

Federal Budget Community Career Road Map: Technical Core Competencies, Key Behaviors, Proficiencies, and Knowledge

Career Road Map



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Federal Budget Community Career Road Map: Technical Core Competencies, Key Behaviors, Proficiencies, and Knowledge

The dramatic growth and complex activities of all three Branches of the federal government in recent years has resulted in the federal budgeting profession becoming increasingly specialized. The budgeting profession demands great adaptive capabilities and an ability on the part of analysts to quickly implement new policies using ever-evolving technologies. Federal budgeting takes place in a very deadline driven environment where staff must manage multiple priorities, adapt quickly to change, and frequently switch between policy interactions and detailed, numbers-driven analyses. While technology gives the appearance of improving the speed, accuracy, and responsiveness of budget work, that same technology is also creating new and unrelenting pressures on budget offices and individual analysts: to be constantly plugged-in; to respond almost instantaneously to requests; to filter and synthesize enormous quantities of data and policy material; to keep current on the latest technology tools that enable enhanced collaboration across the government; and at the same time to maintain person-to-person networks for training, career, and professional development in the face of a growing virtual culture that lessens the amount of human interaction. In light of these challenges, the federal budget community needs to ensure that its staff not only survive in this environment but also thrive in it.

To address these challenges, the Budget Formulation and Execution Line of Business (BFELoB) Human Capital Workgroup undertook an effort to articulate the technical budgeting knowledge, skills, and abilities necessary to maintain and enhance the Federal budgeting profession. The result is the “Federal Budget Community Career Road Map” (Career Road Map), a matrix comprised of six technical budgeting core competencies and associated behaviors, proficiency levels, and knowledge continuum. The Career Road Map is a tool that managers, analysts, and human resources staff can use to guide the development of federal budget staff. This introduction describes the Career Road Map and offers several ways it can be used. For detailed information about this project and how it was developed, see the *Core Competency Framework for Federal Budget Professionals Exposure Draft* on the budget community at <https://max.omb.gov/community/x/B4E6DQ>.

How to Use the Career Road Map

The Career Road Map can be useful to budget managers, analysts, and HR in various ways. These include:

- ✓ Professional Development and Training
- ✓ Individual Development Plans
- ✓ Workforce Assessment and Planning
- ✓ Recruitment and Retention
- ✓ Training Development
- ✓ Improved Job Satisfaction and Better Opportunities

If you are an analyst, the Career Road Map is your key to understanding the broad context of federal budgeting and mapping your career. Regardless of your present job title, grade level, position, academic background, or years of experience, you can use the Career Road Map to chart your ongoing development and make a plan for your own career development. Because of how the Career Road Map is constructed, you can easily continue to challenge yourself for a very long, rewarding career. For example, if your career thus far has been primarily in what we have termed the “Budgetary Accounting and Control” competency but you are intrigued by what you read in the “Planning and Performance Evaluation” competency: the Career Road Map shows you what that competency actually entails and the knowledge you can start gaining now in order to build your skill set in a particular competency. The Career Road Map is a career development tool, not a tool to rate your annual job performance or to ensure promotions. Hopefully you and your supervisor will use it to focus discussions about your short and long-term professional and

career goals. But even if your supervisor does not participate, you can use the Career Road Map as a self-guided tour through the various proficiency levels and educational events that will build your career.

If you are a manager, the Career Road Map provides a ready-made foundational development plan that you can use to build a hiring and training plan for your unit, as well as supplement it with materials specific to your organization. Even though your scope/responsibility is only part of a larger budget environment, your staff that use the Career Road Map will be better prepared and more effective because they will: a) understand the broader federal budget context and b) begin to actively take responsibility for their own career development. By adapting the Career Road Map to your organization, you can also lay the groundwork to tap into a larger pool of analysts that will be using this Career Road Map and therefore eventually looking for temporary developmental assignments in organizations such as yours. The wider the span of your responsibilities, the more the Career Road Map will benefit you and your organization. The Career Road Map can also help you recruit potential staff who are more attracted to organizations that demonstrate a commitment to professional development and that articulate a clear, comprehensive map for individual growth. Adapting the Career Road Map for your organization may help to demonstrate to your senior management that you are a leader in the federal budgeting community, aware of emerging best practices, and forward thinking.

