

Position Description**PD#:** ER263860**Replaces PD#:** ERS0668**Sequence#:** VARIES**TRAINING INSTRUCTOR (ROTARY WING AIRCRAFT)****GS-1712-09****Servicing CPAC:** FORT EUSTIS, VA**Agency:** VARIES**MACOM:** VARIES**Command Code:** VARIES**Region:** SOUTH CENTRAL**Citation 1:** OPM PCS TRNG INSTRUCT SERIES, GS-1712, MAY 91**Citation 2:** OPM GLG / INSTRUCTIONAL WORK, MAR 89**PD Library PD:** NO**COREDOC PD:** NO**Classified By:** MARK S. JONES, DCA**Classification Date:** 10/10/2007**FLSA:** NON-EXEMPT**Career Program:** 00**Functional Code:** 00**Competitive Area:** VARIES**Competitive Level:** VARIES**Bus Code:** VARIES**PD Status:** VERIFIED**Drug Test Required:** VARIES**Financial Disclosure Required:** NO**Requires Access to Firearms:** VARIES**Position Sensitivity:** VARIES**Emergency Essential:** VARIES**DCIPS PD:** NO**Acquisition Position:** NO**Interdisciplinary:** NO**Target Grade/FPL:** 09**Career Ladder PD:** NO**Duties:**

Supervisory Controls

Works under the general supervision of the Division Chief, Helicopter (Utility or Cargo) Division, Department of Aviation Systems Training, who rates performance and otherwise handles personnel management actions. The supervisor assigns ongoing responsibility for particular blocks of instruction within the UH60 Helicopter Maintenance Repairer (15T or 15U) course. The supervisor in the division provides the basic framework for course coverage and objectives and relies on the incumbent to develop materials, methodology, and instruction without further guidance. Prior to submission for department approval, written materials are discussed among division staff as part of a group process and reviewed by the supervisor for consistency with overall course material, for technical accuracy, and for training accuracy. Instructional work is informally spot-checked by supervisory and other staff and officially monitored by instructional systems specialists for conformance to established material and methodology.

MAJOR DUTIES

Performs training development and instructional work in the Helicopter (Utility or Cargo) Division, Department of Aviation Systems Training (DAST), USAALS. Manages the course material for assigned blocks of instruction within comprehensive courses, provides training materials and aids as needed, conducts platform instruction, and administers practical exercises and examinations for students. Applies a thorough knowledge of rotary wing aircraft systems maintenance. Has the ability to effectively communicate with students.

1. Develops programs of instruction (POIs), lesson plans, advance sheets, practical exercises, and other related materials for student use. This material covers blocks of instruction on aircraft ground maintenance, troubleshooting, and related subjects for rotary wing aircraft in the Aviation Systems field. Ensures relation of materials for each block to remaining portions of applicable military occupational specialty (MOS) qualifying courses. Reviews available materials on subjects provided by manufacturers of aircraft in use; determines desired changes and discusses changes with associates in the division; makes changes in material to include supporting documents, aids and devices, and manner of platform and practical presentations; ensures conformance to applicable format and regulatory guidance. 20%
2. Presents platform and practical instruction to students in a number of MOSs to include conducting conferences, lectures, and other activities and administering practical exercises; assists other instructors in conducting practical exercises and similar activities that require more than one instructor; follows established lesson plans; controls student activities and behavior for effective learning conditions; responds to student reactions, questions, and performance without omitting established objectives; assists individual students experiencing difficulties grasping the material; administers written and practical evaluations; checks on availability and condition of needed equipment. 60%
3. Develops examination questions and "performance-specific" items for use in learning evaluation plans; discusses same with associates and responds to comments from other reviewers and specialties; identifies areas of material, methods, training aids or other elements of the training process in need of revision; provides advice and guidance to associates, students, and graduates on an informal basis. 10%
4. Reviews technical manuals, soldiers manuals, and similar materials developed outside of the department for their treatment of rotary wing systems maintenance and related subjects; ensures consistency and currency of treatment with established positions and accepted developments in the aviation field and/or actual use in field units; identifies contradictory or inconsistent items; identifies impact of document on existing materials, programs, etc.; recommends means to correct, improve, replace, or react to such issues; writes comments for originator's use. 10%

Performs other duties as assigned.

Evaluation:

*Pen & ink changes made by D. Sipes as directed by management. 10/10/2007

EVALUATION STATEMENT

1. JOB NUMBER: ER 263860
2. REFERENCE: USOPM PCS GS-1712, 2/80; GRADE LEVEL GUIDE FOR INSTRUCTIONAL WORK, 3/89.
3. BACKGROUND: This position is located in the Department of Aviation Systems Training (DAST), U.S. Army Aviation Logistics School (USAALS).

RISES & TITLE DETERMINATION: This position functions primarily as an instructor while assisting in course development responsibilities. The position is assigned particular blocks of instruction within a longer course. Position is established to develop and teach programs of instruction on systems maintenance and

related subject for rotary wing aircraft to students.

5. GRADE DETERMINATION: The Grade Level Guide for Instructional Work is proper guide for evaluating grade level of this position. The classification factors used to distinguish between the grade levels are Level of Assignment and Level of Responsibility.

a. Nature of Assignment: The incumbents present assigned Course on a repetitive basis. Participate in the process of development of the Program Of Instruction and is responsible for maintaining assigned portions of the course. The instructors do not do the task analysis; however, they serve as subject matter experts providing information to insure that the correct policies and procedures are adhered to in training.

The duties of this position equate to the GS-09 level of referenced standard where the courses taught cover a wide variety of topics in well-established subject-matter fields including courses in the fundamentals and skills of a technical occupation. Position requires thorough familiarity with the assigned subject matter area and use of a wide range of teaching methods depending on the students learning requirements. The incumbents of this position reviews available materials covering the assigned portions of the course and determines desired changes to their assigned portions of the course which meets the GS-09 level where instructors make substantive recommendations for changes.

When compared to Part II of referenced standard, the incumbents course development duties evaluate at the GS-09 level. They do not meet the GS-11 level where instructional specialist develop complete, full length courses or perform work involving comparable assignments.

b. Level of Responsibility: The incumbent of this position is relied upon to independently perform duties within the basic framework that has been established for course coverage and which has been provided by the supervisor. The objectives, topics to be covered and basic content of the course are established by programs and instructions provided by USAALS. The supervisor is available for advice on unusual or critical problems. The Branch Chief and the division and department training specialist reviews the written materials developed by the instructor. The instructional work is officially monitored and evaluated by instructional specialist. The task analysis for USAALS course is the responsibility of the Directorate of Training Developments (DOTD), however; the instructors do participate in the process by serving as subject matter experts.

The level of responsibility fully meets the GS-09 level as described in referenced standard where instructors independently plan and carry out their training sessions within the prescribed course framework; resolve normal classroom problems, make outside contacts for supplemental information and materials, and etc.

The second example described under Level of Responsibility appears to fit this position. The incumbents participate in the development and maintenance of their assigned portions of the course by providing the subject matter expertise. However, this position does not fully meet the GS-11 level where instructors are free to use such methods, as they believe will be most effective and where instructors are required to meet with representatives of outside organizations in order to obtain additional subject matter information. The incumbents of this position must follow certain process when instructing. They are required to have limited contact with representatives of outside organizations.

The Level of Responsibility exercised by the incumbent in the development of course materials does not need the GS-11 level described in part II of referenced standard. There, specialist are required to independently adjust methods to fit situations different from those in existing guidelines and to frequently establish new contacts within and outside the agency to obtain needed information.

Summary: Since both factors evaluate at the GS-09 level, this position is evaluated at the GS-09 level.

ASSIGNMENT: Training Instructor (Rotary Wind Aircraft), GS-1712-09

FLSA EVALUATION

Foreign Exemption

Liability Pay Exemption for certain Criminal Investigators

Customs Officer/Customs Pilot Exemption

Executive Exemption

Exercises appropriate supervisory responsibility (primary duty)

Customarily and regularly exercises independent judgment

80% test, if applicable

Professional Exemption

Professional work (primary duty)

Intellectual and varied work (more than dealing with procedures/precedents)

Discretion & independent judgment

80% test, if applicable

Administrative Exemption

Primary duty

Policy or

Management or general business or supporting services or

Participation in the executive/administrative functions of a management official

Non-manual work test

Intellectual and significant (more than dealing with procedures/precedents), or
specialized & technical in nature requiring considerable training/experience

Discretion & independent judgment

80% test, if applicable

Comments/Explanations: Does not meet criteria for exemption status.

CONCLUSION: NON- EXEMPT

Position Description

PD#: AC00898

Replaces PD#: AC0475

Sequence#: VARIES

CONTRACT SPECIALIST

GS-1102-13

Installation: US ARMY RESEARCH LABORATORY COMMAND ADELPHI, MD **Major Command:** VARIES
Region: NORTHEAST

Citation 1: OPM PCS CONTRACTING SERIES, GS-1102, DEC 83

PD Library PD: X

COREDOC PD: X

Classified By: ROBERT TOMKO

Classified Date: 02/03/2000

FLSA: EXEMPT

Drug Test Required: VARIES

DCIPS PD: NO

Career Program: 11

Financial Disclosure Required: YES

Acquisition Position: YES

Functional Code:

Requires Access to Firearms: VARIES

Interdisciplinary: NO

Competitive Area: VARIES

Position Sensitivity: VARIES

Target Grade/FPL: 13

Competitive Level: VARIES

Emergency Essential: VARIES

Career Ladder PD: NO

PD Status: VERIFIED

Duties:

This position may have a specific leadership training requirement. Prior to use, a training survey(s) must be filled out.

DUTIES

Serves as Team Leader, Senior Contract Specialist and Lead Negotiator with delegated contracting officer authority for acquisition planning, preparation of price/cost analyses for designated actions, formulating negotiation strategy, developing negotiation objectives, negotiation of all types of contracts research and development, major non systems, and special

operations requirers, the integration of contract negotiation efforts for subsystems, components of the assigned system and production management of the assigned system.

Duties include performing all necessary acquisition functions in accordance with FAR, DFARS, AFARS, and all other applicable regulations and policies. These acquisition functions include:

-Acquisition planning: Generates complete acquisition packages including the performance of requiring element functions where the security of the program

or operation precludes their ability to perform this function.

-Acquisition Execution: Prepares and issues solicitations, negotiation of terms, conditions and price. Performs price and cost analyses, and prepares negotiation positions using technical analysis. Serves as Negotiation Team Leader and spokesperson for the government during complex contract negotiation that commit a sizable portion of the commands resources, coordinates with high level management and arranges for their participation in negotiation conferences, if necessary. Utilizes the assistance of a variety of other specialists (engineers, auditors, logisticians, legal, etc.) in obtaining a meeting of the minds regarding all elements being negotiated. The incumbent must be able to represent the government with industry as a leader of the government teamwork with all requiring and support elements to develop a unified position or an agreement. The incumbent must be able to create the required documentation and get all required approvals.

