

The U. S. Office of Personnel Management

Interpretive Guidance for Project Manager Positions

ATTRACTING, HIRING AND RETAINING
PROJECT MANAGERS

EMPLOYEE SERVICES
TALENT ACQUISITION AND WORKFORCE SHAPING
CLASSIFICATION AND ASSESSMENT POLICY
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FEDCLASS@OPM.GOV
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INTRODUCTION

This interpretive guidance addresses position classification, job evaluation, staffing, qualifications, training, and development for project manager positions based on existing criteria and guidance. The Office of Personnel Management (OPM) is issuing this guidance to assist agencies as they:

- Identify project manager positions;
- Clarify project manager duties;
- Address related position classification issues;
- Recruit, select, train, and develop qualified project managers to meet their needs;
- Implement training, performance, and retention programs; and
- Conduct succession planning.

The guidance addresses the above common concerns about project management issues as raised by officials and representatives from OPM, the Office of Management and Budget, the Human Resources Management Council, the Chief Information Officers Council, the Chief Financial Officers Council, the Joint Financial Management Improvement Project, the Procurement Executives Council, the Professional Council of Federal Scientists and Engineers, and other groups.

Definition of a Project

Project

Project is defined in the Project Management Institute's Project Management Body of Knowledge (PMBOK[®], an American National Standard ANSI/PMI 99-001-2000) as:

“A temporary endeavor undertaken to create a unique product, service, or result.”

It is important to distinguish a project from a program. In contrast to a project, which has a defined beginning and end, a **program** is an ongoing operation. A project serves to develop, modify, or enhance a product, service, or system and is constrained by the relationships among scope, resources, and time. A project is unique in that it is not a routine operation, but a specific set of operations designed to accomplish a singular goal. Programs, on the other hand, encompass the missions, functions, operations, activities, laws, rules, and regulations that an agency is authorized and funded by statute to administer and enforce. Programs normally provide products and/or services to the public. Agencies distribute available funding to carry out these continuing programs and any ongoing staff support they require.

Project Manager Characteristics

Project Manager Duties/Tasks

Project manager positions exist in many different disciplines. For example, an engineer or architect normally manages projects associated with designing specialized equipment or structures. Subject matter experts in fields such as IT or finance deal with developing and testing information networks and financial systems. However, regardless of the subject matter area involved, the project manager function is characterized by a *common set* of duties/tasks. A project manager generally applies all of these duties/tasks to meet project requirements, as follows:

- Determines appropriate products or services with clients or customers to define project scope, requirements, and deliverables;
- Develops, modifies, or provides input to project plans;
- Implements project plans to meet objectives;
- Coordinates and integrates project activities;
- Manages, leads, or administers project resources;
- Monitors project activities and resources to mitigate risk;
- Implements or maintains quality assurance processes;
- Makes improvements, solves problems, or takes corrective action when problems arise;
- Gives presentations or briefings on all aspects of the project;
- Participates in phase, milestone, and final project reviews;
- Identifies project documentation requirements or procedures; and
- Develops and implements product release plan.

Project Manager Knowledge, Skills, and Abilities/Competencies

All project managers apply common knowledge, skills, and abilities/competencies, organized into two areas:

- General knowledge, skills, and abilities/competencies; and
- Technical knowledge, skills, and abilities/competencies.

The specific knowledges, skills, and abilities/competencies for each functional area are as follows:

General Knowledge, Skills, and Abilities/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.
- **Attention to Detail** - Is thorough when performing work and conscientious about attending to detail.

- **Conflict Management** - Manages and resolves conflicts, grievances, confrontations, or disagreements in a constructive manner to minimize negative personal impact.
- **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.
- **External Awareness** - Identifies and understands economic, political, and social trends that affect the organization.
- **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.
- **Information Management** - Identifies a need for and knows where or how to gather information; organizes and maintains information or information management systems.
- **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; is sensitive to cultural diversity, race, gender, disabilities, and other individual differences.
- **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.
- **Manages Resources** - Selects, acquires, stores, and distributes resources such as materials, equipment, or money.
- **Oral Communication** - Expresses information (for example, ideas or facts) to individuals or groups effectively, taking into account 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.
- **Reading Comprehension** - Understands and interprets written material, including technical material, rules, regulations, instructions, reports, charts, graphs, or tables; applies what is learned from written material to specific situations.
- **Reasoning** - Identifies rules, principles, or relationships that explain facts, data, or other information; analyzes information and makes correct inferences or draws accurate conclusions.
- **Strategic Thinking** - Formulates effective strategies consistent with the business and competitive strategy of the organization in a global economy. Examines policy issues and strategic planning with a long-term perspective. Determines objectives and sets priorities; anticipates potential threats or opportunities.
- **Teaching Others** - Helps others learn through formal or informal methods; identifies training needs; provides constructive feedback; coaches others on how to perform tasks; acts as a mentor.
- **Team Building** - Inspires and fosters team commitment, spirit, pride, and trust. Facilitates cooperation and motivates team members to accomplish group goals.
- **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.
- **Technology Application** - Uses machines, tools, instruments, or equipment effectively; uses computers and computer applications to analyze and communicate information in the appropriate format.
- **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.

Technical Knowledge, Skills, and Abilities/Competencies:

- **Acquisition Strategy** - Knowledge of the principles and methods for developing an

integrated acquisition management plan that describes the business, technical, and support strategies, including the relationship between the acquisition phases, work efforts, and key program events (for example, decision points, contract awards, test activities).

