

# Federal Program Evaluation Career Path Guide



## **Table of Contents**

Introduction	2
Purpose and Objectives	2
Data and Methodology	3
Program Evaluation Overview	4
Titling Program Evaluation Positions	6
Understanding the Career Path	8
Federal Program Evaluation Competency Development Framework	10
Credentials and Certifications	41
Appendices	
Appendix A: Success Factors – Pieces of Advice from Subject Matter Experts	42
Appendix B: Program Evaluation Proficiency Level Guidance	44
Appendix C: Subject Matter Expert (SME) List of Participating Agencies	48

# Federal Program Evaluation Career Path Guide

## Introduction

The U.S. Office of Personnel Management (OPM), in support of the [Foundations for Evidence-Based Policymaking Act of 2018](#) (Evidence Act) and in consultation with the U.S. Office of Management and Budget (OMB) and Federal agency partners collected data to create a career path and suggested training curriculum for Federal Program Evaluation professionals. The Evidence Act required OPM to establish a Governmentwide career path to develop capable and competent program evaluators.

This Career Path Guide was developed to provide guidance to Federal agencies interested in creating or enhancing their own Program Evaluation career path. The information in this Guide captures activities that may help agencies in recruitment, development, and retention of talent in the program evaluation field.

## Purpose and Objectives

This Career Path Guide was based on the program evaluation competencies identified by Federal agency and human resources subject matter experts as needed for performing program evaluation work Governmentwide. OPM issued the general and technical competencies on November 8, 2023, in the [Memorandum to the Chief Executive Officer Councils on the Foundations for Evidence-Based Policymaking Act of 2018 – Program Evaluation Competency Model](#).

This Guide will help agencies expand opportunities for program evaluators as they implement the program evaluation standards and practices described in [OMB's Guidance, M-20-12: Phase 4 Implementation of the Foundations for Evidence-Based Policymaking Act of 2018: Program Evaluation Standards and Practices](#). This Guide also serves as a roadmap for individuals interested in pursuing a career in Federal Program Evaluation and provides employees and their supervisors with a single-source reference to determine appropriate training opportunities for career advancement. Specifically, the Guide:

- **Provides a career progression outline for employees to move among and across jobs in Federal Program Evaluation, as well as success factors that enable individuals to maximize performance and career advancement.** It identifies the typical and non-typical career paths into program evaluation positions, as well as the success factors that contribute to career development and successful performance. Please note, however, the career paths identified in this Guide by subject matter experts do not constitute an exhaustive list, and employees and supervisors may

identify alternative ways to successfully progress into and through the field of Program Evaluation.

- **Helps employees and supervisors plan and sequence appropriate career training and development for each general and technical competency.** This guide identifies key work behaviors, training options, and developmental opportunities associated with each competency. Individuals are expected to demonstrate higher proficiency levels in alignment with career progression.
- **Lists common degrees and certifications completed by Program Evaluators in the Federal Sector.**

## Data and Methodology

This Career Path Guide was developed using quantitative and qualitative data collection methods to conduct a comprehensive assessment of the career progression, success factors, core competencies, key work behaviors, and recommended training and development for program evaluation. In support of this effort, OPM consulted with subject matter experts (SMEs) identified by the Office of Management and Budget, as well as additional SMEs collectively covering the 24 Chief Financial Officers (CFO) Act of 1990 (31 U.S.C. § 901(b)) agencies, to identify key skills and competencies needed to perform program evaluation work. These methods included:

- **Environmental Scan** – OPM completed a review of leading practices from Federal agencies and private industry, literature, agencies' program evaluation position descriptions, agencies' program evaluations career paths and competency models.
- **Subject Matter Expert (SME) Focus Groups** – OPM facilitated 3 half-day virtual focus group sessions with approximately 26 SMEs and Classification Specialists, representing 18 Federal agencies in August of 2020 and January of 2022 (see Appendix C: Subject Matter Expert (SME) Workshops List of Participating Agencies). SMEs reviewed and further refined the job duties and competencies, providing valuable input on the new program evaluation career path effort. OPM held additional SME sessions in February and April 2024 to refine the career path content.
- **Program Evaluation Workforce and Job Analysis Employee and Supervisor Surveys** – OPM issued the program evaluation workforce and job analysis employee survey via email to Federal employees identified by the Office of Management and Budget and their agencies as performing program evaluation work, and/or identified via eHRI data. Each employee also received a separate email with the supervisor survey to forward to their immediate supervisor (for their supervisor to complete). In support of this effort,

OPM consulted with subject matter experts (SMEs) identified by OMB, as well as additional SMEs collectively covering the 24 Chief Financial Officers (CFO) Act of 1990 (31 U.S.C. § 901(b)) agencies, to identify key skills and competencies needed to perform program evaluation work. Feedback was solicited via focus groups and Governmentwide surveys. The qualitative and quantitative data collected through the focus groups and surveys was used to paint a comprehensive picture of program evaluation work throughout the Federal government and to validate the program evaluation competency model.

This assessment serves as the basis for the Federal Program Evaluation Career Path Guide.

## **Program Evaluation Overview**

Program evaluation work involves overlapping knowledge, skills and abilities to perform work such as, but not limited to: analyzing and evaluating (on a quantitative or qualitative basis) the effectiveness of operations; designing evaluation methodology, including data collection methods (e.g., surveys, interviews, focus groups); designing or conducting analytical studies, cost-benefit analyses, or other research; developing procedural methods to ensure that thorough and accurate data are collected; synthesizing information to draw preliminary conclusions; using evidence and interpretations to draw conclusions, making judgments and recommendations when appropriate; and documenting evaluation activities and findings including recommendations for modifying, revising, or implementing procedures to improve the effectiveness and efficiency of program operations.

Per Section 101(a) of the Evidence Act, program evaluation is defined as “an assessment using systematic data collection and analysis of one or more programs, policies, and organizations intended to assess their effectiveness and efficiency.” As further elaborated in OMB Memo M-20-12, program evaluator work includes the application of scientific principles and techniques to conduct and oversee the execution of evaluation studies to assess effectiveness and efficiency.

The Office of Management and Budget (OMB) Memorandum M-20-12, “Phase 4 Implementation of the Foundations for Evidence-Based Policymaking Act of 2018: Program Evaluation Standards and Practices,” provided examples of leading practices for agencies to draw upon as they build evaluation capacity, develop policies and procedures, and carry out evaluations to support evidence-based policymaking. The practices were selected for their potential usefulness in supporting agencies’ implementation of the program evaluation standards described in OMB M-20-12, Appendix C. This set of practices outlined in M-20-12 is not meant to be exhaustive of the efforts an agency, office, or program could, should, or must

undertake to ensure the quality and integrity of evaluation or adherence to legal or other requirements.

The Evidence Act established the role of the agency Evaluator Officer. Evaluation Officers have authority and responsibility for providing leadership over agencies' evaluation and Learning Agenda activities. As stated in the Evidence Act, the head of each CFO Act agency must designate a senior employee of the agency as the Evaluation Officer of the agency. This shall be done without regard to political affiliation and based on demonstrated expertise in evaluation methodology and practices and appropriate expertise to the disciplines of the agency. Non-CFO Act agencies, as well as sub-agencies, operational divisions, and bureaus of CFO Act Agencies are strongly encouraged to designate a qualified Evaluation Officer as appropriate.

In the context of the Evidence Act “Program evaluation” and “evaluation” are synonymous according to OMB (see OMB M-20-12, p 11). According to 5 U.S.C. § 311(3), the term “evaluation” signifies “an assessment using systematic data collection and analysis of one or more programs, policies, and organizations intended to assess their effectiveness and efficiency”. “Evaluation”, “program,” and other key terms are further described in OMB M-20-12, Appendix A.

In addition, the types of evaluation, and some of the methods and analysis used in evaluation, are provided below (OMB M-20-12).

- **Formative Evaluation** is typically conducted to assess whether a program, policy, or organizational approach-or some aspect of these-is feasible, appropriate, and acceptable before it is fully implemented. It may include process and/or outcome measures. However, unlike outcome and impact evaluations, which seek to answer whether the program, policy, or organization met its intended goals or had the intended impacts, a formative evaluation focuses on learning and improvement and does not aim to answer questions of overall effectiveness.
- **Impact Evaluation** assesses the causal impact of a program, policy, or organization, or aspect thereof, on outcomes relative to those of a counterfactual. In other words, this type of evaluation estimates and compares outcomes with and without the program, policy, or organization, or aspect thereof. Impact evaluations include both experimental (i.e., randomized controlled trials) and quasi-experimental designs. An impact evaluation can help answer the question, "does it work, or did the intervention lead to the observed outcomes?"