-Contract Administration: Performs complex administration required by procurement regulations, management of contract administration services performed by other agencies, execution of required contractual modifications, and oversight of contract performance necessary to assure delivery of the supplies or services required by the contract.

-Serves as AMCAC/ARL contract representative to requiring activities and the agencies administering contracts for research and development and major non-systems.

Performs other duties as assigned.

**Factor 1 - Knowledge Required by the Position FL 1-8
1550 points**

Knowledge and skill necessary to negotiate very complex contracts and to develop unique contract types required to accommodate changing business climates, new technology, dynamic market conditions, and economic uncertainties. This requires the development and execution of a comprehensive plan in order to create contractual instruments that will be responsive to long-range programs with substantial number of potential adversities during the pre award and post award phases of the contractual actions.

Knowledge and skill necessary to acquire new systems that expand the limits of existing technology. Strategies must be developed to accommodate the vagaries of intermittent funding, fiscal shortfalls and erratic market conditions. This requires the ability to successfully negotiate large dollar value contracts that contain a multitude of technical complexities that interact with, and react to, the complex pricing structures and arrangements. Must have the ability to discern the consequences of the technical and financial reactions and interactions and be able to direct resources necessary to minimizing the impact of the complexities. Unique features include clauses, provisions, and arrangements that be effective (for both US and foreign government purchases) in handling co-production, simultaneous production of dissimilar system configurations, unusual funding arrangements with foreign countries, and overseas installation and development.

Knowledge and skill sufficient to conduct management reviews on all aspects of procurement functions, and to provide guidance to contractors; knowledge and skill sufficient to serve as a team leader in the evaluation of procurement contracts for compliance with federal and agency or command procurement policies and regulations, (1) small and disadvantaged business policies and regulations (2) general business practices, operations, and structures, (3) the procurement process and regulations, (4) systems, goods, and services being acquired.

Comprehensive knowledge of procurement principles and methods underlying contract types such as cost reimbursement, cost-plus-fixed fee, cost-plus-award fee, cost-plus-incentive fee, fixed-price incentive, fixed price with escalation and firm fixed price. Contracts are normally negotiated.

Comprehensive knowledge of contract administration and termination techniques sufficient to administer and close out contracts.

Knowledge of the regulations and techniques of source selection sufficient to conduct a selection.

Knowledge and skill to perform acquisition functions within strict security constraints and special circumstances. Must be able to understand and implement security, and assure that contractual activities do not compromise the program.

Factor 2 - Supervisory Controls FL 2-4 450 points

Supervisor assigns the work in terms of overall procurement programs to be accomplished. The employee must be able to work in a co-located environment with the requiring element without the immediate availability of a supervisor. The employee, with limited involvement of the supervisor, establishes and executes work schedules, insuring that necessary planning, coordination, approvals, negotiation, and other requirements are completed in a timely manner to prevent delay in award of contracts or any assigned contractual actions. Establishes clear objectives, necessary priorities, and directs resources to achieve these objectives. Submits negotiation plans to supervisor or higher levels for review prior to negotiations. Conducts negotiations independently. Advises supervisors of potential problems or slippages in the program and recommends solutions. Work review is made through status reports prepared by the employee and used primarily by management to keep informed.

Factor 3 - Guidelines FL 3-4 450 points

Guidelines consist of agency and federal contract and procurement regulations, instructions, directives and laws. These guidelines outline general contracting methods, and requirements, but have limited applicability to the wide variety of problems and situations encountered. Employee must exercise experienced judgment and resourcefulness to deviate from or work with available guidelines to create new and individualized methods and procedures for problem solution.

Factor 4 - Complexity FL 4-5 325 points

The work consists of managing overall life cycle acquisition programs (e.g., concept formulation, research, engineering development, full-scale development, pilot production, full scale production, integrated logistics support, and special security operations). Such programs

require various contractual actions performed on a variety of cost and fixed-price type contracts that include such complex terms and conditions as design to cost, life cycle costs, incentive formulas, enforceable warranty provisions, unusual price escalation features and flexible progress payments.

The complexity of the work has as its principal problem the need to take the requirements and inputs of multiple disciplines involved in the Acquisition process and make a single product that conforms to the laws and regulations of the United States. The complexity of the work is impacted by constant changes in the requirements and inputs and the fact that the other disciplines are not familiar with the applicable acquisition laws and regulations. The complexity of the work is further

driven by the need to develop a consensus with other disciplines and the requirement to reach agreement with contractors whose interests are different from the government and who the Contract Specialist does not control.

Factor 5 - Scope and Effect FL 5-4 225 points

The purpose of the work is to plan, establish, negotiate, administer, and evaluate criteria for a wide range of contracts to formulate approaches to problems arising throughout the procurement process when the problems require extensive analysis of a variety of unusual conditions, questions, or issues, to establish procedures for implementing procurement policies or regulations and to assess procurement operations or contractor effectiveness. As contracting officer, the employees recommendations and commitments are acceptable and authoritative and affect accomplishment of the agencies mission, major projects and programs.

Factor 6 - Personal Contacts FL 6-3 60 points

Makes responsible contacts with both Program and Project Managers, higher headquarters liaison personnel, and officials of industry. As a contracting officer, chairs ad hoc negotiation teams comprised of attorneys, engineers, specialist, small business, transportation, packaging, price analysts and auditors. Also industry association representatives designated as liaison for day-to-day contact with the government procurement community.

Contacts within the agency include managers and program official, contract review staff, small and minority business advisor, legal and patent counsel, budget and finance staff, and security.

Factor 7 - Purpose of Contacts FL 7-3 120 points

Contacts are to negotiate the most difficult contracts with industry officials and to resolve major problems which arise during the performance of the contract. Contacts within the agency are to analyze complex procurement issues, advise program officials of procurement procedures, and insure a proper and supportable course of action. Contacts with higher level organizations are to clarify issues surrounding procurements or to respond to requests for information.

Factor 8 - Physical Demands FL 8-1 5 points

The employees work is sedentary but some walking is required.

Factor 9 - Work Environment FL 9-1 5 points

The employees work is normally performed in an office setting. Occasional visits to contractors plants are made to perform fact finding, preaward surveys and reviews.

TOTAL POINTS 3190

The duties and responsibilities of this position require the incumbent to exercise judgment in making or recommending a Government decision or in taking or recommending a Government action in regard to contracting, procurement, auditing, or other responsibilities in which the decision or action has an economic impact on the interests of any nonfederal enterprise. Therefore, the incumbent of this position will be required to file SF 450, Confidential Statement of Affiliations and Financial Interests.

This is not an Acquisition Position.

Evaluation:

EVALUATION STATEMENT

1. FLSA Determination: This position is exempt as specified in Attachment 1 to FPM Bulletin 551-18, paragraph 551,206, 13 Mar 86, which exempts positions meeting the criteria for professional positions.
2. Merit Pay Determination: Not Applicable.

Position Description

PD#: AB00910

Replaces PD#: AB20061

Sequence#: VARIES

MOTOR VEHICLE OPERATOR (MATERIALS HANDLER)

WG-5703-08

Installation: LETTERKENNY DEPOT CHAMBERSBURG, PA

Major Command: VARIES
Region: NORTHEAST

Citation 1: OPM JGS MOTOR VEHICLE OPER, 5703, APR 91

Citation 2: OPM JGS MATERIALS HANDLER, 6907, SEP 90

Citation 3: OPM JGS PACKER, 7002, JUL 95

PD Library PD: NO

COREDOC PD: NO

Classified By: COL HENRY W. SUCHTING, III

Classified Date: 02/10/2000

FLSA: NON-EXEMPT

Drug Test Required: VARIES

DCIPS PD: NO

Career Program: 00

Financial Disclosure Required: NO

Acquisition Position: NO

Functional Code: 00

Requires Access to Firearms: VARIES

Interdisciplinary: NO

Competitive Area: VARIES

Position Sensitivity: VARIES

Target Grade/FPL: 08

Competitive Level: VARIES

Emergency Essential: VARIES

Career Ladder PD: NO

PD Status: VERIFIED

Duties:

The duties of this position require no specific leadership training.

MAJOR DUTIES

1. Motor Vehicle Operator: Operates a variety of vehicles and support units with up to 30 ton capacity (truck tractor w/full trailer, 5/6 ton flats and/or box truck w/forklift trailer, etc.) to transport a variety of ammunition, explosives, missiles, missile components and inert items. Will occasionally drive other types and sizes of vehicles when required by workload. Work situations within the confines of the installation, will require driving in congested industrial areas, various weight limits, multiple types of intersections, sharp curves, steep hills and rural type roadways and the demands of driving on public roads. Transporting of material over public roads and highways will present same condition as the installation. Performs operator maintenance to insure that vehicles are in a safe, efficient and presentable operating condition. Completes trip tickets and reports equipment failure for repair purposes.

Commercial Driver License (CDL) is required for this position. CDL is mandatory within 120 days upon acceptance of the position.

55%

2. Material Handling: Loads and unloads cargo; segregates items according to condition code, lot number, quantity, compatibility, etc./ stores, stacks and palletizes items. Insures proper storage practices performed/ assembles items for movement; selects items for issue or movement. Checks the condition of items before movement; re-warehouses high explosives, ammunition components, guided missiles, rockets, etc. Will assist other personnel in physically handling materials (must be able to lift 70 lbs.) including individual items and munitions (ammo, grenades, bombs, rockets, shells, mortars, bulk explosives, missile containers, components, etc.), and/or boxed or banded materials. Operates various sizes of forklifts, e.g., electric, diesel, or gasoline-powered forklift capable of lifting up to 10,000 pounds, for the movement, loading, unloading, transfer, transport and stacking of ammunition, explosives, missiles, missile components and inert items. Assumes responsibility for proper movement and handling for above operations. Performs preventative maintenance on material handling equipment (MHE). Completes trip tickets and other forms (Ammunition Transfer Records (ATR), Material Release Orders (MRO), etc.) as required. Forklift licenses is required and must be attained within 30 days of employment.

35%

3. Packing: Selects appropriate methods of packing an material to be used in packing on the basis of class of items (classified according to shape, mounting provisions and resistance to shock). Check items received against the accompanying condition of packaging. Notes manner in which items should be wrapped and types of material to be used. Inspects seals and other protective material to insure material provide the protection. Selects the appropriate method of pack; type and size of shipping container; packaging material to insure proper shipping. Packs items in boxes, metal containers or cartons. Insures all containers are marked in AIW 49CFR, MilStd 129 and UN POP Standards.

