

**OFFICE OF PERSONNEL MANAGEMENT**  
**MERIT SYSTEMS OVERSIGHT AND EFFECTIVENESS**  
**DALLAS OVERSIGHT DIVISION**  
**CLASSIFICATION APPEAL DECISION**

Under section 5112 (b) of title 5, United States Code

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**Appellant:** [the appellant]

**Position:** Secretary (Office Automation), GS-318-5

**Organization:** Cadastral Survey Workgroup  
Support Services  
Colorado State Office  
Bureau of Land Management  
[city, state]

**Decision:** Secretary (Office Automation), GS-318-5  
(Appeal denied)

**OPM decision number:** C-0318-05-03

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/s/ Jodi L. Guss for  
Bonnie J. Brandon  
Classification Appeals Officer

10/08/97  
Date

**Copy of decision sent to:**

[the appellant]

[the appellant's name and address]

[the Director]

National Human Resources Management Center

Bureau of Land Management

Department of the Interior

[location/address]

Mr. Woodrow W. Hooper, Jr.

Director of Personnel

U. S. Department of Interior

Washington, D. C. 20240

## **INTRODUCTION**

On May 20, 1997, the Dallas Oversight Division of the U. S. Office of Personnel Management (OPM) received a classification appeal from [the appellant]. Her position is currently classified as Secretary (OA), GS-318-5. However, she believes its classification should be Secretary (OA), GS-318-7. The position is located in the Cadastral Survey Workgroup, Support Services,[a state office], Bureau of Land Management (BLM), in [location/city/state]. We have accepted and decided her appeal under title 5, United States Code 5112. This is the final administrative decision of the Government, subject to discretionary review only under the conditions and time limits specified in title 5 of the Code of Federal Regulations, sections 511.605 and 511.613, and appendix 4 of the Introduction to the Position Classification Standards.

## **GENERAL ISSUES**

The appellant has several main concerns which she believes should alter the grade level of the position: her collateral duties, her belief that she is doing more work because there are fewer employees, and her interpretation of the “supervisory” status of the four team leaders in the Cadastral Survey Workgroup and the credit that should be given for her work situation.

As verified through the appellant, her supervisor, a BLM National Training Center employee, and the agency’s staffing and classification specialist, the appellant’s collateral duties do not exceed 20% of her time. Since her collateral duties are not regular and recurring, and do not represent the primary purpose of the position, they do not impact the current grade. Work demanding less than a substantial (at least 25 percent) amount of time is not considered in classifying a position.

The appellant believes that her workload is consistently increasing due to the composition of her organization. There are 31 full time permanent positions, and approximately 25 seasonal survey aids and technicians who are hired due to peak workloads in the summer. However, work volume cannot be considered in determining the grade of a position (The Classifier’s Handbook, page 47).

According to the agency’s organizational chart, there is one GS-14 Supervisory Land Surveyor, and four GS-12 Land Surveyors in the Cadastral Survey Workgroup. The GS-12 surveyors are the team leaders over 20 GS-11 Land Surveyors. We will address this topic more in-depth in our discussion of Factor 1, specifically, as it relates to crediting the work situation.

Other issues raised by the appellant are specific to various factors which are used to evaluate the grade level of her position. Therefore, they are more appropriately addressed under the Grade Level Determination section of this decision.

## **POSITION INFORMATION**

The appellant performs a variety of secretarial, clerical, and administrative duties in support of the Cadastral Survey Workgroup. The appellant's duties involve providing staff assistance to the Cadastral Survey Chief, 31 full time permanent positions mostly occupied by land surveyors, and approximately 25 seasonal survey aids and technicians who are hired during peak workloads during the summer months.

Briefly the duties performed by the appellant in support of the Cadastral Survey Workgroup include the following:

- tracks the Cadastral budgets in as many as 50 separate project accounts, and compiles monthly credit card bill reports and vehicle account reports ;
- handles survey protest and appeals files;
- handles the preparation of special instructions and assignment instructions which serve as legal land documents for the land surveyors use ;
- prepares plat filing instructions which are housed in the agency's Public Room, and legal notices of approved surveys required for publication in the Federal Register;
- creates accompanying correspondence for plat and field notes microfilming;
- coordinates the hiring, tracking, and termination of seasonal personnel with the Human Resource Group;
- composes and prepares non-technical group correspondence, forms and other documents utilizing a personal computer and various software programs;
- provides editorial assistance by proofreading correspondence in draft form for typographical accuracy, spelling, punctuation, grammar, and format; and producing a final product ready for signature; and
- opens and distributes mail; arranges for meetings, conferences, and workshops; makes travel arrangements; receives requests for various technical and administrative materials, records, and information from field crew chiefs; and maintains Workgroup files.

The major duties and responsibilities of the position are accurately described in the position description.