If you are a human resources manager, the Career Road Map is an ideal tool to learn more about the competencies that budget staff must master in order to be effective. Your familiarity with this tool may also help to jump-start substantive conversations with the budget staff that you service. It provides examples of observable behaviors and also includes descriptive language that reduces subjective interpretation. Because the Career Road Map focuses on development and aspirations, it differentiates between knowledge and actions required to perform the current job versus knowledge and actions helpful to perform at a higher level or in a different position or series.

How the Career Road Map is Organized

The six technical core competencies are:

- ✓ The Federal Budget Process
- ✓ Budgetary Accounting and Control
- ✓ Federal Legislation, Regulations, and Guidance
- ✓ Budget Development and Justification
- ✓ Planning and Performance Evaluation
- ✓ Financial Analysis, Forecasting, and Modeling

Each competency has one page that includes a brief summary of the competency, a list of between eight and 10 key behaviors, four performance components for each of the three proficiency levels, and a knowledge continuum that shows what specific topics individuals should become increasingly knowledgeable about as they progress through their career.

Competencies are defined as the combination of knowledge, skills, abilities, and behaviors that contribute to individual and organizational performance. Knowledge is information developed or learned through experience, study, or investigation. Skill is the result of repeatedly applying knowledge or ability. Ability is an innate potential to perform mental and physical actions or tasks. Behavior is the observable reaction of an individual to a certain situation. The target proficiency level for each competency will vary based on an individual's position and the organization's needs.

Key behaviors are observable or measurable actions that demonstrate an individual possesses a particular competency. The key behaviors listed here are examples. They are not an all inclusive list of the multitude of ways that an individual may express a competency. They are used to add clarity and examples of the observable behavior.

Proficiency levels are descriptions of a developmental progression of more complex understanding of skills and applications within a competency. The proficiency level scale is: Entry Level, Middle Level, and Expert/Senior Level. Each level has four performance components that are generally consistent across the six competencies: timeliness and supervision in completing work; compliance and situational responsiveness; technical skills; and working with others. As an individual progresses from Entry Level to Senior/Expert Level, you will be able to see the progression in expectations at each proficiency level for each behavior within each competency. These are not tied to grade levels or years of experience. Because the six competencies cover such a broad area, an individual could likely be at Middle Level for some competencies but at Entry or Expert/Senior level for others.

Knowledge continuum endorses the notion that all staff, regardless of current position and assignments, should be continuous learners about the federal budget field. The continuum shows how an individual's knowledge is expected to increase from recognition and awareness at the Entry Level through the creation of new knowledge at the Expert/Senior Level for a variety of subjects under each of the six competencies.

What the Career Road Map is Not

The Career Road Map is a developmental, aspirational tool. It is not intended to be tied to specific grade level, series, or performance in a particular position. It is also not intended to outline an agreement or implied expectation that analysts will be promoted or receive development opportunities contemplated in the Career Road Map. Of course, participation is strictly voluntary. The Career Road Map is focused on budget-specific competencies; it is not a comprehensive plan for all aspects of staff development. It should be supplemented with other development activities and organization-specific requirements, including:

- ✓ Interpersonal skills and ability to work effectively on a team
- ✓ Writing, oral communication, and presentation skills
- ✓ Analytical and listening skills
- ✓ Leadership skills

Future Plans for the Career Road Map

The Career Road Map is a living document that will improve as more agencies and analysts use it and provide valuable feedback. Comments can be posted on the budget community at any time at <https://max.omb.gov/community/x/UIC0H>, but the actual document is not envisioned to be reopened for updating until at least the Spring of 2012. During the Summer of 2010 an additional section will be created for each of the six competencies that identifies specific suggestions for career development, such as the self-paced training presentations posted on the budget community, brown bags hosted by local think tanks, journal articles, vendor-provided training, and more. The Workgroup is also investigating the feasibility of developing/acquiring an automated competency assessment tool, a tool that will automate the process of assessing an individual compared to the standard outlined in the Career Road Map, detecting gaps, and then creating a personalized, detailed development plan to help each individual reach their career goals. Continued work on the assessment tool depends on community interest and available resources.

THE FEDERAL BUDGET PROCESS

Makes appropriate interpretations and applications of substantive and procedural statutory, regulatory, and administrative requirements to formulate, justify, defend, execute, evaluate and report on use of Federal resources. Executes budget activities in compliance with appropriate requirements, advises organizational leaders on compliance requirements and options, and uses flexibility in requirements to achieve the greatest possible effectiveness and efficiency in budget development and administration, aligned with the mission and goals of the organization.