- **Business Process Reengineering** - Knowledge of methods, metrics, tools, and techniques of Business Process Reengineering.
- **Capital Planning and Investment Assessment** - Knowledge of the principles and methods of capital investment analysis or business case analysis, including return on investment analysis.
- **Change Management** - Knowledge of change management principles, strategies, and techniques required for effectively planning, implementing, and evaluating change in the organization.
- **Compliance** - Knowledge of procedures for assessing, evaluating, and monitoring programs or projects for compliance with Federal laws, regulations, and guidance.
- **Contracting/Procurement** - Knowledge of various types of contracts, techniques, or requirements (for example, Federal Acquisitions Regulations) for contracting or procurement, and contract negotiation and administration.
- **Cost-Benefit Analysis** - Knowledge of the principles and methods of cost-benefit analysis, including the time value of money, present value concepts, and quantifying tangible and intangible benefits.
- **Financial Analysis** - Knowledge of the principles, methods, and techniques of financial analysis, forecasting, and modeling to interpret quantitative and qualitative data; includes data modeling, earned value management, and evaluating key financial indicators, trends, and historical data.
- **Financial Management** - Prepares, justifies, and/or administers the budget for program areas; plans, administers, and monitors expenditures to ensure cost-effective support of programs and policies; assesses financial condition of an organization.
- **Knowledge Management** - Knowledge of the value of collected information and the methods of sharing that information throughout an organization.
- **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.
- **Program Management** - Knowledge of the principles, methods, and tools for the coordinated management of a program to include providing oversight of multiple projects, integrating dependent schedules and deliverables, and related activities (for example, benefits management, life cycle management, and program governance).
- **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.

- **Requirements Management** - Knowledge of the principles and methods to identify, solicit, analyze, specify, design, and manage requirements.
- **Risk Management** - Knowledge of the principles, methods, and tools used for risk assessment and mitigation, including assessment of failures and their consequences.
- **Schedule Management** - Knowledge of the strategies, techniques, and processes used to plan, develop, and control project schedule and track project milestones, activities, and deliverables, including timeframes and assigned resources.
- **Scope Management** - Knowledge of the strategies, techniques, and processes used to plan, monitor, and control project scope; includes collecting requirements, defining scope, creating a work breakdown structure, validating scope, and controlling scope to ensure project deliverables meet requirements (i.e., features, functions).
- **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).

Note: Additional technical competencies should be identified based on the specific occupation.

Classifying Project Manager Positions

When you classify a position, you must determine the following:

- The proper pay category;
- The proper occupational series;
- The official position title; and
- The proper grade or level of work.

Determining the Pay Category

Project manager positions usually are General Schedule (GS) positions. However, some positions may be Senior Executive Service (SES) positions or Senior Level (SL) or Scientific/Professional (ST) positions. Guidance for identifying such positions above the GS-15 grade level can be found on pages 13-15. This guidance is not intended for Wage Grade (WG) positions.

Determining Occupational Series

The occupational series of a project manager position usually is apparent by reviewing the duties and responsibilities assigned to the position. In most instances, the primary work of the position, the highest level of work performed, and the paramount occupational knowledge for the project manager work dictate the appropriate series.

Users of the position classification standards normally have little trouble making the series decision by comparing the characteristics of the position in question to series definitions and occupational information in the standards. However, if the work of a project manager position falls into more than one series, the correct series is sometimes difficult to determine. If it is unclear whether a particular series predominates, consider the following to determine the correct series:

- ***Paramount occupational knowledge required.*** Although a project manager position may include several different kinds of work, most positions have a paramount occupational knowledge requirement in addition to the project management knowledge, skills, and abilities/competencies. The paramount occupational knowledge is the most important subject matter knowledge or subject-related experience required to do the work.
- ***Reason for existence.*** The primary purpose of the project manager position, or management's intent in establishing the project manager position, is a positive indicator in determining the appropriate series.
- ***Organizational mission and/or function.*** Project manager positions generally align with the mission and function of the organization to which they are assigned. The organization's function often is mirrored in the organizational title and may influence the choice of appropriate series.
- ***Recruitment source.*** Supervisors and managers can help by identifying the occupational series that provides the best qualified applicants to do the project manager work. This aspect correlates with the paramount knowledge required by the project manager position.

SELECTING THE OCCUPATIONAL SERIES

The duties and responsibilities assigned to most positions are covered by one occupational series, and the series determination is clear. For these positions, the series represents the primary work of the position, the highest level of work performed, and the paramount qualifications required.

Some positions, however, are a mix of duties and responsibilities covered by two or more occupational series and classified by more than one standard or guide. Often the appropriate series for these positions is a general series for the occupational group covering the type of work performed.

For positions whose duties fall in more than one occupational group, the most appropriate series for the position depends on consideration of a number of factors. For many of these positions the grade controlling duties will determine the series. Sometimes, however, the highest level of work performed does not represent the most appropriate series, and the series can be determined only after considering the paramount qualifications required, sources of recruitment and line of progression, the reason for establishing the position, and the background knowledge required.

Project management work can be characterized as falling in more than one occupational group. As a result, the position could be classifiable to two or more occupational series. The nature of the work is such that persons with training and experience in either of two or more occupations may be considered well-qualified to do the work.

Work requiring professional backgrounds including education and experience are considered interdisciplinary. Professional occupations may not be combined with non-professional occupations or viewed as interdisciplinary positions. For further guidance on interdisciplinary positions reference the discussion on Interdisciplinary Professional Positions in Section III L. in the [Introduction to the Position Classification Standards](#).

