

Approved for Release

Date

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**DEPARTMENT OF COMMERCE
OFFICE OF HUMAN RESOURCES MANAGEMENT
HUMAN RESOURCES (HR) BULLETIN #264, FY23**

SUBJECT: The Presidential Management Fellows (PMF) Program

EFFECTIVE DATE: Upon release of this HR Bulletin

EXPIRATION DATE: Effective until canceled or superseded.

SUPERSEDES: HR Bulletin #179, FY13, dated September 12, 2013

PURPOSE: The bulletin describes the Department of Commerce's policy on the PMF Program and new procedures from the Office of Personnel Management (OPM). The PMF Program is one of the three paid programs that comprise the Pathways Programs.

REVISIONS: The bulletin updates the qualifications and eligibility for the PMF Program as well as the regulatory requirements. It changes the hiring procedures for Servicing Human Resources Offices (SHROs) and hiring managers, and all job opportunities MUST be posted on the OPM portal site, Talent Management System (TMS). This revision changes the number of days to complete the Individual Development Plan (IDP) from 30 to 45, mandates a participant agreement (prior to appointment), requires each PMF Fellow to have a mentor within 90 days, updates policy on partial reimbursement of the PMF fee if a Fellow moves to another agency, removes the authority for extensions beyond 120 days, and provides the Department authority to grant readmission to the PMF Program. It also revises the policy on obtaining approval for PMF developmental and rotational assignments outside of the Department and streamlines the section on obtaining a pass over for a preference eligible.

COVERAGE: The policy applies to all PMF appointments and recruitments in the Department.

POLICY: The OPM PMF Office manages the Program, including national recruiting and orientation training. Those selected as Presidential Management Fellows (Fellows) receive an initial 2-year Schedule D excepted service appointment at the General Schedule (GS)-9, GS-11, or GS-12 level (or equivalent). After successful completion of the Program and certification by the bureau/operating unit's Executive Resources Board (ERB) or equivalent, the Fellow **may** be converted to a full-time, career, career-conditional, or term appointment in the competitive service.

PERSONNEL CEILING: Fellows count against personnel ceilings. To hire a Fellow, supervisors must have an approved permanent or term full-time position available when a selection is made.

REIMBURSEMENT FEE: OPM requires payment of a reimbursement fee, which covers costs associated with the recruitment, selection, placement, orientation, and graduation of Fellows. Reimbursement fees must be paid by the bureau/operating unit within 30 days of a PMF Finalist accepting a PMF Program appointment.

PROGRAM RESPONSIBILITIES: The Department's Office of Human Resources Management (OHRM) serves as the Program policy office and is responsible for developing and implementing Program policy and guidance, for providing accountability and oversight, and for being the liaison with the OPM PMF Office. The Department shall appoint a Pathways Program Officer and a Department PMF Program Manager; each bureau/operating unit must appoint a PMF Coordinator. The designated PMF Coordinator manages and administers all aspects of the bureau/operating unit's PMF Program in accordance with this policy.

The Department's Pathways Program Officer will work with the Program Manager and the PMF Coordinators to provide PMF-related data and information to OPM as requested. The PMF Coordinators monitor and facilitate recruitment, hiring, and employment policies and procedures across the bureau/operating unit. PMF Coordinators are responsible for attending OPM's annual PMF Job Fair if their bureau/operating units are interested in hiring a PMF.

Each PMF Coordinator is responsible for advising on and communicating PMF Program requirements to supervisors, as well as for their organization's PMF Program recruitment and appointments. In addition, the PMF Coordinator monitors and oversees the training and development of Fellows in the bureau/operating unit to ensure they receive the training and developmental/rotational assignment(s) set forth by OPM regulations. Upon request, each PMF Coordinator will advise the Program Manager of their bureau/operating unit's projected PMF hiring needs for the specified fiscal year(s). At the time of a PMF Program appointment, the responsible PMF Coordinator will monitor the hiring office's timely completion and submission of FS Form 7600A (Interagency/Intergovernmental Agreement) to pay the required reimbursement fees.

Bureau/operating units will identify positions in their organizations to be filled through the PMF Program. Hiring managers should attend the annual spring PMF Job Fair to meet candidates, promote the agency, and conduct interviews. Hiring managers will notify their PMF Coordinator of the PMF Finalist(s) they wish to select; the PMF Coordinator will then notify the SHRO, for an HR Specialist to extend a job offer.

To balance the development of Fellows and enhance their performance, supervisors will:

1. Develop an IDP for each Fellow selected, within 45 days of his/her appointment.
2. Authorize and monitor completion of at least one developmental assignment of 4 to 6 continuous months in the occupation or functional discipline in which the Fellow will most likely be placed. This assignment must have full-time management and/or technical responsibilities consistent with the Fellow's IDP.
3. Ensure completion of 80 hours of formal interactive required training per year, for a total of 160 hours;
4. Provide a performance plan and annual performance evaluation in accordance with the Department's performance management program; and
5. Support the Fellow's participation in developmental activities.