BEHAVIORS

- ✓ Ensures that OMB and agency policies are consistently applied to formulate budgets
- ✓ Budget management activities reflect correct application of procedures
- ✓ Demonstrates flexibilities in policies and procedures are utilized to improve effectiveness and efficiency
- ✓ Is able to recognize and adjust to changes in Congressional or executive guidance
- ✓ Adapts budget management (formulation and execution) to changes in authorization and appropriations legislation and/or changes in relationships between legislative and executive requirements
- ✓ Informs and advises leadership of changes in guidance and possible risks or advantages of changes
- ✓ Demonstrates the ability to analyze current requirements to determine any needed changes in formulation, justification, or execution of budget
- ✓ Assesses impact of changes on ability to align budget with the organization's mission, priorities, and responsibilities
- ✓ Advises leadership and makes recommendations for adjustment of organizational budget management to ensure responsiveness to requirements

PROFICIENCIES

ENTRY LEVEL

MIDDLE LEVEL

EXPERT / SENIOR LEVEL

Completes interpretation, application, and analysis activities in a timely manner with moderate, regular supervision

With some assistance, consistently makes correct application of budget policies and procedures to assist in budget formulation, execution, and management

Applies guidance regarding emerging conditions to adapt budget development and management activities, assisting in identification of opportunities to increase efficiency

Assists in analysis and adjustment of budget activities to effectively allocate resources and utilize budget resources

Anticipates and adapts to changing conditions while completing budget assignments on time with only occasional supervision

Independently, consistently, and correctly applies budget policies and procedures, identifying and utilizing standard strategies to maintain or improve efficiency

Adjusts quickly to changing legislative or administrative changes, adapting budget activities to the organization's advantage

Within one's area of expertise, analyzes options and recommends adjustments in budget activities that align budget management with mission priorities

Completes unique and challenging assignments in a timely manner and assists others to complete difficult activities

Correctly applies budget guidance, innovatively and expertly interpreting and utilizing flexibilities to improve budget effectiveness

Anticipates the effect of changes in legislative or administrative activity, making adjustments and advising on organizational strategies to fulfill organizational goals

Recognizes and acts on opportunities for utilizing flexibility in the federal budget process to improve the efficiency and effectiveness of budget development and administration

Increases recognition and awareness of:

Continues to expand, refine, and apply knowledge of:

Manages, evaluates, and creates new knowledge about:



KNOWLEDGE CONTINUUM

- ✓ Major steps in the formulation, Congressional, and execution phases
- ✓ Relationships between Congress and executive branch
- ✓ Basic budget laws and concepts
- ✓ Roles of central financial entities, including budget, appropriations, and oversight Congressional committees
- ✓ Major budget guidance documents from agency and OMB, including Circular A-11, budget planning guidance letters, and other recurring documents
- ✓ Agency-specific budget processes and norms
- ✓ Agency processes to make appropriations available and manage the agency budget throughout the year
- ✓ Remains generally current on federal budget process developments

BUDGETARY ACCOUNTING AND CONTROL

Accurately and consistently applies budget controls and financial management systems and procedures. Uses generally accepted accounting principles, policies, procedures and Federal accounting structures, following and applying new developments as appropriate, to ensure proper use and accounting of the organization's funds, integrity of the organization's financial records, and support of the organization's financial status and procedures during audits.

BEHAVIORS

- ✓ Consistently and accurately records and interprets linkages among appropriations, warrants, apportionments, commitments, allotments, obligations, expenditures, and accruals in the US Standard General Ledger
- ✓ Understands how to make budgetary entries for the organization using linkages appropriately
- ✓ Is able to accurately control funds through application of apportionments and allotments in a consistent manner
- ✓ Monitors use of funds and advises on funds control systems to ensure consistency with the Antideficiency Act and OMB requirements on funds control systems
- ✓ Conducts financial reviews and appropriately uses system processes and procedures such as agency obligation and outlay data, OMB apportionments and footnotes, and Treasury warrants and reports
- ✓ Selects or designs effective financial management systems and procedures that can be supported during audits
- ✓ Demonstrates the ability to apply budgetary controls that are appropriate to the organization and meet statutory appropriation and authorization requirements
- ✓ Protects integrity of financial records

