Exposure Draft

FEDERAL

CORE COMPETENCY FRAMEWORK

FOR

BUDGET PROFESSIONALS

Budget Formulation and Execution Line of Business

Human Capital Workgroup

September 30, 2008

Budget Formulation & Execution Line of Business

Executive Summary

The Federal budget community currently faces the monumental challenge of meeting public demands for more services in an environment of a dwindling resource base and closer scrutiny by Congress and the Office of Management and Budget (OMB). Not only does the community face serious demographic and technology challenges, it must also demonstrate that Federal budgeting can continue to operate effectively and efficiently amidst these challenges. Serious upheaval in the workforce due to higher retirements and technological advances are requiring significant transitions in the Federal budgeting process. These workforce and technology challenges are expected to continue over the next decade.

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To respond to the challenges, the Budget Formulation and Execution Line of Business (BFELoB) Human Capital (HC) Workgroup has undertaken a significant effort to try to strengthen the capabilities of the agency budget workforce by defining critical workforce knowledge, skills, and abilities necessary to maintain and to enhance the professionalism prominent in the Federal budgeting field. This effort builds upon a similar effort undertaken in 1998 by the U.S. Chief Financial Officers Council and the Joint Financial Management Improvement Program that updated *Core Competencies for Budget Analysts*, a document originally developed in 1995, to highlight qualities and skills needed by agency budget analysts.

The HC Workgroup has considered the current environment, reevaluated the competency needs of the budget community, and identified the following technical core competencies:

These updated core competencies will help the Federal community strengthen recruitment, training, career development, and retention of the Federal budget workforce. They identify the most critical technical knowledge, skills, abilities, and qualities of the Federal budget workforce in the 21st century. The core competencies do not address general competencies—communication, teamwork, and leadership—that are desirable and often critical for career success. These technical competencies are broad, and not every competency may apply to all organizations. Finally, the core competencies are voluntary and may be applied to fit each Federal budget organization's unique needs.

To enhance understanding and application of the core competencies within the Federal community, the HC Workgroup has developed a framework that contains common technical competencies, with corresponding behaviors and proficiency standards that address knowledge and skills required for the Federal budget workforce.

To make these core competencies operational, the agency budget community is requested to review this Exposure Draft and provide comments. The BFELoB wants to ensure that the developed framework identifies the essential technical knowledge, skills, and abilities desired for Federal budget professionals in the 21st century. Comments should be posted on the MAX Federal Community site at **https://max.omb.gov/community/x/EoKBCw** by November 1, 2008.

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1.0 Introduction

1.1 CHALLENGES

Budgeting within the Federal government is becoming more complex and specialized as agencies try to meet increasing public demands with dwindling resources. Congress and the Office of Management and Budget (OMB) continue to mandate improvements in resource management to ensure that Federal resources are used effectively, are properly accounted for, and are reported accurately.

Adding to these challenges are the rapid workforce and technology changes. A significant number of personnel in the Federal budget community are expected to retire in the next decade, with little succession planning in place across the civil Federal environment. Incorporating automation into the budgeting process has significantly improved speed and accuracy but requires keen foresight and extensive management involvement. Recruitment and retention of new employees in a competitive economy will dictate new hiring and management approaches. And technology-driven processes will stimulate more information sharing and analysis among agencies, which must be managed carefully.

To succeed, the Federal budget community needs to be able to embrace change quickly. Identifying the core competencies required in the current budget workforce is one approach to strengthening the future of the budget profession.

1.2 ADDRESSING THE CHALLENGES

An interagency group—Budget Formulation and Execution Line of Business (BFELoB)—was created to improve Federal budgeting by sharing best practices and budget systems among Federal agencies. Within BFELoB, a Human Capital (HC) Workgroup was created to facilitate aligning workforce goals to human capital initiatives (e.g., recruitment, training, and career assignments). This effort supports guidelines offered by the President's Management Agenda in two major areas:

- Develop human capital strategies linked to the organization's mission, vision, core values, goals, and objectives
- Encourage agency use of strategic workforce planning to recruit, retain, and reward employees and develop a high-performing workforce.