PMF appointees participate in developing their IDPs with their supervisors and mentors, with oversight from their PMF Coordinator. Fellows will participate in various OPM, Department, and bureau/operating unit-sponsored program activities, such as formal and informal orientations; trainings; developmental/rotational and shadowing assignments; other developmental activities; and graduation. Fellows should assist in planning and organizing other meetings and workshops that will contribute to their development.

The PMF Coordinator in each bureau/operating unit shall perform the initial PMF Program completion review, using the PMF Program Requirements certification sheet ([see attached](#)) for successful completion of the Fellows' requirements. The PMF Coordinator must consider whether the Fellow has: (1) met all requirements of the Program, as outlined in the Program regulations found at 5 CFR 362, (2) demonstrated successful performance according to the individual's performance plan, and (3) achieved the developmental expectations set forth in the IDP. This may be conducted through a document review or other methods agreed upon by the ERB. The PMF Coordinator certifies PMF Program completion by signing the certification sheet. The PMF Coordinator forwards the signed certification sheet, along with the corresponding documentation, to the bureau/operating unit's ERB or equivalent for final certification. The results of the ERB certification are to be recorded in the PMF TMS by the Agency PMF Coordinator. OPM will contact the Fellows and provide them with information about the PMF Program's graduation ceremony.

ELIGIBILITY: To be eligible for a PMF Program appointment, a candidate must:

1. Have completed an advanced degree from a qualifying institution within the previous 2 years; or
2. Be currently enrolled in a qualifying educational institution and expected to complete a qualifying advanced degree by August 31 of the academic year in which the competition is held.

In addition, the individual must:

1. Successfully complete an OPM assessment, be selected by OPM as a PMF Finalist; and
2. Meet the requirements of the position being appointed, in accordance with OPM's Qualification Standards.

An applicant may apply for the PMF Program more than once if they meet the eligibility criteria. However, if an applicant becomes a Finalist and subsequently applies for the PMF Program during the next open announcement, the applicant will forfeit his or her status as a current Finalist.

FINALISTS: OPM is responsible for recruiting candidates for the Program. Individuals who meet the requirements of Title 5, CFR § 362.403(c) apply directly to OPM. OPM conducts the assessment process, adjudicates veterans' preference, and selects the PMF Finalists for that year's PMF class. Applicants who have been deemed Finalists are considered eligible for the PMF Program during the 12-month period immediately following OPM's official announcement of their selection as a Finalist.

APPOINTMENTS

TYPE OF APPOINTMENT: Fellows are appointed under Title 5, CFR § 213.3402(c), an excepted service Schedule D appointment not to exceed 2 years.

GRADE/BAND LEVEL: Fellows must be appointed no later than 12 months after selection as a Finalist and must be appointed at the GS-9 level or equivalent, at a minimum. However, if the bureau/operating unit determines that a Fellow meets the qualification requirements, it may appoint the Fellow at the GS-11 or GS-12 level or equivalent.

OPM assesses PMF applicants for general eligibility and initial appointment at the designated minimum grade level or equivalent. To make an initial appointment above the minimum level, the SHRO must determine that the PMF Finalist meets the qualification standard for the position at a higher grade level, for example, GS-11, GS-12, or equivalent. A higher step within the minimum GS pay range may be permissible, in accordance with the highest previous rate rules, under Title 5, CFR § 531.221, if the Fellow has had prior higher level Federal civilian service. The SHRO will determine the permissible rate of pay. For bureau/operating units participating in an alternative personnel management system, the supervisor may set the pay anywhere within the pay band to which the Fellow is appointed.

The superior qualifications authority under Title 5, CFR § 531.212 may be used to grant appointments above the minimum rate for any GS grade level covered by this HR Bulletin.

APPOINTMENT EXTENSIONS: A Fellow's appointment may be extended by up to 120 days based only on the criteria in the Department's MOU with OPM. Extensions must be approved by the Director for Human Resources Management and Chief Human Capital Officer (Director). Requests to extend a Fellow's appointment beyond 2 years must be submitted by the appropriate Principal Human Resources Manager (PHRM) to the Director and be received at least 30 days before the Fellow's appointment expiration date and must include a justification for the extension. **Extensions beyond 120 days are not permissible.**

PROBATIONARY PERIOD UPON CONVERSION: Fellows serve under a trial period for the duration of the PMF appointment. Time worked under a PMF appointment is credited toward the probationary period. Once a Fellow is non-competitively converted to a career or career-conditional appointment in the competitive service, they do not serve a probationary period and acquire competitive status immediately upon appointment (Title 5, CFR § 315.713).