- **Intervention** is a combination of program elements or strategies related to the design and implementation of programs and policies designed to produce specific results.
- **Outcome Evaluation** measures the extent to which a program, policy, or organization has achieved its intended outcome(s) and focuses on outputs and outcomes to assess effectiveness. Unlike impact evaluation above, it typically cannot discern causal attribution. Importantly, it is distinct from, but complementary to, performance measurement. An outcome evaluation can help answer the question "were the intended outcomes of the program, policy, or organization achieved?"

The purpose of program evaluation is to assess the effectiveness or efficiency of a program, policy, organization, or aspect of these. Evaluation can look beyond the program, policy, or organizational level to include assessment of projects or interventions within a program, for example, or aspects of a policy or functions or units within an organization. Evaluations may address questions related to the implementation or institution of a program, policy, or organization; the effectiveness or impact of specific strategies related to or used by a program, policy, or organization; and/or factors that relate to variability in the effectiveness of a program, policy, or organization or strategies of these. Evaluations can also examine questions related to understanding the contextual factors surrounding a program, as well as how to effectively target specific populations or groups for a particular intervention. They can provide critical information to inform decisions about current and future programming, policies, and organizational operations. Importantly, evaluation can be used for learning and improvement, as well as for accountability purposes.

## Titling Program Evaluation Positions

Program Evaluation (PE) work has been found to be appropriately classified to numerous occupational series based on the specific work performed. The skills and qualification requirements for program evaluation work are driven by the classification series determination. OPM found that program evaluation work is multidisciplinary, and the work outlined in the Evidence Act and OMB Guidance M-20-12 is covered by the Management and Program Analysis Series, GS-0343, and other series, including the Social Science Series, 0101. Other series may also be used to classify program evaluation positions when supported by a job analysis and aligned with the agency's mission. OPM also found that program evaluation work is performed in other occupational series. Program Evaluation (PE) work was identified as being performed as both full-time and collateral duty by agencies in various occupational groups to include, but not limited to: 0100 – Social Science, Psychology and Welfare Group; 0200 – Human Resources Management Group; 0300 – General Administrative, Clerical and

Office Services Group; 0400 – Natural Resources Management and Biological Sciences Group; 0500 – Accounting and Budget Group; 0600 – Medical, Hospital, Dental, and Public Health Group; 0800 – Engineering and Architecture Group; 1500 – Mathematical Sciences Group; 1700 – Education Group; 2200 – Information Technology Group. The titling of program evaluation positions is dependent upon the classification of the position. The selection of the occupational series determines the titling of the position.

The official title, Program Evaluator, has been established in the Management and Program Analysis Series, 0343 for positions primarily involved in performing, the planning, implementing, managing, and/or reporting of activities overseen or coordinated by other evaluators and related staff within a federal agency. The parenthetical title (Program Evaluator) may be used for positions performing program evaluation work most of the time and not as a collateral duty as supported by the analysis of work for positions classified outside of this series.

Positions in which work is found through a job analysis that require specialized subject matter or functional competence should follow OPM's classification and qualifications guidance applicable to that occupational series. Agencies must follow the specific titling guidelines found in the applicable classification standard.

Do not use titles authorized for other occupations to construct titles for this series (e.g., IT Program Manager, 2210).

Hiring managers should consult with their agency human resources offices for guidance pertaining to titling of positions.

Please refer to OPM's [Foundations for Evidence-Based Policymaking Act of 2018 Updated Position Classification](#) for more information.



## Understanding the Career Path

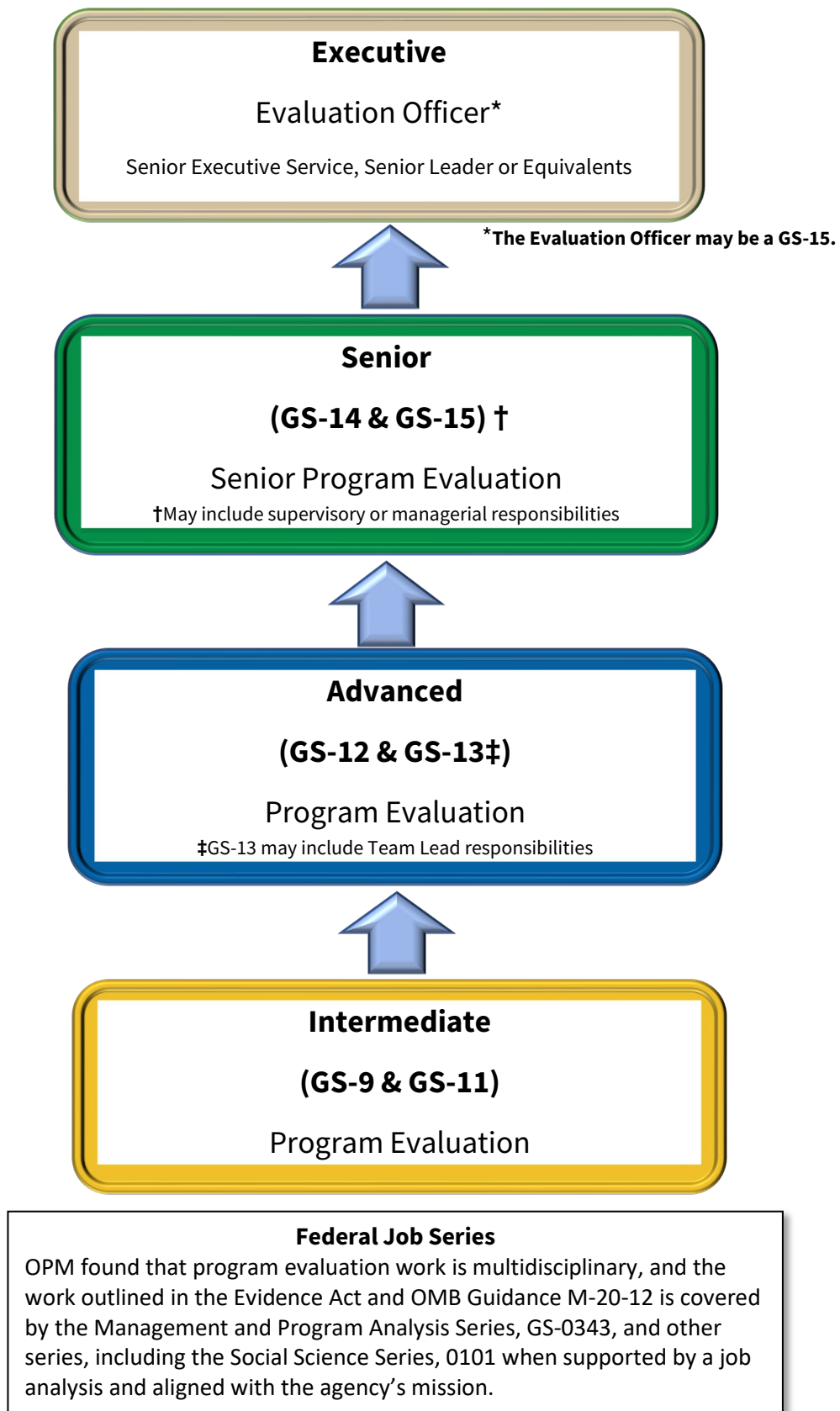
A career path is a progression of positions in one or more occupational series as illustrated in *Figure 1: Typical Career Paths for Program Evaluation*. OPM found that program evaluation work is multidisciplinary, and the work outlined in the Evidence Act and OMB Guidance M-20-12 is covered by the Management and Program Analysis Series, GS-0343, and other series, including the Social Science Series, 0101 when supported by a job analysis and aligned with the agency's mission.

### Entry and Exit Points

For all career levels, **Executive, Senior, Advanced and Intermediate**, it is most common for individuals to come in from General Schedule Occupations, legislative branch, fellowships, non-profit organizations (includes associations and foundations), private sector organizations, colleges/universities, academia, state and local government, tribal government and research firms and exit to the same. The military is a less common entry point, but viable for all levels.

**Note for Figure 1: Typical Career Paths for Program Evaluation:** Career ladder of Program Evaluation positions may be used if the evaluation of work supports a career ladder structure (as determined by your agency's HR office); check with your agency's HR office regarding the appropriateness of career ladder Program Evaluation positions at your agency.