With this in mind, one of the initiatives undertaken by the HC Workgroup was to establish professional budget core competencies. The HC Workgroup's effort

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resulted in the development of this Exposure Draft. The core competency framework lays the groundwork for undertaking other initiatives to address the challenges facing the Federal budget community.

1.3 Focus and Intent

The HC Workgroup focused on creating a core competency framework that improves Federal government budget operations through the identification of critical budget knowledge, skills, and abilities. Of special interest to the HC Workgroup was the identification of the skills that are most critical to the daily function of budget activity. The workgroup's ultimate objectives were threefold:

- Drive improvement in government budget staff effectiveness through training and professional development
- Guide agencies toward recruiting and retaining the right talent to meet the needs of the future within the budgeting profession
- Address new laws, technology, and budget processes in the competency framework that have made budgeting more complex.

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1.4 HC Workgroup Members

The scope of participation in the HC Workgroup spans the Federal budget community. Ideas were collected from members of various Federal departments and agencies and shared to enhance the professionalism and capabilities of the Federal budget community. In addition, many organizations were invited to help the HC Workgroup in its deliberations. Table 1 lists the members and organizations involved in this effort.

Table 1. Members and Other Contributors on the HC Workgroup

Core members	Other contributors	
Navneeta Chandra, Department of Education Shelly McAllister, Office of Management and Budget Terry Grindstaff, Environmental Protection Agency Jonathan Stehle, Corporation for National and Community Service Department of Labor Social Security Administration Department of Justice LMI Government Consulting	Department of Defense (Army Business Transformation Agency and Navy) Department of Agriculture (USDA) USDA Graduate School Department of Commerce Department of Education Department of Energy Department of Health and Human Services	Department of Homeland Security Department of Housing and Urban Development Department of the Interior Department of Justice National Science Foundation Office of Management and Budget Office of Personnel Management Management Concepts, Inc.

2.0 Competency Framework Development

2.1 What Competencies Are

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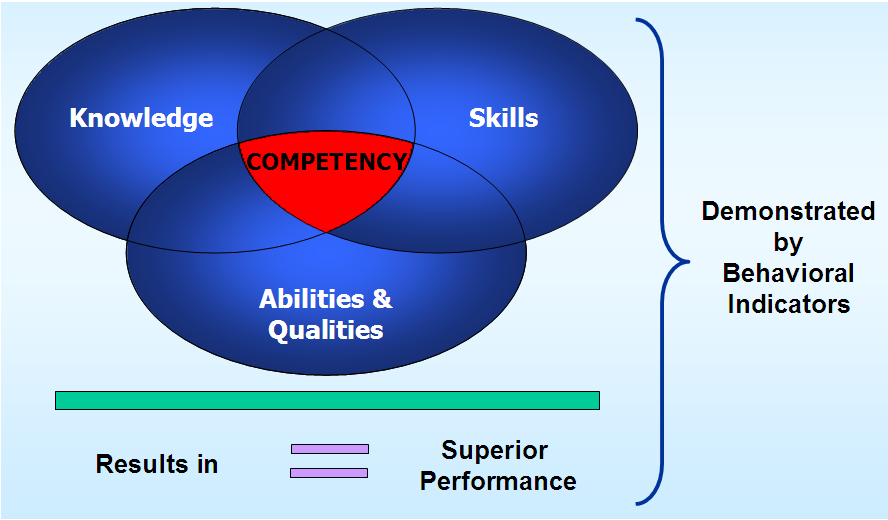
Competencies can be characterized as follows:

- Measurable collection of skills, knowledge, abilities, and qualities, together with behaviors, required to perform particular job functions successfully
- Skills developed and attained through education, training, rotational assignments, experience, professional development, and self-development.