## **TITLE AND SERIES DETERMINATION**

The GS-318 Secretary Series includes positions that assist one individual, and in some cases the subordinate staff of the individual, by performing general office work auxiliary to the work of the organization. To be included in this series, a position must be the principal office clerical or administrative support position in the office, operating independently of any other such position in the office. The duties require a knowledge of clerical and administrative procedures and requirements, various office skills, and the ability to apply such skills in a way that increases the effectiveness of others. The position classification standard for the GS-318 series provides for the title Secretary while allowing an appropriate parenthetical addition. The appellant does not question the series or title of her position. We agree with the agency's determination that the position is properly classified to the GS-318 series and titled Secretary (Office Automation). The Office Automation parenthetical title is appropriate since the appellant routinely performs duties using her personal computer.

## **GRADE LEVEL DETERMINATION**

Since application of office automation technology is a recurrent part of the appellant's job, the grade level of these duties was evaluated in accordance with the criteria published in the Office Automation Grade Evaluation Guide, dated November 1990. It was determined that the appellant's office automation duties do not exceed the GS-05 grade level. The grade of the office automation duties does not affect the overall grade of the appellant's position, as determined in the remainder of this decision. Therefore, we will not discuss these duties further.

The position classification standard for the GS-318 Secretary Series (dated January 1979) was used to evaluate the grade level of the position. The standard is written in the Factor Evaluation System (FES) format. The FES format compares the duties and responsibilities of positions with nine factors or conditions that, taken together, measure a position's overall worth. For each factor, the full intent of the level must be met in order to credit the points for that level. If a position fails in any significant aspect to meet a particular level, the point value for the next lower level must be assigned.

The appellant does not dispute the levels and points assigned for factors 5, 6, 7, 8, and 9; consequently, we do not discuss in this decision why we agree with the agency's determination in this regard. The following is our evaluation of this position in terms of factors 1, 2, 3, and 4 of the GS-318 standard.

### **Factor 1 - Knowledge Required by the Position**

This factor measures the nature and extent of information or facts which the secretary must understand to do acceptable work and the nature and extent of skills needed to apply those knowledges. As well as measuring this element, Factor 1 examines the work situation itself. It considers the complexity of the organization served, which affects the extent of office rules, procedures, operations, and priorities the secretary

must apply to maintain a proper and smooth flow of work within the organization. Factor 1 defines four types of knowledge required and three types of work situations. A level is assigned upon application of the appropriate knowledge required and work situation.

Knowledge Type II requires knowledge of an extensive body of rules, procedures, or operations applied to clerical assignments, and knowledge of the organization and functions of the office. Knowledge Type II positions are involved in carrying out and coordinating many different procedures such as obtaining and monitoring a full range of office support services; requesting various types of personnel training actions or services; and preparing a wide variety of recurring reports and documents from information obtained from staff, files, and other sources.

Knowledge Type III positions require, in addition to Type II knowledges, knowledge of duties, priorities, commitments, policies, and program goals of the staff sufficient to perform non-routine assignments. Secretaries at this level are fully responsible for coordinating the work of the office with other offices and for recognizing the need for such coordination in various circumstances.

The appellant has knowledge of bureau manuals, directives, instructional guidelines, privacy and freedom of information acts, and an extensive body of rules and procedures governing the Cadastral Survey Workgroup. She uses this knowledge to perform a wide variety of administrative and secretarial duties for the Cadastral Survey Workgroup which include the following: tracking the budgets; compiling monthly credit card bill and vehicle account reports; handling survey protests, appeals files, and legal land documents which are Special/Assignment Instructions; preparing Plat Filing Instructions for the Public Room and legal notices of approved surveys required for publication in the Federal Register; creating accompanying correspondence for Plat and Field Notes Microfilming; providing assistance to personnel concerning time and attendance procedures, overtime requests, correspondence procedures, and training requirements; providing input for Cadastral employees to the division timekeeper; greeting office visitors; answering the telephone; providing routine information and directing inquiries to the appropriate area; coordinating the hiring, tracking, and termination of seasonal personnel with Human Resources; composing non-technical group correspondence, forms, and other documents using various software programs; providing editorial assistance; and typing procurement requests, personnel actions, training requests, and travel authorizations. These duties occupy most of the incumbent's time and are classified as procedural, routine work of the office. The knowledge required of the appellant meets the knowledge Type II Level.

The appellant believes that Knowledge Type III is required to perform the duties of her position. She cites compiling standard operating procedures (SOP's) for the hiring and termination of seasonal employees; and creating more efficient procedures for handling plat filings and Federal Register submissions as being indicative of regular and recurring assignments which are non-routine in nature. Additionally, when interacting with other personnel to gather information necessary to compile these instructions, she

views these contacts as coordinating the work of the office with the work of other offices.