10%

PERFORMS OTHER DUTIES AS ASSIGNED.

SKILLS AND KNOWLEDGE

Operator must be skilled at coupling and uncoupling the truck tractor and semi-trailer and connecting and disconnecting air brakes and electrical lines.

Skill in the knowledge of correct turning radius for tractor trailers, backing of trailer into loading docks, between trailers and operating in congested areas.

Knowledge of procedures and regulations, military specifications, and the ability to apply that knowledge in the storage of ammunition, explosives, missile and missile components.

Ability to read and work form plans, written instructions, sketches, blueprints, or drawings.

Skill in positioning and securing items and containers in commercial and military carriers according to the capacity of the carrier and the configuration and weight of the shipment.

Ability to use arithmetical principles to insure proper fit; and to compute sizes, weights, and quantities of items in determining the proper arrangement and load capacity.

Knowledge of a wide range of accepted packing containers, protective devices, cushioning materials, methods, and techniques to complete packaging and repackaging.
Ability to determine the materials and methods required to perform packaging, taking into consideration size, shape, type, weight, fragility, mode of transportation and destination of items.

Skill in palletizing, stacking, placing, and arranging items in storage areas, taking into consideration items use, size, shape, quantity, stock number, location, etc.

Ability to operate a fork lifts (up to 50,000 pounds lift capacity) to move, load, unload, transfer, transport, and stack or unstack palletized items in a safe manner.

Knowledge of ammunition, explosives, missile and missile components safety practices to safely perform operations.

RESPONSIBILITY

Supervisor/Leader gives assignments in the form of general instructions on work to be performed. Operator is responsible for the arrangement of cargo, determination of routes and safe operation of the vehicle. Incumbent is expected to read and understand applicable drawings, specifications, and regulations; to plan work sequences and to select tools and materials; and otherwise to carry assignments through to completion, referring only the unusual and difficult problems to supervisor. Guidance consists of the product to be constructed, blocked/braced, or packaged based on special requirements, type of transportation, storage, or planned use and hazardous aspects. Employee works independently in planning and carrying out the work, making technical judgements based on knowledge of specialized techniques within the framework of accepted practices and general instructions. Determines or recommends the extent of repairs required and construction alterations necessary to modify or rework containers. Instructions cover packaging methods and procedures; and offers special instructions on new items not paced before or on special packing problems. Incumbent is relied upon to determine materials, containers, and devices needed to complete the work. Work may be spot checked for compliance with specifications and instructions to ensure that production schedules are maintained.

PHYSICAL EFFORT

Work is generally performed on hard surfaces, uneven ground surfaces, and in areas that require the incumbent to stand, stoop, bend, climb, use excessive arm movement, and work in tiring and uncomfortable positions. Frequent lifting and carrying of parts, equipment, and packed containers weighing up to 70 pounds is required. May occasionally lift heavier items with assistance. Employee is required to wear safety clothing and equipment appropriate for the job and work area where assigned, as directed by the supervisor. The types of protective clothing and equipment include, but area limited to eye, respiratory, foot protection, and protective clothing (gloves, apron, coveralls, etc.). During forklift operation, physical effort is required in braking and steering, manipulation of clutch, shift, lifting and tilting mechanisms.

WORKING CONDITIONS

Work is performed inside shop areas or in partly enclosed areas that are sometimes uncomfortably warm, cool, damp, or drafty; and outside in all kinds of weather. Works in near zero temperatures, with almost constant wind and snow, also is subject to discomfort from heat, high-velocity dry winds, ticks, snakes, etc. May perform work around protruding nail heads, steel banding, broken carrier floors, etc. Frequently exposed to loud noises such as those from power saws, hammers, and nailing machines. Exposed to nose and lung irritations from sawdust, chemically treated pallets and boxes plus particles, nails, staples,

and fasteners; to splinters from handling unfinished wood, and subject to cuts, scratches, and bruises from loading or unloading vehicles. Is also required to work on concrete floors and in areas where there is unpleasant dust, dirt, fumes and noise.

NOTE: Incumbent must be cleared IAW requirements of AR 190-11, Physical Security of Arms, Ammunition, and Explosives (AA&E).

NOTE: Incumbent must meet the requirements of AMCR 350-4, Training and Certification Program for personnel working ammunition operations.

NOTE: Incumbent will be required to successfully complete the General Transportation of Hazardous Materials Course, MTMC II, and keep certification current IAW DOT Regulations, Title 49, and BOE-6000.

This position has critical safety or security responsibilities and as such has been designated as a testing designated position (TDP). As a condition of employment, incumbent of a TDP is subject to a random drug test that occurs without suspicion that a particular individual is using illegal drugs.

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Position Description

FU#: ER148156
Sequence#: VARIES

Replaces PD#:

SUPERVISORY GENERAL SUPPLY SPECIALIST

GS-2001-09

Servicing CPAC: FORT EUSTIS, VA

Agency: VARIES
MACOM: VARIES
Command Code: VARIES

Region: SOUTH CENTRAL

Citation 1: OPM PCS GENERAL SUPPLY SERIES, GS-2001, JUL 92
Citation 2: OPM GENERAL SCHEDULE SUPERVISORY GUIDE, TS-123, APR 98
PD Library PD: NO
COREDOC PD: NO

Classified By: STEVE J. PERGER, JR., DIR
Classified Date: 05/21/2003

FLSA: EXEMPT
Career Program: 13
Functional Code: 00
Competitive Area: VARIES
Competitive Level: VARIES
Bus Code: VARIES
PD Status: VERIFIED

Drug Test Required: VARIES
Financial Disclosure Required: NO
Requires Access to Firearms: VARIES
Position Sensitivity: VARIES
Emergency Essential: VARIES

DCIPS PD: NO
Acquisition Position: NO
Interdisciplinary: NO
Target Grade/FPL: 09
Career Ladder PD: NO

Duties:

CL:

MAJOR DUTIES

Serves as Chief, Logistics Branch within the Reserve Component Support Division (RCS D). Provides assistance to reserve component commanders at all levels in resolving logistics readiness problems. This includes initial identification of the problem, analysis of any systemic causes and development of alternative solutions. Resolves immediate logistics problems through coordination with appropriate reserve component command. Recommends action or changes to policy to achieve improved logistics.

Plans and Directs Operations. Plans activities of the Logistics Branch. Reviews new or changed logistics policies, regulations and procedures, notifying and promoting those changes that specifically improve logistics readiness for reserve units. Coordinates facility engineer utility support, inventory and

financial management, storage management, maintenance, transportation, housekeeping, propositioned reserve stock management aspects of the RC logistics support and missions. Coordinates energy conservation program for the RC command on Annual Training (AT) readiness of equipment in support of RC units. Maintains cognizance of current and evolving logistics policies and procedures from the unit level down to the RC user level. Review and evaluates office operational procedures, supply and maintenance practices employed at the RC user level. Recommends changes to plans or takes required action to assure the RC units with a program objectives are attained. 40%

2. Performs Specialized Tasks.

a. Provides advice, assistance and informal instruction in support of the RC units on Authorized Stockade List (ABC) and Prescribed Load List (PLL) policies and procedures. Provides Logistic Assistance Representatives (LAR) with internal logistic programs such as the LAR, Continuing Education Program (CFP), maintaining a working knowledge of retail supply procedures; i.e., Defense Property Accountability System (DPAC), as well as current and evolving supply policies and procedures contained in DA/DOD regulatory guidance.

b. Serves as RCSD Property Book Officer, is directly responsible for all logistical requirements which encompass property and supply, inventory management including authorization, acquisition, issue, accountability, and documentary control. Uses the Defense Property Accountability System for issue, accountability, and documentary control of all RCSD accountable property. to Maintain U.S. Forces Command (FORSCOM) and Major U.S. Army Reserve Command (MUSARC) property books and related documents for property issued to RCSD for support of RC units. Property book accounting includes keeping accurate records of certain types of property issued to USAR/NG units performing Annual Training (AT) and Inactive Duty Training (IDT) at Forts Eustis and Story. Determines the most efficient support options for eliminating equipment deficiencies and negotiates the most efficient loan of equipment to RC units from other RC units, Equipment Concentration Sights (ECS) and AC units to RC units undergoing AVIDT. Monitors supply operations and supply performance indicators at supported activities with the goal of reducing invalid requisitions and streamlining requisition flow during AT. Serves as the focal point for the coordination of material support and the resolution of problems.

c. Provides AVIDT site support for approximately 150 units undergoing AT/IDT at Forts Eustis/Story. Provides equipment, supplies, clothing, ammunition, expendables and services by USATCFE to RC units. Advises RC units in supply and service matters. Operates satellite supply points as required. Provides assistance to HQ USATCFE proponents in support of approximately 30 ROTC, CAP, BSA, GSA, Federal/State/local policy and other paramilitary units transiting at Forts Eustis/Story annually. Provides logistic service support for approximately 25-30 40 local RC units of USATCFE. Provides barracks, administration and logistics buildings, classrooms and related equipment and services for use by RC units during AVIDT and arranges VOQ with main service for officers. Coordinates Dining Facility support with installation Regional Director of Logistic, Food Service Advisor for all supported customers at Forts Eustis and Story. Advises and assists RC mess teams in managing food service facilities and rations. Coordinates feeding for advance and rear parties and those RC units without dining facility personnel. Maintains approximately 25 items of real estate in readiness for occupancy and utilization, through self-help, requests for preventive maintenance and preparation and submission of work requests. Has continuing responsibility for effective supply support for assigned work operations, projects or programs. Reviews reports, plans and schedules for material support for AT requirements. Develops activity plans that identify actions, responsibilities and schedules that must be met to ensure proper and timely support and follows up with responsible parties to assure that necessary logistics actions are taken during AT/IDT.

d. Provides AVIDT movement planning and coordinates route clearances with Transportation Officer. Provides administrative AVIDT transportation requirements beyond the capability of RC to support and arrange transportation for USAR/NG units conducting AT/IDT at Forts Eustis and Story. Provides vehicle parks and maintenance facilities; requisitions, issues and controls POL and repair parts for use by RC units during AT/IDT. Coordinates general support and backup support maintenance beyond the capability of the RC units. Provides, advises and assists in the maintenance of equipment and vehicles. 20%

5. Performs Supervisory Duties. Supervises 1 civilian employee and 5 military personnel performing

various technical and support duties. Provides operating guidelines for subordinates to achieve established goals and objectives. Assigns and explains work requirements for new or changed programs, functions, goals and processes. Furnishes advice and assistance on technical and administrative problems and shows findings and recommendations of subordinates for soundness and applicability. Initiates personnel actions involved in the recruitment, selection, promotion, transfer, commendation, and discipline of subordinates. Selects employees referred for vacancies in the office. Reviews and certifies job descriptions and prepares performance appraisals. Resolves problems of employee relations and morale, referring with recommendations only the more serious problems to supervisor. Encourages employee suggestions and recommendations on projects and work improvement. Schedules vacations and approves leave of subordinates. Implements provisions of and supports personnel management programs such as Equal Employment Opportunity, Hire-the-Handicapped, Upward Mobility, Labor Management, and Federal Women's Programs. 40%

Performs other duties as assigned.