Figure 1 depicts these ideas.

Figure 1. What Competencies Are



Source: Center for Naval Analyses.

The HC Workgroup focused on identifying core competencies for the Federal budget community through the analysis of completed competency studies and frameworks being used in the Federal sector. The results of this analysis were used to develop a core competency framework that contains common technical competencies, with corresponding behaviors and proficiency standards that address knowledge and skills required for the Federal budget workforce.

Core competencies are also meant to provide a unified Federal framework that will promote a standard perspective of the skills required for effective job performance in the budget career field. They will help improve the way training, certification, and professional development are developed, measured, and

evaluated. Once finalized, the competency framework has the potential to increase the flexibility and mobility of budget professionals across the Federal budget community.

2.2 UPDATING CORE COMPETENCIES

In early 2008, the HC Workgroup began updating the 1998 "Core Competencies for Budget Analysts," issued by the Joint Financial Management Improvement Program, with the goal of publishing a competency framework for all budget-related jobs by fall 2008. The workgroup met with the Office of Personnel Management to explore best approaches to develop and validate competencies as well as to gain its insight and support. In March 2008, the workgroup began outreach to the budget community, senior budget officers, management councils, and industry for comment and feedback on the competency data. Results were presented at the 2008 symposium of the American Association for Budget and Program Analysis. The workgroup also invited members of the commercial training community (e.g., Management Concepts, Inc., and USDA Graduate School) to review its work and products.

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The workgroup used a four-step process to develop a draft framework of core competencies for the budget community:

- Conduct an environmental scan to identify existing competency frameworks and analyze content
- Develop a draft Federal-wide competency framework; make it available for review and comment by the agency budget community, including subject matter experts; and incorporate changes
- Develop example proficiency levels for each competency to be used as a guide for agencies to evaluate their existing workforce capabilities
- Finalize the Federal-wide competency framework.

The following subsections describe the methods that were used or are planned to be used to accomplish the steps.

2.2.1 Environmental Scan and Content Analysis

The initial collection of information included discussions with the USDA Graduate School, which supports a significant number of training opportunities for budget analysts across the Federal government. An initial list of competencies was compiled for review and was supplemented and revised by workgroup members.

Further information was then collected from other sources and used to augment the list of competencies. This process was facilitated by biweekly meetings of the

HC Workgroup. The workgroup leveraged numerous information sources to identify competencies based on frameworks from the following organizations:

- Association of Government Accountants
- Department of Commerce
- Department of Defense (Army and Navy)
- Department of Health and Human Services
- National Association for State Budget Officers
- Social Security Administration
- Management Concepts, Inc.

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2.2.2 Development of a Draft Competency Framework

On July 15, 2008, a draft competency framework was posted to the BFELoB MAX Federal Community website for review and consideration by a broader community for a period of 45 days. The draft competency framework consisted of core competencies that were further supported by key behaviors. A copy of the core competencies was made available at **https://max.omb.gov/community/x/pwBpB**. The approach taken by the HC Workgroup relied on budget subject matter experts and the knowledge of people performing budget tasks. Perspectives differed based on the scope of responsibilities and types of experience among the budget organizations. However, such involvement created a robust exchange that resulted in a more usable competency framework.

2.2.3 Development of Proficiency Levels

To expand the scope of information addressing the core competencies in the framework, the workgroup developed three sample proficiency levels for each: (1) entry, (2) journeyman, and (3) expert. These sample proficiency levels are provided to assist Federal agencies with developing proficiency definitions that describe the professional progression of their own budget personnel.

2.2.4 Finalization of the Competency Framework

The core competency framework as described in this document exhibits the knowledge, skills, and behaviors considered by the HC Workgroup to be critical for maintaining the professionalism of the Federal budget community. It is expected that debate over the core competencies in this Exposure Draft will continue. However, such debate will concentrate the focus of the budget community to decide what professional characteristics are most important. Thus, this Exposure Draft is an evolving document on which the workgroup invites

comments. Periodically, the core competencies will need to be reviewed to revalidate their scope and applicability to day-to-day budget operations.

