MAY 2022

PUBLIC-PRIVATE TALENT EXCHANGE

Playbook

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PROGRAM OVERVIEW

In 2019, the U.S. Department of Defense (DoD) launched its acquisition-focused Public-Private Talent Exchange (PPTE) to enhance opportunities to partner with industry and facilitate increased communication. This program enables DoD and private sector participants to better understand each other's business operations and share innovative best practices. The Program targets high-performing, mid-career civilians with demonstrated leadership potential.

The opportunities for program participants are significant. Participants will work on-site with one of the program's partner agencies or companies. The Office of the Secretary of Defense (OSD), Army, Navy, Air Force, and the DoD Defense Agencies and Field Activities hosted industry exchange participants in the pilot year. In contrast, Boeing, Booz Allen Hamilton, Deloitte, General Dynamics, GuideHouse, Northrop Grumman, and Raytheon hosted DoD exchange participants.

Additionally, hosting organizations will learn from their hosted exchange participants. Hosts will learn about industry/government practices and gain strategic insights from the point of view of exchange participants working on-site. This knowledge can be implemented to optimize operational efficiency and improve relationships with industry/government partners. Additionally, the exchange will broaden participants' perspectives through exposure to operations and innovations exclusive to their detail, which can be shared with leadership and leveraged by their home organization.

This Playbook intends to serve as a resource to provide PPTE participants and host organization support teams with a basic overview of the Program experience and a simple "how-to" for specific tasks. It should be used in conjunction with the PPTE Website, PPTE Checklist, and any materials provided by Human Capital Initiatives (HCI). If there are any questions or concerns, please contact ppte@dau.edu for assistance.

Identify Program Participant - Host Organization Match

- Each match between the Program participant and host organization will be different, considering the specific skills, needs, and interests of all parties involved. The following captures the process at a high level.

- HCI may request a preference list from the Program participant, coordinated with the participant's home organization supervisor, to facilitate the matching process as well as a preference list from the host organization with available exchange opportunities.

- HCI will strive to adjudicate preferences on harder-to-fill positions to mitigate any potential operational risk or minimize the extent of post-government restrictions for the employee.

- Ultimately, HCI will evaluate the candidate's application and available private exchange opportunities and recommend a match based on qualifications and preferences.

- HCI will contact the host organization to obtain approval of the potential candidate.

- HCI will also contact the candidate and their home organization's supervisor to receive similar approval for the match.

DEVELOP CONTRACTUAL PAPERWORK

- Each participant, home and host organization supervisor should work with HCI and their applicable legal departments to review any contract and other relevant documentation for the participant's exchange. A participant application is required for both government and private industry applicants, and must be approved and signed by their supervisor. HCI and the DoD or private sector host organization reserve the right to request additional documentation in exceptional cases. Documents required for application and participation in the Program include the following:

    - Memorandum of Agreement (MOA): A written MOA will be used for each Program participant to document the specific terms and responsibilities to which the DoD Component, the private sector organization, and the participant agree. Modifications to the MOA require the same approval process as the original agreement. At a minimum, each MOA must include the information in the sample MOA (visit https://www.hci.mil/ppte.html for example), regardless of the format used.

    - Financial Disclosure Statement: By the Ethics in Government Act of 1978, private sector employees will be required to complete a financial disclosure statement before commencing their detail dependent on the duties and responsibilities of their detail position within DoD.

    - Continued Service Agreement (CSA): Upon completion of the assignment, DoD employees will serve in the DoD for a period equal to twice the length of the detail, including any extensions. This will be codified in a Continued Service Agreement. Private sector organizations will determine the continued service requirements for their employees who participate in the Program.

- These contracts must be completed before the exchange commences. For questions regarding the preparation of these documents, please contact HCI at ppte@dau.edu.

COMMUNICATION WITH PARTICIPANT

- Upon matching a participant and host organization, the host organization supervisor should be prepared to reach out to the selected participant with an introductory welcome email.
  - This email should introduce the participant to the organization and their team and answer basic questions about the host organization (what we do, how our partnership with the PPTE Program has gone in the past, what we expect of the participation in the weeks leading up to their joining the team) and schedule an introductory phone call.

- The host organization will then conduct the introductory phone call with the participant to answer any further questions they may have, get an idea of the participant's goals and interests for the exchange, and preview plans and ideas for the exchange as well as areas where they can incorporate the participant's interests.

- This intro phone call should be followed by the scheduling and execution of an in-depth meet and greet between the host organization and the participant.

