# Presidential Management Fellows

# Technology Fellows Program

# Program Description

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These guidelines are based on current Presidential Management Fellows (PMF) Program regulations and policies as of August 2011. The U.S. Office of Personnel Management (OPM) is presently proposing new regulations to reinvigorate the PMF Program as a result of Executive Order 13562 of December 27, 2010. These guidelines will be updated accordingly. Please refer to the AS OF date referenced in the footer.

## Introduction

In December 2010, the Federal Chief Information Officer published the 25-Point Implementation Plan to Reform Federal Information Technology (IT) Management. One critical requirement of the plan is the development of a Technology Fellows Program aimed at cutting bureaucratic barriers to entering public service and providing access to unique career opportunities in Federal Agencies to highly talented technology professionals. Through a competitive application process, recent graduates of top graduate programs with significant experience in the field of information technology, computer science, or information technology policy will serve as Technology Fellows. As part of the two-year paid fellowship, Fellows will have the opportunity to actively participate in rotational assignments and gain in-depth experience in managing large and complex IT programs. Designed to integrate the next generation of IT professionals, this program will allow the Federal Government to tap into the emerging talent pool and begin to build a sustainable pipeline of talent.

## Hiring Authority

The Technology Fellows Program will use the PMF Schedule A hiring authority to appoint eligible candidates to 2-year fellowships. Fellows will be selected through the PMF process, and will be under a temporary two-year appointment codified by the current Executive Order 13318 and soon to be Executive Order 13562 that governs the PMF Program. Participants in the Technology Fellows Program will be "appointed" and "recorded" as PMFs\Fellows; however, they will have a working title of "Technology Fellows".

## Eligibility

Based on current program regulations, graduate students from any discipline who are expected to complete an advanced degree (master's or doctoral-level degree) from a qualifying college or university during the current academic year are eligible to be nominated by their school for the PMF Program.

For the Technology Fellows Program, significant experience, as mentioned above, can include: an undergraduate degree in computer science, computational mathematics, information technology, or information science; a graduate degree in an information technology discipline; and/or relevant work experience in a technology firm or the field of information technology.

Applicants must meet all graduate degree requirements, including the completion or successful defense of any required thesis or dissertation (as required) by the deadline established by the PMF Program Office.

Applicants who have a prior graduate degree may still participate as a Fellow so long as they are currently completing a degree which will be completed by the deadline established by the PMF Program Office. Generally, applicants will be permitted to apply and participate in the program nomination and selection process only once per graduate degree.

After the eligible graduate student applies, he/she must participate in a competitive nomination process at their graduate school to obtain a nomination. Eligible applicants are invited to participate in an on-line assessment. Based on score, semi-finalists are chosen. Semi-finalists are then invited to participate in an in-person assessment. Based on score, Finalists are chosen. Finalists have one year from selection to obtain an appointment as a PMF\Fellow, with a working title of "Technology Fellow".

**Citizenship**

By law, most Federal Agencies are prohibited from paying anyone who is not a U.S. citizen for positions in the continental United States. There are certain exemptions to this restriction. A non-citizen may be eligible for employment if the individual is:

1. Eligible to work under U.S. immigration laws. Technology Fellows must possess U.S. citizenship by the conclusion of the two-year fellowship, and
2. Eligible for and pursuing U.S. citizenship or appointed by a Federal Agency permitted by that agency's appropriation act or agency-specific statutes to hire and pay non-citizens.

If a non-U.S. citizen is appointed as a Technology Fellow by a Federal Agency and does not possess full U.S. citizenship by the conclusion of the two-year fellowship, by Executive order, the non-U.S. citizen Fellow cannot be converted to permanent career or career-conditional employment. The employing agency is under no obligation to retain a Fellow who is not eligible for conversion upon completion of the fellowship. The appointment will expire and the Technology Fellow will be separated from Government service. The PMF Program Office will not grant extensions or deferrals to a Technology Fellow's fellowship to meet citizenship requirements for conversion.

**Education Completed Outside of the United States**

Education completed outside of the United States must be deemed equivalent, by an accrediting body recognized by the Secretary of the U.S. Department of Education, to that gained in conventional/accredited U.S. educational programs to be acceptable for Federal employment. Most foreign education is not accredited by an accrediting body that is recognized by the Department of Education.