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3.0 Core Competency Descriptions

The HC Workgroup identified eight core competencies (shown in Figure 2) as being critical to the effective performance of budget professionals in the Federal government. The following sections define each of the competencies, identify key behaviors, and specify three proficiency levels.

Figure 2. Federal Budget Core Competencies

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3.1 COMPETENCY: FEDERAL BUDGET PROCESS

This competency entails having knowledge and understanding of the Federal budget process to adhere to and comply with statutory, regulatory, administrative, and agency mission requirements in formulating, executing, defending, and reporting on the use of Federal resources. Table 2 and Table 3, respectively, list the key behaviors and proficiencies for this competency.

Table 2. Key Behaviors: Federal Budget Process

Demonstrates and applies knowledge of executive branch policies and the role of the Office of Management and Budget in agency budget formulation, budget execution, and management oversight.
Demonstrates and applies knowledge of the relationship between the legislative branch and the executive branch to develop, justify, and transmit a budget from the agency to OMB and Congress.
Demonstrates and applies knowledge of the agency's mission and how the budget document defines policy, presents a financial plan, defines priorities, allocates resources, identifies revenue sources, and establishes the linkage between budget and performance data.

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Table 3. Sample Proficiency Levels: Federal Budget Process

Description	Proficiency level		
	1	2	3
Has knowledge and understanding of the Federal budget process to adhere to and comply with statutory, regulatory, administrative, and agency mission requirements in formulating, executing, defending, and reporting on the use of Federal resources.	X		
Executes the agency budget mission in formulating, executing, defending, and reporting on the use of Federal resources.		X	
Reviews, revises, and ultimately approves packages developed by subordinate budget staff members that convey agency mission requirements in formulating, executing, defending, and reporting on the use of Federal resources.			X

3.2 Competency: Federal Legislation, Regulations, and Guidance

This competency entails having knowledge and understanding of the legislation, regulations, and guidance applicable to formulating, executing, and reporting on the use of Federal resources. Table 4 and Table 5, respectively, list the key behaviors and proficiencies for this competency.

Table 4. Key Behaviors: Federal Legislation, Regulations, and Guidance

Uses knowledge of the theories of appropriation law, including the Antideficiency Act, and their implications for financial decisions.
Demonstrates and applies knowledge of executive branch (department, agency, OMB) policies, regulations, and standards as applicable to the budget process, including OMB circulars and bulletins, and Executive orders.
Demonstrates and applies knowledge of appropriation and authorizing legislation, committee reports, Congressional Budget Impoundment and Control Act of 1974, Budget and Accounting Act of 1921, Chief Financial Officers Act of 1990, Federal Managers' Financial Integrity Act (FMFIA), and Federal Credit Reform Act, as applicable to the budget process.
Demonstrates and applies knowledge of agency directives as applicable to the budget process.
Participates in the development and analysis of proposed legislation, reauthorization proposals, regulations, and other regulatory documents (for example, program funding priorities).
Displays ability to research, interpret, and apply laws, regulations, directives, policies, Comptroller General decisions, and court opinions governing the agency's management processes.

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Table 5. Sample Proficiency Levels: Federal Legislation, Regulations, and Guidance

Description	Proficiency level		
	1	2	3
Has a basic understanding of the legislation, regulations, and guidance applicable to formulating, executing, and reporting on the use of Federal resources.	X		
Applies knowledge of applicable legislation, regulations, and guidance while formulating, executing, and reporting on the use of Federal resources.		X	
Contributes to the writing of legislation, regulations, and guidance applicable to formulating, executing, and reporting on the use of Federal resources.			X

3.3 COMPETENCY: BUDGET DEVELOPMENT AND JUSTIFICATION

This competency entails developing budgets and preparing budget justifications that communicate the policies and positions of the organization and comply with legislative, congressional, and OMB guidelines. Table 6 and Table 7, respectively, list the key behaviors and proficiencies for this competency.