FACTOR 1. Knowledge Required by the Position Level 1-6 950 pts

- Knowledge of a wide range of well-established and commonly applied procurement, contracting, and supply principles, concepts, and methodologies in property and supply, inventory and storage management, including authorization, acquisition, issue, accountability, documentary control, and the informal property and maintenance support.
- Knowledge of inventory management/property book, in order to serve as Property Book Officer and principle hand receipt holder.
- Knowledge of distribution and storage management in order to evaluate and review existing methods and procedures for receiving, warehousing, rewarehousing, document control, stock selection, issue of property/equipment.
- Knowledge of preservation and packing to determine packing methods for supplies and equipment that are subject to damage.
- Knowledge of supply identification systems in order to describe a full range of items in one or more commodity areas when items are closely similar to a number of other items.
- Skill in searching for and analyzing information to evaluate and revise existing methods and procedures for receiving, warehousing, re-warehousing, document control, stock selection, and issuing.

FACTOR 2. Supervisory Control Level 2-3 275 pts

Works under general supervision of Chief, Reserve Component Support Division (RCSD). Supervisor establishes overall program objectives and in consultation with the C, RCSD, develops the deadlines, projects, and the work to be done. Incumbent plans and carries out assignments resolving most conflicts, which arise; coordinates work with others, as necessary, and keeps the supervisor informed of progress and potentially controversial matters. This position plans and assigns work to be accomplished by subordinates, and performs the full range of supervisory duties. The work is periodically checked to evaluate technical soundness, appropriateness and conformance with policy or requirements of the specific assignment at hand,

FACTOR 3. Guidelines Level 3-3 275 pts

Guidelines regularly used include agency policies, directives, manuals, handbooks, supply regulations, procurement regulations, CTAs, TDAs, and locally developed standing operating procedures. Uses judgment in selecting and interpreting the most appropriate guidelines, adapting as necessary for application to a specific situation. Reviews and studies applicable regulations and guides. Recommends changes to improve the effectiveness or efficiency of supply controls. Establishes or revises operating

procedures to be followed.

FACTOR 4. Complexity Level 4-3 150 pts

Incumbent is responsible for all logistical requirements which encompass procurement, property and supply inventory and storage management, including authorization, acquisition, issue and accountability. Directs all functions of the Logistics Branch. Must determine the suitability and usefulness of existing billeting, administrative, warehousing and dining facilities. Plans the layout of existing billeting, administrative, warehousing and dining facilities. Incumbent evaluates and revises existing methods and procedures for receiving, warehousing, re-warehousing, document; control, stock selection and issuing.

FACTOR 5. Scope and Effect Level 5-3 150 pts

Incumbent performs a combination of material management and material coordination duties involving supply system and control of material and support operations for Reserve Component units during AT/IDT. Provides direct logistic service support to nationwide USAR, ARNG, ROTC, BSA, GSA law enforcement and similar organizations transiting at Forts Eustis/Story. The work determines course of total readiness capabilities for all key RC units and staff agencies to include USARC, FORSCOM, 1st Army, 5th Army, numerous Regional Support Commands, and professional transportation organizations.

FACTORS 6 and 7 Levels 6-2 and 7-b 75 pts

FACTOR 6. Personal Contacts

Contacts are regular and with members outside the organization. Incumbent meets and deals with people working in different functions, missions, and other kinds of supply work. Contacts dealing with supervisor and managerial responsibilities include subordinates within the organization as well as higher ranking Battalion/Company Commanders of RC units whose soldiers are under the incumbent's supervision during AT/IDT.

OR 7. Purpose of Contacts

The purpose of the contacts is to plan coordinate activities, obtain information, resolve problems, and provide advice among managers, supervisors and subordinates. Contacts are primarily for the purpose of providing technical advice and assistance, planning and coordinating work of the Logistics Branch.

FACTOR 8. Physical Demands Level 8-1 5 pts

Work is sedentary in nature, however, some walking, stooping, bending, lifting, and/or standing may be required during a normal workday or while attending meetings and conferences, or visiting other customers/organization on Forts Eustis and Story.

FACTOR 9. Work Environment Level 9-1 5 pts

Work is mainly performed in an office setting.

Total Points: 1885 equates to GS-9

Factors for Supervisory Duties

FACTOR 1 - Program Scope and Effect Level 1-2 350 Pts

a. SCOPE. Performs a combination of material management and material coordination duties involving supply system and control of material and support operations for Reserve Component units during AT/IDT. Provides direct logistic service support to nationwide USAR, ARNG, ROTC, CAP, BSA, GSA law enforcement and similar organizations transiting at Forts Eustis/Story.

b. EFFECT. The work determines course of total readiness capabilities for all key RC units and staff agencies to include ARCOM, GOCOM, MUSARC and professional transportation organizations.

FACTOR 2 - Organizational Setting Level 2-1 100 Pts

This position reports to the Chief, RCSD, who in turn reports to the Director, Plans, Training, Mobilization and Security (DPTMSEC) who is one level below the installation Commanding General; therefore this position is accountable to a position that is two or more below a general officer.

FACTOR 3 - Supervisory and Managerial Authority Exercised Level 3-2c 450 Pts

This position plans and assigns work to be accomplished by subordinates, evaluates work performance, advises and counsels on work and administrative matters, interviews candidates and makes selections, hears and resolves minor employee complaints, effects minor disciplinary actions and recommends more severe actions to higher authority, identifies training and developmental needs, and develops performance standards.

FACTOR 4 - Personal Contacts a & b = 125 Pts

a. Nature of Contacts. Level 4-A2 50 Pts

Contacts dealing with supervisor and managerial responsibilities include subordinates within the organization as well as higher ranking Battalion/Company Commanders of RC units whose soldiers are under the incumbent's supervision during AVIDT.

b. Purpose of Contacts. Level 4-B2 75 Pts

The purpose of the contacts is to plan coordinate activities, obtain information, resolve problems, and provide advice among managers, supervisors and subordinates.

FACTOR 5 - Difficulty of Typical Work Directed Level 5-3 340 Pts

The basic work of the unit is to provide logistical support to a variety of units transiting Forts Eustis/Story. In this regard, the regular and recurring supervision provided is to one Supply NCO, E6, one MVO (Warehouse Wkr/FLO), WG-06, and approximately 5 military personnel E-4 to E-6. The E-6 and WG-06 work equates the GS-05 level; therefore, at least 25% of the work supervised is at that level

FACTOR 6 - Other Conditions Level 6-2 575 Pts

This supervisory has full and final technical authority over the work, which requires extensive coordination within and outside the office to provide logistical and supply services to the reserve units.

Total points: 1940 equates to GS-09

Grade Conversion 1855-2100

Evaluation:

Not Listed

Evaluation:

Not Listed

FLSA Evaluation Outline

PD # _____ PS/Occupation/PB _____

Foreign Exemption

Executive Exemption

- Exercises appropriate supervisory responsibility (primary duty)
- Customarily and regularly exercises independent judgment
- 80% test, **if applicable** (GS-5/6; Sit 1 & 2 WS supervisors; law enforcement & firefighter supervisors thru GS-9)

Professional Exemption

- Professional work (primary duty)
- Intellectual and varied work (more than dealing with procedures/precedents)
- Discretion & independent judgment
- 80% test, if applicable (This virtually never applies since GS-5/6 positions are trainees and other eligible employees are not professional)

Administrative Exemption

- Primary duty
 - Policy **or**
 - Management or general business or supporting services **or**
 - Participation in the executive/administrative functions of a management official

- Nonmanual work test
 - intellectual and significant (more than dealing with procedures/precedents), **or**
 - specialized & technical in nature requiring considerable training/experience
- Discretion & independent judgment
- 80% test, if applicable

Comments/Explanations (State which major duties/job functions are Exempt):

Conclusion:

HOW TO MAKE EXEMPTION STATUS DETERMINATIONS UNDER THE FAIR LABOR STANDARDS ACT (FLSA)

Prepare Analyze Conclude

Prepare

1. *Gather materials.*
 - part 551 of title 5, Code of Federal Regulations
 - exemption criteria summary sheets
 - position description (PD)
 - position classification evaluation statement (eval. statement)
 - position classification standard
2. *Study materials.*
3. *Confirm PD accuracy and validate classification.*

Analyze

1. *Eliminate primary duty tests that are obviously not met.*
2. *Consider which of the remaining tests appear, initially, to be met.*
3. *Summarize the criteria for which you must identify evidence.*
4. *Analyze the PD and eval. statement.*

Conclude

1. *Develop your conclusion.*
2. *Write your FLSA exemption status evaluation statement to support your conclusion.*
3. *Review your written analysis (the FLSA eval. statement) and confirm that the FLSA exemption status determination you made is fully supported.*

Prepare

- Have an up-to-date copy of part 551, subparts A and B, of title 5, Code of Federal Regulations.
- Review 5 CFR 551.202, General principles governing exemptions.
- Review either 5 CFR 551.203, Exemption of General Schedule employees, or 5 CFR 551.204, Exemption of Federal Wage System employees, as appropriate.
- Have up-to-date exemption criteria summary sheets..
- Verify the accuracy of the position description (e.g., interview the incumbent and supervisor) and validate the classification. Remember that the FLSA exemption status is based on the duties the employee *actually performs* (5 CFR 551.202(i)) rather than what is described in the position description.
- Carefully read the position description and position classification evaluation statement. Underline key sentences, phrases, and words.
- Once you have underlined key sentences, phrases, and words in the position description and position classification evaluation statement, you are ready to do your FLSA exemption status determination analysis.

Analyze

To meet the executive exemption criteria, two tests must be met--the primary duty test and the 80 percent test.

To meet the administrative exemption criteria, four tests must be met--the primary duty, nonmanual work, discretion and independent judgment, and 80-percent tests.

To meet the professional exemption criteria, four tests must be met--the primary duty, intellectual and varied work, discretion and independent judgment, and 80-percent tests.

1. Consider the introductory paragraph and the primary duty test of each of the exemption criteria and identify those which are not met. Make a list of what must still be considered.
2. Consider which of the remaining tests appear, initially, to be met --
 - The nonmanual work test of the administrative exemption (5 CFR 551.206(b));
 - The intellectual and varied work of the professional exemption (5 CFR 551.207(b));
 - The discretion and independent judgment of the administrative and professional exemptions (5 CFR 551.206(c) and 551.207(c), respectively); and
 - The 80-percent test of the executive, administrative, and professional exemptions (5 CFR 551.205(b), 551.206(d), and 551.207(d), respectively).