Project management work can be characterized as multidisciplinary. A multidisciplinary position is a position involving duties and responsibilities closely related to more than one discipline. As a result, the position could be classifiable to two or more occupational series. The nature of the work is such that persons with training and experience in either of two or more occupations may be considered well-qualified to do the work.

NOTE: Due to the evolution of project management work, the term multidisciplinary is used to more appropriately define the unique and occupationally cross-cutting combinations of work in this discipline. While this term is not addressed in the current Introduction to the Position Classification Standards or the Classifier's Handbook, future updates will address the usage of this terminology.

Multidisciplinary positions generally fall into one of the following two categories:

- Positions which involve a specific *combination* of knowledges that is characteristic of two or more non-professional series. Such positions involve the performance of some duties which are characteristic of one series and other duties which are characteristic of another series.
- Positions which involve knowledge which is characteristic of *either* two or more non-professional series. These positions include work which is substantially identical to work performed in either of the non-professional occupations.

The position description should show clearly that the position is multidisciplinary and indicate the various series in which the position may be classified. The final classification of the position is determined by the qualifications of the person selected to fill it.

Positions are not to be considered multidisciplinary when members of a work team with varied but complimentary competencies and experiences collaborate on a multifaceted problem or project and contribute to the achievement of organizational specific objectives. Also excluded are positions which require special licensing, as in the practice of medicine, and positions which are solely and clearly classifiable to a single series but can be filled by persons from a variety of education and experience backgrounds. Work requiring professional backgrounds including education and experience are considered interdisciplinary. Professional occupations may not be combined with non-professional occupations or viewed as interdisciplinary positions. For further guidance on interdisciplinary positions reference the discussion on Interdisciplinary Professional Positions in Section III L. in the [Introduction to the Position Classification Standards](#).

Determining Official Position Titles

Project Management work has been found to be appropriately classified to numerous occupational series based on the specific work performed. The titling of program and project management positions is dependent upon the classification of the position. The selection of the occupational series determines the titling of the position.

Determining the occupational series for a position is usually apparent by reviewing its assigned duties and responsibilities and then comparing them to the series definitions and general occupational information in the appropriate position classification flysheet or standard. Generally, the primary work of the position, the highest level of work performed, and the paramount knowledge required to successfully perform the work of the position determines the appropriate occupational series.

Users of position classification standards normally have little trouble making the series decision by comparing the characteristics of the position in question to the occupational series definition and occupational information in the standards. However, if the work of a Project Manager position falls into more than one series, the correct series is sometimes difficult to determine. If it is unclear whether a particular series predominates, consider the following to determine the correct series:

- ***Paramount occupational knowledge required.*** Although Project Manager positions may include several different kinds of work, most positions have a paramount occupational knowledge requirement in addition to the project management knowledge, skills, and abilities/competencies. The paramount occupational knowledge is the most important subject matter knowledge or subject-related experience required to do the work.
- ***Reason for existence.*** The primary purpose of the Project Manager position, or management's intent in establishing the Project Manager position, is a positive indicator in determining the appropriate series.
- ***Organizational mission and/or function.*** Project Manager positions generally align with the mission and function of the organization to which they are assigned. The organization's function often is mirrored in the organizational title and may influence the choice of appropriate series.
- ***Recruitment source.*** Supervisors and managers can help by identifying the occupational series that provides the best qualified applicants to do the program or project management work. This aspect correlates with the paramount knowledge required by the program or project management position.

Titling Program and Project Management Positions

Any position may have an organizational title or functional title, but every position must have an official title. 5 U.S.C. 5105 (a)(2) requires OPM to establish the official class titles. This title must be used on all official personnel documentation. However, subsection 5 U.S.C. 5105(c) states that this requirement does not prevent the use of organizational or other titles for internal administration. Agencies may supplement the basic and prescribed titles authorized in standards with the parenthetical title (Project Manager) if necessary for recruitment or other human resources needs. In those instances where OPM has not prescribed an official title for a series, an agency may construct its own official title. According to the [Introduction to Position Classification Standards](#), constructed titles should be “short,” “meaningful,” and “generally descriptive of the work performed.” The title selected by the agency should not be one that has been prescribed by OPM as an official title for positions in another series.

PROJECT MANAGEMENT CLASSIFICATION POLICY GUIDANCE

PROJECT MANAGEMENT CLASSIFICATION

OPM is providing the following guidance for classifying project management positions in the Federal Government.

Based on OPM's collaboration with our agency partners and critical work with stakeholders, the data and information collected identify that project management work is performed in numerous occupational series.

The following policy is effective immediately upon issuance of this guidance:

- 1. Agencies may supplement the basic and prescribed titles authorized in classification standards with the parenthetical title (Project Manager) if the position meets the definition and criteria for project management work and project management knowledge is paramount.**

Guidance for titling IT Program and IT Project Management positions may be found in the [Job Family Standard for Administrative Work in Information Technology Group, 2200](#) and the [Interpretive Guidance for IT Project Manager Positions \(Including Guidance for Classifying, Staffing, Training, and Developing IT Project Managers\)](#).

Applying Grading Criteria to Project Manager Positions

According to the [Introduction to the Position Classification Standards](#), selecting the appropriate grade level criteria is critical for determining the proper classification of a position.