Applicants from foreign schools **may** be asked to submit all necessary documents to a private U.S. organization that specializes in interpreting foreign educational credentials, commonly called a credential evaluation service. To be acceptable, the foreign credential evaluation must include/describe:

- The type of education received by the applicant,
- The level of education in relation to the U.S. education system, and
- A statement that its comparability recommendations follow the general guidelines of the U.S. National Council for the Evaluation of Foreign Educational Credentials.
- The content of the applicant's educational program earned abroad and the standards obtained,
- The status of the awarding foreign school's recognition and legitimacy in its home country's education system, and
- Any other information of interest, such as:
    o What the evaluation service did to obtain this information,
    o The qualifications of the evaluator, and
    o Any indications as to other problems such as forgery.

Eligibility criteria for Foreign Education may be found in OPM Qualification Standards for General Schedule Positions Policies, and Instructions in the Educational and Training Provisions or Requirements section (http://www.opm.gov/qualifications/policy/ApplicationOfStds-04.asp). The PMF Program Office will verify school accreditation prior to selecting Finalists.


# Veterans' Preference

To be entitled to preference, a veteran must meet the eligibility requirements in section 2108 of title 5, United States Code. For more information on veterans' preference and its application in Federal employment refer to the U.S. Office of Personnel Management's (OPM's) Vet Guide at www.opm.gov/veterans/html/vetguide.asp.

**Finalists with Adjudicated Veterans' Preference**

If a Finalist is a veteran and he/she expresses an interest in working for an agency, that agency must apply the provisions of section 302 of title 5, Code of Federal Regulations, when selecting and appointing candidates. For purposes of the PMF Program, "expresses an interest" means that he/she has initiated contact with the agency in person or by other direct communication and asked for consideration for appointment to a *specific position*. This contact can include dropping off a resume at the PMF Job Fair, sending a letter by mail/email to the agency asking for consideration, or delivering it in person at any agency office that is considering Technology Fellow appointments for a specific position. This does not mean an agency must contact each veteran on the list of Finalists before offering a job to a non-veteran.

The only way a veteran Finalist may be removed from consideration for a position for which he or she has expressed an interest or for which the agency contacted the veteran Finalist is if the appointing agency can demonstrate that the veteran Finalist does not qualify for an agency's specific Technology Fellows vacancy that clearly describes the requirements needed for the specific position.

Once a job offer is extended (for example, the Finalist has accepted an offer and an Entry on Duty (EOD) start date has been established), that specific applicant pool is closed. Veteran Finalists who request consideration after a job offer is extended and accepted will become part of a new applicant pool that will be established if/when a new position becomes available.

If the agency selects a non-veteran Finalist over a preference eligible veteran Finalist it contacted or who expressed interest in a technology position, then the agency must prepare a written justification as to why the veteran Finalist did not meet the criteria for the position. Decisions must be qualifications driven and based on the specific requirements detailed in the position advertisement. The written justification accomplishes two objectives:

1. Veteran Finalists are entitled, upon request, to obtain a copy of the reasons they were passed over in favor of a lesser preference or non-veteran Finalist. The written justification is intended to satisfy that obligation and thus should be written with the expectation that the veteran Finalist who was passed over may request to review it.
2. Additionally, if OPM officials audit agency PMF processes, the written justification serves as documentation that veteran Finalists who were part of the agency applicant pool received proper consideration.

For more information concerning agency pass over of preference eligible candidates, please refer to OPM's Vet Guide at www.opm.gov/veterans/html/vetguide.asp. Instructions will be provided on how to claim veterans' preference and how to submit supporting documentation during the application process.


## Equal Opportunity Employment

The United States Government does not discriminate in employment on the basis of race, color, religion, sex, national origin, political affiliation, sexual orientation, gender identity, marital status, disability and genetic information, age, membership in an employee organization, or other non-merit factor.

## Reasonable Accommodations

Reasonable accommodations are provided to applicants with disabilities where appropriate. Determinations on requests for reasonable accommodation will be made on a case-by-case basis based upon supporting documentation provided by applicants.