**Figure 1: Typical Career Paths for Program Evaluation**



# **Federal Program Evaluation Competency Development Framework**

## **Program Evaluation Core Competencies**

The Federal Program Evaluation Competency Development Framework incorporates recommended general and technical competencies, key work behaviors, and developmental opportunities needed to succeed as a program evaluator. A competency is a measurable pattern of knowledge, skills, abilities, behaviors, and other characteristics that an individual needs to perform work roles or occupational functions successfully. Competencies specify the "how" of performing job tasks, or what the person needs to do the job successfully. General competencies cut across occupations, while technical competencies are specific to an occupation and/or specialty area. This guide provides definitions of the general and technical competencies along with key work behaviors. Mastering the activities listed under each of the technical competency sections may increase your likelihood of success, within both your current and future positions.

The intention of the framework is to assist agencies in charting workforce development for program evaluators and to assist senior leaders with succession planning. Aspiring and current program evaluators are also encouraged to review the framework to assess their knowledge of Government-specific leadership and technical competencies.

The framework is divided into two-parts. Part One identifies the recommended general and technical competencies for Program Evaluation at various career stages. Part two identifies key work behaviors, and recommended training, certification, and developmental opportunities that will strengthen competencies. Key work behaviors describe the specific job duties and tasks related to each competency that correlate with successful job performance. The key work behaviors at different grade levels may vary based on unique program factors such as risk, complexity, cost, and partners.

## **Part 1 Program Evaluation Competency Development Framework**

### **Core Competencies**

Part One identifies the recommended general and technical competencies for Program Evaluation at various career stages. Core competency grade level inclusion is data-driven reflective of current importance ratings. All competencies included in the [Memorandum to the Chief Executive Officer Councils on the Foundations for Evidence-Based Policymaking Act of 2018 – Program Evaluation Competency Model](#) have been identified as important for the work performed. Through job analysis (5 CFR 300.103), agencies must determine the applicability of these competencies to positions within your agency. Please refer to OPM's [Delegated Examining Operations Handbook](#) for more information on conducting a job

analysis. Agencies can tailor competencies based on the job analysis evidence they collect for their positions. Key considerations include agency mission, position work and series, and position location/functional area (research versus finance) within an agency.

## Part 1: Program Evaluation Competency Development Framework

Core General Competencies		
All Career Stages		
Intermediate (GS-9, GS-11), Advanced (GS-12, GS-13), Senior (GS-14 & GS-15)		
Accountability Conflict Management Continual Learning Creative Thinking Customer Service Decision Making Flexibility Influencing/Negotiating	Integrity/Honesty Interpersonal Skills Leadership Legal, Government and Jurisprudence * Manages Human Resources** Oral Communication Organizational Awareness Partnering	Planning and Evaluating Political Savvy* Problem Solving Reasoning Teamwork Technical Competence Technical Credibility Writing
*GS-14 & GS-15 Only; **GS-15 Only		
Core Technical Competencies		
Intermediate (GS-9 & GS-11)	Advanced (GS-12 & GS-13)	Senior (GS-14 & GS-15)
Data Analysis Evaluation Knowledge Management Organizational Performance Analysis Performance Measurement Quality Management Research (GS-11 only) Stakeholder Management	Data Analysis Evaluation Knowledge Management Organizational Performance Analysis Performance Measurement Project Management Quality Management Research Stakeholder Management	Data Analysis Evaluation Knowledge Management Organizational Performance Analysis Performance Measurement Project Management Quality Management Research (GS-14 only) Stakeholder Management

## **Note on the Competency Development Framework**

In accordance with Public Law 115-435, Foundations for Evidence-Based Policymaking Act of 2018, the Evidence Act, OPM identified key skills and competencies needed for program evaluation in an agency. A key component of OPM's governmentwide occupational study was a qualitative and quantitative analysis of program evaluation work. A review of legislation and policy guidance, along with an environmental scan, focus groups, and survey analysis, identified research as an important technical skill for program evaluation positions.

While Research was confirmed as an important competency for program evaluation work governmentwide, the study did not confirm Research as a core competency for the GS-9 and GS-15 levels. Agencies may conduct a job analysis to determine whether Research is a core competency for their program evaluation work. Please refer to OPM's [Delegated Examining Operations Handbook](#) for more information on conducting a job analysis.

## **Part 2 – Program Evaluation Competency Development Framework**

Part two identifies key work behaviors, and recommended training, certification, and developmental opportunities that will strengthen general and technical competencies for each career stage. Key work behaviors describe the specific job duties and tasks related to each competency that correlate with successful job performance. The key work behaviors at different grade levels may vary based on unique program factors such as risk, complexity cost and partners.

### **General Competencies**

**Accountability** – Holds self and others accountable for measurable high-quality, timely, and cost-effective results. Determines objectives, sets priorities, and delegates work. Accepts responsibility for mistakes. Complies with established control systems and rules.

**Conflict Management** – Manages and resolves conflicts, grievances, confrontations, or disagreements in a constructive manner to minimize negative personal impact.

**Continual Learning** – Assesses and recognizes own strengths and weaknesses; pursues self-development.

**Creative Thinking** – Uses imagination to develop new insights into situations and applies innovative solutions to problems; designs new methods where established methods and procedures are inapplicable or are unavailable.

**Customer Service** – Works with clients and customers (that is, any individuals who use or receive the services or products that your work unit produces, including the general public, individuals who work in the agency, other agencies, or organizations outside the Government) to assess their needs, provide information or assistance, resolve their problems,

or satisfy their expectations; knows about available products and services; is committed to providing quality products and services.

**Decision Making** – Makes sound, well-informed, and objective decisions; perceives the impact and implications of decisions; commits to action, even in uncertain situations, to accomplish organizational goals; causes change.

**Flexibility** – Is open to change and new information; adapts behavior or work methods in response to new information, changing conditions, or unexpected obstacles; effectively deals with ambiguity.

**Influencing/Negotiating** – Persuades others to accept recommendations, cooperate, or change their behavior; works with others towards an agreement; negotiates to find mutually acceptable solutions.

**Integrity/Honesty** – Contributes to maintaining the integrity of the organization; displays high standards of ethical conduct and understands the impact of violating these standards on an organization, self, and others; is trustworthy.

**Interpersonal Skills** – Shows understanding, friendliness, courtesy, tact, empathy, concern, and politeness to others; develops and maintains effective relationships with others; may include effectively dealing with individuals who are difficult, hostile, or distressed; relates well to people from varied backgrounds and different situations.

**Leadership** – Influences, motivates, and challenges others; adapts leadership styles to a variety of situations.

**Legal, Government and Jurisprudence** – Knowledge of laws, legal codes, court procedures, precedents, legal practices and documents, Government regulations, Executive orders, agency rules, Government organization and functions, and the democratic political process.

**Manages Human Resources** – Plans, distributes, and monitors work assignments; evaluates work performance and provides feedback to others on their performance.

**Oral Communication** – Expresses information (for example, ideas or facts) to individuals or groups effectively, considering the audience and nature of the information (for example, technical, sensitive, controversial); makes clear and convincing oral presentations; listens to others, attends to nonverbal cues, and responds appropriately.

**Organizational Awareness** – Knows the organization's mission and functions, and how its social, political, and technological systems work and operates effectively within them; this includes the programs, policies, procedures, rules, and regulations of the organization.

**Partnering** – Develops networks and builds alliances; collaborates across boundaries to build strategic relationships and achieve common goals.

**Planning and Evaluating** – Organizes work, sets priorities, and determines resource requirements; determines short- or long-term goals and strategies to achieve them; coordinates with other organizations or parts of the organization to accomplish goals; monitors progress and evaluates outcomes.

**Political Savvy** – Identifies the internal and external politics that impact the work of the organization. Perceives organizational and political reality and acts accordingly.

**Problem Solving** – Identifies problems; determines accuracy and relevance of information; uses sound judgment to generate and evaluate alternatives, and to make recommendations.

**Reasoning** – Identifies rules, principles, or relationships that explain facts, data, or other information; analyzes information and makes correct inferences or draws accurate conclusions.

**Teamwork** – Encourages and facilitates cooperation, pride, trust, and group identity; fosters commitment and team spirit; works with others to achieve goals.

**Technical Competence** – Uses knowledge that is acquired through formal training or extensive on-the-job experience to perform one's job; works with, understands, and evaluates technical information related to the job; advises others on technical issues.