If the work assigned to a project manager position is adequately covered by the grading criteria in a particular standard for a specific occupational series or job family, then evaluate the work by that occupational series or job family standard (JFS).

If the type of project manager work does not have a directly applicable occupational series, job family, or functional standard, then select a standard as similar as possible to the kind of work described. Evaluate and grade the project manager position in question by comparing it to grading criteria in the comparable standard, as it relates to:

- The kind of work processes, functions, or subject matter of the work performed;
- The qualifications required to do the work;
- The level of difficulty and responsibility necessary; and
- The combination of classification factors having the greatest influence on the grade level.

When making these determinations, we recommend referring to one of the following standards for making meaningful comparisons:

- The [JFS for Administrative Work in the Information Technology Group, GS-2200](#), to evaluate project manager positions for IT projects;
- The [JFS for Professional and Administrative Work in the Accounting and Budget Group, GS-0500](#), or the [Financial Management Series, GS-0505](#), to evaluate project manager positions for financial systems projects;
- The [Administrative Analysis Grade Evaluation Guide](#) to evaluate project manager positions for projects where a more closely related standard has not been issued; and
- Part II of the [Equipment Development Grade Evaluation Guide](#) to evaluate positions for project management engineers.

NOTE: If a project manager position exercises supervision of Federal Government employees at a level that meets the criteria indicated in the [General Schedule Supervisory Guide](#), be sure to evaluate the position's supervisory duties. Do not classify a project manager position to a lower grade on the basis of personal work accomplishment rather than the proper grade for supervising a staff of the type and level actually involved.

Applying Grading Criteria to Project Manager Positions

Surveys identified a large number of positions performing project management work assigned to the Management and Program Analysis Series, GS-0343. Nonsupervisory positions at grade GS-9 and above correctly assigned to this series are evaluated by reference to the **Administrative Analysis Grade Evaluation Guide**. Criteria for grading some project managers is included in the **Administrative Analysis Grade Evaluation Guide** and should be utilized where a more closely related standard has not been issued. The grade level of a Project Manager position will depend on the nature of the project as constrained by the relationship of its scope, resources, and timeline (e.g., its size, risk, sensitivity). Because higher grade level positions are broader in scope or involve projects that are more mission critical, they generally require greater knowledge and experience.

The factor level descriptions (FLDs) provide criteria for classifying Project Manager positions: FLDs: 1-6, 1-7 or 1-8; 4-3, 4-4, 4-5 or 4-6; 5-3, 5-4, 5-5 or 5-6

The example on the following page illustrates how Factor 1 (Knowledge Required by the Position) applies to the duties of a particular Management and Program Analyst (Project Manager), GS-343-12 position. The factor level descriptions (FLDs) are excerpted directly from the **Administrative Analysis Grade Evaluation Guide**.

Criteria for grading project manager positions in the Information Technology Management Series, GS-2210 are in the **JFS for Administrative Work in the Information Technology Group, GS-2200**. The grade level of an IT Project Manager, GS-2210 position will depend on the nature of the project as constrained by the relationship of its scope, resources, and timeline (e.g., its size, risk, sensitivity). Because higher grade level positions are broader in scope or involve projects that are more mission critical, they generally require greater knowledge and experience. Consequently, a position occupied by a project manager assigned to add a major enhancement to an existing IT system for a single agency might be classified at the GS-13 grade level, while a position occupied by a project manager adding major enhancements and coordinating capital planning used in a multi-agency IT system might be classified at the GS-15 grade level.

IT Project Manager functions are clearly described in the Information Technology Management Series, GS-2210 in the **JFS for Administrative Work in the Information Technology Group, GS-2200**. The FLDs, especially those in the following three GS-2210 specialties, provide criteria for classifying IT Project Manager positions:

(Policy and Planning)	FLDs: 1-7 or 1-8, 4-5 or 4-6, 5-5 or 5-6,
(Systems Analysis)	FLDs: 1-8, 4-5 or 4-6, 5-5 or 5-6; and
(Network Services)	FLDs: 1-8, 4-5 or 4-6, 5-5 or 5-6.

The examples on the following pages illustrate how Factor 1 (Knowledge Required by the Position) applies to the duties of a fictional Management and Program Analyst (Project Manager), GS-343-12 and IT Project Manager, GS-2210-13 position. The factor level descriptions (FLDs) are excerpted directly from the **Administrative Analysis Grade Evaluation Guide** or **JFS for Administrative Work in the Information Technology Group, GS-2200**.