## Recruitment

Recruitment will be conducted through the Chief Information Officers (CIO) Council (www.cio.gov) and through targeted marketing to colleges, universities, and technology companies. The program will also be advertised through the CIO Council and PMF websites.

Questions and information requests regarding the Technology Fellows Program can be directed to the CIO Council at CIOCouncil.Support@gsa.gov.

## Application Process

Based on current PMF Program regulations and for the PMF Class of 2012 only, the PMF Program Office will solicit eligible graduate students via a job opportunity announcement (JOA) on USAJOBS (www.usajobs.gov) and via a link on the PMF website. The announcement will include detailed instructions on how to apply.  Applicants will need to submit a resume and submit their answers to the Qualifications Questionnaire during the application process.

The JOA for the PMF Class of 2012 will open on Thursday, September 15, 2011, and close at 11:59:59pm (ET), Sunday, September 25, 2011.

In addition to submitting an application, applicants must be nominated by their school's Dean, Chairperson, or Academic Program Director, otherwise known as the Nomination Official. Schools must conduct a competitive process to determine which students to nominate based upon the following:

- Breadth and quality of accomplishments,
- Capacity for leadership, and
- A commitment to excellence in the leadership and management of public technology policies and programs.

Schools will determine preliminary eligibility for veterans' preference. Any student who is eligible for veterans' preference and qualifies for nomination must be nominated by the school. The nomination deadline is Friday, September 30, 2011. Students will be officially informed, via email, of their nomination status approximately 3-4 weeks after the nomination deadline.

## Assessment Process

### On-line Assessment

After the application deadline, eligible applicants must participate in a multi-phase assessment. Applicants who are found to be eligible will be invited by email to take an on-line timed assessment. During this stage, the PMF Program Office will verify nominations and school accreditation.

### In-Person Assessment

Top applicants from the on-line assessment, now referred to as "semi-finalists", will be invited to an in-person assessment (a structured interview process) at their expense. In-person assessments will be conducted at various locations throughout the U.S. The structured interview is designed to assess applicant's job-related competencies using targeted questions and benchmarks to evaluate responses. Applicants will have the opportunity to choose an in-person assessment center location during the application process.

### Finalists

Semi-finalists who pass the in-person assessment will become Finalists and are eligible to be appointed to a technology job in a participating agency after all graduate degree requirements (not necessary to have graduated), including successful completion or defense of any thesis or dissertation and a background investigation have been completed by the hiring agency. The CIO Council will select from the PMF Finalists' pool those individuals that fit the requirements and skills necessary for a Technology Fellowship. The Finalist status expires one year after the date Finalists are officially announced.

### Job Fair

The PMF Program hosts an annual Job Fair for all current class Finalists to attend. The Job Fair is typically held in the Washington, DC, metropolitan area, shortly after Finalists are selected. This event will be by invitation only for recently selected Finalists and participating agency representatives. Participating at the Job Fair is not mandatory and will be at the Fellows expense. Agencies may start their hiring process when Finalists are announced by reviewing on-line resumes, conducting phone interviews, scheduling interviews at the Job Fair, and posting their available positions on the PMF Program's Projected Position System (PPS). The PPS is a tool for agencies to advertise positions available for PMF appointments. The CIO Council plans to participate during the PMF Job Fair and advertise Technology Fellow positions on the PPS for the 2012 class.

**Waivers**

Requests for waivers in the program will be granted on a very limited basis. A waiver may be granted to a Finalist for three reasons: (1) called into active duty with the United States military; (2) severe illness which prevents further participation; or (3) severe illness of an immediate family member or emergency preventing which prevents further participation. Waivers based on clerkships, fellowships, grants, scholarships, or other educational or employment opportunities will not be granted.

**Appointment Extensions**

Hiring agencies may formally request an appointment extension for a specific Finalist they are interested in hiring and cannot bring onboard by the one year deadline. This is typically a result of a lengthy background investigation. The hiring agency must submit a request no later than 30 days prior to the end of the 12 month period. If the PMF Program Office approves such a request, the appointment extension is only valid for that agency. If, for whatever reason, the requesting agency rescinds the offer and the one year deadline has been reached, the extended Finalist will lose further consideration. Such requests must be submitted no later than 30 days prior to the end of the 12 month period.