**Technical Credibility** – Understands and appropriately applies principles, procedures, requirements, regulations, and policies related to specialized expertise.

**Writing** – Recognizes or uses correct English grammar, punctuation, and spelling; communicates information (for example, facts, ideas, or messages) in a succinct and organized manner; produces written information, which may include technical material, that is appropriate for the intended audience.



## **General Competencies & Key Work Behaviors for All Career Stages**

General competencies are grouped by likeness into categories. The various work behaviors are relevant to all competencies comprising each category. Behaviors at different grade levels may vary based upon unique program factors such as risk, complexity, cost, location, and partners.

### **Competencies: Continual Learning, Creative Thinking, Decision-Making, Problem-Solving**

#### **Key Work Behaviors**

- Identifies personal areas of professional competence and needs for growth.
- Keeps abreast of latest technology, information, research, etc., to maintain knowledge, technical skills, and expertise in program evaluation methods.
- Solicit input and feedback through peer review.
- Uses self-awareness and reflective thinking to continually improve practice.
- Monitors evaluation progress and quality and adjusts when appropriate.
- Identifies needs or problems.
- Uses findings to answer evaluation questions and, where appropriate, to develop recommendations.

### **Competencies: Reasoning, Technical Competence, Technical Credibility**

#### **Key Work Behaviors**

- Reads and understands technical or other complex materials required for the job.
- Uses evidence to draw conclusions, making judgments and recommendations when appropriate.
- Designs evaluations that address the evaluations questions identified.
- Identifies relevant sources of evidence.
- Uses appropriate methods to collect, analyze and interpret data.
- Reviews reports, documents, records, data, or other materials to verify completeness, correctness, consistency, compliance, or authenticity.
- Assists with monitoring evaluation progress and quality.
- Reviews evaluation -related policies, guidance, systems, procedures, and tools.
- Supports the management of evaluations to ensure they meet Federal and professional standards (e.g., American Evaluation Association), including those outlined in OMB Memo M-20-12.

**Competencies: Customer Service, Integrity/Honesty, Organizational Awareness,  
Partnering**

**Key Work Behaviors**

- Provides information or assistance to evaluation partners.
- Anticipates and addresses stakeholder concerns.
- Engages in reciprocal processes in which evaluation knowledge and expertise are shared between the evaluator and partners to enhance evaluation capacity for all.
- Fosters positive relationships for professional practice and evaluation use.
- Builds cooperation between departments and work groups.

**Competencies: Accountability, Flexibility, Planning and Evaluating, Teamwork**

**Key Work Behaviors**

- Maintains accountability by advising higher-level management of progress or problems.
- Ensures that activities, services, or products reflect organizational goals and objectives.
- Ensures the effective utilization of assigned staff within and across teams.
- Cooperates with other team members.
- Fulfills commitments to other team members.
- Provides others with feedback to help them be better team members

**Competencies: Conflict Management, Influencing/Negotiating, Interpersonal Skills,**

**Key Work Behaviors**

- Negotiates with individuals or organizations to resolve conflicts, disputes, or grievances.
- Organizes meetings, workshops, and other discussion in order to establish a dialogue on evaluation results, recommendations and lessons learned.
- Communicates evaluation activities and findings in timely, appropriate, and effective ways.
- Prepares or assists in the preparation of a program evaluation report on findings and conclusions, review the report and provide feedback.
- Utilizes negotiation skills to work with agency officials to obtain access to the information needed to conduct thorough, timely, evaluations.

**Competencies: Leadership, Oral Communication, Writing**

**Key Work Behaviors**

- Explains technical or other complex information in writing.

- Prepares a program evaluation report on findings and conclusions.
- Facilitates constructive and responsive interaction throughout the evaluation.
- Composes complex correspondence or other written work (for example, manuals, evaluation reports, evaluation, or contract proposals).
- Develops evaluation-related policies guidance, systems, procedures, and tools.
- Fosters positive relationships for professional practice and evaluation use.
- Explains technical or other complex information orally.

### **General Competencies for Specific Grades Only**

#### **GS-14 & GS-15 Only**

#### **Competencies: Legal Government and Jurisprudence and Political Savvy**

##### **Key Work Behaviors**

- Assesses the effects (for example, costs or benefits) of changes to laws, regulations, policies, professional standards (e.g., American Evaluators Association), or procedures.
- Monitors and responds to organizational changes and changes in the program environment during the evaluation.

#### **GS-15 Only**

#### **Competencies: Manages Human Resources**

#### **(May apply to a GS-14 with supervisory responsibilities)**

##### **Key Work Behaviors**

- Determines resource requirements (for example, staffing, funding, equipment) based on program or project objectives or operational needs.
- Schedules work assignments, sets priorities, and coordinate the work of staff.
- Ensures the effective utilization of assigned staff within and across teams.
- Provides technical supervision of program or project work.
- Provides career development opportunities for staff.

**Recommended Developmental Activities and Training to Strengthen  
General Competencies**

<b>Recommended Developmental Activities</b>	<b>GS-9 &amp; GS-11</b>	<b>GS-12 &amp; GS-13</b>	<b>GS-14 &amp; GS-15</b>
Participate in professional organizations initiatives, conferences meetings and seminars.	√	√	√
Participate in team building exercises.	√	√	√
Shadow senior staff.	√	√	
Obtain a mentor and participate in a mentoring relationship.	√	√	
Assist senior staff in conveying general information about Federal Program Evaluation to partners.	√	√	
Assist senior staff in reviewing evaluation reports and other deliverables.	√	√	
Assist senior staff in developing communications to partners.	√	√	
Assist senior staff with presenting findings to partners.	√	√	
Publish evaluation findings	√	√	√
Participate in project meetings with partners.	√	√	√
Participate in intra-agency and interagency work groups.	√	√	√
Join a program evaluation Community of Practice.	√	√	√
Study technical writing as it applies to your work role.	√	√	√
Study lessons learned from previous evaluations.	√	√	√
Mentor junior staff.		√	√
Leverage self-learning platforms for real-time information on conflict management techniques.	√	√	√

Obtain a coach.		√	√
Be a mentor.		√	√
Be a coach.			√
<b>Recommended Training/Subject Areas</b>	<b>GS-9 &amp; GS-11</b>	<b>GS-12 &amp; GS-13</b>	<b>GS-14 &amp; GS-15</b>
Problem Solving	√	√	√
Decision Making Techniques	√	√	√
Innovative Thinking	√	√	√
Human-Centered Design Methods	√	√	√
Federal Program Evaluation Standards	√	√	√
Customer Engagement	√	√	√
Active Listening	√	√	√
Business Ethics	√	√	√
Team Building	√	√	√
Conflict Resolution	√	√	√
Emotional Intelligence	√	√	√
Effective Communication Skills	√	√	√
Facilitation Skills		√	√
Mentoring Employees		√	√
Team Development		√	√
Coaching Skills			√
Political Acumen			√

## Technical Competencies & Key Work Behaviors

This section outlines the technical competencies and identifies key work behaviors, and recommended training, certification, and developmental opportunities that will strengthen these competencies for each career stage. Key work behaviors describe the specific job duties and tasks related to each competency that correlate with successful job performance. The key work behaviors at different grade levels may vary based on unique program factors such as risk, complexity, cost, and partners.

### Technical Competencies

**Data Analysis** – Knowledge of the principles, methods, and processes used to analyze data and datasets; including investigating trends or anomalies, establishing relationships, and identifying patterns.

**Evaluation** – Knowledge of evaluation theory, concepts, standards, methods, and tools to assess the effectiveness and efficiency of programs, policies, and organizations.

**Knowledge Management** – Knowledge of the value of collected information and the methods of sharing that information throughout an organization.

**Organizational Performance Analysis** – Knowledge of the methods, techniques, and tools used to analyze program, organizational, and mission performance; includes methods that deliver key performance information (for example, comparative, trend, diagnostic, root cause, predictive) used to inform decisions, actions, communications, and accountability systems.

**Performance Measurement** – Knowledge of the principles and methods for evaluating program or organizational performance using financial and nonfinancial measures, including identification of evaluation factors (for example, workload, personnel requirements), metrics, and outcomes.

**Project Management** – Knowledge of the principles, methods, or tools for developing, scheduling, coordinating, and managing projects and resources, including monitoring, and inspecting costs, work, and contractor performance.

**Quality Management** – Knowledge of the principles, methods, and tools of quality assurance, quality control, and reliability used to ensure that a project, system, or product fulfills requirements and standards.