<p align="center">Example: Management and Program Analyst (Project Manager), GS-343</p>	<p align="center">Excerpts from Level 1-7 FLDs</p>
<p>Sample Duties</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>1) <u>Researches and analyzes potential improvements management systems, processes and data to evaluate for increased program effectiveness.</u> Identifies processes for improvement and coordinates effective funds management for projects. Systems encompass programming, scheduling, budgeting, reporting, manpower, cost estimates, and funds control for current and future year work performed in-house and by contract.</p> </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px; width: fit-content; margin-left: 200px;"> <p>Administrative Analysis Grade Evaluation Guide FLD 1-7</p> </div> <div style="border: 1px solid black; padding: 5px;"> <p>2) <u>Determines the required information and accomplishes data acquisition, review, analysis, and subsequent development of alternative strategies or information documents through coordination and consultation with other personnel, as appropriate. Obtains advice and suggestions relative to use of finances and resources. Develops alternate strategies and circulates, as appropriate, for review and comment. Staff meetings are arranged, as needed, to discuss alternatives and develop consensus regarding recommendations.</u></p> </div> <div style="border: 1px solid black; padding: 5px; width: fit-content; margin-left: 200px;"> <p>Administrative Analysis Grade Evaluation Guide FLD 1-7</p> </div>	<div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>Common to All Program Management Positions – Knowledge of, and skill in applying:</p> <ul style="list-style-type: none"> • cost-benefit analysis principles and methods • project management principles and methods <p>sufficient to:</p> <ul style="list-style-type: none"> • plan and carry out difficult and complex assignments and develop new methods, approaches and procedures • interpret policies, standards, and guidelines </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>Knowledge of qualitative and quantitative techniques for analyzing and measuring the effectiveness, efficiency, and productivity of administrative and technical programs, along with knowledge of the mission, organization, and work processes of programs throughout a military command, complex multi-mission local installation, or equivalent, and the relationships of administrative support activities (e.g., data processing, accounting, budget) to such missions.</p> </div> <div style="border: 1px solid black; padding: 5px;"> <p>Knowledge is applied in conducting studies, analyzing findings and making recommendations on substantive operating programs; e.g., weapons testing or commodity management. The work requires skill in preparing project papers and staff reports and skill in organizing and delivering briefings to managers to encourage understanding and acceptance of findings and recommendations.</p> </div>

Using the Administrative Analysis Grade Evaluation Guide to evaluate the duties listed on the previous page *could* develop as follows across all nine factors in the Factor Evaluation System and result in classifying the position as a Management and Program Analyst (Project Manager), GS-0343-13:

Factor	Level	Points
1. Knowledge Required	1–7	1,250
2. Supervisory Controls	2–5	650
3. Guidelines	3–4	450
4. Complexity	4–5	325
5. Scope & Effect	5–5	325
6 & 7. Contacts & Purpose	7–3	180
8. Physical Demands	8–1	5
9. Work Environment	9–1	5
Total Points		3,190
Conversion		GS-13

NOTE: [The Classifier’s Handbook](#) includes additional guidance on Factor Level Relationships or the most common factor levels used at various grade levels for different kinds of work (i.e., professional, administrative, technical, and clerical and assistance work).

Example: IT Project Manager, GS-2210	Excerpts from Level 1-7 FLDs
<p>Sample Duties</p> <div data-bbox="203 268 516 961"> <p>2) Works with proponents and sponsors to <u>develop a business case that highlights the costs and benefits of the proposed project</u> for presentation to upper level management and for review and approval of the National Information Investment Board. Directs a team of subject matter experts, technical specialists, and support staff to <u>produce a business plan</u> in conformance with established <u>capital planning</u> procedures and agency guidance.</p> </div> <div data-bbox="203 1060 516 1516"> <p>2) <u>Prepares, implements, monitors, and updates the project plan.</u> Coordinates with the <u>system's owner and upper level management</u> to ensure the actions are consistent with the approved plan. <u>Oversees the design, construction, testing, and implementation of the system.</u></p> </div> <div data-bbox="537 342 802 558"> <p>2200 JFS FLD 1-7 – Common to All Positions FLD 1-7 (Policy and Planning) FLD 1-7 (Systems Analysis)</p> </div> <div data-bbox="537 594 802 711"> <p>2200 JFS FLD 1-7 (Systems Analysis)</p> </div> <div data-bbox="537 779 802 896"> <p>2200 JFS FLD 1-7 (Policy and Planning)</p> </div> <div data-bbox="537 1016 802 1134"> <p>2200 JFS FLD 1-7 (Policy and Planning)</p> </div> <div data-bbox="537 1274 802 1392"> <p>2200 JFS FLD 1-7 (Systems Analysis)</p> </div> <div data-bbox="537 1541 802 1659"> <p>2200 JFS FLD 1-7 (Network Services)</p> </div>	<div data-bbox="927 226 1404 499"> <p>Common to All Positions – Knowledge of, and skill in applying:</p> <ul style="list-style-type: none"> • cost-benefit analysis principles and methods • project management principles and methods <p>sufficient to:</p> <ul style="list-style-type: none"> • plan and carry out difficult and complex assignments and develop new methods, approaches and procedures • interpret policies, standards, and guidelines </div> <div data-bbox="927 512 1404 915"> <p>Policy and Planning – Knowledge of, and skill in applying:</p> <ul style="list-style-type: none"> • the organization's policy and planning formulation process • capital investment planning principles and methods • the organization's enterprise IT goals and objectives • IT metrics methods and concepts <p>sufficient to:</p> <ul style="list-style-type: none"> • draft IT policies and plans • participate in the IT capital planning process • develop and monitor metrics used in evaluating the accomplishment of IT goals and objectives </div> <div data-bbox="927 928 1404 1331"> <p>Systems Analysis – Knowledge of, and skill in applying:</p> <ul style="list-style-type: none"> • systems design tools, methods, and techniques, including automated systems analysis and design tools • systems design standards, policies, and authorized approaches • systems design precedents or alternative approaches • structured analysis principles and methods • business processes and operations of customer organizations <p>sufficient to:</p> <ul style="list-style-type: none"> • develop requirements and specifications for <u>systems that meet business requirements</u> </div> <div data-bbox="927 1331 1404 1682"> <p>Network Services – Knowledge of, and skill in applying:</p> <ul style="list-style-type: none"> • network systems design, development, testing, installation, operations, management, and maintenance concepts and methods • the organization's network architecture, topology, and protocols <p>sufficient to:</p> <ul style="list-style-type: none"> • provide network services that support business requirements • plan, design, develop, and integrate network systems consistent with existing or planned network infrastructures </div>