Table 6. Key Behaviors: Budget Development and Justification

Develops and prepares budget justification materials that comply with departmental, agency/bureau, and administration policy.
Follows OMB and congressional guidance for writing budget justifications and performance plans, and conforms to legal requirements.
Uses guidelines for establishing effective budget objectives for performance plans.
Prepares agency responses (written and oral) to potential and actual OMB and congressional reactions to proposed agency budgets.

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Table 7. Sample Proficiency Levels: Budget Development and Justification

Description	Proficiency level		
	1	2	3
Understands legislative, congressional, and OMB guidelines, as well as organizational policies and positions that apply to the preparation of budget justifications.	X		
Prepares budget exhibits and narrative justification materials that conform to legislative, OMB, and organizational guidelines, requirements, and reporting criteria.		X	
Reviews and assesses the quality of budgetary exhibits and justification materials to ensure conformance with legislative, OMB, and organizational guidelines, requirements, and reporting criteria.			X

3.4 COMPETENCY: STRATEGIC PLANNING

This competency entails envisioning the organization's future and developing strategies, goals, and plans to reach desired outcomes. Table 8 and Table 9, respectively, list the key behaviors and proficiencies for this competency.

Table 8. Key Behaviors: Strategic Planning

Contributes to the development and implementation of the strategic planning process and ensures conformity with the budget.
Analyzes and uses budget and financial data to evaluate strategic options and opportunities.
Identifies budgeting strategies for a variety of situations.
Uses knowledge of the legislative, administrative, and regulatory requirements, laws, and policies that apply to strategic planning (Government Performance and Results Act, Government Management Reform Act, Chief Financial Officers Act, etc.) and the impact of identified requirements on external organizations and operations.
Uses knowledge of general manpower management and organizational functions, including requirements determination, allocation, utilization, documentation, costing, and reporting processes as they relate to financial management.
Uses knowledge of the strategic planning process and its relationship to financial management.
Displays an ability to develop creative and innovative solutions to complex financial, budget, and program management issues.
Displays an ability to identify problems and potential concerns, provide leadership, involve others in the decision-making process, and build support for options that provide solutions.
Displays knowledge of applicable legislative, administrative, and regulatory requirements as well as organization-specific strategic planning guidance.

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Table 9. Sample Proficiency Levels: Strategic Planning

Description	Proficiency level		
	1	2	3
Has knowledge of the legislative, administrative, and regulatory requirements, laws, and policies that apply to strategic planning and the impact of identified requirements on external organizations and operations.	X		
Analyzes and uses budget and financial data to evaluate strategic options and opportunities.		X	
Contributes to the development and implementation of a strategic planning process and ensures conformity with the budget.			X

3.5 Competency: Performance Evaluation and Analysis

This competency entails understanding the impact of strategic planning on the organization and developing measurable outcome metrics that provide management with a tool to make informed decisions. Table 10 and Table 11, respectively, list the key behaviors and proficiencies for this competency.