**Research** – Knowledge of the scientific principles, methods, and processes used to conduct a systematic and objective inquiry; including study design, collection, analysis, and interpretation of data; and the reporting of results.

**Stakeholder Management** – Knowledge of the concepts, practices, and techniques used to identify, engage, influence, and monitor relationships with individuals and groups connected to a work effort; including those actively involved, those who exert influence over the process and its results, and those who have a vested interest in the outcome (positive or negative).

**Intermediate**  
**Program Evaluation, GS-9 & GS-11**  
**Technical Competencies & Key Work Behaviors**

**Competency: Data Analysis**

**Key Work Behaviors**

- Collaborates with team members to decide on form, content scope, and depth of analysis.
- Uses appropriate methods to collect, analyze, and interpret data.
- Uses and interprets data to draw conclusions, making judgments and recommendations when appropriate.
- Uses quantitative and qualitative analysis skills including the types of software use for both.

**Recommended Developmental Activities and Continued Training**

<b>Developmental Activities</b>	<b>Training</b>
<ul style="list-style-type: none"><li>• Conduct quantitative &amp; qualitative analyses.</li><li>• Create data visualizations.</li><li>• Develop written summaries of data analyses</li><li>• Interpret data analysis in context.</li></ul>	<ul style="list-style-type: none"><li>• Statistics Courses</li><li>• Statistical Software (R, SAS, Stata)</li><li>• Qualitative Methods</li><li>• Quantitative Analysis Methods &amp; Techniques</li><li>• Qualitative Analysis Software (NVivo, ATLAS.ti, MAXQDA)</li><li>• Econometrics Courses</li><li>• Data Visualizations</li><li>• Emerging Analytical Technologies</li></ul>



## Competency: Evaluation

### Key Work Behaviors

- Demonstrates a foundational knowledge of evaluation-specific concepts, methods, research, and theories.
- Assesses program evaluability (with supervision, if needed).
- Identifies strengths and limitations of evaluation design and methods.
- Clarifies the purpose and scope of an evaluation.
- Helps to plan for evaluation use.
- Supports efforts to document evaluation activities and findings.
- Manages evaluation data, including safeguarding sensitive and confidential data, according to applicable laws and regulations.
- Develops a logic model (a diagram and text that shows the relationship between the program's work and its desired results) or theory of change.
- Supports development of a requirements document to solicit proposals to conduct an evaluation.

### Recommended Developmental Activities and Continued Training

Developmental Activities	Training
<ul style="list-style-type: none"><li>• Review proposals to conduct an evaluation.</li><li>• Participate in a professional association.</li><li>• Develop logic models.</li><li>• Develop a theory of change (the description of the preconditions and assumptions about how interventions/programs will lead to specific change) that guide plans for measurement and evaluation.</li><li>• Refine evaluation questions.</li><li>• Develop evaluation plans.</li><li>• Shadow a senior program evaluator.</li><li>• Read program evaluation trade journals.</li></ul>	<ul style="list-style-type: none"><li>• Project Management</li><li>• Basic Elements of Evaluation Phases</li><li>• Evaluation Metrics</li><li>• Contracting Officer's Representative (COR) Training</li><li>• Evaluation Study Designs</li><li>• Effective Survey/Interview Design</li></ul>

## **Competency: Quality Management**

### **Key Work Behaviors**

- Maintains accountability by advising higher-level management of progress or problems.
- Verifies accuracy of data and reconciles errors or inconsistencies.
- Monitors evaluation progress and quality and adjusts when appropriate.

### **Recommended Developmental Activities and Training**

<b>Developmental Activities</b>	<b>Training</b>
<ul style="list-style-type: none"><li>• Participate in project planning meetings.</li><li>• Participate in reviews and oversees contractor activities and deliverables, with guidance from senior staff.</li><li>• Shadow a senior program evaluator.</li></ul>	<ul style="list-style-type: none"><li>• Quality Management</li><li>• Relationship Management</li><li>• Customer Engagement</li></ul>

## **Competency: Research (GS-11 only)**

### **Key Work Behaviors**

- Develops and implements a research plan that incorporates relevant scientific principles, techniques, and methods.
- Develops protocols and data-collection methods based on the research plan.
- Performs research procedures in conformance with the research plan.

### **Recommended Developmental Activities and Training**

<b>Developmental Activities</b>	<b>Training</b>
<ul style="list-style-type: none"><li>• Participate on a team designing a study.</li><li>• Assess methods for fit with research questions.</li><li>• Conduct research studies.</li><li>• Peer review/referee of research studies.</li></ul>	<ul style="list-style-type: none"><li>• Applied Research Methods</li><li>• Applied Research Design</li><li>• Effective Writing (Scientific)</li><li>• Effective Communication (Scientific)</li></ul>

## **Competency: Stakeholder Management**

### **Key Work Behaviors**

- Facilitates constructive and responsive interaction throughout the evaluation.
- Fosters positive relationships for professional practice and evaluation use.
- Identifies evaluation partners (e.g., program staff, customers, senior leadership).
- Develops and implements plans to identify partners' needs.
- Organizes meetings, workshops, and other discussion to establish a dialogue on evaluation results, recommendations and lessons learned.

### **Recommended Developmental Activities and Training**

<b>Developmental Activities</b>	<b>Training</b>
<ul style="list-style-type: none"><li>• Participate in project meetings with partners.</li><li>• Assist with the engagement of partners to determine evaluation questions, design, analysis, and use of findings.</li><li>• Assist senior staff in developing communications to partners.</li></ul>	<ul style="list-style-type: none"><li>• Stakeholder Engagement specific to Program Evaluation</li><li>• Effective Facilitation Skills</li><li>• Responsive Evaluation</li><li>• Stakeholder Mapping</li></ul>

## **Competency: Knowledge Management**

### **Key Work Behaviors**

- Promotes usefulness of the evaluation process, results, and use of evaluation findings.
- Compiles findings from all evidence-building activities, ensuring agency staff have access to them and use them, etc.

### **Recommended Developmental Activities and Training**

<b>Developmental Activities</b>	<b>Training</b>
<ul style="list-style-type: none"><li>• Participate in professional/technical associations related to evaluation.</li><li>• Read program evaluation trade journals</li></ul>	<ul style="list-style-type: none"><li>• Knowledge Management</li></ul>

## **Competency: Organizational Performance Analysis**

### **Key Work Behavior**

- Develops evaluations that complement organizational performance analyses by shedding light on how and to what extent organizations perform effectively.

### **Recommended Developmental Activities and Training**

<b>Developmental Activities</b>	<b>Training</b>
<ul style="list-style-type: none"><li>• Read the Foundations for Evidence-Based Policymaking Act of 2018</li><li>• Read your agency's strategic plan and annual performance plan and report.</li></ul>	<ul style="list-style-type: none"><li>• Performance Analysis Tools and Techniques</li><li>• Strategic Planning</li></ul>

## **Competency: Performance Measurement**

- Uses program performance data as potential sources in program evaluation to assess why results are occurring.
- Supports the use of program evaluation results to inform the design of performance measurement.

### **Recommended Developmental Activity**

- Join a program evaluation community of practice to learn the synergy between performance measurement and program evaluation.

**Advanced  
Program Evaluation, GS-12 & GS-13  
Technical Competencies & Key Work Behaviors**

**Competency: Data Analysis**

**Key Work Behaviors**

- Uses and interprets data to draw conclusions, making judgments and recommendations when appropriate.
- Adapts analytical methods and techniques to address specific issues that arise during an evaluation.
- Reviews preliminary results with the evaluation team.
- Uses findings to answer evaluation questions and, where appropriate, to develop recommendations.
- Designs, conducts, or oversees program evaluation studies involving qualitative and quantitative data.
- Uses quantitative and qualitative analysis skills including the types of software use for both.