The 80-percent test applies to certain employees.

(1) *For the executive, administrative, and professional exemptions:* Employees in positions properly classified in the General Schedule at GS-5 or GS-6 (or the equivalent level in other comparable white-collar pay systems);

(2) *For the executive exemption only:* Firefighting or law enforcement employees in positions properly classified in the General Schedule at GS-7, GS-8, or GS-9 who are subject to section 207(k) of title 29, United States Code; and

(3) *For the executive exemption only:* Supervisors in positions properly classified in the Federal Wage System below situation 3 of Factor I of the *Federal Wage System Job Grading Standard for Supervisors* (or the equivalent level in other comparable wage systems).

3. Summarize the criteria for which you must identify evidence through a closer reading of the position description and the position classification evaluation statement.
4. Re-read the pertinent criteria and descriptions.
5. Re-read the position description and position classification evaluation statement and annotate them with section and paragraph identification to indicate support for a specific test.
6. Re-read the general principles governing exemptions.

Remember these points:

- Each employee is presumed to be nonexempt.
- Exemption criteria must be narrowly construed.
- If the employee clearly meets the criteria for exemption (5 CFR 551.202(d)) under one or a combination of criteria (5 CFR 551.202(h)), the employee must be designated FLSA exempt.
- If there is reasonable doubt as to whether the employee meets the criteria for exemption, the employee should be designated FLSA nonexempt.

Conclude

Develop your conclusion.

Write your FLSA exemption status evaluation statement to support your conclusion. This evaluation statement should accompany or become part of the position classification evaluation statement.

Review your written analysis (the FLSA eval. statement) and confirm that the FLSA exemption status determination you made is fully supported.

5 CFR 551.202 General principles governing exemptions.

In all exemption determinations, the agency must observe the following principles:

- (a) Each employee is presumed to be FLSA nonexempt unless the employing agency correctly determines that the employee clearly meets one or more of the exemption criteria of this subpart and such supplemental interpretations or instructions issued by OPM.
- (b) Exemption criteria must be narrowly construed to apply only to those employees who are clearly within the terms and spirit of the exemption.
- (c) The burden of proof rests with the agency that asserts the exemption.
- (d) An employee who clearly meets the criteria for exemption must be designated FLSA exempt. If there is a reasonable doubt as to whether an employee meets the criteria for exemption, the employee should be designated FLSA nonexempt.
- (e) There are groups of General Schedule employees who are FLSA nonexempt because they do not fit any of the exemption categories. These groups include the following:
 - (1) Nonsupervisory General Schedule employees in equipment operating and protective occupations, and most clerical occupations (see the definition of *participation in the executive or administrative functions of a management official* in subpart A of this part);
 - (2) Nonsupervisory General Schedule employees performing technician work in positions properly classified below GS-9 (or the equivalent level in other comparable white-collar pay systems) and many, but not all, of those positions properly classified at GS-9 or above (or the equivalent level in other comparable white-collar pay systems); and
 - (3) Nonsupervisory General Schedule employees at any grade level in occupations requiring highly specialized technical skills and knowledges that can be acquired only through prolonged job training and experience, such as the Air Traffic Control series, GS-2152, or the Aircraft Operations series, GS-2181, unless such employees are performing predominantly administrative functions rather than the technical work of the occupation.
- (f) Although separate criteria are provided for the exemption of executive, administrative, and professional employees, those categories are not mutually exclusive. All exempt work, regardless of category, must be considered. The only restriction is that, when the requirements of one category are more stringent, the combination of exempt work must meet the more stringent requirements.
- (g) Failure to meet the criteria for exemption under what might appear to be the most appropriate criteria does not preclude exemption under another category. For example, an engineering technician who fails to meet the professional exemption criteria may be performing exempt administrative work, or an administrative officer who fails to meet the administrative criteria may be performing exempt executive work.
- (h) Although it is normally feasible and more convenient to identify the exemption category, this is not essential. An exemption may be based on a combination of functions, no one of which constitutes the primary duty, or the employee's primary duty may involve two categories which are intermingled and difficult to segregate. This does not preclude designating an employee FLSA exempt, provided the work as a whole clearly meets the other exemption criteria.
- (i) The designation of an employee as FLSA exempt or nonexempt ultimately rests on the duties actually performed by the employee.

5 CFR 551.203 Exemption of General Schedule employees.

(a) *GS-4 or below.* Any employee in a position properly classified at GS-4 or below (or the equivalent level in other comparable white-collar pay systems) is nonexempt, unless the employee is subject to the foreign exemption in § 551.209.

(b) *GS-5 or above.* Any employee in a position properly classified at GS-5 or above (or the equivalent level in other comparable white-collar pay systems) is exempt only if the employee is an executive, administrative, or professional employee as defined in this subpart, unless the employee is subject to § 551.208 (the effect of performing temporary work or duties on FLSA exemption status) or § 551.209 (the foreign exemption).

5 CFR 551.204 Exemption of Federal Wage System employees

(a) *Nonsupervisory.* A nonsupervisory employee in the Federal Wage System or in other comparable wage systems is nonexempt, unless the employee is subject to § 551.208 (the effect of performing temporary work or duties on FLSA exemption status) or § 551.209 (the foreign exemption).

(b) *Supervisory.* A supervisory employee in the Federal Wage System or in other comparable wage systems is exempt only if the employee is an executive employee as defined in § 551.205, unless the employee is subject to § 551.208 (the effect of performing temporary work or duties on FLSA exemption status) or § 551.209 (the foreign exemption).

5 CFR 551.205 Executive exemption criteria.

must meet 205 Introduction and
PDT – both 205(a)(1) and (a)(2) and
80% test, if applicable – 205(b)

An *executive employee* is a supervisor or manager who manages a Federal agency or any subdivision thereof (including the lowest recognized organizational unit with a continuing function) and customarily and regularly directs the work of subordinate employees and meets both of the following criteria:

(a) *Primary duty test.* The primary duty test is met if the employee--

(1) Has authority to make personnel changes that include, but are not limited to, selecting, removing, advancing in pay, or promoting subordinate employees, or has authority to suggest or recommend such actions with particular consideration given to these suggestions and recommendations; and

(2) Customarily and regularly exercises discretion and independent judgment in such activities as work planning and organization; work assignment, direction, review, and evaluation; and other aspects of management of subordinates, including personnel administration.

(b) *80-percent test.* In addition to the primary duty test that applies to all employees, the following employees must spend 80 percent or more of the worktime in a representative workweek* on supervisory and closely related work* to meet the 80-percent test*:

(1) Employees in positions properly classified in the General Schedule at GS-5 or GS-6 (or the equivalent level in other comparable white-collar pay systems);

(2) Firefighting or law enforcement employees in positions properly classified in the General Schedule at GS-7, GS-8, or GS-9 who are subject to section 207(k)* of title 29, United States Code; and

(3) Supervisors in positions properly classified in the Federal Wage System below situation 3 of Factor I of the *Federal Wage System Job Grading Standard for Supervisors* (or the equivalent level in other comparable wage systems).

Definitions

Customarily and regularly means a frequency which must be greater than occasional but which may be less than constant. For example, the requirement in § 551.205(a)(2) will be met by an employee who normally and recurrently exercises discretion and independent judgment in the day-to-day performance of duties.

Discretion and independent judgment means work that involves comparing and evaluating possible courses of conduct, interpreting results or implications, and independently taking action or making a decision after considering the various possibilities. However, firm commitments or final decisions are not necessary to support exemption. The "decisions" made as a result of the exercise of independent judgment may consist of *recommendations for action* rather than the actual taking of action. The fact that an employee's decisions are subject to review, and that on occasion the decisions are revised or reversed after review, does not mean that the employee is not exercising discretion and independent judgment of the level required for exemption. Work reflective of discretion and independent judgment must meet the three following criteria:

(1) The work must be sufficiently complex and varied so as to customarily and regularly require discretion and independent judgment in determining the approaches and techniques to be used, and in evaluating results. This precludes exempting an employee who performs work primarily requiring skill in applying standardized techniques or knowledge of established procedures, precedents, or other guidelines which specifically govern the employee's action.

(2) The employee must have the authority to make such determinations during the course of assignments. This precludes exempting trainees who are in a line of work which requires discretion but who have not been given authority to decide discretionary matters independently.

(3) The decisions made independently must be significant. The term "significant" is not so restrictive as to include only the kinds of decisions made by employees who formulate policies or exercise broad commitment authority. However, the term does not extend to the kinds of decisions that affect only the procedural details of the employee's own work, or to such matters as deciding whether a situation does or does not conform to clearly applicable criteria.

Primary duty typically means the duty that constitutes the major part (over 50 percent) of an employee's work. A duty constituting less than 50 percent of the work may be credited as the primary duty for exemption purposes provided that duty--

- (1) Constitutes a substantial, regular part of a position;
- (2) Governs the classification and qualification requirements of the position; and
- (3) Is clearly exempt work in terms of the basic nature of the work, the frequency with which the employee must exercise discretion and independent judgment, and the significance of the decisions made.

Recognized organizational unit means an established and defined organizational entity which has regularly assigned employees and for which a supervisor is responsible for planning and accomplishing a continuing workload. This distinguishes supervisors from leaders who head temporary groups formed to perform assignments of limited duration.

* see page titled "80 Percent Test"

5 CFR 551.206 Administrative exemption criteria.

must meet 206 Introduction and
PDT – either 206(a)(1) or (2) or (3) and
NWT – either 206(b)(1) or (2) and
DIJT – 206(c) and
80% test, if applicable – 206(d)

An *administrative employee* is an advisor or assistant to management, a representative of management, or a specialist in a management or general business function or supporting service and meets all four of the following criteria:

(a) *Primary duty test.* The primary duty test is met if the employee's work--

- (1) Significantly affects the formulation or execution of management programs or policies; or
- (2) Involves management or general business functions or supporting services of substantial importance to the organization serviced; or
- (3) Involves substantial participation in the executive or administrative functions of a management official.

(b) *Nonmanual work test.* The employee performs office or other predominantly nonmanual work which is--

- (1) Intellectual and varied in nature; or
- (2) Of a specialized or technical nature that requires considerable special training, experience, and knowledge.

(c) *Discretion and Independent Judgment test.* The employee frequently exercises discretion and independent judgment, under only general supervision, in performing the normal day-to-day work.