Note: Fellows who are converted to a term appointment in the competitive service do not serve a new trial period. Time worked under a PMF appointment is credited toward completion of the trial period in accordance with Title 5, CFR § 316.304(a).

CAREER TENURE: Service under PMF counts toward career tenure in the competitive service if the Fellow is converted to a career-conditional appointment upon completion of the program. To obtain career status, employees in the competitive service must have 3 years of substantially continuous service without a break in service of more than 30 calendar days (Title 5, CFR §§ 315.201(a), 315.201(b)(1) (xiii), and 315.201(3)).

RECRUITMENT PROCESS

RECRUITING FELLOWS: Hiring officials can hire Fellows as highly skilled new staff members and as investments in succession planning. The OPM PMF Office recruits thousands of candidates, assesses their skills, and selects only the top Finalists, saving hiring managers time and expenses as well as ensuring a premium candidate pool.

Hiring managers must post positions on OPM's portal site, TMS. Hiring managers can view Finalists' resumes on TMS, and/or attend OPM's annual spring PMF Job Fair. Finalists may be hired at any time throughout the 12-month period immediately following OPM's official announcement of their selection as Finalists.

Posting Positions to TMS: PMF Coordinators must post PMF positions on OPM's portal site, TMS. When feasible, positions should be posted before the annual PMF Job Fair, though positions must be posted throughout the year. PMF Coordinators are responsible for entering positions, editing, or deleting existing positions, and maintaining up-to-date information. Positions should include details on the specific skills and abilities the operating unit is seeking. There is no minimum or maximum open period, and postings can be canceled at any time without notice. PMF Coordinators and hiring managers must consider all Finalists who apply for, express an interest in, or who are contacted by Department personnel for a position that has been posted on TMS. The Program Manager can provide TMS access to PMF Coordinators, who will in turn provide access to hiring managers within their bureau/operating unit who are interested in viewing Finalists' resumes.

Viewing Finalists' Resumes: PMF Coordinators and hiring managers may view Finalists' resumes on TMS throughout the 12-month period following the official announcement of their selection as Finalists. PMF Coordinators and hiring managers may contact the Finalist for an interim interview. All finalists must apply through TMS.

Attending the Annual Spring PMF Job Fair: PMF Coordinators and hiring managers may attend OPM's annual PMF Job Fair. PMF Coordinators must notify the Program Manager of their intent to attend the Job Fair. All exhibit booth(s) requests must be submitted to OPM, if applicable. The PMF Coordinator is the liaison with OPM. During the Job Fair, hiring managers and HR personnel may receive resumes and interview Finalists.

Extending Appointments: HR Specialists can extend job offers to Finalists in the PMF Program, for which they must meet OPM's "Operating Manual: Qualification Standards for General Schedule Positions" at any time during the 12-month period immediately following OPM's official announcement of their selection as Finalists. **PMF Finalists must enter on duty within this 12-month period.**

VETERANS' PREFERENCE

PREFERENCE ELIGIBLES: Preference eligibles receive three-tiered consideration during the PMF process. The first tier occurs during the nomination process. The second tier occurs during the OPM application review and rating process, and the third tier occurs during the agency appointment process. Veterans' preference is applied in accordance with Title 5, CFR §§ 302.201, 302.302, and 302.304. During the nomination process, candidates are ranked according to their assessment score, with any adjudicated veterans' preference applied. OPM adjudicates veterans' preference based on the

supporting documentation supplied by the PMF candidate. Compensable disabled veterans are placed at the top of the list. From this list, OPM designates the PMF Finalists and posts the Finalists' names and online resumes on the PMF website in alphabetical (unranked) order. PMF Coordinators and hiring managers who are registered users of OPM's TMS can access a separate list that indicates the veterans' preference category for those Finalists with preference.

Veterans' preference procedures under Title 5, CFR §§ 302.304 and 302.401 must be applied during the consideration and selection process to all applicants within the same applicant pool.

Applying Veterans' Preference: Hiring managers must select from the **highest available preference group** based upon the applicant's preference designation within the pool. The highest preference group is the CPS and CP (combined), the next group is the XP, and the last preference group is the TP. When there are fewer than three preference eligible candidates in the highest preference group, consideration may be expanded to include the next group.

For example: First consideration must be given to the highest preference group, consisting of preference eligibles having a service-connected disability of 10% or more (CPS and CP); second consideration is to other 10-point preference eligibles (XP); third consideration is to 5-point preference eligibles (TP); and last consideration is to non-preference eligibles. Once a job offer is extended, accepted, and an enter-on-duty date is established for available position(s), that specific applicant pool is closed. Preference eligibles who request consideration after job offers are extended and accepted for all the available positions will become part of a new applicant pool that will be established if/when a new position becomes available.