- For the participant, these early interactions should be used to ask questions on the following:
  - Overview of the job and projects expected to be performed by the participant.
  - Company or DoD Component-specific nuances (i.e., dress requirements).
  - Contact information for any mentor or supervisor. This will provide a head start on any in-processing actions or paperwork specific to the company or DoD. Component (i.e., e-mail applications, badge requests, security clearances, etc.).
  - Coordinating the transfer of security clearance information before starting the Program, if necessary.
  - Publicly available resources to research the organization.
  - If relocating for the Program, the best areas to live.

- The host organization, home organization, and participants should also discuss plans for communication between all parties throughout the exchange and feedback channels.

ARRANGE AND CONFIRM TRAINING ENROLLMENT

- The host organization should create an onboarding and training program for the participants in advance of their start date.

- Training should include whatever formal program is utilized by the organization to onboard new employees. The host organization should also consider additional onboarding activities that are tailored to the participant's unique circumstances and interests.

- The host organization should also identify opportunities for industry or competency area-specific training and experiences throughout the term of the exchange and enroll the participant in these in advance.

ARRANGE ACCESS AND TECHNOLOGY

- It is essential to ensure the participant has access to the host organization's email, networks, systems, and can receive a laptop and badge on their first day on the exchange. To arrange this, contact the host organization information technology POC and provide the following information:
  - Name of participant
  - Name of exchange program
  - Expected start date
  - Office alignment (if applicable)
  - Signed legal documents
  - Other required information to arrange technology and access

- Initiate the process of transferring the participant's clearance and completing Visitor Access Request's (VAR) required for any work locations, if needed.

IDENTIFY RELEVANT PROJECTS AND AREA OF INTEREST

- Based on the participant's resume, previous work experience and conversations with the participant, the host organization should begin to identify where their interests lie and where they would like to gain experience while on exchange.

- Once these interest areas have been identified, the host organization should coordinate project opportunities with appropriate contacts. The host organization should enlist the help of internal Program supporters to identify contacts in relevant service areas that would be willing to work with the participant.

PREPARE HOST ORGANIZATION INTRODUCTORY INFORMATION

- Before the participant's onboarding, the host organization should prepare a packet of information on the organization to provide to the participant.

- Examples of materials to send to the participant at this stage could include but are not limited to:
  - Organizational Charts
  - "Hot topic" or "buzzworthy" internal or external news articles about the host organization or its work
  - Example work products
  - Organization/business overview briefs
  - Other host organization-specific materials

SCHEDULE INTRODUCTORY MEETINGS

- Set up introductory meetings with key host organization leadership. Include each individual's role and title in the organization.

- The host organization supervisor should write to networking targets in advance to explain the exchange program and introduce the exchange participant and their interests.

DISCUSS TRAVEL REQUIREMENTS (IF APPLICABLE)

- The Program MOA allows that a participant may travel in the course of their work and that there is flexibility in how this travel is expensed. Due to the unique nature of the program and the varying circumstances of each Program participant, host organization, and home organization, travel requests should be handled on a case-by-case basis following the guidelines below:
  - When arranging travel, all Program participants should:
    - Discuss travel upon onboarding, even if not anticipated, with the host organization.
    - Communicate with their home and host organizations as soon as a trip is known to verify which party is paying for the travel and what expenses will be covered by each party.
    - Even if not required, create a travel expense estimate to ensure all assumed costs of the trip will be covered by the paying organization(s).
    - Receive written permission to proceed with travel from the paying party before the traveling.

- When arranging travel, all government participants on exchange to an industry host should also consider the following:
  - If the participant's host industry organization agrees to pay for travel, the organization should treat the participant as if they are an employee of that industry organization. This means that the organization will process travel and reimburse the participant in the same manner and at the same rate as its employees. Official PPTE travel is not considered a gift of travel.
  - If your home government organization agrees to pay for travel, Defense Acquisition Workforce Development Account funds (DAWDA) are an option to fund your PPTE travel-related expenses. PPTE is treated as a training program for purposes of 10 U.S.C. § 1705.

- When arranging travel, all industry participants on exchange to a government host should also consider the following:
  - If the participant's host organization agrees to pay for travel, it is recommended that the government organization process the participant's travel as if they were invitational travel orders. The host government organization should consult with its Defense Travel System (DTS) lead to help set up an appropriate Line of Accounting (LOA) for the participants' travel if this approach is employed. In this case, travel is handled similarly to personnel covered under the Intergovernmental Personnel Act (IPA).
  - If the participant's home industry organization agrees to pay for travel, the participant should follow their home organization's travel protocol.

DOCUMENT EXCHANGE PLAN

- Once logistics are prepared and the host organization has been in contact with the participant, both parties should work together to document a formal exchange plan. The host organization maintains responsibility for creating the initial exchange plan, with input from the participant.