(d) *80-percent test.* In addition to the primary duty test that applies to all employees, General Schedule employees in positions properly classified at GS-5 or GS-6* (or the equivalent level in other comparable white-collar pay systems) must spend 80 percent or more of the worktime in a representative workweek* on administrative functions* and work that is an essential part of those functions to meet the 80-percent test.*

Definitions

Discretion and independent judgment means work that involves comparing and evaluating possible courses of conduct, interpreting results or implications, and independently taking action or making a decision after considering the various possibilities. However, firm commitments or final decisions are not necessary to support exemption. The "decisions" made as a result of the exercise of independent judgment may consist of *recommendations for action* rather than the actual taking of action. The fact that an employee's decisions are subject to review, and that on occasion the decisions are revised or reversed after review, does not mean that the employee is not exercising discretion and independent judgment of the level required for exemption. Work reflective of discretion and independent judgment must meet the three following criteria:

(1) The work must be sufficiently complex and varied so as to customarily and regularly require discretion and independent judgment in determining the approaches and techniques to be used, and in evaluating results. This precludes exempting an employee who performs work primarily requiring skill in applying standardized techniques or knowledge of established procedures, precedents, or other guidelines which specifically govern the employee's action.

(2) The employee must have the authority to make such determinations during the course of assignments. This precludes exempting trainees who are in a line of work which requires discretion but who have not been given authority to decide discretionary matters independently.

(3) The decisions made independently must be significant. The term "significant" is not so restrictive as to include only the kinds of decisions made by employees who formulate policies or exercise broad commitment authority. However, the term does not extend to the kinds of decisions that affect only the procedural details of the employee's own work, or to such matters as deciding whether a situation does or does not conform to clearly applicable criteria.

Formulation or execution of management programs or policies means work that involves management programs and policies which range from broad national goals expressed in statutes or Executive orders to specific objectives of a small field office. Employees make policy decisions or participate indirectly, through developing or recommending proposals that are acted on by others. Employees significantly affect the execution of management programs or policies typically when the work involves obtaining compliance with such policies by other individuals or organizations, within or outside of the Federal Government, or

making significant determinations furthering the operation of programs and accomplishment of program objectives. Administrative employees engaged in such work typically perform one or more phases of program management (that is, planning, developing, promoting, coordinating, controlling, or evaluating operating programs of the employing organization or of other organizations subject to regulation or other controls).

Management or general business function or supporting service, as distinguished from production functions, means the work of employees who provide support to line managers.

(1) These employees furnish such support by--

- (i) Providing expert advice in specialized subject matter fields, such as that provided by management consultants or systems analysts;
- (ii) Assuming facets of the overall management function, such as safety management, personnel management, or budgeting and financial management;
- (iii) Representing management in such business functions as negotiating and administering contracts, determining acceptability of goods or services, or authorizing payments; or
- (iv) Providing supporting services, such as automated data processing, communications, or procurement and distribution of supplies.

(2) Neither the organizational location nor the number of employees performing identical or similar work changes management or general business functions or supporting services into production functions. The work, however, must involve substantial discretion on matters of enough importance that the employee's actions and decisions have a noticeable impact on the effectiveness of the organization advised, represented, or serviced.

Participation in the executive or administrative functions of a management official means the participation of employees, variously identified as secretaries, administrative or executive assistants, aides, etc., in portions of the managerial or administrative functions of a supervisor whose scope of responsibility precludes personally attending to all aspects of the work. To support exemption, such employees must be delegated and exercise substantial authority to act for the supervisor in the absence of specific instructions or procedures, and take actions which significantly affect the supervisor's effectiveness.

Primary duty typically means the duty that constitutes the major part (over 50 percent) of an employee's work. A duty constituting less than 50 percent of the work may be credited as the primary duty for exemption purposes provided that duty--

- (1) Constitutes a substantial, regular part of a position;
- (2) Governs the classification and qualification requirements of the position; and
- (3) Is clearly exempt work in terms of the basic nature of the work, the frequency with which the employee must exercise discretion and independent judgment, and the significance of the decisions made.

Work of an intellectual nature means work requiring general intellectual abilities, such as perceptiveness, analytical reasoning, perspective, and judgment applied to a variety of subject matter fields, or work requiring mental processes which involve substantial judgment based on considering, selecting, adapting, and applying principles to numerous variables. The employee cannot rely on standardized application of established procedures or precedents, but must recognize and evaluate the effect of a continual variety of conditions or requirements in selecting, adapting, or innovating techniques and procedures, interpreting findings, and selecting and recommending the best alternative from among a broad range of possible actions.

Work of a specialized or technical nature means work which requires substantial specialized knowledge of a complex subject matter and of the principles, techniques, practices, and procedures associated with that subject matter field. This knowledge characteristically is acquired through considerable on-the-job training and experience in the specialized subject matter field, as distinguished from professional knowledge characteristically acquired through specialized academic education.

* see page titled "80 Percent Test"

5 CFR 551.207 Professional exemption criteria.

must meet 207 Introduction and
PDT – either 207(a)(1) or (2) or (3) and
IVWT – either 207(b)(1) or (2) and
DIJT – 207(c) and
80% test, if applicable – 207(b)

A *professional employee* is an employee who meets all of the following criteria, or any teacher who is engaged in the imparting of knowledge or in the administration of an academic program in a school system or educational establishment.

(a) *Primary duty test.* The primary duty test is met if the employee's work consists of--

(1) Work that requires knowledge in a field of science or learning customarily and characteristically acquired through education or training that meets the requirements for a bachelor's or higher degree, with major study in or pertinent to the specialized field as distinguished from general education; or is performing work, comparable to that performed by professional employees, on the basis of specialized education or training and experience which has provided both theoretical and practical knowledge of the specialty, including knowledge of related disciplines and of new developments in the field; or

(2) Work in a recognized field of artistic endeavor that is original or creative in nature (as distinguished from work which can be produced by a person endowed with general manual or intellectual ability and training) and the result of which depends on the invention, imagination, or talent of the employee; or

(3) Work that requires theoretical and practical application of highly-specialized knowledge in computer systems analysis, programming, and software engineering or other similar work in the computer software field. The work must consist of one or more of the following:

(i) The application of systems analysis techniques and procedures, including consulting with users, to determine hardware, software, or system functional specifications; or

(ii) The design, development, documentation, analysis, creation, testing, or modification of computer systems or programs, including prototypes, based on and related to user or system design specifications; or

(iii) The design, documentation, testing, creation, or modification of computer programs related to machine operating systems; or

(iv) A combination of the duties described in paragraphs (a)(3)(i), (a)(3)(ii), and (a)(3)(iii) of this section, the performance of which requires the same level of skills.

(b) *Intellectual and varied work test.* The employee's work is predominantly intellectual and varied in nature, requiring creative, analytical, evaluative, or interpretative thought processes for satisfactory performance.

(c) *Discretion and independent judgment test.* The employee frequently exercises discretion and independent judgment, under only general supervision, in performing the normal day-to-day work.

(d) *80-percent test.* In addition to the primary duty test that applies to all employees, General Schedule employees in positions properly classified at GS-5 or GS-6* (or the equivalent level in other comparable white-collar pay systems), must spend 80 percent or more of the worktime in a representative workweek* on professional functions* and work that is an essential part of those functions to meet the 80-percent test*.

Definitions

Primary duty typically means the duty that constitutes the major part (over 50 percent) of an employee's work. A duty constituting less than 50 percent of the work may be credited as the primary duty for exemption purposes provided that duty--

- (1) Constitutes a substantial, regular part of a position;
- (2) Governs the classification and qualification requirements of the position; and
- (3) Is clearly exempt work in terms of the basic nature of the work, the frequency with which the employee must exercise discretion and independent judgment, and the significance of the decisions made.

Discretion and independent judgment means work that involves comparing and evaluating possible courses of conduct, interpreting results or implications, and independently taking action or making a decision after considering the various possibilities. However, firm commitments or final decisions are not necessary to support exemption. The "decisions" made as a result of the exercise of independent judgment may consist of *recommendations for action* rather than the actual taking of action. The fact that an employee's decisions are subject to review, and that on occasion the decisions are revised or reversed after review, does not mean that the employee is not exercising discretion and independent judgment of the level required for exemption. Work reflective of discretion and independent judgment must meet the three following criteria:

- (1) The work must be sufficiently complex and varied so as to customarily and regularly require discretion and independent judgment in determining the approaches and techniques to be used, and in evaluating results. This precludes exempting an employee who performs work primarily requiring skill in applying standardized techniques or knowledge of established procedures, precedents, or other guidelines which specifically govern the employee's action.
- (2) The employee must have the authority to make such determinations during the course of assignments. This precludes exempting trainees who are in a line of work which requires discretion but who have not been given authority to decide discretionary matters independently.
- (3) The decisions made independently must be significant. The term "significant" is not so restrictive as to include only the kinds of decisions made by employees who formulate policies or exercise broad commitment authority. However, the term does not extend to the kinds of decisions that affect only the procedural details of the employee's own work, or to such matters as deciding whether a situation does or does not conform to clearly applicable criteria.

Work of an intellectual nature means work requiring general intellectual abilities, such as perceptiveness, analytical reasoning, perspective, and judgment applied to a variety of subject matter fields, or work requiring mental processes which involve substantial judgment based on considering, selecting, adapting, and applying principles to numerous variables. The employee cannot rely on standardized application of established procedures or precedents, but must recognize and evaluate the effect of a continual variety of conditions or requirements in selecting, adapting, or innovating techniques and procedures, interpreting findings, and selecting and recommending the best alternative from among a broad range of possible actions.

* see page titled "80 Percent Test"

80-Percent Test

5 CFR 551.205 Executive exemption criteria.

(b) *80-percent test.* In addition to the primary duty test that applies to all employees, the following employees must spend 80 percent or more of the worktime in a representative workweek on supervisory and closely related work to meet the 80-percent test:

(1) Employees in positions properly classified in the General Schedule at GS-5 or GS-6 (or the equivalent level in other comparable white-collar pay systems);

(2) Firefighting or law enforcement employees in positions properly classified in the General Schedule at GS-7, GS-8, or GS-9 who are subject to section 207(k) of title 29, United States Code; and

(3) Supervisors in positions properly classified in the Federal Wage System below situation 3 of Factor I of the *Federal Wage System Job Grading Standard for Supervisors* (or the equivalent level in other comparable wage systems).

5 CFR 551.206 Administrative exemption criteria.

(d) *80-percent test.* In addition to the primary duty test that applies to all employees, General Schedule employees in positions properly classified at GS-5 or GS-6 (or the equivalent level in other comparable white-collar pay systems) must spend 80 percent or more of the worktime in a representative workweek on administrative functions and work that is an essential part of those functions to meet the 80-percent test.

5 CFR 551.207 Professional exemption criteria.

(d) *80-percent test.* In addition to the primary duty test that applies to all employees, General Schedule employees in positions properly classified at GS-5 or GS-6 (or the equivalent level in other comparable white-collar pay systems), must spend 80 percent or more of the worktime in a representative workweek on professional functions and work that is an essential part of those functions to meet the 80-percent test.