**Recommended Developmental Activities and Training**

<b>Developmental Activities</b>	<b>Training</b>
<ul style="list-style-type: none"><li>• Lead quantitative &amp; qualitative analyses.</li><li>• Serve as the lead for creating data visualizations.</li><li>• Serves as a mentor.</li><li>• Interpret complex data analyses in context.</li></ul>	<ul style="list-style-type: none"><li>• Advanced Statistics</li><li>• Advanced Quantitative and Qualitative Analysis Methods &amp; Techniques</li><li>• Advanced Econometrics</li><li>• Data Visualizations</li></ul>

## Competency: Evaluation

### Key Work Behaviors

- Develops a logic model (a graphic depiction of the relationship between the program's activities and its desired outcomes).
- Identifies evaluation topics or questions.
- Develops a plan describing an evaluation's proposed design, methods, and reporting, along with timelines for implementation.
- Designs evaluations that address the evaluation questions identified.
- Identifies strengths and limitations of the evaluation design and methods.
- Estimates evaluation costs for budgeting.
- Plans for the use of evaluation results.
- Manages evaluation data, including upholding all privacy and related protections for sensitive and personally identifiable information.
- Negotiates a rigorous evaluation plan, budget, resources, and timeline.
- Involves partners in designing, implementing, interpreting, and reporting evaluations as appropriate.
- Uses findings to answer evaluation questions and, where appropriate, to develop recommendations.
- Provides technical supervision of program or project work.

### Recommended Developmental Activities and Training

Developmental Activities	Training
<ul style="list-style-type: none"><li>• Participate or serve as the lead in developing logic models and theories of change.</li><li>• Lead the drafting of evaluation designs.</li><li>• Participate or serve as the lead of an evaluation (planning, designing, implementing, analyzing, report writing, interpretation of findings, and justifying conclusions).</li><li>• Serve as the lead for assessing evaluation results and draw logical conclusions from multiple data sources.</li><li>• Serve as the lead for developing and delivering briefings on evaluation findings.</li></ul>	<ul style="list-style-type: none"><li>• Effective Survey/Interview design</li><li>• Evaluation Project Management</li><li>• Facilitation</li><li>• COR Training</li></ul>

<ul style="list-style-type: none"> <li>• Participate in ensuring use of evaluation findings for continuous program improvement.</li> <li>• Participate in intra-agency and interagency work groups.</li> <li>• Participate in development of learning agenda/evidence-building plan.</li> <li>• Serve as a mentor.</li> <li>• Read program evaluation trade journals.</li> </ul>	
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## **Competency: Project Management**

### **Key Work Behaviors**

- Creates an evaluation budget.
- Negotiates a reasonable budget, resources, and timeline.
- Prioritizes work to ensure milestones are met.
- Oversees a range of communication activities to ensure the evaluation is conducted appropriately.

### **Recommended Developmental Activities and Training**

<b>Developmental Activities</b>	<b>Training</b>
<ul style="list-style-type: none"> <li>• Read the Federal Acquisition Regulations.</li> <li>• Serve as a COR or Project Manager on an evaluation contract or grant.</li> <li>• Provide direction to a contractor or grantee conducting an evaluation.</li> <li>• Write sections of Statements of Work, Statements of Objectives, Request for Proposals (RFPs), Notices of Funding Opportunities (NOFOs) (or other similar announcements) of moderate complexity.</li> </ul>	<ul style="list-style-type: none"> <li>• Project Management</li> <li>• Advanced COR</li> </ul>

## Competency: Quality Management

### Key Work Behaviors

- Maintains accountability by advising higher-level management of progress or problems.
- Reviews and provides feedback on the content of information (for example, research or contract proposals, financial, technical, or management reports).
- Reviews and provides feedback on others' work (for example, peers, subordinates, contractors).

### Recommended Developmental Activities and Training

Developmental Activities	Training
<ul style="list-style-type: none"><li>• Review and oversee contractor activities and deliverables, with guidance from senior staff.</li></ul>	<ul style="list-style-type: none"><li>• Quality Management</li><li>• Relationship Management</li><li>• Customer Engagement</li><li>• Continuous Improvement</li></ul>

## Competency: Research

### Key Work Behaviors

- Develops and implements a research plan that incorporates relevant scientific principles, techniques, and methods.
- Develops protocols and data-collection methods based on the research plan.
- Performs research procedures in conformance with the research plan.
- Designs or conducts analytical studies, cost-benefit analyses, or other research.
- Collects, compiles, and organizes information.
- Prepares reports on research findings and conclusions.
- Questions, interviews, or confers with others to obtain or verify information.

### Recommended Developmental Activities and Training

Developmental Activities	Training
<ul style="list-style-type: none"><li>• Conduct applied research and evaluation in a collaborative environment.</li><li>• Lead a cost-benefit analyses study.</li><li>• Lead a research study.</li><li>• Publish research.</li><li>• Serve as a mentor.</li></ul>	<ul style="list-style-type: none"><li>• Applied Research Methods</li><li>• Applied Research Design</li><li>• Econometrics</li><li>• Effective Writing (Scientific)</li><li>• Effective Communication (Scientific)</li></ul>



## Competency: Stakeholder Management

### Key Work Behaviors

- Facilitates shared understanding of the evaluation with partners.
- Anticipates and addresses stakeholder concerns.
- Involves partners in designing, implementing, interpreting, reporting, and using evaluations as appropriate.
- Clarifies varied perspectives, stakeholder interests, and assumptions.
- Engages in reciprocal processes in which evaluation knowledge and expertise are shared between the evaluator and partners to enhance evaluation capacity for all.
- Informs superiors and partners of plans, developments, and issues.
- Coordinates the activities of individuals inside or outside of the organization.
- Utilizes negotiation skills to work with agency officials to obtain access to the information needed to conduct thorough, timely evaluations.
- Identifies evaluation partners (e.g., program staff, customers, senior leadership).

### Recommended Developmental Activities and Training

Developmental Activities	Training
<ul style="list-style-type: none"><li>• Lead gathering and compiling of information from partners.</li><li>• Assist with and/or lead the engagement of partners to determine evaluation questions, design, analysis, and use of findings.</li><li>• Assist senior staff with presenting findings to partners.</li><li>• Participate in project meetings with partners</li></ul>	<ul style="list-style-type: none"><li>• Effective Facilitation Skills</li><li>• Stakeholder Engagement</li></ul>

## **Competency: Knowledge Management**

### **Key Work Behaviors**

- Reviews and provides feedback on the content of complex information (for example, research or contract proposals, financial, technical, or management reports).
- Facilitates shared understanding of the program and its evaluation with partners.

### **Recommended Developmental Activities and Training**

<b>Developmental Activities</b>	<b>Training</b>
<ul style="list-style-type: none"><li>• Participate in professional/technical associations related to evaluation.</li><li>• Read program evaluation trade journals.</li><li>• Serve as a mentor.</li></ul>	<ul style="list-style-type: none"><li>• Knowledge Management</li><li>• Effective Communications</li></ul>

## **Competency: Organizational Performance Analysis**

### **Key Work Behavior**

- Assists with drafting recommendations for modifying, revising, or implementing procedures to improve the effectiveness and efficiency of program operations.

### **Recommended Developmental Activities and Training**

<b>Developmental Activities</b>	<b>Training</b>
<ul style="list-style-type: none"><li>• Read the Government Performance and Results Act.</li><li>• Read your agency's strategic plan and annual performance plan and report.</li></ul>	<ul style="list-style-type: none"><li>• Performance Analysis Tools and Techniques</li><li>• Strategic Planning</li></ul>

## **Competency: Performance Measurement**

### **Key Work Behaviors**

- Uses program performance data as potential sources in program evaluation to assess why results are occurring.
- Supports the use of program evaluation results to inform the design of performance measurement.

### **Recommended Developmental Activity**

- Assist junior staff with using performance data to identify priority questions.

**Senior**  
**Program Evaluation GS-14 & GS-15**  
(May include supervisory or managerial responsibilities)  
**Technical Competencies & Key Work Behaviors**

**Competency: Data Analysis**

**Key Work Behaviors**

- Implements quantitative and qualitative analytical methods, using appropriate software where relevant.
- Designs and conducts analytical studies involving qualitative and quantitative data.
- Presents results of data analyses in written and spoken form, making findings interpretable to both technical and non-technical audiences.
- Uses evidence to draw conclusions, making judgements and recommendation when appropriate.
- Adapts analytical methods and techniques to address specific issues that arise during an evaluation.
- Collaborates with team members to decide on form, content, scope, depth of analysis.
- Uses findings to answer evaluation questions and, where appropriate to develop recommendations.