PASSING OVER OR REMOVING A PREFERENCE ELIGIBLE: A preference eligible who is contacted by hiring manager or other Department personnel, who has expressed an interest in, or has applied to a specific position, may only be removed from consideration upon approval of a formal pass over request in accordance with current Department policy. The hiring manager must demonstrate that the individual does not qualify or meet the criteria for the position. Before removing the preference eligible, the hiring manager must submit a written request to pass over the preference eligible to their PMF Coordinator, documenting the reason(s) why the individual is not qualified or did not meet the criteria for the position and should be removed from consideration. Upon concurrence, the PMF Coordinator must submit a written request and justification to the SHRO. The SHRO must follow current Department policy for the approval of pass overs. Requests to pass over 30% or more compensable disabled preference eligibles must be submitted to the Director and must be approved by the OPM Director (for 30% or more compensable disabled).

PROGRAM REQUIREMENTS:

PARTICIPANT AGREEMENT: Prior to appointment, a Fellow must enter into a Participant Agreement with the bureau/operating unit. The bureau/operating unit may use OPM's Participant Agreement template or develop its own. However, at a minimum, the Participant Agreement must contain the following elements:

1. A general description of duties
2. Work schedule
3. The length of the appointment

4. Mentorship opportunities
5. Training requirements
6. Evaluation procedures that will be used for the Fellow
7. Requirements for continuation and successful completion of the PMF Program
8. Minimum eligibility requirements for noncompetitive conversion to a permanent or term competitive service appointment

PROGRAM MENTORS: PMF Coordinators **must** ensure that within the first 90 days of a Fellow’s appointment, the Fellow has been assigned a mentor. The mentor must be a managerial employee outside of the Fellow’s chain of command. The PMF Coordinator, in conjunction with the Fellow’s supervisor, will determine the Fellow’s mentor. Mentors should be those who can provide leadership, insight, guidance, and objectivity to the Fellow during the PMF Program and thereafter. Mentors serve as role models and personal advisors to convey positive information about the Department’s mission, policies, rules, and regulations. In addition to a mandatory mentor, Fellows may also be paired with other skilled and experienced employees (for networking and developing other insights and skills) in preparation for managerial and supervisory positions. However, guidance provided by these employees to the Fellow is not a substitute for an officially designated mentor.

INDIVIDUAL DEVELOPMENT PLAN (IDP): The IDPs of Fellows must be completed within 45 days after the effective date of their appointment and must be aligned with the Fellow’s performance plan, target position, and career development goals. The Fellow’s IDP should be established in consultation between the Fellow, supervisor, PMF Coordinator, and mentor. IDPs are designed for the 2-year appointment. They set 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. IDPs must indicate the competencies required for each grade level/band as well as provide a benchmark identifying the successful attainment of the needed competencies. IDPs should specify how and when the learning objectives will be met and determine how the Fellow will be evaluated.

The target position of a Fellow is a position, occupational series, or program area, as defined by the employing organization, which may plan to employ the Fellow upon successful completion of the PMF Program. IDPs should be updated to include previously unforeseen training and developmental requirements as needed.

Each IDP should be individually tailored around the following elements:

1. Target Position: A brief description of the target position, and the specific knowledge, skills, and abilities needed to qualify for the target position upon successful completion of the 2-year PMF Program.
2. Learning Objective: The learning objective should include general management areas, as well as specific technical skills and experiences that will qualify the Fellow for the target position at the end of the Program.
3. Details and Timeline: The IDP should clearly indicate when and how the learning objectives will be accomplished. It should outline the required developmental assignment and the 80 hours of formal interactive training each year of the Program, including OPM’s Orientation Program and the Department’s Orientation Program.
4. Demonstrated Success: The IDP should include a means for tracking the completion of all IDP objectives at the end of the 2-year PMF Program. The supervisor, mentor, PMF Coordinator,

and Fellow should be partners in determining if the objectives set forth in the IDP have been accomplished. Should events preclude an individual from attaining specific learning objectives by a particular date, alternative arrangements should be made with the supervisor.

ORIENTATION, TRAINING, AND DEVELOPMENT: Supervisors will provide a minimum of 80 hours per year of formal interactive training for each Fellow that addresses the core competencies required in the occupation or functional discipline that the Fellow will most likely be placed in upon completion. Formal interactive training can be in the form of “blended courses” that combine online and in-person learning. Blended courses must combine some form of human instructor interaction with multiple students, either through virtual means or in person, and any electronic learning component (e.g., webinars). Trainings/Courses/Webinars that are only web-based, meaning no instructor and trainee interaction, will not count towards the 80 hours. Trainings that provide learning documents only cannot count toward the 80 hours of formal interactive training. OPM-sponsored PMF training (including orientation) and the Department’s orientation training count toward the annual 80-hour requirement. Mandatory trainings for employees, such as on security and ethics, do not count toward the annual 80-hour requirement. Training conducted via webinars or online platforms would count if participation were interactive between the Fellow and the instructor and/or other participants.