PROFICIENCIES

ENTRY LEVEL

MIDDLE LEVEL

EXPERT / SENIOR LEVEL

With regular, moderate guidance and supervision, performs accounting and budget control assignments accurately and in a timely manner, using correct procedures and recording methods

Uses assigned methods to record and interpret linkages properly in the US Standard General Ledger

Uses proper methods to control, monitor, and advise regarding assigned funds

Provides information to senior budget officials on use and results of application of assigned management systems, procedures, and controls

Performs accounting and budget control assignments accurately and in a timely manner with infrequent, limited supervision, adapting to unexpected or unusual events by adjusting work to complete high priority assignments

Selects appropriate methods to ensure accurate and consistent recording and interpretation of linkages in the US Standard General Ledger, spotting and responding correctly to any anomalous situations

Uses proper methods to control, monitor, and advise on use of funds, including consideration of alternative control systems or methods and when appropriate, selecting or recommending a more effective approach

Selects and consistently applies most effective financial management and budget control systems for the organization and situation

Leads development of methods and procedures to perform budgetary accounting and control functions, including advising leadership on alternative methods and presenting recommendations for improvement as appropriate. Assists others in performing timely and accurate accounting and budget control responsibilities

Performs analyses of methods to improve linkage interpretation, looks for new methods that might be applied, and advises on improvement methods

Conducts financial reviews and assists others to apply funds control effectively

Applies expertise in management and control by selecting or recommending systems, procedures, and controls to improve the organization's ability to protect integrity of financial records and meet statutory requirements

Increases recognition and awareness of:



Continues to expand, refine, and apply knowledge of:



Manages, evaluates, and creates new knowledge about:

KNOWLEDGE CONTINUUM

- ✓ Generally accepted accounting principles, policies, and procedures
- ✓ Budgetary accounting principles and how they differ from proprietary accounting principles
- ✓ Laws and regulations pertaining to the control of budgetary resources, including purpose, time, amount, object classification, earmarks, transfers, and reprogramming
- ✓ Control mechanisms of appropriations, apportionment, allotment, and how these are managed in the design and operation of the agency's accounting system
- ✓ Linkages between budgetary entries in the US Standard General Ledger, including appropriations, warrants, apportionments, allotments, commitments, obligations, expenditures, and accruals
- ✓ Interpretation of accounting data and reports and how it relates to and supports budget functions and program managers
- ✓ Processes for managing various types of obligations, including procurement, grants, payroll, travel and interagency agreements
- ✓ Remains generally current on budgetary accounting and control developments

FEDERAL LEGISLATION, REGULATIONS, AND GUIDANCE

Analyzes and applies legislative actions, regulations, and guidance to formulate, execute, provide accurate advice, and report on budget activities that improve organizational access to and effective, efficient use of resources to fulfill mission, responsibilities, and priorities.

BEHAVIORS

- ✓ Correctly applies legislation, regulation, and guidance in managing the budget
- ✓ Provides accurate analysis regarding provisions of appropriation and authorization legislation, regulations, and GAO decisions, executive orders, OMB guidance, and agency directives
- ✓ Advises on possible risks and advantages of legislative enactments or executive decisions in managing the budget to achieve goals
- ✓ Is able to accurately analyze developments related to and application of executive branch budget directives
- ✓ Executes or advises on budget functions consistent with new directives
- ✓ Develops or assists in development of agency directives related to the funding process
- ✓ Advises leadership on new or changed agency regulations and procedures to respond to changes in legislation, regulations, GAO decisions, executive orders, OMB guidance, or agency directives
- ✓ Assesses and recommends possible actions to align budget activities with agency mission, goals, and priorities