Definitions

Supervisory and closely related work means work that is included in the calculation of exempt work for supervisory positions.

(1) Work is considered closely related to exempt supervisory work if it contributes to the effective supervision of subordinate workers, or the smooth functioning of the unit supervised, or both. Examples of closely related work include the following:

- (i) Maintaining various records pertaining to workload or employee performance;
- (ii) Performing setup work that requires special skills, typically is not performed by production employees in the occupation, and does not approach the volume that would justify hiring a specially trained employee to perform; and
- (iii) Performing infrequently recurring or one-time tasks which are impractical to delegate because they would disrupt normal operations or take longer to explain than to perform.

(2) Activities in which both workers and supervisors are required to engage themselves are considered to be closely related to the primary duty of the position, for example, physical training during tours of duty for firefighting and law enforcement personnel.

Essential part of administrative or professional functions means work that is included as an integral part of administrative or professional exempt work. This work is identified by examining the processes involved in performing the exempt function. For example, the processes involved in evaluating a body of information include collecting and organizing information; analyzing, evaluating, and developing conclusions; and frequently, preparing a record of findings and conclusions. Often collecting or compiling information and preparing reports or other records, if divorced from the evaluative function, are nonexempt tasks. When an employee who performs the evaluative functions also performs some or all of these related steps, all such work (for example, collecting background information, recording test results, tabulating data, or typing reports) is included in the employee's exempt duties.

Essential part of administrative or professional functions means work that is included as an integral part of administrative or professional exempt work. This work is identified by examining the processes involved in performing the exempt function. For example, the processes involved in evaluating a body of information include collecting and organizing information; analyzing, evaluating, and developing conclusions; and frequently, preparing a record of findings and conclusions. Often collecting or compiling information and preparing reports or other records, if divorced from the evaluative function, are nonexempt tasks. When an employee who performs the evaluative functions also performs some or all of these related steps, all such work (for example, collecting background information, recording test results, tabulating data, or typing reports) is included in the employee's exempt duties.

Worktime, for the purpose of determining FLSA exemption status, means time spent actually performing work. This excludes periods of time during which an employee performs no work, such as standby time, sleep time, meal periods, and paid leave.

Worktime in a representative workweek means the average percentages of worktime over a period long enough to even out normal fluctuations in workloads and be representative of the job as a whole.

Workweek means a fixed and recurring period of 168 hours--seven consecutive 24-hour periods. It need not coincide with the calendar week but may begin on any day and at any hour of a day. For employees subject to part 610 of this chapter, the workweek shall be the same as the administrative workweek defined in § 610.102 of this chapter.

Section 7(k) of the Fair Labor Standards Act of 1938, as amended--

(k)⁵⁸ No public agency shall be deemed to have violated subsection (a) with respect to the employment of any employee in fire protection activities or any employee in law enforcement activities (including security personnel in correctional institutions) if --

(1) in a work period of 28 consecutive days the employee receives for tours of duty which in the aggregate exceed the lesser of (A) 216 hours, or (B) the average number of hours (as determined by the Secretary pursuant to Section 6(c)(3) of the Fair Labor Standards Amendments of 1974)⁵⁹ in tours of duty of employees engaged in such activities in work periods of 28 consecutive days in calendar year 1975; or

(2) in the case of such an employee to whom a work period of at least 7 but less than 28 days applies, in his work period the employee receives for tours of duty which in the aggregate exceed a number of hours which bears the same ratio to the number of consecutive days in his work period as 216 hours (or if lower, the number of hours referred to in clause (B) of paragraph (1)) bears to 28 days, compensation at a rate not less than one and one-half times the regular rate at which he is employed.

58 Effective January 1, 1975, the complete overtime exemption provided by section 6(c)(2)(A) of the Fair Labor Standard Amendments of 1974 was replaced by the more limited exemption in section 7(k). The present overtime standard--the lesser of 216 hours or the average number of hours (as determined by the Secretary of Labor) in tours of duty of employees in work periods of 28 consecutive days--became effective January 1, 1978. During calendar year 1977 the overtime standard was 216 hours, during 1976 the overtime standard was 232 hours, and during 1975 the overtime standard was 240 hours. The complete overtime exemption remains applicable only to public agencies employing less than 5 employees in fire protection or law enforcement activities. See section 13(b)(20), *infra*.

59 The results of the Secretary's study were published in the Federal Register on September 8, 1983. The Secretary determined hours standards for law enforcement employees at 171 and for fire protection employees at 212 in a 28-day period (48 FR 40518).

7

Position Description

PD#: ER304874
Sequence#: VARIES

Replaces PD#:

BUDGET ANALYST

YA-0560-02

Servicing CPAC: FORT EUSTIS, VA

Agency: VARIES
MACOM: VARIES
Command Code: VARIES

Region: SOUTH CENTRAL

Citation 1: DOD CIVILIAN PERSONNEL MANUAL 1400.25-M, SUBCHAPTER 1920
PD Library PD: NO
COREDOC PD: NO

Classified By: DCA MANAGER
Classified Date: 02/02/2009

FLSA: EXEMPT
Career Program: 11
Functional Code: 00
Competitive Area: VARIES
Competitive Level: VARIES

Drug Test Required: VARIES
Financial Disclosure Required: NO
Requires Access to Firearms: VARIES
Position Sensitivity: VARIES
Emergency Essential:
[]

DCIPS PD: NO
Acquisition Position: NO
Interdisciplinary: NO
Target Grade/FPL: 02
Career Ladder PD: NO

Bus Code: VARIES
PD Status: VERIFIED

Personnel Reliability Position: VARIES

Information Assurance: N

Duties:

DUTIES:

Serves as budget analyst with responsibility to perform various PPBES functions involving the formulation, justification, and execution of budgets for assigned activities, programs, or projects. This work requires knowledge and skill in the application of related laws, regulations, policies, precedents, methods and techniques of budgeting and budget execution.

MAJOR DUTIES:

1. Responsible for providing input to higher headquarters for the command budget or a portion thereof. Is responsible for administering assigned portions of the organization's budget for one or more funds (i.e., OMA, GWOT, OPA, etc.) or projects. Analyzes higher headquarters program and budgetary guidance. Implements budget policy and procedures. Reviews, analyzes, edits, and consolidates budget submissions. Identifies requirements shortfalls and tradeoffs and prepares appropriate supporting documentation. Proposes alternative methods of financing unfunded requirements. Develops narrative justification

Position Description

statements and presentation material for budget submissions and re-programming requests. Develops detailed programming and financial planning justification and documentation for inclusion in the Program Objectives Memorandum (POM) and Command Budget Estimate (CBE) budget submissions of higher headquarters. Attends presentations at higher headquarters to defend estimates, answer specific questions, and provide clarification as required. Plans, develops, implements, and maintains budget/financial systems.

2. Responsible for executing assigned portions of the organization's budget. Identifies and analyzes spending trends, obligations, expenditures and reimbursements. Monitors budget levels to ensure legal/efficient use of funding. Receives approved fund targets for assigned account(s). Allocates funds to individual activities/functional areas based on an analysis of activity budget estimates, historical expenditures, projected workload, and approved funding. Monitors and reviews obligations, expenditures, reimbursable orders, requests for allotments, etc. through examination of accounting records, continuing dialogue with program officials and their staffs, and review of various documentation. Prepares a variety of reports covering the status of funds, expenses, and obligations, as required by higher headquarters. Evaluates the effect of cost and program changes on the budget execution process. Analyses productivity, workload and program accomplishments. Reports the need for transfer of funds between object class and line item accounts under assigned budget accounts. Participates in the justification and prioritization of unfinanced requirements. Executes fund control responsibilities for Operations and Maintenance, Army (OMA) and other appropriated funds received to include certifying funds availability on all obligation documents. Monitors the organization's budget and participates in the full scope of budget execution phases. Certifies, monitors, and tracks all commitments and obligations for assigned accounts. Verifies that obligations and expenditures are valid and processed timely into financial management systems. Participates in year-end closing to ensure proper and full use of provided funds, with no anti-deficiency violations. Maintains local budget/financial systems.

3. Provides financial advisory services for assigned portions of the command budget. Provides management with financial information such as: financial reports showing the status of commitments, obligations, and disbursements of funds; trend analyses of rates of expenditures, comparisons of actual performance to the financial plan and identification of variances. Serves as a financial consultant to management on issues such as: budgeting strategies and techniques; use of financial management products; resource distribution; program priorities; resource execution, financial forecasts and projections; and development of annual and long-range financial plans.

4. Tracks major funding issues for the organization. Serves as a technical expert on all financial regulations, specific Title 10 requirements, and the Investment (OPA) versus Expense (OMA) procurement regulation. Prepares monthly reports covering status of funds by operation as required.

Performs other duties as assigned.

NOTE: SECRET Clearance required.

KNOWLEDGE REQUIRED BY THE POSITION:

Comprehensive knowledge and understanding of the agency budget formulation process in order to assure that budget forecasts, estimates, and submissions conform to requirements, guidelines, and financial objectives of assigned funds.

Detailed and practical knowledge of the goals, objectives, workforce composition, work methods, and functions of programs served, in order to determine whether requests for funds and expenditures are proper, necessary, and timely.

Ability to gather, assemble, analyze and prepare strategy for presenting, explaining, and documenting the budget request.

Ability to present and justify a budget to management officials, agency representatives, and budget examiners.

Skill in identifying, analyzing, and resolving a range of budgetary problems, including developing alternative

Position Description

methods of funding and substantial reprogramming.

Comprehensive and detailed knowledge and understanding of the Department of Defense (DoD), Planning, Programming, Budgeting, and Execution System (PPBES).

Comprehensive knowledge of the sources, types, and methods of funding for assigned budgets.

Knowledge and skill in analyzing and evaluating the effects of continuing changes in program plans and funding on the accomplishment of the organization's budget and milestones.

Comprehensive knowledge and understanding of budget execution processes and practices in order to develop, implement, and advise on organization policies and controls for the obligation and expenditure of funds.

Comprehensive knowledge of command and agency budget execution policies and procedures in order to recommend re-apportionment, supplemental appropriations, deferrals, and rescissions of funds.

Ability to present and recommend adjustments, reprogramming and resolution of budget issues.

Comprehensive knowledge of Fiscal/Appropriation Law.