Table 10. Key Behaviors: Performance Evaluation and Analysis

Identifies and utilizes financial and nonfinancial performance measures to inform agency management.
Demonstrates knowledge of public accountability through performance measurement and reporting, including the "Performance and Accountability Report."
Develops performance measures linked to agency goals and objectives to meet legislative requirements.
Identifies and utilizes relationships between financial and nonfinancial performance measures to support the strategic plan and budget.
Develops and reviews evaluation initiatives and performance indicators.
Demonstrates knowledge of concepts, principles, and procedures (including statistical methods such as analysis of variance, confidence intervals, and regression) for performing cost and economic analyses and for developing estimates for a variety of programs (information systems, information technology hardware and software, force structure, training, manpower, weapon systems, etc.).
Demonstrates knowledge of operations research techniques (linear programming, queuing theory, modeling and simulations, decision risk analysis, etc.).
Demonstrates knowledge of policies and procedures governing cost and economic analysis programs, as well as life-cycle management techniques for various systems, programs, and acquisition strategies.
Demonstrates knowledge of program planning, analysis, and evaluation, including program issues and analytical techniques to measure progress toward objectives.
Demonstrates knowledge of the management and evaluation systems that use performance measurement to achieve program objectives.
Displays ability to manage the evaluation systems that use performance measurement to achieve program objectives.
Demonstrates knowledge of the various types of performance measurement and the levels of information they provide to decision makers.
Demonstrates knowledge of the methods for evaluating programs that have a diverse customer base.
Demonstrates knowledge of the benefits of performance measurement as a tool to manage strategic planning.

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Table 11. Sample Proficiency Levels: Performance Evaluation and Analysis

Description	Proficiency level		
	1	2	3
Understands the impact of strategic planning on the organization and the development of measurable outcome metrics that provide management with tools to make informed decisions.	X		
Participates in the organization's strategic planning process by providing analyses, and develops outcome measures that provide management with tools to make informed decisions.		X	
Directs analysis support to the strategic planning process and the development of measurable outcomes for senior leaders to facilitate informed decision making.			X

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3.6 COMPETENCY: BUDGETARY ACCOUNTING

This competency entails understanding and establishing the accounting of Federal funds to facilitate budgetary controls and reporting. Table 12 and Table 13, respectively, list the key behaviors and proficiencies for this competency.

Table 12. Key Behaviors: Budgetary Accounting

Demonstrates knowledge of generally accepted accounting principles, policies, procedures, and the overall Federal accounting structure and systems.
Analyzes and uses different types of Treasury funds (e.g., general, trust, and revolving funds), as appropriate.
Demonstrates and applies knowledge of recording budgetary entries in the Standard General Ledger, including warrants, appropriations, apportionments, allotments, commitments, obligations, expenditures, and accruals.
Demonstrates an appropriate level of expertise in interpreting and understanding the link between the SF 132, Apportionment and Reapportionment Schedule; SF 133, Report on Budget Execution and Budgetary Resources; and Treasury reports and documents.
Applies the most appropriate method for allocating indirect costs.

Table 13. Sample Proficiency Levels: Budgetary Accounting

Description	Proficiency level		
	1	2	3
Understands the accounting of Federal funds to facilitate budget controls and reporting.	X		
Establishes accounting for Federal funds to facilitate budget controls and reporting in response to supervisory direction.		X	
Directs and manages the accounting of Federal funds to facilitate budget controls and reporting.			X

3.7 COMPETENCY: BUDGETARY CONTROL

This competency entails identifying and ensuring the appropriate use of Federal funds to adhere to statutory requirements and administrative policy. Table 14 and Table 15, respectively, list the key behaviors and proficiencies for this competency.

Table 14. Key Behaviors: Budgetary Control

Identifies and utilizes budgetary controls such as apportionments, allotments, operating plans, reprogramming guidelines, department/agency funds control processes, and inter- and intra-agency reimbursable agreements.
Monitors agency use of funds, provides advice on agency's funds control system, prepares apportionments and the required OMB documents, and designs and uses system processes and procedures (e.g., OMB Apportionments, OMB Footnotes, and Treasury Warrants) that ensure financial integrity.
Designs and uses financial system processes and procedures that ensure financial management integrity.
Implements fiscally responsible management control systems within the agency to effectively support program auditors, respond to findings, and harness audit information for program improvement.
Identifies and applies budgetary controls that reflect statutory (e.g., FMFIA) appropriation and authorization requirements regarding the use of funds, spending levels, and spending conditions.