ENTRY LEVEL

MIDDLE LEVEL

EXPERT / SENIOR LEVEL

PROFICIENCIES

<p>Completes assigned study, analysis, and reports on time with moderate, regular supervision</p> <p>Develops understandable, relevant and accurate information and explanations of assigned legislation to assist in development of advice for organizational leaders</p> <p>Within one's area of assignment, keeps up-to-date track of developments and assists in formulating the organization's budgetary response</p> <p>Correctly applies agency or legislative guidance to budget development, justification, and execution functions</p>	<p>With only occasional supervision, completes complex analysis, reporting, and development of advice in time to be considered and used effectively by organizational leaders</p> <p>Conducts accurate analysis of legislation and develops accurate, helpful reports and advice to organizational leaders, including options for budget development, justification, and administration</p> <p>Tracks a broad variety of developments that affect budget functions and, in one's area of expertise, applies theoretical as well as practical knowledge to formulate effective budget responses</p> <p>Assists in development of effective and efficient budget policy for the organization, helping ensure compliance with legislative guidance and applying agency policy consistently and correctly</p>	<p>Sets or advises on timelines for development of legislative analyses, responses, and policy, assisting others to stay up to date on developments and complete timely responses</p> <p>Effectively analyzes emerging and final legislation, leading development of possible agency response to and application of legislation to help meet organizational goals</p> <p>Leads development of comprehensive practical responses to new developments, making pragmatic, correct application of relevant budget theory to execute budget functions and provide advice to organizational leaders</p> <p>Leads development of budget policy for the organization that is consistent with legislative guidance and makes most efficient and effective use of resources and expenditures</p>
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Increases recognition and awareness of:

Continues to expand, refine, and apply knowledge of:

Manages, evaluates, and creates new knowledge about:



KNOWLEDGE CONTINUUM

- ✓ Roles of the three branches of government and how they interact
- ✓ Roles of the central agencies including OMB, Treasury, GSA, and OPM
- ✓ Agency's mission and functions
- ✓ Policy making process, including the President's agenda, how a bill becomes law, and implementation through the executive branch process
- ✓ Rulemaking process and agency rules that have budgetary impact
- ✓ Requirements for clearing testimony, regulations, and communications through executive branch interagency review
- ✓ How budget process fits in with broader policy making process
- ✓ Remains generally aware of developments in this competency

BUDGET DEVELOPMENT AND JUSTIFICATION

Participates in or leads budget development and justification, resulting in approved budgets that support, reflect, and enable achievement of the organization's strategic goals and implementing programs and priorities. Develops budgets that comply with congressional, OMB, and agency guidelines and procedural requirements. Writes justifications and responses to information requests that clearly, persuasively, and accurately demonstrate relationships between budget proposals and achievement of goals. Creates budget proposals and descriptions that reflect appropriate selection and application of budgeting models and strategies. Works cooperatively and effectively with organizational leaders and oversight representatives.

BEHAVIORS

- ✓ Proposals and justifications are aligned with organizational and administration policies, OMB and Congressional guidance, and other laws, regulations, and guidance
- ✓ Justification statements and responses to questions reflect knowledge of inter- and intra-agency programs and a clear relationship between goals, strategic plan, operational priorities, and proposed expenditure patterns
- ✓ Understands that budget materials and justifications identify important performance issues and establish cause-effect relationships between the budget and the organization's achievement of strategic goals
- ✓ Selects and properly implements budget development strategies appropriate to the situation
- ✓ Develops and uses knowledge of own agency and other programs, forecasting and historical data, strategic plans, and other information that is clear and defensible to both organizational and Congressional leaders
- ✓ Develops and delivers clear, effective presentations on budget strategies, processes, and plans that are appropriate to the audience
- ✓ Provides understandable, accurate advice and analysis to organizational leadership and assists leaders to develop budgets that enable achievement of objectives
- ✓ Works responsively and cooperatively with oversight organization representatives, anticipating and addressing questions so the relationship between budget proposals and organizational goals and priorities is clear

ENTRY LEVEL

MIDDLE LEVEL

EXPERT / SENIOR LEVEL

PROFICIENCIES

<p>Completes assignments in a timely manner with moderate, regular supervision</p> <p>Works consistent with policy and regulation and implements budget strategies accurately</p> <p>Follows models for proposal and justification development, producing clear, accurate work</p> <p>Works cooperatively on a team, providing accurate information and advice regarding assigned portions of a proposal or justification</p>	<p>Completes assignments on time, adapts to changing conditions, and requires infrequent, low intensity supervision</p> <p>Selects and accurately implements appropriate, compliant budget strategies and procedures for routine and some unusual budget settings</p> <p>Selects and appropriately applies models for proposal and justification development, producing accurate, clear, sometimes original work</p> <p>Works effectively through networking, on teams, and independently, to develop materials and make presentations that clearly demonstrate the connection between budget and strategic goals</p>	<p>Even in challenging and unique situations, completes assignments on time with little or no supervision</p> <p>Improves or adopts new budget strategies that comply with requirements and are appropriate to new or unique budget situations</p> <p>Develops, applies, and helps others to create models for budget proposals or justifications that improve quality or that are suited to new goals or situations</p> <p>Leads proposal and/or justification development teams or inter/intra-agency groups or takes on unique and challenging assignments to advise, explain, and respond to questions regarding the budget and budget process</p>
<p>Increases recognition and awareness of:</p>	<p>Continues to expand, refine, and apply knowledge of:</p>	<p>Manages, evaluates, and creates new knowledge about:</p>