- The host organization should develop the initial exchange plan in advance of the participant's agreed-upon start date. Components of the exchange plan should take into consideration the participant's outlined goals and could include but are not limited to:
  - Introductory meetings and briefs
  - Organized networking opportunities
  - Opportunities for industry or competency area-specific training and experiences
  - Initial assignments, projects, and deliverables
  - Explanation of any milestones and deliverables for mid-point or conclusion of exchange

- The host organization should also keep in mind the following best practices when crafting the initial exchange plan:
  - Treat employees like one of your own from day one by participating in onboarding, organizational culture, and environment
  - Ensure rotations within an organization are not too complex for the timeframe
  - Provide broad exposure to host organizations rather than single job experience
  - Brief senior leadership before rotation on the importance of the program and how best to employ participants
  - Provide opportunities for participants to connect with fellow participants
  - Schedule senior leader engagements for participants

- Once the exchange plan is completed, the host organization should share it with the participant and with HCI before the official start date of the participant.

- As the participant conducts their exchange, they should have opportunities to change the outlined exchange plan to meet their changing interests and needs.

SIGN LOGISTICS AND PLANNING ACKNOWLEDGEMENT FORM

- The Program participant, home organization Program Lead/supervisor, and host organization Program Lead/supervisor should discuss critical topics and logistics for the duration of the PPTE Program in advance of the start of the participant's exchange with the host organization. The Logistics and Planning Acknowledgement Form outlines the information, and all parties must sign that they have discussed and acknowledged for inclusion in the Program.

ARRIVAL EMAIL

- Develop and send leadership and organization-wide welcome emails announcing the arrival of exchange participants.

REPORT REGULARLY BACK TO HOME ORGANIZATION

- While engaging in the PPTE Program and integrating into the operations of a host organization, it is critical that the participant not lose sight of the importance of engaging regularly with their home organization. While communication with the home organization is not required in any particular format by the Program, it is highly recommended to maintain strong relationships among all parties supporting the exchange and for participants to share knowledge gained from the exchange with home organization stakeholders.

- The cadence and manner of engagement with home organizations can vary with participants. The following are examples of engagement opportunities that each participant should consider:
  - Weekly or biweekly emails, calls, or meetings with the home organization supervisor
  - Monthly or quarterly reports/deliverables on the experience and key observations and challenges
  - Ad hoc meetings with home organization stakeholders to discuss specific topics or observations from the exchange
  - Mid-point report or brief to the home organization
  - Conclusion/capstone report or brief to home organization

- Before beginning the exchange, each participant should discuss these opportunities with their home organization supervisor and agree on the timing and manner of engagement during the exchange.

- Additionally, participants should send HCI a copy of any major outputs/reports provided to their home organization to add to HCI's collection of lessons learned and accomplishments for the Program and its participants.

DEVELOP CONTINUITY FILES

- Each host organization is required to maintain and update a continuity book or digital file at their company for subsequent participants. The continuity book or file should include, but is not limited to, the following:
  - Important host organization contact information (e-mail and phone roster and org chart)
  - Copies of program deliverables (work, travel plans and student reports, etc.)
  - Job description and responsibilities
  - Helpful information for the incoming participant (badging process, dress code, etc.)
  - Housing information such as recommended areas, best ways to find an apartment, etc.

- Each participant is required to maintain a continuity digital file and send it to HCI at the end of their exchange. HCI will maintain these documents and distribute them to future participants as appropriate. The file should include but is not limited to the following:
  - Important host organization contact information (e-mail and phone roster and org chart)
  - Brief description of your job and responsibilities (200 words max)
  - Helpful information for the incoming participants (high level, 100 words max, bullet points)
  - Housing information such as recommended areas, best ways to find an apartment, etc.
  - Participant follow-on contact info

OFF-BOARDING LOGISTICS

- The main off-boarding tasks for the participants to complete include turning in their laptop and any other technology accessories and handing over their host organization ID to the appropriate contacts.

- Any outstanding reimbursements should be submitted at least six weeks before off-boarding to ensure payment before the participant's departure.

PROVIDING FEEDBACK

- Throughout the course of the Program, each participant should plan to meet regularly with their host organization supervisor to receive feedback on their performance and opportunities for improvement throughout the Program. The participant should also provide the host organization supervisor with feedback on the organization's execution of the Program and opportunities to improve their Program experience.

- Host organization supervisors also have the authority to provide informal feedback information to the participant's home organization supervisor to inform performance assessments upon the participant's return to the home organization. While this informal feedback should not include specific performance ratings, it can include participant strengths, performance highlights, achievements, and areas for improvement.