The appellant's role in the Support Services of the Cadastral Survey Workgroup does not require knowledge equivalent to that described in the standard for Knowledge Type III. The examples provided by the appellant were one time occurrences and are not characteristic of the requirements of her overall work. For the most part, the appellant's work is routine and procedural. Non-routine assignments do not occur on a regular or frequent basis. The level of extensive coordination required for Knowledge Type III is not present in the appellant's duties and responsibilities.

Work Situation A covers organizations that are small and of limited complexity. Although the organization may include several subordinate sections or subgroups, the staff is directed primarily through face-to-face meetings, and internal procedural and administrative controls are simple and informal. Within the supervisor's organization, there are few complicated problems or coordination requiring formal procedures and controls for adequate solution.

In Work Situation B, the staff is organized into subordinate segments which may in turn be further divided. Direction of the staff is exercised through intermediate supervisors, and the subordinate groups differ from each other in such aspects as subject matter, functions, relationships with other organizations, and administrative requirements in ways that place demands upon the secretary that are substantially greater than those described at Work Situation A. Coordination among subordinate units is sufficiently complex to require continuous attention. The presence of subordinate supervisors does not by itself mean that Work Situation B applies.

Also in Work Situation B are organizations described as Work Situation A in terms of internal coordination when they have extensive responsibility for coordinating work outside of the organization. The secretary's role in these organizations requires establishing and maintaining numerous contacts outside of the organization which adds to the complexity of the position.

The Cadastral Survey organization, composed of 31 full time permanent positions and approximately 25 seasonal temporary positions, does not necessarily constitute a small organization. However, it has informal internal administrative and procedural controls and most of the office communication takes place with face-to-face meetings. This is representative of Work Situation A organizations. The appellant's organizational structure is not complicated by the existence of several sections or units with differing functions, subject matter, and administrative requirements, as at Work Situation B.

As mentioned before, some Work Situation A organizations meet the Work Situation B level if they coordinated work with outside organizations. The appellant's organization has contact with several outside organizations, such as county and State agencies, however, her role with these outside groups is involvement in the clerical procedures. When these organizations call Cadastral Survey, she refers the caller to the

appropriate person and only answers basic questions. As explained in the Secretary Series Explanatory Memorandum (dated June 1982), the role of a Work Situation B secretary is in establishing and maintaining numerous outside contacts for the purpose of coordinating substantive program requirements, administrative details, and staff support responsibilities. The appellant's contact with outside organizations does not involve such issues. Although her clerical work involves outside groups and adds to her workload, it does not significantly add to the complexity of her job.

The appellant believes that her organization comes under Work Situation B because of the manner in which her supervisor's position was evaluated against the General Schedule Supervisory Guide. She believes that evaluation justifies the supervisor and the secretary being given credit for the same work situation elements. Regardless of whether the Cadastral Survey Workgroup's Team Leaders are accurately classified as supervisors or team leaders, this organization does not meet the full intent of Work Situation B, as explained above. Work Situation A, therefore, is warranted.

Knowledge Type II in combination with Work Situation A equates to Level 1-3 and is credited 350 points.

## **Factor 2 - Supervisory Controls**

This factor measures the nature and extent of direct or indirect controls exercised by the supervisor, the secretary's responsibility, and the review of completed work.

At level 2-3, the supervisor defines the overall objectives and priorities of the work in the office. The secretary plans and carries out the work of the office and handles problems and deviations in accordance with established instructions, priorities, policies, commitments, and program goals of the supervisor. The secretary at this level screens telephone calls and visitors which can be handled without the supervisor's help and personally answers substantive questions not requiring technical knowledge.

The secretary keeps the supervisor's calendar, scheduling appointments and conferences without prior approval. The secretary at this level also makes necessary arrangements for conferences, including space, time, and contacting participants. The secretary at level 2-3 assembles background material for the supervisor, drafts replies to general inquiries, and reads outgoing correspondence for procedural and grammatical accuracy, returning documents to the originators for corrections when needed. Completed work is evaluated for adequacy, appropriateness, and conformance to established policy.

At level 2-4, the supervisor sets the overall objectives of the work. The secretary and the supervisor, in consultation, develop the guidelines and the work to be done. At this level, the secretary handles a wide variety of situations and conflicts requiring the use of initiative to determine the approach to be taken or methods to be used. This level is most likely found in organizations of such size and scope that many complex office problems arise that cannot be brought to the attention of the supervisor. For example,



the secretary at this level may decide to arrange for a subordinate of the supervisor to represent the organization at a conference. Completed work is reviewed only for overall effectiveness.

