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Subject Matter Expert Evaluation

Assessment Methods

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OPM HR SOLUTIONS
by government, for government

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Introduction

What Is a Subject Matter Expert Evaluation Assessment Method?

A Subject Matter Expert (SME) Evaluation is one of four **Assessment Types** available in USA Staffing, the other three being Questionnaire, Manual, and External (aka USA Hire). An SME Evaluation allows HR Users to interact directly with SMEs who will evaluate applicants using different **Assessment Methods**.

What Assessment Methods Are Available?



The only assessment method currently available under the SME Evaluation assessment type is the Structured Resume Review. We will add additional assessment methods as we continue to refine system functionality.

Structured Resume Review

A specific Assessment Method option under the SME Evaluation Assessment Type is the Structured Resume Review, designed to support a systematic resume review process performed by SMEs. The Structured Resume Review functionality in USA Staffing collects the SMEs' evaluations and justifications, determines if there are discrepancies between SMEs, brings in a tiebreaker SME as needed, and presents the information in an organized way to the HR User. The term 'Structured Resume Review' is also used in a broader sense to refer to an assessment method for screening applicants regardless of the system used.



In this guide, the term 'Structured Resume Review' can refer to **both** an assessment method independent of any system **and** the specific USA Staffing system functionality under an SME Evaluation Assessment Type. When we refer to the USA Staffing system functionality, the term 'Assessment Method' will be capitalized.

This guide focuses on planning and questions to consider when using each Assessment Method. A link to OPM training on how to manage a Structured Resume Review is provided below. A separate resource, the SME Evaluation HR User Guide, explains how to set up and use the SME Evaluation and associated Assessment Method functionality within USA Staffing.

Assessment Methods

Structured Resume Review

Assessment strategies that involve SMEs in the applicant evaluation process can help to reduce sole reliance on self-evaluation questionnaires and promote the use of multiple assessment hurdles. A Structured Resume Review is one way to leverage subject matter expertise in the applicant screening process. Below are questions to consider in deciding whether to include a Structured Resume Review as part of your assessment strategy for a given position.

Questions to Consider in Deciding Whether to Use a Structured Resume Review

What Is a Structured Resume Review?

OPM defines a Structured Resume Review as a screening (pass/fail) assessment whereby a trained panel of two or more subject matter experts (SMEs) follows a systematic process to review an applicant's resume and come to agreement on whether the applicant has the required specialized experience necessary to successfully perform the job. The Structured Resume Review is intended to screen out individuals who do not have the specialized experience required. This method does not identify best qualified applicants, provide a numerical score, or determine a category rating placement.

What Are the Benefits of a Structured Resume Review?

A structured and systematic resume review process that includes a panel of trained raters, clear evaluation criteria, and a standardized process can help agencies screen applicants in a reliable, valid, and effective manner. Agencies can leverage SME technical knowledge to improve the quality of candidates referred to the hiring official. The Structured Resume Review, when implemented consistent with OPM guidance and best practices (see section on available OPM training below), also meets the Executive Order 13932 requirement that applicants must complete one or more assessments that do not rely solely on their self-evaluation.

When Is a Structured Resume Review Recommended?

The nature of the vacancy is important to consider when determining if a Structured Resume Review is appropriate to incorporate into a given assessment strategy. Generally, the Structured Resume Review is recommended only for situations meeting the following criteria.

- Highly specialized or technical jobs for which SMEs are in a better position than HR professionals to interpret experience as described in applicants' resumes.
- Higher graded positions (i.e., GS-12 and above, or equivalent).
- Positions for which there is no education substitution; the applicant can qualify based on specialized experience only.
- Smaller applicant pools or recruitments where there is control over the number of applicants moving forward (i.e., through application caps or a hurdled process) OR Larger recruitments for which multiple hurdles are being applied, multiple selections are being made and/or agencies can dedicate a larger number of SMEs.



Depending on agency policy, your assessment strategy, and other position considerations, agencies can consider using applicant caps, passing scores (based on minimum required proficiency) and multiple hurdles (business necessity cut points) to cull down the applicant pool. See the [Multiple Hurdles Guide](#) and the [Assessment Questionnaires Passing Score FAQs](#) at the [USA Staffing Resource Center](#) for more information.

What Resources Are Required?

Structured Resume Reviews require participation and collaboration among key stakeholders. Before including a Structured Resume Review in your assessment strategy, determine the availability of key stakeholders and other resources/processes to support the reviews. The list below assumes you already have a current job analysis for the target position.