# Training and Development

Technology Fellows will be invited to attend the OPM sponsored PMF Orientation and Training Program which is geared towards an area of leadership that most Fellows will need to develop and master during their Federal Government career. Fellows who participate in one of the orientation sessions can count their hours towards the training requirements referenced below. Tuition is covered by the appointment reimbursement fee the appointing agency submits to the PMF Program Office, but any travel costs are the responsibility of the appointing agency.

At a minimum, applicants will be required to have at least 80 hours of formal classroom training each year during their fellowship and to have completed one 4 to 6 consecutive month developmental assignment.

Each agency is responsible for ensuring Technology Fellows receive 80 hours of formal classroom training each year. The content of the training should be tailored to the specific learning objectives that will qualify the Fellow for a technology position at the end of the fellowship. This training may address both functional/technical and leadership competencies. On the job training (OJT) will NOT fulfill the formal classroom training requirement.

During the first 3 months of the fellowship, the Supervisor and the Fellow will work together to develop a written outline of core competencies and technical skills to include in an Individual Development Plan (IDP). Fellows are expected to gain these core competencies and skills before conversion to a target

position. All Fellows must have an IDP covering their two-year fellowship, to include all training and development requirements.

As with all Federal Government employees, Fellows will have a performance plan that includes performance elements and standards directly related to acquiring and demonstrating the various leadership, technical, and/or general competencies expected of a Technology Fellow as well as elements and standards established for the duties assigned.

Fellows will also receive an annual performance evaluation in accordance with the agency's performance management program. The rating is derived from an evaluation of the Fellow's success in completing developmental activities designed to prepare him/her to meet the development and performance expectations described in the performance plan.

Fellows will be required to complete at least one 4 to 6 consecutive month developmental assignment in Information Technology, with full-time management and/or technical responsibilities consistent with their IDP.

**Rotational Opportunities**

Rotations and developmental assignments are grouped together as Rotational Opportunities. Rotational opportunities will allow Fellows to gain a broader perspective of the Federal Government. These opportunities may be in another bureau, division, office, program, or another agency or branch of the Federal Government.

Fellows will be required to do at least one developmental assignment of 4 to 6 consecutive months in duration in area of IT, with full-time management and/or technical responsibilities consistent with their IDP. The 4 to 6 month rotation is mandatory, but other rotations may be available at the agency's discretion (if viewed as useful to achieve agency goals).

The PMF regulations specify that in addition to the developmental assignment, Fellows may receive other short-term rotations of 1 to 6 months in duration, at their appointing agency's discretion, to occupations or functional areas different from the one in which the Fellow is placed.

Rotational opportunities are at the discretion of the employing agency. If an agency concludes that a rotational opportunity to a non-Federal entity is appropriate to assist Fellows to reach core competencies necessary for conversion to the targeted position at the end of the fellowship, it is the responsibility of the agency to address potential legal and ethical issues associated with such a rotation.

The frequency and duration of rotational opportunities during a Fellow's two-year fellowship may vary greatly from agency to agency. While on a rotational opportunity, the Fellow will remain employed by the agency and will not be separated from Federal service. While on the rotational opportunity, the Fellow's salary continues to be paid by the appointing agency, although housing, transportation, training, or other expenses are sometimes paid by the agency hosting the Fellow for this period of time. Agencies that permit a Fellow to perform a rotational opportunity outside of the agency will be

encouraged to have a Memorandum of Understanding (MOU) with the hosting agency in place before the rotational opportunity begins. A sample MOU can be found under the "Agencies\Resources" section on the PMF website.

## Graduation

Each year the PMF Program Office conducts a graduation ceremony for Fellows who have been certified as successfully completing the program. In order to participate in the graduation ceremony and/or receive a completion certificate, each Fellow must complete all requirements of the Technology Fellows Program, be certified by their appointing agency's Executive Resources Board (ERB), or equivalent, and the reimbursement appointment fee must be paid to OPM by the appointing agency. The Graduation Ceremony is free to all Fellows and guests.

## Compensation and Benefits

The Technology Fellows Program is a paid program. While in the program, Fellows will receive full salary and benefits just like any other Federal employee. In addition, they may be eligible for repayment of their student loans depending on the agency.