KNOWLEDGE CONTINUUM

- ✓ Builds on knowledge for Federal Budget Process competency and how each impacts agency and assigned programs or organizations
- ✓ Interactions/impact of Congressional committees, Members, and staff on agency environment and programs
- ✓ Agency's mission and how budget process and documents define policy and priorities, present a financial plan, allocates resources, identifies revenue sources, and establishes the linkage between budget and performance data
- ✓ OMB, Congressional, and agency guidance for preparing various budget products
- ✓ Requirements for clearing testimony and communications through executive branch interagency review
- ✓ Agency requests that have additional justification requirements, such as capital assets, information technology, and space
- ✓ Executive branch interagency coordination and reporting efforts for crosscutting programs and initiatives [such as homeless, drugs, Recovery Act, and homeland security]
- ✓ Assigned programs, including authorization and appropriations language, constituents, geographic profile, budget and non-budget resources
- ✓ Remains generally aware of developments in this competency

PLANNING AND PERFORMANCE EVALUATION

Applies an appropriate strategic planning process, including a systematic evaluation component, and anticipates, analyzes, and develops solutions to budgetary and programmatic issues. Provides clear, accurate, and persuasive evidence for effectiveness of proposed strategies and solutions, resulting in implementation of a process for planning, evaluation, and issue analysis and resolution that improves efficiency and effectiveness of use of resources and that has the confidence of organization and oversight leadership.

BEHAVIORS

- ✓ Considers alternative strategic planning approaches, consistent with legislation, regulations, and agency guidance
- ✓ Selects and consistently applies an approach that best suits the organization
- ✓ Uses planning and evaluation processes to anticipate short and long term budget issues
- ✓ Provides accurate analysis, using a variety of tools, to develop workable, creative, and innovative solutions to financial, budget, and program management issues
- ✓ Provides accurate, clear, and persuasive evidence to peers and leaders
- ✓ Selects and applies a results-based evaluation procedure, consistent with the selected strategic planning process and requirements of the Government Performance and Results Act
- ✓ Regularly evaluates budget and program performance against strategic and operational goals and objectives
- ✓ Provides organizational leaders accurate, timely, clear reports on performance
- ✓ Demonstrates an overall knowledge of program planning, analysis, and evaluation

ENTRY LEVEL

MIDDLE LEVEL

EXPERT / SENIOR LEVEL

PROFICIENCIES

With regular, moderate guidance and supervision, completes assigned parts of plans, evaluations, and/or advisory documents that are on time and consistent with requirements

Remains up-to-date on developments in assigned area, including knowledge of developments in guidance, and participates substantively in development of suitable strategic and budget planning approaches

Uses assigned budget analysis tools to accurately anticipate and forestall short term budget issues, developing alternative recommendations based on accurate data

Uses assigned procedures to evaluate budget and program performance related to goals, providing clear and accurate reports in assigned areas

Completes a broad array of strategic planning, evaluation, and advisory assignments on time, using approaches that result in clear, usable products, with infrequent, limited supervision

Remains current in a range of strategic planning and evaluation areas, adapts to changes in legislation, regulations, and guidance, and selects approaches to planning and evaluation tasks that are appropriate to and effective for the organization

Uses operational knowledge of a variety of tools for analysis and selects and applies tools that allow for accurate anticipation of short-term budget issues. Develops effective, sometimes creative, solutions or recommendations for resolving financial, budget, and program management issues

Selects and applies appropriate evaluation procedures to conduct clear analysis and develops clear, usable recommendations regarding broad planning and performance questions

With minimal supervision, anticipates effects of guidance changes and applies new timelines or approaches to strategic planning and evaluation. Helps others apply appropriate strategies and complete budget and program management assignments

Uses up-to-date expertise in a range of planning and evaluation methodologies to lead selection of methods, consistent with guidance and most likely to suit the organization, resulting in effective budget and program management to achieve goals