- **Hiring Manager and/or SMEs** – To participate in the development and review of the specialized experience requirements.
- **SMEs** – Assuming use of USA Staffing functionality, a minimum of three¹ SMEs are needed to review and rate the resumes. USA Staffing uses a tiebreaker approach to resolve discrepancies between raters, whereby a third tiebreaker SME is required to review the documentation and make a final determination. Depending on the vacancy, use of more SMEs can help to reduce the burden on any one SME. One or more additional SMEs may be needed in the event an SME needs to recuse themselves from the rating process. SMEs serving as raters are required to attend a training and calibration session.
- **HR Personnel and/or Personnel Psychologists** – To lead development of specialized experience statements and to train SME raters on the resume review process, including a calibration practice exercise. (See training resources described below.)
- **HR Personnel** – To facilitate the overall process and review rating justifications provided by SMEs, including addressing questions and resolving any issues that may arise.
- **Business Processes** – To support identification and scheduling of SMEs, SME training and calibration, review of rating justifications, and protection of personally identifiable information (PII).



A single SME can review a typical resume to evaluate three to four specialized experience statements in about 10 to 15 minutes. Depending on their other responsibilities and the rating timeline, a general rule of thumb is to ask SMEs to rate no more than a maximum of 50 applicants.

Who Can Serve as an SME Rater?

SMEs are generally high-performing incumbents and/or supervisors who are highly knowledgeable about the work performed in the occupation at the target grade level. SMEs need to be at or above the grade level they are representing. It is critical that SMEs have first-hand knowledge of the technical/specialized experience required to be successful in the occupation.

Below is summary of common requirements for SMEs serving as raters for the Structured Resume Review. The requirements may vary depending on an agency's internal HR policies.

- Highly knowledgeable regarding the tasks and competencies needed to be successful in the target position
- Current incumbents or supervisors at or above the grade level of the position being recruited who have been in the position for a minimum of 6 months
- **Not** the selecting official or direct supervisor for the target position
- Representative of the incumbent/supervisor population (e.g., agency, office, demographics)
- **Not** applying for the target position under the current hiring action

¹ USA Staffing functionality will permit a single SME to carry out a resume review. However, this approach is not consistent with OPM guidelines around what constitutes a valid assessment hurdle for purposes of meeting Executive Order 13932.

- Able to articulate key behaviors and experience that differentiate a qualified applicant from an unqualified applicant
- Available to participate fully in the training and resume review process

Is Structured Resume Review Training Available?

Yes. A self-paced web-based Structured Resume Review training course (approximately 3 to 4 hours) is available to all Federal agencies at no charge. The course, not specific to any one talent acquisition system, is designed for experienced HR professionals proficient in:

- Conducting job analyses
- Writing specialized experience statements
- Providing direction to hiring managers/SMEs (e.g., training or focus groups)
- Federal staffing

The training, which includes five lessons, covers both the pre-recruitment and post-announcement phases of the Structured Resume Review process. Participants have an opportunity to measure their understanding through knowledge checks and practical exercises in each section. Resources are provided to assist participants in applying the concepts in real-world situations.

The training is designed to provide participants with the knowledge required to successfully manage a Structured Resume Review process including how to:

- Identify when a Structured Resume Review may be an appropriate part of the assessment strategy for a given vacancy
- Identify and recruit appropriate SMEs
- Collaborate with SMEs to review job analyses and develop/review specialized experience statements
- Conduct or oversee a Structured Resume Review process
- Prepare appropriate rating documentation
- Identify and avoid rater biases and prohibited personnel practices

Any Federal employee with a Federal email address (e.g., .gov, .mil) can access the course by creating an account on the USA Staffing Online Course Portal at <https://usastaffing.usalearning.net/login/index.php>. Supported browsers include Microsoft Edge, Mozilla Firefox, and Google Chrome.

Developing Supporting Content

Specialized Experience Requirements

Specialized experience requirements (aka specialized experience statements), commonly assessed as part of the minimum qualifications for a position, serve as the basis for the Structured Resume Review and supporting documents. Specifically, the specialized experience requirements are listed under Qualifications on the Job Opportunity Announcement (JOA), are included as Minimum Qualification (screen-out) Items on the Assessment Questionnaire (AQ), and serve as the basis for the SME Evaluation Items (also referred to as the evaluation criteria) used in the Structured Resume Review Assessment Method in USA Staffing.