Using the GS-2200 JFS to evaluate the duties listed on the previous page *could* develop as follows across all nine factors in the Factor Evaluation System and result in classifying the position as an IT Project Manager, GS-2210-13:

Factor	Level	Points
1. Knowledge Required	1–7	1,250
2. Supervisory Controls	2–5	650
3. Guidelines	3–4	450
4. Complexity	4–5	325
5. Scope & Effect	5–5	325
6 & 7. Contacts & Purpose	3–C	180
8. Physical Demands	8–1	5
9. Work Environment	9–1	5
Total Points		3,190
Conversion		GS-13

NOTE: [The Classifier's Handbook](#) includes additional guidance on Factor Level Relationships or the most common factor levels used at various grade levels for different kinds of work (i.e., professional, administrative, technical, and clerical and assistance work).

Identifying Positions above the GS-15 Grade Level

Agencies are responsible for managing their executive resources and deciding how to organize functions and structure positions, including project manager positions, in a manner that best meets the organization's mission requirements. This includes deciding whether positions meet the Senior Executive Service (SES) criteria or the Senior Level (SL) or Scientific/Professional (ST) criteria and establishing individual SES, SL, and ST positions within the agency's executive resource allocation as authorized by OPM.

The law and OPM regulations clearly state that SES, SL, and ST positions must be classifiable **above the GS-15 grade level**. Positions at the GS-15 grade level as described in statute clearly cover a broad range of work: *Grade GS-15 includes those classes of positions the duties of which are to perform, under general administrative direction, with very wide latitude for the exercise of independent judgment, work of outstanding difficulty and responsibility along special technical, supervisory, or administrative lines which has demonstrated leadership and exceptional attainments (5 U.S.C. 5104(15))*. Do not assume a project manager position is above the GS-15 grade level simply because it has a somewhat larger scope or requires more knowledge and skill than another project manager position that is already classified at GS-15.

Distinctions among the SES, SL, and ST positions are not always clear. The following information provides general guidance to help agencies identify SES, SL, and ST positions; maintain an agency's flexibility to manage its executive resources; and contribute to intra- and inter-agency consistency in establishing SES, SL, and ST positions.

General Information - Unless an agency is excluded from the SES by statute or by the President of the United States, any position that is classifiable above the GS-15 grade level **and** which meets the functional executive criteria set forth in 5 U.S.C. 3132(a)(2) may be placed in the SES. Positions that are classifiable above the GS-15 grade level that do **not** meet the executive criteria and involve the performance of high-level research and development in the physical, biological, medical, or engineering sciences are more appropriately placed in the ST system. The SL system includes any other positions that are classifiable above the GS-15 grade level and do **not** meet the executive criteria and do **not** involve the fundamental research and development responsibilities characteristic of ST positions.

SES Criteria - 5 U.S.C. 3132(a)(2) sets forth the criteria that characterize SES positions. SES positions must be classifiable **above the GS-15 grade level**, or equivalent, based on the duties, responsibilities, and qualifications required by the position. In addition, the incumbent **must** engage in one of the following activities:

- Direct the work of an organizational unit;
- Be accountable for the success of one or more specific programs or projects;
- Monitor progress toward organizational goals and periodically evaluate and make appropriate adjustments to such goals;
- Supervise the work of employees (other than personal assistants); or
- Otherwise exercise important policy-making, policy-determining, or other executive functions.

Directing the work of an organizational unit to manage a project includes responsibility for:

- Assessing policy, program, and project feasibility;
- Determining program goals and developing implementation tools;
- Designing an organizational structure to promote effective work accomplishment; and
- Setting effectiveness, efficiency, productivity, and management/internal control standards.

Being accountable for the success of a program or project encompasses responsibility for the full range of factors that affect program/project accomplishment. This includes:

- Obtaining the resources necessary to achieve the desired project objective;
- Assuming responsibility for the effective use of government resources; and
- Dealing with key officials both within and outside the organization to gain understanding and support for the project.

Monitoring progress toward organizational goals and making appropriate adjustments is an extension of an individual's responsibility for directing the work of an organizational unit. It includes:

- Monitoring work status through formal and informal means to evaluate progress toward objectives;
- Assessing overall effectiveness, efficiency, and productivity of the organization;
- Identifying, diagnosing and consulting on problem areas related to implementation and goal achievement; and
- Making decisions regarding alternative courses of action.

Supervising the work of employees should be credited only if the project manager position meets the minimum requirements for coverage under OPM's [General Schedule Supervisory Guide](#). Specifically, the project manager position's supervisory responsibilities must:

- Require accomplishment of work through the combined technical and administrative direction of others;
- Constitute a major duty occupying at least 25 percent of the incumbent's time; and
- Meet at least the lowest level of Factor 3 in the guide based on supervision of non-contractor personnel. (Work performed by contractors is considered in applying the grading criteria within each factor of the supervisory guide, provided the position first meets the coverage requirements above based on supervision of non-contractor personnel).

Policy-making or policy-determining functions include responsibility for reviewing staff recommendations on policies developed to affect the organization's mission; considering political, social, economic, technical, and administrative factors with potential impact on recommended policies; and approving those policies.

It would be unusual to find a project manager position that entails making major policy decisions.