Evaluates and applies emerging methods of budget analysis and problem solving to anticipate and solve problems. Helps others learn to use new tools and develop accurate data, clear options, and persuasive evidence on budget and program management issues

Maintains expertise in a large range of evaluation procedures, selecting those that result in clear, accurate data. Develops clear, timely, accurate reports and recommendations regarding performance against goals

Increases recognition and awareness of:

Continues to expand, refine, and apply knowledge of:

Manages, evaluates, and creates new knowledge about:



KNOWLEDGE CONTINUUM

- ✓ Major steps in planning, analysis, and evaluation
- ✓ Legislation, concepts, principles, and procedures for planning and evaluation
- ✓ General principles of the various types of planning, evaluation, and measurement and how they relate to resource management
- ✓ Applicable legislative, administrative, and regulatory requirements and agency-specific guidance
- ✓ Agency roles and how it impacts various agency components and external organizations
- ✓ Remains generally current on planning and performance developments in the federal government

FINANCIAL ANALYSIS, FORECASTING, AND MODELING

Selects and properly applies, from a range of financial analysis, forecasting, and modeling tools, those that are consistent with guidance, appropriate to the organization, and that provide valuable information that results in decision making and provision of clear and accurate budget and financial advice to organizational leadership.

BEHAVIORS

- ✓ Studies and determines relative advantages and disadvantages of various financial models, tools, and systems
- ✓ Knows how to select and properly apply tools likely to best assist in organizing and interpreting quantitative and qualitative data
- ✓ Analyzes use of funds, informs decisions, identifies trends, and measures results against goals
- ✓ Gathers, analyzes, and uses historical data
- ✓ Applies key financial indicators to forecast economic trends
- ✓ Is able to interpret historical data and economic trends to assess past performance and project future budgets
- ✓ Demonstrates the ability to use results of forecasting and modeling activities to develop clear, accurate forecasting and issue analysis reports (e.g., monthly outlay plans and projections)
- ✓ Provides advice and recommendations for leadership regarding future budget decisions

ENTRY LEVEL

MIDDLE LEVEL

EXPERT / SENIOR LEVEL

PROFICIENCIES

With regular, moderate guidance and supervision, correctly applies analytical tools to assigned responsibilities to produce accurate, timely analysis and forecasts

Applies tools consistently and properly to produce accurate interpretations, analysis, and recommendations regarding trends, goal achievement, and courses of action in assigned area

In assigned area, correctly applies tools used by the organization to gather, analyze and use historical data, providing clear and usable identification of trends and issues

Develops clear and accurate reports and recommendations for short term, tactical budget management measures in assigned area

From among a range of tools in which expertise is maintained, applies those appropriate to the task to produce accurate, timely analyses, forecasts, and measurements, with infrequent, limited supervision

Applies tools to organize and interpret both quantitative and qualitative data, providing clear and accurate analysis, identification of trends, and measures of results against budget goals in a broad area of responsibility

Using historical data and key financial indicators, provides interpretations, forecasts trends, identifies and projects financial needs and risks, and develops financial recommendations

In a broad area of responsibility, uses results of analysis, forecasting and modeling to provide clear, accurate reports and advice on short and mid-term budget management

Completes broad, complex assignments on time, despite unforeseen circumstances, and assists other budget professionals with conducting analysis, forecasting, and measurement functions

Provides expert assessment on the selection of tools for the organization to use for budget analysis, forecasting, and measurement. Leads in applying tools to organize data, identify trends, and measure budget and program performance against goals

Applies new, creative, and/or more effective methods to organize and analyze historical data, develop interpretations, project risks and needs. Develops and applies interventions to increase the effectiveness of resource decision making

Develops, recommends, and implements new methods of performing analysis, forecasting, and modeling, developing and presenting clear and accurate reports in complex, unusual or unique circumstances and for long term and strategic budget management

Increases recognition and awareness of:

Continues to expand, refine, and apply knowledge of:

Manages, evaluates, and creates new knowledge about:



KNOWLEDGE CONTINUUM

- ✓ Concepts, principles, and procedures for performing various types of analyses
- ✓ Overall financial performance of the agency
- ✓ Uses and objectives of government financial reporting, including form and content of basic financial documents and statements
- ✓ Key financial indicators and how they impact the agency budget and program performance
- ✓ Principles, methods, techniques, and systems of financial management
- ✓ Remains generally current on financial, economic issues and trends in the broader economy