Depending on the position, as well as other assessments being used, specialized experience for most positions can be defined by three to four discrete behaviorally based statements. Generally, applicants must have at least one year (52 weeks) of full-time experience equivalent to the next lower grade level in the Federal service (or comparable level of experience from outside the Federal service) performing each behavior to meet the specialized experience requirements.

Writing effective specialized experience requirements is critical to the success of a Structured Resume Review assessment process. Best practice criteria for writing specialized experience requirements are reviewed below. Additional considerations when developing the JOA, AQ Minimum Qualification Items, and SME Evaluation Items are also discussed.

When writing and reviewing specialized experience requirements with your SMEs, ensure they are based on current job analysis information and that wording for each requirement is:

- Clear, specific, behavioral (observable) and unambiguous.
 - Evaluate every word by questioning, ‘Will it be interpreted the same way by all applicants (and raters)?’
 - Evaluate the action verb by questioning, ‘Is this the behavior we are most interested in verifying?’
- Readily demonstrable and verifiable on the basis of a resume.
 - Identify experience that you can expect to find in a resume.
 - Determine the most appropriate level of specificity for the position. For example, for a GS-2210/14 Information Technology (IT) Product Manager, one might expect to see experience that reflects ‘Managing an IT project involving multiple stakeholder groups.’ However, ‘Developing a project plan and conducting a stakeholder analysis’ may be too narrow.
- Attainable or realistic for applicants applying to the position (i.e., representative of the next lower grade level).
 - Consider experience that applicants at the next lower grade level (or in an equivalent position outside the Federal sector) will have had the opportunity to gain.
- Reflective of critical experience required for entry into the target position (i.e., experience obtained at the next lower grade level).
 - Remember the reference is a minimally competent applicant just entering the target grade. It is not a “super-star.” The reference is not a borderline unsuccessful applicant, either. The reference is a qualified applicant, but at a “minimum” level.
- Non-redundant.
 - Write requirements that are independent and do not overlap with one another.



When developing and reviewing specialized experience requirements with your SMEs, provide them with sample resumes from an announcement for the same position (series/grade) to gauge whether they are able to determine if the resume reflects each specialized experience requirement. If appropriate resumes are not available, ask SMEs to provide you with examples of acceptable language they would expect to see on applicant resumes that would satisfy each specialized experience requirement.

Job Opportunity Announcement

In addition to following best practice when developing the specialized experience requirements to list under the ‘Qualifications’ section of the Job Opportunity Announcement (JOA), there are several other considerations when developing a JOA for a vacancy that includes a Structured Resume Review. First, depending on agency policy and the nature of the announcement, consider if you want to impose a page limit on resumes. Second, inform applicants that a Structured Resume Review assessment process will be used. Finally, inform applicants of information that should be included in their resume. See sample JOA language below.

Sample language for ‘How You Will Be Evaluated’ section:

Structured Resume Review. Subject matter experts (SMEs) will review your resume to determine your technical qualifications for this position based on the required specialized experience. SMEs will review ONLY four (4) pages of your resume, starting at your work experience. SMEs will not review additional information beyond your resume (e.g., cover letter, links embedded in your resume). Applicants passing the structured resume review will move on to the next phase of the assessment process.

Sample language under ‘Required Documents’ section:

A resume which includes a list of all significant jobs held and duties performed, with dates specified in month and year, and indicates hours worked per week. If military or a civilian Federal employee, you must include your rank and/or grade. IMPORTANT NOTE: Only four (4) pages of your resume, starting at your work experience will be reviewed to determine your technical qualifications for this position based on the specialized experience. Additional information beyond your resume (e.g., cover letters, links to additional information) will not be reviewed. In describing your experience, please be clear and specific. We may not make assumptions regarding your experience. Overstating your qualifications and/or experience in your application materials may result in your removal from consideration.

Assessment Questionnaire - Minimum Qualification Items

Specialized experience requirements also serve as the basis for the Minimum Qualifications Items on your Assessment Questionnaire. To maximize clarity, transparency, and accountability, consider presenting each specialized experience requirement as a separate Yes/No item when building the Minimum Qualifications section of your Assessment Questionnaire. See sample language below.

INSTRUCTIONS: Please respond to the following questions regarding the Minimum Qualifications for the Customer Experience Strategist, GS-0301-13 position. To meet the Minimum Qualifications, you must have at least one year (52 weeks, full-time) of specialized experience equivalent to the GS-12 grade level in the Federal service (or comparable level of experience from outside the Federal service) performing the following duties (i.e., you must be able to respond ‘Yes’ to ALL statements below).