Distinguishing Between SES and SL/ST Positions – Positions that are properly classified above the grade GS-15 grade level, and do **not** meet the functional executive criteria, are more appropriately placed in the Senior Level (SL) or Scientific/Professional (ST) systems. The nature of a position's work determines which system is most appropriate.

- **Senior Level (SL) Positions.** SL positions are classifiable **above the GS-15 grade level**, but do **not** meet the executive criteria characteristic of the SES, nor do they involve the fundamental research and development responsibilities characteristic of ST positions. SL positions may include some supervisory and related managerial duties, provided these duties occupy less than 25 percent of the position's time.

NOTE: In some instances, the SL system is used for positions that meet the SES executive criteria in agencies that have been excluded from the SES.

- **Scientific/Professional (ST) Positions.** ST positions are classifiable **above the GS-15 grade level** and involve the performance of high-level research and development in the physical, biological, medical, or engineering sciences (or closely related field). ST positions may include some supervisory and related managerial duties, provided these duties occupy less than 25 percent of the position's time. Given the characteristics of project manager work, it is unlikely to occur in ST positions.

Qualifying and Ranking Applicants for Project Manager Positions

Qualifying Applicants

Governmentwide minimum qualification standards are published in OPM's [Operating Manual: Qualification Standards for General Schedule Positions](#). Because project manager positions usually require knowledge of a specific administrative, scientific, or engineering field, agencies must determine the paramount occupational knowledge for each position to identify the appropriate qualification standard. The same occupational knowledge that determines the series of a position for classification purposes (see pages 6 and 7) also determines the qualification standard used to select an individual to fill the position. For minimum qualifications, use the qualification standard appropriate for the occupational series.

Agencies may supplement minimum qualifications with additional knowledge, skills, and abilities (KSAs) or competencies identified through job analysis. Job analysis is a systematic method of studying a job to identify the tasks performed and link them to the KSAs/competencies required to perform these tasks. Where appropriate, and supported by job analysis, agencies may use the project management competency as a selective factor or quality ranking factor. For additional information on conducting a job analysis and establishing selective and quality ranking factors, agencies may consult OPM's [Delegated Examining Operations Handbook](#).

Selective factors become part of the minimum requirements for a position. A selective factor is a "screen out" (i.e., if an applicant does not meet a selective factor he/she is ineligible for further consideration).

Selective factors:

- Are essential for successful performance on the job (i.e., if individuals do not have the selective factor, they cannot perform the job);
- Are almost always geared toward a specific technical KSA/competency;
- Require extensive training or experience to develop; and
- Cannot be learned on the job in a reasonable amount of time.

Selective factors cannot be so narrow that they preclude from consideration applicants who could perform the duties of the position. Agencies may not use selective factors that could be learned readily during the normal period of orientation to the position. Nor should agencies use selective factors that are so agency specific that they exclude from consideration applicants without prior Federal service or preclude selection of applicants from priority placement lists established to assist in the placement of employees affected by reductions in force. Examples of KSAs/competencies that should not be used as selective factors include knowledge of:

- An organization's policies and planning processes; and
- An agency's rules, regulations, policies, and guidance.

NOTE: When using a selective factor, you must specify the required proficiency level.

Ranking Qualified Applicants

Quality ranking factors are KSAs/competencies that significantly enhance performance in a position, but, unlike selective factors, are not essential for satisfactory performance. Agencies should rank applicants with higher proficiency levels on a quality ranking factor above those with lower proficiency levels. Agencies may not rate qualified candidates ineligible solely for failure to possess a quality ranking factor. With quality ranking factors, the focus is on the level of proficiency the candidate brings to the job.

Justification and Documentation

Agencies must document both selective factors and quality ranking factors through job analysis by identifying the:

- KSAs/competencies basic to and essential for satisfactory job performance;
- Duties/tasks the incumbent will perform that require possessing the required KSAs/competencies; and
- Education, experience, or other qualifications that provide evidence of the possession of the required KSAs/competencies.

Considering Certification

OPM has not established certification requirements for Project Manager positions. However, agencies may specify a particular type of certification (or equivalency) in establishing selective criteria or in defining quality ranking factors. Subject matter experts must determine that the certification is necessary for satisfactory job performance (i.e., the certification is related to the duties/tasks and required KSAs/competencies of the job). The certification may then be used as evidence that a person has the KSAs/competencies needed to perform project management work at a satisfactory level.

Assessment Policy and Tools

Applicable law requires the use of effective assessments in the hiring process, and OPM promotes their use for practical reasons as well. The use of effective assessments addresses barriers to recruiting and hiring the talent needed in agencies to perform the cybersecurity work of the agency and improves the quality and diversity of hires. In addition, the use of effective assessments in the hiring process provides human resources professionals and hiring managers the tools and resources needed to support their recruiting and hiring efforts and increase hiring manager satisfaction with the quality of applicants. This requires the collaboration between HR and hiring managers to develop and design effective assessment strategies to hire the talent needed to perform the cybersecurity work of your agency.

Agencies should standardize and document the assessment process through the following steps:

- Treat all individuals consistently. This is most easily accomplished by adopting a standardized assessment and decision-making process. "Standardizing" means making a

process uniform to ensure the same information is collected on each individual and is used in a consistent manner in employment decisions.

- Ensure the selection tool is based on an up-to-date job analysis and is supported by strong validity evidence. A validation study can verify that applicants who score well on the selection device are more likely to do well on the job and contribute to organizational success. Agencies not familiar with validation research methodology are encouraged to consult a measurement expert.