**Pay**

Technology Fellows are initially hired to Federal Agencies at the GS-9, GS-11 or GS-12 level (or equivalents). Salaries will vary by geographical location.

**Promotions**

While in the Technology Fellows Program, Fellows may become eligible for promotion. Eligibility for promotion will be determined by the policies and criteria adopted by the employing agency for the PMF Program, which may differ from the policies and criteria that apply to other positions.

**Benefits**

Technology Fellows will be eligible for the same benefits as most Federal employees. These include vacation and sick time, a variety of health insurance options, life insurance, a Thrift Savings Plan (similar to a 401(k)), flexible spending accounts, and more. Additional information can be found under "The Opportunity\Compensation" section on the PMF website at www.pmf.gov.

**Student Loans**

Federal Agencies are authorized to repay student loans under the Federal Student Loan Repayment Program, as provided for in part 537 of title 5, Code of Federal Regulations. The amount paid by the agency is subject to the following maximum limits: (1) $10,000 per employee per calendar year, and (2) a total of $60,000 per employee. Finalists accepting appointments as Fellows are eligible to receive student loan repayments; however, these programs are agency-specific.

Before repaying any student loans, the agency must establish a student loan repayment plan, which is to include the designation of officials with authority to review and approve repayment benefits, situations when the loan repayment authority may be used and criteria that must be met, procedures for making loan payments, a system for selecting employees to receive repayment benefits that ensures fair and equitable treatment, requirements for service agreements, and documentation and recordkeeping requirements.

# Agency Responsibilities

**Responsibilities of the Agency**

Each participating agency plays a critical role in the orientation of Fellows to the Federal Government, the achievement of their career goals, and their retention in the Federal service. Agencies excepted from the competitive service may participate in the Technology Fellows Program using their own appointment authorities, but must follow the PMF Program's Agency Roles and Responsibilities listed below, or their equivalent. Participating agencies agree to:

- Designate an Agency PMF Coordinator who is responsible for the overall administration and development of the agency's PMF Program and who serves as the principal contact point.

- Work with the Agency PMF Coordinator, human resources staff, and technology hiring officials to plan program budgets and to project the number of Fellow hires in the agency. The agency's Chief Human Capital Officer, or in agencies without a CHCO, the Human Resources Director, will compile this information by October and provide to OPM to determine the total number of PMF hires government-wide. In regards to Technology Fellows, work with the agency's CIO, in consultation with the CIO Council, to identify such positions.

- Reimburse the PMF Program Office the fee for costs associated with the recruitment, selection, placement, orientation, and graduation of Fellows within 30 days of acceptance of a PMF appointment, or no later than 2 weeks prior to the PMF orientation session.

- Conduct an agency orientation on mission and structure as early as possible for all newly hired Fellows.

- Establish policies and criteria for the promotion of Fellows during their technology fellowships.

- Certify the Fellow's completion of the Program by the agency's Executive Resources Board (ERB). In agencies without an ERB, the responsibility falls to the senior agency official(s) who have been given executive resource management and oversight responsibility by the agency head. The agency and/or CIO Council may have specific requirements for Technology Fellows.

- Convert or appoint Fellows who successfully complete the Program (ERB certified) into a full-time, permanent position without further competition.


**Agency PMF Coordinator Responsibilities:**

- Lead for PMF Program questions at their agencies.

- Ensure that all hiring officials within their agency\sub-agency are aware of the commitments involved in hiring Fellows including Full-Time Equivalent (FTE) status, OPM reimbursement, starting grade and pay, Individual Development Plans (IDPs), training and developmental requirements, and promotions and conversions.

- Work with supervisors to identify and post Fellow positions on the PMF Program's PPS.

- Recruit Fellows to the agency by requesting access to the Finalist on-line resumes for agency personnel, scheduling interviews with Finalists, and participating in the annual PMF Finalists Job Fair.

- Notify the PMF Program Office of any Fellow's change in status in a timely manner including appointment, movement between agencies (reappointments), extensions, ERB certification, resignation, termination, and conversion.

- Complete the on-line Agency System for Automated Processing (ASAP) upon acceptance of appointment, updating a Fellow's employment information, and submitting ERB certifications and conversions.

