

Competency-Based Classification Process Guidance (HR Classifiers)

What is Competency-Based Classification?

Competency-based classification is a modern approach to federal job classification that organizes, describes, and evaluates positions based on the competencies, the knowledge, skills, abilities, behaviors, and other characteristics, required to perform the work successfully.

Instead of focusing only on duties and tasks, competency-based classification centers on the skills and capabilities that the job requires.

This approach is directly supported by the competency-linked position classification work.

Competency Based Classification Process Guidance

STEP 1 – Review the Position

- Review the position's purpose, mission alignment, major duties, and expected outcomes
- Identify the paramount knowledge and the primary reason the position exists
- Determine appropriate occupational series • Determine supervisory or leader status (if applicable)
- Confirm the Position Description (PD) reflects organizational needs—not incumbent traits

Output: Assigned series, official title, and supervisory/leader designation (if applicable)

STEP 2 – Validate Duties & Responsibilities

- Ensure duties are accurate, recurring, and written at the correct level (functional, not task-level)
- Remove incidental or temporary tasks that do not affect classification
- Ensure duties justify the series selection and support the position purpose

Output: Duty statements that accurately reflect assigned work

STEP 3 – Identify Required Competencies & Knowledge, Skills and Abilities

- Identify the competencies implied by the work (general and technical)
- Validate competencies through the agency's job analysis, consistent with 5 CFR 300.103
- Confirm the competencies are supported by duties and not aspirational

TIP (NEW): Use Governmentwide and Agency-Supported Competency Models

To ensure competencies are properly aligned to a competency-based classification framework:

- Use OPM's Federal Workforce Competency Initiative (FWCI) Framework to identify validated, governmentwide competencies.
- If series coverage is limited, use OPM's MOSAIC competency models or an OPM occupational series competency model, which remain compatible and may continue to be referenced.
- Use any agency-approved competency models or job-analysis-supported frameworks.
- Confirm competencies align with:
 - Duties in the PD
 - Knowledge, skills, abilities, and tasks identified in OPM competency models
 - Competencies referenced in applicable OPM standards and qualification policy

Output: Competencies validated through job analysis and aligned with duties & classification standards

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Competency-Based Classification Process Guidance *(continued)*

STEP 4 – Evaluate the Position Against Grade Criteria

- Match PD duties to grade or factor-level expectations
- Assign the factor level that is fully supported
- Ensure higher-level duties are recurring and significant
- Document rationale for every factor or grade determination

Output: Grade determination with documented justification

STEP 5 – Apply Grading Criteria & Evaluate the Position

- Identify the correct OPM grading method (Factor Evaluation System (FES), narrative guide, flysheet, or related evaluation guide)
- Review applicable factor-level descriptions or grade-level criteria
- Match the position's actual duties—not intent or incumbent performance—to the appropriate factor or grade expectations
- Assign the fully supported factor level (consistent with OPM guidance on matching intent, not word-for-word duties)
- Ensure any higher-level duties are regular and significant, not incidental
- Document justification for each factor or grade determination to support transparency and defensibility

Output: Final grade level with documented, standards-based justification

STEP 6 – Conduct Internal Consistency & Organizational Structure Checks

- Compare with similar positions to ensure grade and series consistency with policy
- Validate appropriate alignment across supervisory chains and career ladders
- Confirm classification decisions do not conflict with agency-wide taxonomy structures or internal competency frameworks used for workforce planning

Output: Structure aligned, consistent classification outcome

STEP 7 – Finalize the Position Description

- Incorporate final series, title, grade, supervisory designation, physical demands, and work environment
- Ensure the PD is clear, current, and meets agency formatting standards
- Document evaluation notes and classification rationale for the record

Output: Final PD ready for supervisory review and approval

STEP 8 – Approve & Record

- Issue the classification decision
- Store PD, evaluation worksheet, and rationale in accordance with agency policy
- Ensure updates occur whenever duties materially change

Output: Official classification recorded and filed