Fellows must attend the following:

1. OPM’s Orientation Training Program: Each Fellow should complete this training during the first year of the Program. It provides Fellows with an overall perspective on the Federal Government and the PMF Program, and includes components on leadership, communications, teamwork, and preparing IDPs. The session also provides valuable networking opportunities.
2. Department Orientation Training Conducted by the Department’s OHRM: Each Fellow should complete this training during the first year of the Program. The training covers topics on the Department’s mission, organizational structure, strategic plans, and other relevant material.

DEVELOPMENTAL/ROTATIONAL ASSIGNMENTS: Developmental assignments are required as part of the PMF Program and are intended to broaden the Fellow’s perspective on the work of the Department, which can lead to an insightful employee and a more effective leader. Developmental assignments **must** prepare the Fellow for the occupation or function in which they are likely to be placed. Rotational assignments are not required; however, they can be used to broaden the Fellow’s perspective of the Government’s executive branch. Developmental and rotational assignments can range from assignments at a Fellow’s home agency (outside of their immediate office), to another agency, or even outside of the Federal Government. The assignments are to be clearly outlined and negotiated in advance with the Fellow’s supervisor.

Developmental and rotational assignments in the PMF Program are covered under Department policy on details and assignments and must follow the appropriate approval process (below).

1. Developmental Assignment: The supervisor **must** provide a Fellow at least one developmental assignment of 4 to 6 continuous months in the occupation or functional discipline in which the Fellow will most likely be placed. The assignment must have full-time management or technical responsibilities consistent with the PMF Fellow’s IDP. The developmental assignment may be within the Fellow’s organization (outside of immediate office), in another bureau/operating unit of the Department, or in another Federal agency.

2. Rotational Assignment: The supervisor may provide the Fellow with additional rotational assignments from 1 to 6 months to any desired field. Fellows can gain management experience, work in specific occupational fields, or learn about a program function from another perspective. The nature of the rotation should be agreed upon by the supervisor and the Fellow. While rotational assignments do not have to directly relate to the Fellow's present position, current field, or functional area (in which the Fellow will most likely be placed), assignments must relate to the overall career path identified in the IDP. Rotational assignments are to be decided by the home organization, and the Fellow's supervisor and host organization must agree on their timing so there is no conflict with the Fellow's responsibilities in the home organization.

Developmental and rotational assignments must be carefully planned and documented to provide a clear understanding of the expectations, goals, timing of the assignment, and the office where the training will occur to provide maximum benefit for the Fellow. Training objectives should be well-defined prior to the effective date of the assignment. Developmental and rotational assignment supervisors are responsible for preparing a written assessment of the Fellow's performance at the conclusion of the assignment, including training received and work accomplished, and must provide the assessment to the supervisor of record. The supervisor of record will use the assessment when completing the Fellow's annual performance evaluation. Upon completion of the developmental or rotational assignment, Fellows will return to their position of record.

The written training objectives shall be developed by the supervisor of record in consultation with the host supervisor, the Fellow, and the PMF Coordinator, and must include:

1. Dates of the assignment.
2. Duties that the Fellow will perform.
3. Relationship of the developmental or rotational assignment to the Fellow's career goals.
4. How the Fellow's performance will be appraised during the assignment, and
5. Long-term benefit to the Department of the developmental or rotational assignment.

Approval Process – Both reimbursable and non-reimbursable developmental and rotational assignments outside the Department must be approved by the Director. Developmental and rotational assignments between bureaus may be negotiated by heads of bureaus/operating units or their designees and do not require the Director's approval. In addition, extensions for assignments to organizations outside the Department must be approved by the Director.

Note: Before a Fellow begins an assignment outside the Department to another Federal agency or between bureaus, an MOU between the parties must be executed. Bureau/operating units must use OPM's sample [PMF MOU](#).

Before a Fellow begins a temporary assignment to a State, local, or Tribal government; institution of higher education; or other eligible organizations, an [Intergovernmental Personnel Act agreement](#) is required.

OTHER DEVELOPMENTAL ACTIVITIES: In addition to formal interactive training, developmental activities may include the following: on-the-job training; mentoring sessions; career management counseling; rotational assignments; educational brown-bag lunches; cross-training; career broadening assignments; and attendance at conferences, workshops, and off-site meetings. Supervisors

and bureau/operating units may provide additional informal training and development through participation in other activities, such as:

Shadowing Assignments. Fellows may complete shadowing assignments of a short duration, such as 1 week. By shadowing managers, Fellows gain insight on managerial responsibilities and management approaches.

Readings and Seminars. Fellows may meet informally with their supervisors, organizational staff, and other Fellows to discuss books or articles on areas of interest.