SCALE: Yes/No (Default)

1. I have at least one year of experience leading customer experience projects that involve multidisciplinary teams and multiple research methods (e.g., qualitative and quantitative).
2. I have at least one year of experience creating design artifacts (e.g., journey maps, personas, wireframes, storyboards) to improve product or service delivery.
3. I have at least one year of experience facilitating workshops or other interactive sessions using inclusive methods and practices (e.g., interviews, co-design) to build buy-in and gather experience insights among customers/stakeholders.

Subject Matter Expert (SME) Evaluation Items

The SME Evaluation Items serve as the criteria for SME ratings when conducting a Structured Resume Review in USA Staffing. The specialized experience requirements serve as the basis for the SME Evaluation Items. The key difference between the Minimum Qualifications Items and the SME Evaluation Items is that applicants rate themselves on the Minimum Qualifications Items and SMEs rate applicants on the SME Evaluation Items.

When developing the SME Evaluation Items, you will begin each item with the phrase, “Resume reflects at least one year of specialized experience equivalent to the [insert next lower] grade level” (see examples below). You also will be required to include an item header. The item header can be an abbreviated version of the specialized experience requirement (see Sample 1 below). The item header also may be the competency associated with the specialized experience requirement (see Sample 2 below).

Sample 1:

Leading Customer Experience Projects

Resume reflects at least one year of specialized experience equivalent to the GS-12 level leading customer experience projects that involve multidisciplinary teams and multiple research methods (e.g., qualitative and quantitative).

Creating Design Artifacts

Resume reflects at least one year of specialized experience equivalent to the GS-12 level creating design artifacts (e.g., journey maps, personas, wireframes, storyboards) to improve product or service delivery.

Facilitating Workshops

Resume reflects at least one year of specialized experience equivalent to the GS-12 level facilitating workshops or other interactive sessions using inclusive methods and practices (e.g., interviews, co-design) to build buy-in and gather experience insights among customers/stakeholders.

Sample 2:

Microbiology

Resume reflects at least one year of specialized experience equivalent to the GS-12 level planning microbiological field and laboratory investigations involving novel or difficult-to-identify pathogens.

Serotyping

Resume reflects at least one year of specialized experience equivalent to the GS-12 level serotyping immune-based and/or molecular assays to detect emerging threats such as viruses, bacteria, proteins and/or peptides.

Encapsulation

Resume reflects at least one year of specialized experience equivalent to the GS-12 level utilizing nanoparticle and/or microparticle production processes for encapsulation and/or characterization of encapsulated material.

Aerosolization

Resume reflects at least one year of specialized experience equivalent to the GS-12 level aerosolizing nano and/or microencapsulated material.

Planning Implementation of a Structured Resume Review in USA Staffing

As stated in the beginning of this guide, an **SME Evaluation** is the **Assessment Type** that provides the ability to use a **Structured Resume Review Assessment Method** to carry out a Structured Resume Review in USA Staffing.

The system defaults in USA Staffing are designed for compliance with the requirements of Executive Order 13932. At a high level, a Structured Resume Review that meets the Executive Order involves the following steps:

- Two SMEs independently review an applicant's resume against each specialized experience requirement targeted for the resume review.
- Each SME independently determines whether or not the applicant meets each specialized experience requirement based on the content of their resume.
- Each SME provides a justification for each Yes/No rating.
 - When rating 'Yes' (resume reflects the required experience) SMEs indicate where in the resume they found support for their rating (i.e., year(s) experience gained, as well as position title as needed for clarity).
 - When rating 'No' (resume does not reflect the required experience) SMEs indicate that the resume reflects insufficient evidence of the required experience, providing justification needed to help others to retrace their decision.

- If the two SMEs disagree on one or more specialized experience requirement(s), a third tiebreaker SME reviews documentation from the two SMEs to make a final determination.

Important to note, although the steps outlined above reflect the system defaults and are consistent with Executive Order 13932 requirements, USA Staffing functionality offers flexibilities.

When planning to use the SME Evaluation Assessment Type to carry out a Structured Resume Review, keep in mind the following:

- SME Evaluations can be added to an Assessment Package Template or an individual vacancy.
- Assessments of any type must be added to your vacancy before it is released and opened on USAJOBS.
- Your vacancy must accept and require resumes.
- SME Evaluations can be combined with other types of assessments in the same assessment package, including other SME Evaluations, if needed.

See the SME Evaluation HR User Guide for detailed information on carrying out a Structured Resume Review within USA Staffing.