The supervisory controls over the appellant meet level 2-3. The appellant works under the general supervision of the Cadastral Survey Chief who defines overall objectives and priorities for the office. She performs her work independently. The appellant plans and carries out the work within the parameters of established instructions. When the appellant is given certain tasks which might deviate from the normal method of completion and a problem develops, she handles it by conferring either with the supervisor, team leaders, or other secretaries. Similar to those responsibilities described at level 2-3, the appellant answers nontechnical questions, arranges conferences, and screens correspondence and reports for procedural and grammatical accuracy. The supervisor reviews the work on the basis of established procedural criteria.

The supervisory controls over the appellant do not meet level 2-4. The appellant is not required to handle a variety of situations and complex office problems. Also her work receives a closer review than that described at level 2-4. Therefore, the position's supervisory controls meet level 2-3 and are credited 275 points.

### **Factor 3 - Guidelines**

This factor considers the nature of guidelines and the judgment needed to apply them. Guides may include reference materials such as dictionaries and style manuals, agency instructions concerning correspondence, and operating procedures of the organization served.

At level 3-2, guidelines typically include dictionaries, style manuals, agency instructions concerning correspondence, and operating policies of the supervisor or organization served. The secretary locates and selects the appropriate guidelines, references, and procedures for application to specific cases. The secretary refers to the supervisor significant proposed deviations or situations to which existing guidelines cannot be applied.

At level 3-3, guidelines include a large body of unwritten policies, precedents, and practices which are not completely applicable to the work or are not specific. Guidelines cover matters relating to judgment, efficiency and relative priorities rather than procedural concerns. The secretary at this level applies and adapts guidelines to specific problems for which the guidelines are not clearly applicable.

Guidelines used by the appellant meet level 3-2. The guidelines include BLM ADP standards and policies, style manuals, software manuals, training and BLM/government publication standards, agency instructions regarding correspondence procedures, time and attendance regulations, Division operating policies, and dictionaries. Judgment is required in locating and selecting the appropriate guidelines, references or procedures.

The appellant believes that she fully meets level 3-3 because of the work she does with the credit card and vehicle reports and the assignment and special instructions. These examples do not demonstrate that the appellant's work in this area is with a large body of unwritten policies or guidelines that are ambiguous and not applicable to the work. Generally, the appellant's work is covered by specific, applicable guidelines and procedures. Therefore, level 3-3 is not met and this factor is assigned Level 3-2 with 125 points.

#### **Factor 4- Complexity**

This factor measures the nature, variety, and intricacy of tasks, steps, processes, or methods in the work performed; the difficulty in identifying what needs to be done; and the difficulty and originality involved in performing the work.

At level 4-2, the secretary's duties involve various related steps, processes, or methods and include a full range of procedural duties in support of the office. Decisions at this level involve various choices requiring the secretary to recognize the existence of and differences among clearly recognizable situations. Decisions are based on knowledge of the procedural requirements of the work coupled with an awareness of the specific functions and staff assignments of the office.

Level 4-3 work includes various duties involving different and unrelated processes and methods. Decisions regarding what needs to be done and how it should be done are based on the secretary's knowledge of the duties, priorities, commitments, policies, and program goals of the supervisor and staff. Decisions involve analysis of the subject, phase, or issues involved in each assignment. The chosen courses of action are selected from many alternatives. An example of work performed at this level is the preparation of one-of-a-kind reports from information in various documents when this requires reading a variety of materials and reports to identify relevant items, and when decisions are based on the relationships between the various types of information.

The complexity of the appellant's position meets level 4-2. She performs a variety of procedural duties in support of the organization. Some of which are preparing recurring reports, tracking budgets in project accounts, preparing survey documents, tracking obligations in reimbursable accounts, correcting errors in coding and filing instructions for highly complicated boundary surveys, and maintaining time and attendance records. Decisions involve various choices within clearly recognizable situations.

The appellant believes that her position meets level 4-3 because of her plat filing and Federal Register responsibilities. The work described by the appellant falls within the context of level 4-2. This work requires actions to be taken by the appellant which differ in sources of information, and kinds of transactions or entries to be made. This and other work of the appellant does not involve different and unrelated processes and methods, thus, not meeting the requirements for level 4-3. We evaluate the complexity of the position at level 4-2, credited with 75 points.

## Summary

The point assignments to the appellant's position are as follows:

	Level	Points
Factor 1, Knowledge Required by the Position	1-3	350
Factor 2, Supervisory Controls	2-3	275
Factor 3, Guidelines	3-2	125
Factor 4, Complexity	4-2	75
Factor 5, Scope and Effect	5-2	75
Factor 6, Personal Contacts	6-2	25
Factor 7, Purpose of Contacts	7-2	50
Factor 8, Physical Demands	8-1	5
Factor 9, Work Environment	9-1	5
Total Points		<hr/> 985

The point total for the nine factors is 985. By comparison to the grade conversion table on page nine of the standard, this total converts to the GS-5 grade level, falling within the point range of 855-1100.

## DECISION

The appellant's position is properly classified as Secretary (Office Automation), GS- 318-5.