**Recommended Developmental Activities and Training**

Developmental Activities	Training
<ul style="list-style-type: none"> <li>• Lead a team using both quantitative and qualitative methods.</li> <li>• Design and conduct quantitative and qualitative analyses.</li> <li>• Lead a team designing data visualizations.</li> <li>• Lead a team determining most effective data visualization techniques.</li> <li>• Interpret the results of data analysis in context developing appropriate recommendations.</li> <li>• Conduct statistical analysis of evaluation or other data and present results in actionable form to high-level policymakers and agency leadership.</li> </ul>	<ul style="list-style-type: none"> <li>• Advanced Statistics</li> <li>• Advanced Quantitative and Qualitative Analysis Methods &amp; Techniques</li> <li>• Advanced Econometrics</li> </ul>

## **Competency: Evaluation**

### **Key Work Behaviors**

- Leads the development of evaluation designs.
- Leads a team performing complex program evaluations.
- Manages/oversees evaluations to ensure they meet Federal and professional standards.
- Monitors and responds to organizational changes and changes in the program environment during the evaluation.
- Supervises evaluations conducted by staff members and external entities.
- Monitors evaluation progress and quality and adjusts when appropriate.
- Supervises evaluation processes and products.
- Negotiates a rigorous evaluation plan, budget, resources, and timeline.
- Involves partners in designing, implementing, interpreting, and reporting evaluations, and using evaluation findings as appropriate.
- Reviews evaluation results with the evaluation team.
- Uses evaluation findings to answer questions and to develop recommendations.

### **Recommended Developmental Activities and Training**

<b>Developmental Activities</b>	<b>Training</b>
<ul style="list-style-type: none"> <li>• Serve as a technical consultant on evaluations that are managed by other organizations, teams, or individuals.</li> <li>• Analyze data and justify conclusions.</li> <li>• Oversee a team designing, conducting, analyzing, and interpreting evaluations.</li> <li>• Lead the development of a learning agenda/ evidence-building plan.</li> <li>• Lead a team ensuring use of evaluation findings for continuous program improvement.</li> <li>• Serve as the lead for developing and delivering briefings on evaluation findings.</li> </ul>	<ul style="list-style-type: none"> <li>• Advanced Evaluation Metrics</li> <li>• Evaluation Project Management</li> <li>• Evaluation Study Designs</li> <li>• Effective Survey/Interview Design</li> </ul>

## **Competency: Project Management**

### **Key Work Behaviors**

- Supervises evaluation processes to conduct program evaluation and the development of related products.
- Supervises evaluations conducted by staff members and external entities.
- Manages the effective and efficient use of evaluation resources, including staff.
- Maintains accountability by advising higher-level management of progress or problems.
- Ensures the effective utilization of assigned staff within and across teams.
- Leads team through constructive and responsive interaction throughout the evaluation.

### **Recommended Developmental Activities and Training**

<b>Developmental Activities</b>	<b>Training</b>
<ul style="list-style-type: none"><li>• Join a project management professional association.</li><li>• Develop evaluation project management standard operating procedures or best practices for your organization's evaluation functions and activities.</li><li>• Teach and mentor other staff on project management approaches/skills.</li></ul>	<ul style="list-style-type: none"><li>• Project Management</li><li>• Advance COR Training</li></ul>

## **Competency: Quality Management**

### **Key Work Behaviors**

- Serves as a quality assurance point for final products.
- Monitors evaluation progress and quality and adjusts when appropriate.
- Provides technical supervision of program or project work.

### **Recommended Developmental Activities and Training**

<b>Developmental Activities</b>	<b>Training</b>
<ul style="list-style-type: none"><li>• Teach quality control review techniques to junior staff members.</li></ul>	<ul style="list-style-type: none"><li>• Quality Management</li><li>• Continuous Improvement</li><li>• Relationship Management</li></ul>

## **Competency: Research (GS-14 only)**

### **Key Work Behaviors**

- Uses evidence to draw conclusions, making judgments and recommendations when appropriate.
- Composes complex correspondence or other written work (for example, manuals, books, management, or technical reports, research, or contract proposals).
- Explains or justifies decisions, conclusions, findings, or recommendations.
- Keeps abreast of latest technology, information, research, etc., to maintain knowledge in field of expertise (for example, reads trade journals, participates in professional/technical associations).
- Serves on panels, committees, or task forces as a representative for the organization on technical or professional issues.
- Questions, interviews, or confers with others to obtain or verify information.

### **Recommended Developmental Activities and Training**

<b>Developmental Activities</b>	<b>Training</b>
<ul style="list-style-type: none"><li>• Publish research finding, white papers, etc.</li></ul>	<ul style="list-style-type: none"><li>• Applied Research Methods</li><li>• Applied Research Design</li><li>• Cost-Benefit Analysis</li><li>• Effective Writing</li><li>• Effective Communication</li></ul>

## **Competency: Stakeholder Management**

### **Key Work Behaviors**

- Negotiates with individuals or organizations to resolve conflicts, disputes, or grievances.
- Utilizes negotiation skills to work with agency officials to obtain access to the information needed to conduct thorough, timely evaluations.
- Informs senior management and partners of plans, developments, and issues.

### **Recommended Developmental Activities and Training**

<b>Developmental Activities</b>	<b>Training</b>
<ul style="list-style-type: none"><li>• Lead the engagement of partners to determine evaluation questions, design, analysis, and use of findings.</li><li>• Lead the communication of complex methods and findings to partners.</li><li>• Lead a briefing to partners on the results of a complex evaluation.</li></ul>	<ul style="list-style-type: none"><li>• Effective Facilitation Skills</li><li>• Negotiating</li><li>• Conflict Management</li><li>• Collaborative Government</li><li>• Executive Communications</li></ul>

## **Competency: Knowledge Management**

### **Key Work Behaviors**

- Engages in reciprocal processes in which evaluation knowledge and expertise are shared between the evaluator and partners to enhance evaluation capacity for all.
- Reviews and provides feedback on the content of complex information (for example, research or contract proposals, financial, technical, or management reports).
- Integration of evaluation findings into institutional knowledge repositories.

### **Recommended Developmental Activities and Training**

<b>Developmental Activities</b>	<b>Training</b>
<ul style="list-style-type: none"><li>• Participate in interagency working groups.</li><li>• Lead Community of Practice(s) focused on evaluation methods.</li><li>• Develop in-house tools and training to support evaluation knowledge and practice.</li><li>• Develop, contribute to, use, and support internal repositories of lessons from evaluations.</li><li>• Mentor staff.</li></ul>	<ul style="list-style-type: none"><li>• Knowledge Management</li><li>• Succession Management</li></ul>

## **Competency: Organizational Performance Analysis**

### **Key Work Behaviors**

- Searches literature for, identifies, tests, and recommends appropriate use of effective practices.
- Identifies evaluation and research questions that can help to better understand performance issues; develops a plan to answer those questions and refine performance measures and indicators, through the agency's learning agenda.

### **Recommended Developmental Activities and Training**

<b>Developmental Activities</b>	<b>Training</b>
<ul style="list-style-type: none"><li>• Read your agency's strategic plan and annual performance plan and report.</li><li>• Attend your organization's strategic planning sessions.</li></ul>	<ul style="list-style-type: none"><li>• Performance Analysis Tools and Techniques</li><li>• Strategic Planning</li></ul>

## **Competency: Performance Measurement**

### **Key Work Behaviors**

- Uses program outcome data to identify priority questions to be addressed by evaluations.
- Verifies accuracy of data and reconcile errors or inconsistencies.
- Determines resource requirements (for example, staffing, funding) based on evaluation needs.

### **Recommended Developmental Activity**

- Teach junior staff how performance measurement and evaluation work together.



## **Supervisory Competencies**

Program Evaluation at the Senior Level may include supervisory or managerial responsibilities. The *Supervisory Qualification Guide* prescribes general guidance when determining requirements for supervisory positions in the General Schedule (GS) or equivalent at grades 15 and below. While not mandatory, use of this *Guide* is strongly recommended. Ten (10) competencies listed in this document reflect those considered as most important for successful performance of Federal supervisory work. Candidates should possess proficiency or the potential to develop proficiency in these competencies prior to entry into a supervisory position. The specific level of proficiency identified for each competency depends on the specific requirements of the position being filled and must be determined by the employing agency. Click on the link for more information on [OPM's Supervisory Qualification Guide](#).

## **Credentials and Certifications**

The following is a list of credentials and certifications attained or recommended by Program Evaluations SMEs in the Federal Government. This list serves only as a guide to help individuals identify developmental opportunities for continued success. Agencies proper evaluation of program evaluation work will determine the appropriate occupational series and needed knowledge, skills and abilities (KSAs) and competencies to perform program evaluation work. The occupational series will drive the needed qualifications for entry into the position. Most OPM Qualification Standards and occupational series have identified experience and/or education as qualifying. Federal agencies analysis of the work and selection of an occupational series will determine the needed qualifications. Whether at the high school or post high school level, 5 U.S.C. §3308 prohibits requiring education for positions in the competitive service, unless OPM has determined that the duties of a scientific, technical, or professional position cannot be performed by an individual who does not have the prescribed minimum education.