Meet-the-Manager Sessions. Fellows may meet with other managers outside their bureau/operating unit to discuss managerial duties and responsibilities, current Department- and bureau-level issues and recommendations regarding the Fellow's career development.

Program Impact Paper. At the end of the first and second year of the PMF Program, Fellows may be asked by their PMF Coordinator, or their supervisor, to prepare a short paper discussing their experiences and observations, which will be used in determining potential improvements to the PMF Program in the bureau/operating unit and/or Department.

PMF Leadership Development Program (LDP). The training and leadership program is designed to support Fellows' journey during their 2-year Fellowship. To learn more about PMF and this LDP, go to <https://www.pmf.gov/current-pmfs/training-and-development/leadership-development-program/>.

PROMOTIONS:

PROMOTION CRITERIA: Time-in-grade requirements apply to the promotion of a Fellow, and individuals may be promoted to the GS-13 level or equivalent provided they meet the following eligibility requirements:

1. Fellows are eligible for promotion to the next higher grade/band after they have served in their current position of record for a minimum of 120 days, as required by the Department's performance management system; have a performance rating of at least Level 3 or equivalent; meet OPM's "Qualification Standards for General Schedule Positions" for the appropriate series and grade /band; possess the specialized experience equivalent in difficulty to the next lower grade/band; demonstrate the ability to perform at the higher grade /band; and meet all of the requirements for promotion as identified in their IDP.
2. Promotions above the GS-13 level or equivalent for a Fellow can only occur on or after the date of conversion to the competitive service and are dependent upon the Department or SHRO's Merit Assignment Plan, the position's career ladder and full performance level, and the Fellow's performance. However, once a Fellow is converted to the competitive service, time-in-grade regulations apply.

Note: Fellows covered under the Commerce Alternative Personnel System (CAPS), or the Alternative Personnel Management System (APMS) are not eligible to receive an increase in salary, except for performance increases, without a promotion to a higher band.

PROMOTION APPROVAL PROCESS: PMF supervisors shall provide the following to the PMF Coordinator:

1. Standard Form (SF)-52 requesting the promotion.
2. The Fellow's current performance plan and appropriate end-of-year performance rating or interim rating
3. Documentation that the Fellow meets all requirements of OPM's "Qualification Standards for General Schedule Positions" for the appropriate series and grade/band, meets the specialized experience equivalent in difficulty to the next lower grade/band, and demonstrates the ability to perform at the higher grade/band.
4. A copy of the Fellow's IDP for his or her current grade /band, and
5. Documentation that the Fellow meets all requirements for promotion as identified in their IDP.

The PMF Coordinator shall review and certify that all criteria for the current grade /band have been met and forward the documentation and certification to the bureau/operating unit's ERB or equivalent for final approval. After the ERB's or equivalent final approval, the promotion request may be submitted to the appropriate SHRO for processing. The PMF Coordinator shall notify the Program Manager of the Fellow's promotion.

CERTIFICATION/CONVERSION

CERTIFICATION OF COMPLETION: The PMF Coordinator must begin the certification process with enough time to complete the entire process so they can notify the Fellow of the bureau/operating unit's ERB or equivalent decision **no later** than 30 days before their appointment expires.

1. Upon a Fellow's completion of the PMF Program, the PMF Coordinator must confirm the conversion position is available prior to the evaluation process. The PMF Coordinator must evaluate and certify in writing using the attached certification sheet (the Fellow, Fellow's Supervisor, Agency PMF Coordinator, and ERB Chairperson (or equivalent) should fill this form out) that all requirements of the PMF Program have been met, including developmental expectations set forth in the individual's performance plan and IDP, and that the Fellow has a demonstrated performance rating of at least Level 3 or equivalent.
2. Once the PMF Coordinator certifies PMF Program completion using the certification sheet, the signed certification is forwarded to the bureau/operating unit's ERB or equivalent for final review and certification. The appropriate ERB or equivalent member signs the certification sheet upon determination that the Fellow has completed all requirements of the PMF Program and can be non-competitively converted to a full-time, career, career-conditional, or term appointment in the competitive service.
3. The bureau/operating unit's ERB or equivalent member shall return the signed certification sheet to the PMF Coordinator.
4. The PMF Coordinator shall notify the Fellow of being certified or not certified **no later than** 30 calendar days before the expiration of his or her appointment in the PMF Program.

The results of the ERB certification are to be recorded in the PMF TMS by the Agency PMF Coordinator. If a Fellow is not certified by the bureau/operating unit, they may request that OPM reconsider the bureau/operating unit's determination. The Fellow must submit a written request that

includes a justification to the OPM Director (or the OPM Director's designee) through the OPM PMF Office within 15 calendar days from the date of the bureau/operating unit's determination.