OPM offers various assessments resources and tools for agency use. The following highlights our policy, tools and educational resources available to agencies.

POLICY

Assessment & Selection Website – contains resources to learn more about personnel assessment, assessment methods, steps to designing effective assessment strategies, and the importance of effective personnel assessment.

Delegated Examining Operations Handbook (DEOH), contains information on the assessment process and policy.

- **Chapter 2**– Identifying the Job and its Assessments (p. 22);
- **Chapter 5** – Assess Applicants (p.90);
- **Appendix F** – Multipurpose Occupational Systems Analysis (p. 233); and
- **Appendix G** – OPM’s Job Analysis Methodology (p. 275).

Interagency Assessment Policy Forum – Interagency work group with the focus to improve assessments Governmentwide. Contact us at Assessment_Information@opm.gov or FedClass@opm.gov.

TOOLS

Assessment Decision Tool (ADT) – OPM’s automated system developed to help Federal agencies evaluate and improve their hiring processes and thus continuously build and sustain an effective civilian workforce for the Federal Government. The system is designed to help human resources professionals and hiring supervisors/managers develop assessment strategies targeted to specific competencies and other situational factors relevant to their hiring situation (e.g., volume of applicants, level of available resources). The ADT is designed to provide you with customized information based on your specific hiring needs.

USA Hire – The USA HireSM assessment battery can be used in conjunction with the traditional occupational questionnaire, and/or additional assessments, such as a Structured Interview, to target agency-specific job requirements. USA HireSM offers the following advantages:

- Objective, professionally-developed assessments
- An efficient and effective tool for evaluating candidates
- Meets all legal guidelines and professional standards
- Applicant friendly
- Ease of implementation as it is already fully integrated with USA Staffing®

- Advanced technology to include computer adaptive testing
- Whole person assessments allow agencies to target critical job-relevant competencies
- More valid measures of applicant competence, reinforced by decades of research supporting the validity of USA HireSM type assessment results

EDUCATIONAL RESOURCES

[OPM's Assessment and Selection](#) website includes presentations and tools that agencies may use to develop an assessment strategy and to learn more about various assessment tools and the use of assessments to meet agency specific needs in hiring (e.g., assessing students and recent grads).

Training and Developing Project Managers

Credentials and Academic Degrees

Agencies may establish career development programs in which employees can move through a series of increasingly more responsible project management assignments. Sometimes these career programs include opportunities for rotational assignments that help broaden the employee's perspective. In addition, formal training (both Government-sponsored and commercial courses) may cover aspects of project management. Individual courses may be organized into formal programs that lead to academic degrees or that help employees become eligible for a specific credential. In any instance, agencies need to ensure that courses and training adhere to established procedures and guidelines, especially as the law now authorizes agencies to fund credentials and academic degree training. **Agencies are reminded that they may pay for formal programs that lead to academic degrees only if the academic institution is accredited by an organization approved by the U.S. Department of Education.**

Credentials

The National Defense Authorization Act for Fiscal Year 2002 enacted into law changes in chapter 57 of title 5, United States Code. Now, 5 U.S.C. 5757 provides that an agency may pay for “(1) expenses for employees to obtain professional credentials, including expenses for professional accreditation, State-imposed and professional licenses, and professional certification; and (2) examinations to obtain such credentials.”

This law goes on to require that this authority “may not be exercised on behalf of any employee occupying or seeking to qualify for appointment to any position that is excepted from the competitive service because of the confidential, policy-determining, policy-making, or policy-advocating character of the position.”

Academic Degree Training

The Homeland Security Act of 2002 expanded agency authority to pay for academic degree training. Now, 5 U.S.C. 4107 provides that “An agency may select and assign an employee to

academic degree training and may pay or reimburse the costs of academic degree training from appropriated or other available funds if such training:

- Contributes significantly to (A) meeting an identified agency training need; (B) resolving an identified agency staffing problem; or (C) accomplishing goals in the strategic plan of the agency;
- Is part of a planned, systemic, and coordinated agency employee development program linked to accomplishing the strategic goals of the agency; and
- Is accredited and is provided by a college or university that is accredited by a nationally recognized body.

The new 5 U.S.C. 4107 goes on to require that the agency:

- Consistent with the merit system principles set forth in paragraphs (2) and (7) of section 2301(b), take into consideration the need to (A) maintain a balanced workforce in which women, members of racial and ethnic minority groups, and persons with disabilities are appropriately represented in Government service; and (B) provide employees effective education and training to improve organizational and individual performance;
- Assure that the training is not for the sole purpose of providing an employee an opportunity to obtain an academic degree or qualify for appointment to a particular position for which the academic degree is a basic requirement;
- Assure that no authority under this subsection is exercised on behalf of any employee occupying or seeking to qualify for (A) a noncareer appointment in the Senior Executive Service; or (B) appointment to any position that is excepted from the competitive service because of its confidential policy-determining, policy-making, or policy-advocating character; and
- To the greatest extent practicable, facilitate the use of online degree training.

Further Guidance

This guidance will help you classify and fill project manager positions, as well as develop project managers. If you have questions about this guide, contact the appropriate OPM office as follows:

- Classification/Qualifications Policy – FedClass@opm.gov
- Assessment Policy – Assessment_Information@opm.gov
- Employment or staffing issues – Employ@opm.gov
- Pay and Leave Policy – Pay-leave-policy@opm.gov
- Training and employee development topics – HRDLeadership@opm.gov