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Table 15. Sample Proficiency Levels: Budgetary Control

Description	Proficiency level		
	1	2	3
Understands the appropriate use of Federal funds to adhere to statutory requirements and administrative policy.	X		
Executes control procedures to ensure the appropriate use of Federal funds in order to adhere to statutory requirements and administrative policy.		X	
For a major budget area, ensures the appropriate use of Federal funds to adhere to statutory requirements and administrative policy.			X

3.8 Competency: Financial Analysis, Forecasting, and Modeling

This competency entails using financial analysis, forecasting, and modeling to facilitate resource decision making and provide financial advice to management. Table 16 and Table 17, respectively, list the key behaviors and proficiencies for this competency.

Table 16. Key Behaviors: Financial Analysis, Forecasting, and Modeling

Uses financial models and tools to interpret quantitative and qualitative data to analyze alternatives, draw conclusions (e.g., status of funds by object class), make decisions, identify trends, and achieve results.
Understands the overall financial performance of the agency.
Understands the major uses and objectives of governmental financial reporting, including the form and content of basic financial statements and notes.
Interprets accounting data, records, or reports, and provides accounting or financial management advice and assistance to management.
Uses key indicators to forecast economic trends.
Develops models or projections based on research, relationships, and time series data.
Interprets historical data and economic trends to project future financial needs.
Reviews forecasts for accuracy.
Conducts analysis using various forecasting tools and methods to assess performance and quantify risks.
Prepares forecasting reports/communications and disseminates them to various stakeholders.
Explains complex budgeting calculations (e.g., pricing indexes).

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Table 17. Sample Proficiency Levels: Financial Analysis, Forecasting, and Modeling

Description	Proficiency level		
	1	2	3
Understands the use of financial analysis, forecasting, and modeling techniques to facilitate resource decision making and provide financial advice to management.	X		
Uses financial analysis, forecasting, and modeling to facilitate resource decision making and provide financial advice to management.		X	
Reviews, revises, and ultimately approves the results of financial analysis, forecasting, and modeling used to facilitate resource decision making and provide financial advice to management.			X

4.0 Next Steps

After working with leaders and subject matter experts from across the federal community to finalize the budget core competencies, the HC Workgroup will initiate efforts outlined in the sections below.

4.1 Determine Proficiencies by Key Behaviors

The workgroup made several assumptions when developing proficiency levels for each of the competencies. These assumptions included identifying three levels of proficiency—entry, journeyman, and expert—to describe behaviors required at different levels of expertise. Proficiencies for each core competency articulate the knowledge, skills, and abilities desired for each level. Proficiencies for associated key behaviors will be developed later.

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4.2 Advance the Core Competency Framework

The HC Workgroup will make a series of presentations (for example, at the American Association for Budget and Program Analysis 2008 symposium) to the Federal budget community to promote understanding of this core competency framework and how it can assist agencies with addressing their HC needs. Depending upon the needs of the organization, the core competencies will be available to support a multitude of purposes, such as:

- Align skills with mission needs
- Target investment that align training to “successful performance”
- Undertake succession planning to identify expected critical vacancies and candidate gaps
- Improve assessments of workforce proficiency gaps
- Engage in strategic workforce planning
- Recruit and select new hires in order to capture key behaviors for successful performance
- Further individual career planning.

4.3 Socialize the Core Competency Framework

When the core competency framework is finalized, the HC Workgroup will reach out to Federal agencies to encourage them to use the framework as a starting point for internal initiatives to improve the development of workforce competencies. Specifically, the workgroup will encourage the adoption of this tool to identify gaps in the core competencies of its budget workforce succession planning and to support recruitment, training, career development, and retention efforts. Strong support by the Chief Human Capital Officers Council and the Office of Personnel Management will also be sought to ensure involvement by the Federal budget and human resource communities.

4.4 Integrate the Core Competency Framework in Future Training

The HC Workgroup will reach out to the private training and academic community to seek their adoption and integration of the budget core competencies into their training and education programs. The possibility of expanding current BFELoB training offerings to include training on the core competency framework will also be explored.

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