1. The Fellow may continue in the Program pending their request for reconsideration.
2. The OPM Director or the designee's determination shall be final and not subject to further review or appeal.

CONVERSIONS:

1. Fellows who are certified by the bureau/operating unit's ERB or equivalent **may** be non-competitively converted to a full-time, career, career-conditional, or term appointment in the competitive service.
2. Conversions are not allowed prior to satisfactory completion of the PMF Program, as well as the bureau/operating unit's ERB or equivalent certification of satisfactory completion.
3. Conversions must be effective on the date that the 2-year service requirement is met unless the appointment has been extended. Conversions can be effective at any point during the extension period once the Fellow has been certified by the operating unit's ERB, or equivalent, as having met all requirements of the PMF Program.

PERFORMANCE/CONDUCT

PERFORMANCE MANAGEMENT: All Fellows are covered by either the Department's 5-Level Performance Management System, CAPS, or the APMS. Under all systems, Fellows must be issued a performance plan that outlines specific elements and standards that the Fellow is expected to accomplish during the appraisal cycle. At the midpoint of the appraisal cycle, Fellows must receive a formal progress review, and at the end of the appraisal cycle, the supervisor of record must evaluate the Fellow's performance against the elements and standards in the performance plan and assign a rating of record. If a Fellow's performance falls below Level 3 or equivalent, the supervisor should contact the SHRO for guidance and notify the PMF Coordinator. For additional information on the 5-Level Performance Management System, refer to Department Administrative Order (DAO) 202-430, "Performance Management System," and the Performance Management System Handbook; for CAPS, refer to the CAPS Operating Procedures Manual; and for APMS, refer to the APMS Performance Management Program.

To progress in grades and complete the PMF Program, Fellows must attain a performance rating of Level 3 or equivalent for all critical elements in their performance plan. Supervisors cannot allow a promotion or a conversion action to occur if the Fellow's performance is less than a Level 3 or equivalent.

During the PMF appointment, a three-way feedback process should be implemented between the supervisor of record, the Fellow, and the PMF Coordinator to address the Fellow's progress and the adequacy of developmental experiences. Supervisors must monitor the Fellow's work and provide feedback on whether the Fellow is meeting the learning objectives of their IDP.

PERFORMANCE BELOW LEVEL 3 OR EQUIVALENT: Fellows will be given assistance in improving whenever their performance rating is determined to be below Level 3 or equivalent. Individuals performing below that level are expected to have additional progress reviews.

Failure to meet the minimum standards outlined in the position description and performance plan can lead to warnings, termination, or other corrective action as appropriate. It is the supervisor's responsibility, with oversight from the PMF Coordinator and the SHRO, to review and follow established regulations when addressing performance issues. Supervisors should take into consideration the Fellow's IDP, performance plan, and performance reviews when addressing performance issues.

The supervisor and PMF Coordinator should resolve performance issues before the end of the 2-year Program. Fellows with demonstrated performance problems cannot be converted.

CONDUCT ISSUES: It is the supervisor's responsibility, with oversight from the PMF Coordinator and the SHRO, to review and follow established regulations when addressing conduct issues. Procedures on disciplinary actions can be found in DAO 202-752, "Discipline."

The supervisor and PMF Coordinator should attempt to resolve conduct issues before the end of the 2-year PMF Program. Fellows who have demonstrated ongoing conduct issues cannot be converted.

EXPIRATION OF APPOINTMENT: A Fellow's appointment expires at the end of the 2-year PMF Program period if the Fellow is not converted, and the individual has not been granted an extension.

Federal agencies have the authority to extend a Fellow's 2-year appointment (otherwise referred to as the fellowship) for up to 120 additional days for rare and unusual circumstances. When doing so, agencies must adhere to the definition and procedures outlined in their Pathways MOU with OPM.

If a Fellow is not converted at the end of the PMF Program and the initial appointment has not been extended, the appointment expires when the certification for PMF Program completion is denied or when the Director denies the bureau/operating unit's request for an extension. The PMF Coordinator must record the fellowship extension in the portal site of the TMS.

TERMINATION OF APPOINTMENT: Either the supervisor or the Fellow may terminate the PMF Program appointment. If a proposed termination is initiated by the supervisor, the basis of the termination must be related to misconduct, poor performance, or suitability. The Agency PMF Coordinator would record such status change in the PMF TMS.

NOTIFICATION OF NON-CONVERSION: The PMF Coordinator must provide the Fellow a notice of intent to not certify Program completion, and the reason, no later than 30 calendar days before the expiration of their PMF appointment. The PMF Coordinator must also provide notification to OPM of the decision, via TMS, and the reason to not convert in accordance with Title 5, CFR § 362.408(a)(3).

