified at the GS level for the target position upon completion of the program;
- Identify resources needed to execute the plan and familiarize the Presidential Management Fellow with various components and operations of the U.S. Government, particularly USAID; and
- Address not only how the Presidential Management Fellow will accomplish his/her career development for the target position but also how s/he will gain the expertise to function in a leadership/management role in the government, as is required by the Office of Personnel Management.

Accomplishment of the Individual Development Plan objectives is critical for the Presidential Management Fellow's qualification for assignment to the permanent position.

The PMF should complete the first version of the Individual Development Plan within 90 calendar days of the entrance on duty date. The IDP must be completed in consultation with the supervisor and the PMF coach. The IDP must be approved by the PMF's supervisor and forwarded to the PMF Coordinator in the Office of Human Resources within this timeframe.

The IDP must include:

1. A brief description of the target position, consistent with the relevant Position Description and the Annual Evaluation Form for the PMF. This description will include specific knowledge, skills, and competencies needed to perform at the target level of the position;
2. An outline of the knowledge, skills and competencies that will qualify the PMF for his/her specific GS target position;
3. 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,
 - Budget and financial management,
 - Information systems,
 - Procurement and grants, and
 - Management or program analysis;
4. 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, and other activities enhancing knowledge, skills, and competencies;
5. A preliminary schedule for training, tasks, and other activities;
 6. A timeframe for revisiting and revising the IDP. This should take place about every six months. As significant changes to the IDP are made, they should be explained in writing and submitted to the coordinator in the Office of Human Resources; and
 7. Progress to date.

The PMF takes the lead in preparing the IDP but should receive guidance from the supervisor. Basically, the PMF should:

- Assess current skills and knowledge;
- Compare current skills and knowledge to the position description and other identified needed knowledge and competencies;
- Identify areas for needed additional training or experience;
- Review findings with supervisors, coaches and others that may provide insights; and
- Once the needed training and rotations are identified, seek guidance from the supervisor, coach and others to develop a plan of how to acquire the needed training and experience through formal training, rotations, work assignments, and other professional development efforts.

There is no set order for training or rotations. However, a good place to begin is to review the Office of Human Resources Learning Support Web site to identify training opportunities provided directly by USAID. These may include training in program management, contract management, supervisory skills, etc. There is a wide array of training provided by USAID and it changes over time so it is important to get the most current information about available training. Many new hires use training as the “anchors” in their IDP because training is sometimes offered only once or twice a year and is one of the less flexible aspects of completing the IDP.

The IDP and the AEF serve two different purposes. The IDP is to help the PMF plan how s/he will acquire new skills and experience in the two years of the PMF program. The AEF is the USAID mechanism for the supervisor and the employee to discuss work performance. The IDP and the AEF should complement each other but are not interdependent except that one of the work objectives of the AEF should be to develop the IDP and to enhance one’s skills and expertise.

LADDER POSITIONS/PROMOTIONS

Fellows who meet Agency requirements for performance at the next higher level in their career ladder may be non-competitively promoted to the higher grade level up to the GS-13 level prior to their conversion to the competitive service. Fellows must meet the following Agency requirements for promotion:

- Have received at least a “fully successful” AEF rating of record;
- Have completed satisfactorily one year of service at his/her current grade;
- Demonstrated the ability to perform at the promotion level; and
- Be recommended for promotion by the home supervisor.

Promotions above the GS-13 can occur only on or after the date of conversion to the permanent position following successful completion of the PMF Program. If recommended, promotion actions will be effected in accordance with USAID’s Civil Service Merit Promotion system (see [ADS 418](#)).

The Office of Human Resources makes the final decisions for promotion based upon the recommendation of the supervisor on the status of the PMF’s career development as outlined in the Individual Development Plan and the Annual Evaluation Form.

CONVERSION/PLACEMENT OF PRESIDENTIAL MANAGEMENT FELLOWS

Presidential Management Fellows who successfully complete the two-year program and are certified by the Office of Human Resources as eligible for conversion must be appointed without competition to a full-time, permanent position in the competitive service. Appointments must be effective on or before the expiration of the PMF appointment, including extensions, if applicable.

Upon conversion to the civil service, the employee becomes a career employee if the Federal service requirement for status of three years 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. Time as a Peace Corps volunteer counts for annual and sick leave as well as for retirement credit but does not count for time “worked” toward tenure in the civil service.

ROTATIONS

Rotations are an integral part of the Presidential Management Fellow experience and essential in the development of well-rounded and versatile employees. All rotations must be linked to the Individual Development Plan.

All Presidential Management Fellows will remain in their target position for three months before rotating to another position. This affords an opportunity for the PMF to complete

OPM and USAID orientation training, become more familiar with the target position and complete the IDP before beginning rotations. Rotations must not begin until the IDP is completed. PMFs should spend the last month of their Program in the target conversion position as well. Rotational assignments are identified by the PMF in conjunction with his/her home supervisor and, for non-USAID rotations, with the concurrence of the Office of Human Resources.

Rotations must:

1. Consist of one four-to-six month continuous rotation outside the PMF's home office in line with OPM requirements;
2. Total approximately six months. The specific length and timing of a rotation depends on the nature of the assignment and the workload requirements of the home position;
3. Focus on developing the specific professional skills or fulfilling particular managerial competencies not just for the target position but for functioning in the Agency at large;
4. Complement the PMF's existing knowledge or professional interest; and
5. Allow PMFs to gain different perspectives of USAID.

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 rotation position in the host mission.

All rotations are to have a memorandum prepared by the host supervisor to the supervisor of record which includes:

- The designation of the hosting supervisor;
- A description of the tasks to be performed; and
- The timing of the rotation.

The home supervisor should approve this memorandum before the rotation begins.

The host supervisor is responsible for preparing an Appraisal Input Form which is to be provided to the home supervisor within 30 days of the completion of the rotation.

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

Identifying rotations is more an art than a science. Sometimes opportunities will arise with very little notice or planning. Some opportunities will be identified by asking the relevant office managers. Other rotation opportunities are identified by other senior Agency managers. One of the purposes of the rotations is to network within the Agency, so using networking skills is critical. Home offices and PMFs may want to consider swapping rotations with another PMF or perhaps with a Development Leadership

Initiative (DLI) Officer. Finally, one method to assist in identifying PMF rotations is the USAID Social Media Network “Developedia” on the USAID intranet where a variety of USAID rotation opportunities are identified on the “DLI Rotation Opportunities” site.

There is no set length for a rotation except the OPM requirement that each Fellow must receive at least one four-to-six month rotation outside the PMF’s home office. It is very unlikely that any office will approve a rotation for less than two weeks. At the same time, it is unlikely that supervisors will approve a rotation for more than four months.

TRAINING

Training is a requirement of the Presidential Management Fellows Program. In accordance with OPM regulations, Agencies are responsible for ensuring that PMFs receive at least 80 hours of training each year of their Fellowship.

Trainings should include:

- OPM required training, including an Orientation for first-year PMFs and an OPM Graduation upon completion of the PMF program;
- The USAID New Employee Orientation that is available for the PMF as soon as possible after entrance on duty;
- Other required internal USAID training such as USAID ethics and security; and
- Technical and other training relevant to the PMF’s capacities and target position.

The PMF’s home offices must incur the cost of all trainings, including OPM 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.