An agency may consider education (e.g., coursework) in determining a candidate's satisfaction of a minimum qualification only if the candidate's education directly reflects the KSAs/competencies necessary to satisfy the qualifications and the duties of a position. However, education alone may not be considered qualifying when using a multiple hurdle assessment approach.

Agencies may only establish requirements for specific credentials (e.g., registration, licenses, or certificates) when such credentials are necessary for satisfactory job performance. This would normally be validated by a job analysis that sustains the requirement.

The lists below include examples of certificates, certifications, and education that may be used to determine program evaluation applicants' qualifications. Please note, this list is not exhaustive, and certifications may be subject to change over time. The list below is also reflective of experience job candidates may acquire through formal and informal methods.

### **Degrees**

Master or Doctorate in Program Evaluation

Master or Doctorate in Social Science Fields (i.e., economics, sociology, psychology, data scientist. etc.)

Master or Doctor of Public Administration, Public Policy, Public Health

### **Certificates and Certifications**

Certificate in Program Evaluation

Graduate Certificate in Social Science

Evaluation Practices Certification

## **Appendix A: Success Factors – Pieces of Advice from Subject Matter Experts**

Success factors provide guidance on how individuals can maximize performance and career success as they progress through career stages in Program Evaluation. These success factors represent advice from subject matter experts who have reflected on their experience in the Program Evaluation field and provided a roadmap to maximize performance and career advancement. Note that many of the success factors indicated in this Guide do not tie to any grade level, any specific competency or developmental experience. After reading through the success factors, individuals should seek clarification from their supervisor on how best to implement some of the suggestions. The following constitute a list of success factors identified by subject matter experts in developing this Guide:

- Gain as much experience as possible working with different types of evaluation and different genres of evidence (Foundational Fact Finding, Policy Analysis, and Performance Measurement) to more fully understand and guide others toward using/building the most appropriate evidence for their empirical and decision-making questions as well as working with a variety of partners.
- Identify opportunities to gain experience in all phases of evaluation. Begin with small stretch assignments and then look for assignments with increased responsibilities.
- Take on increasingly complex evaluation work. As you progress, start overseeing larger, more complex evaluations with more components.
- Develop a deep expertise in the programs you are evaluating, so you can speak expertly with partners.
- Develop proficiency in research designs, such as Randomized Controlled Trial (RCT) or Quasi-Experimental Evaluation Designs (QED) with minimal supervision.
- Being an effective Contracting Officer's Representative - project management, contractor management, technical skills, etc.
- Develop the ability to work with a broad range of partners to interpret and synthesize evaluation findings, account for program and evaluation context, make judgements based on finding, and address negative and unexpected findings with an improvement mindset.
- Ability to translate technical concepts and findings for programmatic and non-technical partners.
- Develop robust skills in facilitation and facilitative leadership, specifically how to use fair and open procedures to help evaluation partners work more effectively, collaborate, and achieve synergy, while managing inherent group and interpersonal dynamics.
- Develop robust skills to assess partners' evaluation capacity and apply theories and practices in how people (adults) learn to supplement the knowledge, skills, and attitudes of partners for meaningful participation in evaluation.
- Understand and apply key tenets of change management that are necessary to help establish and maintain evaluative thinking at any level of the organization, including

recognizing that effective solutions are co-created, include multiple perspectives, and grounded in shared understandings and commitments by the people most impacted.

## Appendix B: Program Evaluation Proficiency Level Guidance

The following tables present the proficiency level scale and the proficiency levels associated with each Program Evaluation competency by band. Please note these proficiency levels are based on Governmentwide data and are provided as guidance for training and development. Required proficiency levels may vary based on an agency's specific occupational needs and position requirements.

### Proficiency Level Scale

Proficiency	General Competencies	Technical Competencies
0 = Not needed	<ul style="list-style-type: none"> <li>Competency is not needed.</li> </ul>	<ul style="list-style-type: none"> <li>Competency is not needed</li> </ul>
1 = Awareness	<ul style="list-style-type: none"> <li>Applies the competency in the simplest situations.</li> <li>Requires close and extensive guidance</li> </ul>	<ul style="list-style-type: none"> <li>Applies the competency in the simplest situations.</li> <li>Requires close and extensive guidance.</li> <li>Demonstrates awareness of concepts and processes.</li> </ul>
2 = Basic	<ul style="list-style-type: none"> <li>Applies the competency in somewhat difficult situations.</li> <li>Requires frequent guidance.</li> </ul>	<ul style="list-style-type: none"> <li>Applies the competency in somewhat difficult situations.</li> <li>Requires frequent guidance.</li> <li>Demonstrates familiarity with concepts and processes.</li> </ul>
3 = Intermediate	<ul style="list-style-type: none"> <li>Applies the competency in difficult situations.</li> <li>Requires occasional guidance.</li> </ul>	<ul style="list-style-type: none"> <li>Applies the competency in difficult situations.</li> <li>Requires occasional guidance.</li> <li>Demonstrates understanding of concepts and processes.</li> </ul>
4 = Advanced	<ul style="list-style-type: none"> <li>Applies the competency in considerably difficult situations.</li> <li>Generally, requires little or no guidance.</li> </ul>	<ul style="list-style-type: none"> <li>Applies the competency in considerably difficult situations.</li> <li>Generally, requires little or no guidance.</li> <li>Demonstrates broad understanding of concepts and processes.</li> </ul>

5 = Expert	<ul style="list-style-type: none"> <li>• Applies the competency in exceptionally difficult situations.</li> <li>• Serve as a key resource and advises others.</li> </ul>	<ul style="list-style-type: none"> <li>• Applies the competency in exceptionally difficult situations.</li> <li>• Serve as a key resource and advises others.</li> </ul>
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**Proficiency Levels by Band**  
**Technical and General Competencies**

<b>Competency Type</b>	<b>Competency Name</b>	<b>Intermediate GS-9 &amp;11</b>	<b>Advanced GS-12 &amp; 13</b>	<b>Senior GS-14 &amp; 15</b>
Technical	Data Analysis	3	4	4
Technical	Evaluation	3	3	4
Technical	Knowledge Management	3	4	4
Technical	Organizational Performance Analysis	3	3	4
Technical	Performance Measurement	3	3	4
Technical	Project Management	3	3	4
Technical	Quality Management	3	3	3
Technical	Research	3	3	3
Technical	Stakeholder Management	3	3	4
General	Accountability	4	4	4
General	Conflict Management	3	3	4
General	Continual Learning	3	3	4
General	Creative Thinking	3	3	4
General	Customer Service	4	4	4
General	Decision Making	3	4	4
General	Flexibility	4	4	4
General	Influencing/Negotiating	3	3	4
General	Integrity/Honesty	4	4	5
General	Interpersonal Skills	4	4	4
General	Leadership	3	3	4

General	Legal, Government and Jurisprudence	3	3	3
General	Manages Human Resources	3	3	3
General	Oral Communication	4	4	4
General	Organizational Awareness	3	3	4
General	Partnering	3	3	4
General	Planning and Evaluating	3	4	4
General	Political Savvy	2	3	3
General	Problem Solving	3	4	4
General	Reasoning	3	4	4
General	Teamwork	4	4	4
General	Technical Competence	3	4	4
General	Technical Credibility	3	4	4
General	Writing	3	4	4



## **Appendix C: Subject Matter Expert (SME) List of Participating Agencies**

OPM facilitated 3 half-day virtual focus group sessions with approximately 26 program evaluation Subject Matter Experts (SMEs) and Federal classification specialists in August of 2020 and January of 2022. Subsequently, SMEs reviewed and further refined the job duties and competencies, providing valuable input on the development of this career path guide. OPM held additional SME sessions in February and April 2024 to refine the career path content.

- Corporation for National and Community Service
- Department of Agriculture
- Department of Defense
- Department of Education
- Department of Health and Human Services
- Department of Homeland Security
- Department of Housing and Urban Development
- Department of Justice
- Department of Labor
- Department of Veterans Affairs
- Environmental Protection Agency
- Federal Deposit Insurance Corporation
- Millennium Challenge Corporation
- Office of Management & Budget
- Office of Personnel Management
- Small Business Administration
- Social Security Administration
- U.S. Agency for International Development



## **U.S. Office of Personnel Management**

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