- Facilitate reimbursement of the PMF fee to OPM upon acceptance of an appointment of a Fellow.

- Act as a resource for Fellows 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.

- Ensure the CIO Council is aware of the projects given to the Fellow, and seek mechanisms to engage with Technology Fellows placed at other agencies.

- Work with agency ERB (or equivalent) to certify Fellow's completion of the Program and notify the PMF Program Office of ERB decisions via the on-line ASAP.

- Work with the supervisor and human resources staff to ensure proper processing of personnel actions within the agency and notification of Fellow's status changes to the PMF Program Office.

- Provide the PMF Program Office with updated Coordinator contact information (via the Update Agency Coordinator Information on-line form) in order to receive important updates on Finalists/Fellows and PMF events.

**The HR Office**

The agency's HR staff is responsible for the following:

- Preparing policies and criteria for the promotion of Fellows.

- Assisting the hiring official and/or Agency PMF Coordinator with starting grade and pay decisions.

- Verifying the Finalist's completion of all graduate degree requirements before bringing onboard as a Fellow

- In consultation with the Hiring Official\Supervisor, establish Entrance on Duty (EOD) date, and determine security requirement and initiate security clearances.

- Processing personnel transactions upon a Fellow's initial appointment or reappointment, promotion, conversion, etc.

**The Hiring Official/Technology Fellow Supervisor**

Supervisors play a critical role in the Program and most directly impact the overall experience for their Fellows by providing developmental opportunities and meaningful work. Supervisors should consult with the Agency PMF Coordinator and HR Office.

Supervisor responsibilities are:

- Work with the Agency PMF Coordinator to enter positions into the PMF Projected Positions System (PPS), prior to the announcement of Finalists and the annual Job Fair.

- Supervisors should consult with their CIO, or the CIO Council, in regards to the training and development for Technology Fellows.

- Recruit Finalists for Fellow positions by reviewing Finalist resumes participating in the PMF Finalists Job Fair, and interviewing Finalists.

- Assign Fellows to specific positions with defined duties and career ladders, establish Entrance on Duty (EOD) date, and determine security requirement and initiate security clearances.

- Work with the Agency PMF Coordinator to reimburse the PMF Program Office the fee for costs associated with the recruitment, selection, placement, orientation, and graduation of Fellows within 30 days of onboarding as a PMF, or no later than 2 weeks prior to the PMF orientation session, whichever occurs first.

- Develop an Individual Development Plan (IDP) with the Fellow that addresses the target position, developmental requirements, and recommended activities.

- Provide at least 80 hours of formal classroom training during each year of the fellowship. Tuition for the OPM sponsored PMF Orientation and Training Program and PMF Program Office sponsored forums are included in the reimbursement fee and may be counted towards the 80 hours of annual training. Agencies bear the costs of travel and per diem for these programs, as well as tuition and costs for additional outside training.

- Provide Fellows with at least one developmental assignment of 4 to 6 consecutive months, outside the Fellow's immediate office (place of employment).

- Provide a reasonable amount of time during work hours for other Fellow activities, as appropriate, such as Fellow Forums and/or rotational opportunities of 1 to 6 months in other occupations or functional areas.

- Establish a performance plan and annual evaluation for each Fellow with performance elements and standards for the competencies expected and for duties assigned.

- Provide input to the agency's ERB (or equivalent) as needed to evaluate the Fellow's progress and certify whether the Fellow has successfully completed the Program.

## CIO Council Responsibilities

The Federal Chief Information Officer will work with CIOs across the Federal Government through the CIO Council to select projects for Fellows to work on throughout their fellowship. Additionally, the CIO Council will develop training and networking opportunities for the Technology Fellows that will fall under the guidelines of the PMF Program but will be specifically tailored to the Technology Fellows.

The CIO Council will sponsor and support the Technology Fellows Program and will work directly with Fellows, and their supervisors, to ensure the quality of the projects to which they are assigned and provide an additional layer of support for their professional development.

The CIO Council will select from the PMF Finalists' pool those individuals that fit the requirements and skills necessary for a Technology Fellowship. This subset of Finalists will be presented to the CIOs for their selection into their home agency and final placement.