MOVEMENT OF PMFs

MOVEMENT TO OTHER FEDERAL AGENCIES: Fellows may move to another agency at any time during their appointment in the PMF Program. To remain in the PMF Program, the Fellow must separate from the current agency and the new employing agency must appoint the participant without a break in service. If the Fellow moves to another agency within the first 6 months of the Fellow's original appointment, the bureau/operating unit may request reimbursement of one-quarter of the

placement fee from the new appointing agency. Bureaus/operating units may also appoint Fellows from other agencies subject to the provisions of Title 5, CFR, Part 362.

The Fellow does not begin a new 2-year period in the PMF Program upon appointment by the new employing agency. Because there is no break in service, time served under the previous appointment will apply toward the completion of the 2-year PMF Program with the new agency.

The PMF Coordinator must immediately update the portal site of the TMS when the Fellow is reappointed.

MOVEMENT TO ANOTHER BUREAU/OPERATING UNIT: Fellows may move to another bureau/operating unit in the Department at any time during their appointment in the PMF Program with no break in service.

The Fellow does not begin a new 2-year period in the PMF Program upon appointment by the new bureau/operating unit. Because there is no break in service, time served under the previous appointment will apply toward the completion of the 2-year PMF Program with the new bureau/operating unit.

The gaining PMF Coordinator must immediately update the TMS portal site. There is no provision in the regulations for OPM or the gaining bureau/operating unit to reimburse the original appointing bureau/operating unit for the fee paid to cover costs for the recruitment, selection, placement, orientation, and graduation of a Fellow.

WITHDRAWAL FROM THE PROGRAM: Fellows may withdraw from the PMF Program at any time by resigning from their appointment. Such a withdrawal will be treated as a resignation from Federal service. Individuals under service agreements for receiving incentives such as recruitment, relocation, or student loan repayment may be indebted to the Department, in accordance with Department policy, when the terms of the service agreement are not met.

A Fellow who held a career or career-conditional appointment in the competitive service in another agency or in the Department, immediately before entering the PMF Program, and who withdrew for reasons unrelated to misconduct, poor performance, or suitability may, at the Department's discretion, be placed in a career or career-conditional position, in accordance with Department policies. The Department's determination in this regard is not subject to appeal.

The PMF Coordinator must immediately update the portal site of the TMS.

RESIGNATION: Fellows who resign before completion of the PMF Program do not have reinstatement eligibility for competitive service positions based upon the PMF appointment.

READMISSION: Fellows who withdraw from the PMF Program for reasons related to misconduct, poor performance, or suitability, as determined by the PMF Coordinator, may not be readmitted to the PMF Program.

If a Fellow withdraws from the PMF Program for reasons **not related** to misconduct, poor performance, or suitability, they may petition the Director, through the Program Manager and the appropriate PMF Coordinator, for readmission and reappointment to the Program. The readmission request does not need

to be for a position within the original bureau/operating unit. Upon approval from the Director, the Director shall submit written notification of the approved readmission to OPM, via the PMF Program Office. OPM retains the authority to overrule the Director's decision to readmit and reappoint. OPM's decision is not subject to appeal.

STUDENT LOAN REPAYMENT PROGRAM: Bureaus/operating units are authorized to repay federally insured student loans, in accordance with the DAO on student loan repayment. The PMF Program is not a graduate fellowship program for the purpose of Federal student loan deferment. Borrowers may not defer repayment of their loans based on participation in the PMF Program. Additional information may be obtained on the Federal Student Aid website at <http://studentaid.gov>.

TRAVEL EXPENSES: Bureaus/operating units are authorized, but not required, to pay travel expenses for pre-employment interviews and first post-duty stations. However, travel expenses incurred to attend OPM- and Department-sponsored training are the responsibility of the bureau/operating unit.

REDUCTION-IN-FORCE: Fellows are in the excepted service, Tenure Group II, for purposes of reduction-in-force, under Title 5, CFR § 351.502.

APPEAL RIGHTS: Fellows are excepted service employees within the meaning of Chapters 43 and 75 in Title 5, United States Code (U.S.C.), and have appeal rights as provided therein.

REFERENCES: EO 13562, "Recruiting and Hiring Students and Recent Graduates"; 5 CFR, Part 362, Subpart D; 5 CFR, Part 362, Subpart A; EO 13318; OPM's "Operating Manual: Qualification Standards for General Schedule Positions"; 5 CFR §§ 362.202(b), 213.3102 (ii), 531.221, 531.212, 302.304; Department Administrative Order (DAO) 202-430, "Performance Management System"; Performance Management System Handbook; Commerce Alternative Personnel System Operating Manual; Alternative Personnel Management System program; 5 CFR §§ 362.208(b), 362.207(3), 315.708(c), 315.201(a), 315.201(b)(1)(xiii), 315.201(3); DAO 202-957, "Department of Commerce Repayment of Student Loan Policy"; 5 CFR § 351.502; 5 U.S.C. Chapters 43 and 75

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