This position is classified in accordance with DoD Civilian Personnel Manual 1400.25-M, Subchapter 1920. The position is equivalent to GS Grade 12

Evaluation:

FLSA EVALUATION

Foreign Exemption

Executive Exemption

Exercises appropriate supervisory responsibility (primary duty)

Customarily and regularly exercises independent judgment

80% test, if applicable (GS-5/6; Sit 1 & 2 WS supervisors; law enforcement & firefighter supervisors thru GS-9)

Professional Exemption

Professional work (primary duty)

Intellectual and varied work (more than dealing with procedures/precedents)

Discretion & independent judgment

80% test, if applicable (This virtually never applies since GS-5/6 positions are trainees and other eligible employees are not professional)

Administrative Exemption

Primary duty

Policy or

Management or general business or supporting services or

Participation in the executive/administrative functions of a management official

Position Description

Nonmanual work test

intellectual and significant (more than dealing with procedures/precedents), or

specialized & technical in nature requiring considerable training/experience

Discretion & independent judgment

80% test, if applicable

CONCLUSION: EXEMPT



Classification Exercise, Example 1

Budget Analyst, YA-560, Pay Band _____

Location: Field installation

Compiles and summarizes data concerning personnel salaries, contracts and expenses. Performs the formulation of budget estimates based on historical data, projected income, workload, manpower, and resources. Formulates civil and military overhead rates and level of distributions to be made to other organizational operating accounts outside of immediate organization.

Monitors execution of the budget, maintaining control for compliance with various statutory or other limitations. Tracks execution, reviews, analyzes, and reconciles organization's annual operating budget, by subordinate accounts and organizations. Produces and utilizes a variety of miscellaneous reports and analyses to track, monitor and report the status of overhead accounts. At year-end, assures that nominal balances are within tolerance set by the parent command HQ.

Maintains accounts for all budget items including personnel, supplies, communications, and all other expenses. Monitors reports, checks the accuracy of costs charged to the organization and initiates corrections for improper transactions. Prepares statistical reports for Resource Management, Commander, and command HQ briefings. Analyzes cost budgets by organizational element and types of expense for budget execution. Monitors and reports labor, travel, award, training and overtime usage to insure established target limits are not exceeded.

Compares current and historical budget and workload data for the same or closely related programs and activities to discern trends in spending and anticipate needs for funds or reprogramming actions. Reviews requests for allotments of funds from approved operating budgets to assure that funds are being spent for proper purposes in accordance with annual work plans and budget schedules. Certifies the availability of funds and notifies other offices.



Classification Exercise, Example 2

Budget Analyst, YA-560, Pay Band _____

Location: Medical clinic

Responsible for the formulation, reprogramming, and execution of budgetary objectives for the Clinic. Makes continuous minor and frequent major reprogramming changes. Assesses impact of changes in workload, of assumption of new missions and other developments affecting funding requirements for which existing, standardized resource estimation techniques may not exist. Directs continuing maintenance of accumulative experience data for all activities. Receives requests for changes of apportionment from operating activities together with justification in terms of program fluctuations and changes. Analyzes data, and approves minor reprogramming within prescribed constraints, analyzing costs of other activities to determine where funds can be cut to provide for increases elsewhere. When major reprogramming requirements occur, analyzes data and submits recommendations for forwarding to higher headquarters.

Projects budgetary requirements for selected accounts for the Command Operating Budget (COB) and Midyear Budget Review. Determines estimates for various accounts within totals provided by next higher headquarters. Ensures accuracy of financial records. Compiles and analyzes information prior to completing budget schedules. Reviews and consolidates prepared budget estimates and verifies all levels of budget detail. Assures all elements of COB conform to guidance provided by higher command. Assembles proposed operating budget with summaries for review by local management and governing command. Formulates narrative and quantitative justification for financed and unfinanced resource requirements for the COB and Midyear Budget Review.

Upon receipt of overall budget ceiling, contacts operating activities; furnishes accumulated experience data and limitations and requests anticipated requirements. Reviews and analyzes data submitted; if in excess of funded operating cost figures, determines, by review of experience data, where reductions might be made. Coordinates reprogramming recommendations with activities, considering impact of anticipated new program changes, anticipated reimbursements, increased cost, and increased workload.

Participates in overall financial planning, furnishing recommendations for future plans based on budgetary experience. Maintains contact with all program officers and satellite activities regarding status of funds and to keep apprised of requirements. Maintains liaison with activities providing feeder data for complex budget development to insure timely and accurate reporting of data. As requested, discusses with local Commander or MACOM representatives regarding the feasibility of future budgetary requirements and needs for additional funding.



Classification Exercise, Example 3

Budget Analyst, YA-560, Pay Band _____

Location: Installation

Serves as the senior budget analyst and technical expert at the installation, responsible for the programming, budgeting, and execution of the installation's programs and budgets. Ensures that adequate fiscal controls are maintained to minimize the risk of over-obligation or illegal use of appropriated funds.

Responsible for the correct and on-time submission of the installation's Program Objective Memorandum (POM) to HQDA. Ensures that all schedules are technically correct and prepared consistent with HQDA Program Development Instructions. Ensures that programmatic guidance from the installation leadership is followed. Ensures that programs are internally balanced to the extent possible. Identifies imbalances and mismatches between dollar and manpower guidance. Reviews dollar and program guidance and alerts leadership of potential or actual funding problems. Coordinates the entire POM preparation process with the installation staff, assigning responsibility for schedule preparation to appropriate the installation staff directorates.

Responsible for the correct and on-time submission of the installation's biennial Command Budget Estimate and biennial Resource Management Update. As in program formulation, ensures that all budget schedules are technically correct and prepared in accordance with published budgetary guidance from the Component HQ. Coordinates the input from the various functional areas on the installation staff. Ensures that guidance of the installation leadership is followed. Assists supervisor in resolving disputes among the installation functional proponents.

Responsible for the timely, correct, and legal execution of the current year budget. Establishes processes to adequately monitor installations' and major subordinate activities' budget performance. Plans and conducts the mid-year review, as necessary. Advises supervisor of execution year problems and provides recommendations for fixes. Plans and conducts yearend closeout. Establishes internal controls to minimize the possibility of an over-obligation of funds.



Classification Exercise, Example 4

Budget Analyst, YA-560, Pay Band _____

Location: Deputy ASA for Resource Analysis (Pentagon), Resources Directorate

Plans, analyzes, formulates, justifies, presents, and executes assigned annual Army Working Capital Fund (AWCF) Supply Management Budgets. AWCF budgets include customer orders, capital purchases, revenues, expense, manpower, and other business parameters related to performance of manufacturing, fabrication, overhaul, repair, supply, storage, base support, and functions for appropriated and other AWCF customers. Carries out special projects, studies, and Congressional interest and classified projects. Provides AWCF input for the annual budget work plans and program budget guidance including schedules for obligation and expenditure of funds to support programs, timetables for allocation and distribution of Army funds, and MACOM employment ceilings. Analyzes, plans, schedules, and coordinates the amount, sequence, and timing of substantial mission programs in all phases of budgeting and executing.

Provides advisory services for the total budget for one or more funds (i.e., O&M, AWCF, revolving, investment, FMS, etc.), a major segment of the agency budget, or the total budget program for a major command that supports overall operations and major national substantive programs or projects. Serves as a financial consultant to management on issues such as: budgeting strategies; financial management tools and products; resource distribution; program priorities; financial forecasts and projections; reprogramming; and development of annual and long-range financial plans.

Establishes the master schedule for logical sequencing and timely accomplishment of the programming and budgeting cycle for one or more funds. Develops the Future Years Defense Plan (FYDP) and its related annexes, and formulates the agency's Budget Estimates Submission (BES) to OSD. Adjusts the BES to reflect OSD/OMB decisions and the President's Budget Submission. Analyzes the budgetary impact of new or revised legislation, policies, and procedures. Develops budget/program processes, procedures and guidance for executing financial management plans and programs. Writes programming and budgeting policy directives, including the agency Financial Management Manual. Responsible for the agency Program Objectives Memorandum (POM) submission. Reviews POM requirements from field activities and functional staff for compliance with DoD guidance.

Evaluates the effect of cost and program changes on the budget execution process. Analyzes data trends, productivity, workload and program accomplishments. Develops projections of program funding requirements, and recommends financial strategies and actions for meeting program requirements.



Classification Exercise, Example 5

Budget Analyst, YA-560, Pay Band _____

Location: HQ, AMC

Serves as principal Army Material Command (AMC) Budget Analyst with overall responsibilities for the total spectrum of programming and budgeting functions of the complex AMC procurement program for assigned procurement appropriation. Performs all phases of planning, analysis, formulation, justification, presentation, execution and review of the multi-year budget and program for the development, procurement, and modification of every weapon system within the assigned appropriation. Reviews, analyzes, and interprets legislation, appropriation language, and OMB/OSD directives pertaining to assigned command(s). Incumbent must constantly change the programs based upon priorities and objectives of DA, OSD and Congress, because of frequent and unpredicted financial needs and because of lack of stable predictive data based on new or greatly changed projects and priorities.

Provides expert advice and guidance on the interpretation of all aspects of legislation, OMB and other regulatory directives, and procedural requirements for the formulation, justification, presentation and execution of the assigned AMC procurement appropriation. Reviews, studies, and interprets legislation, including preparation of narrative and other statistical justification in support of budget requests, preparation of testimony and/or supporting data for AMC officials scheduled to appear before Congress. Reviews, interprets, and provides guidance on all OMB, OSD, and DA directives and policies.

Prepares the AMC procurement execution plan, and releases the annual procurement program to commands for execution. Maintains continuous contact with commands to ensure program objectives relate to funds available, recommends major reprogramming of funds to AMC commander to ensure adequate and efficient distribution of resources, and informs commands of any potential or immediate change in plans and policies. Evaluates total program execution to detect potential financial problem areas and initiates corrective actions. Prepares and participates in periodic program reviews to determine progress against approved funding, schedules, and objectives.

Determines the impact of the DA programs and budget limitations on future procurement programs and budgets. Plans, develops and coordinates program adjustments required to conform to these limitations.

Performs special assignments that are of major significance in the accomplishment of the AMC portion of the DA procurement mission. Represents AMC at DA and OSD conferences relative to assigned procurement appropriations. Participates in working groups and ad hoc committees as they relate to the incumbent's assigned areas of responsibility.



Classification Exercise, Example 6

Mechanical Engineer, YD-830, Pay Band _____
Location: Field activity

Prepares and/or reviews complete civil/structural construction cost and quantity estimates for the mechanical area of the design phase for construction of a wide variety of permanent structures, such as large, multi-story buildings, steam plants, and hospitals. Uses basic data derived from drawings, specifications, tentative plans, and other file materials or available sources. Works from descriptions, one-line drawings, or detailed final plans, drawings, and specifications.

Prepares preliminary cost estimates to establish the funds required for a project. Considers factors peculiar to the nature and location of the projects, such as whether international or local contractors and materials will be used, availability, types, and quantities of materials, equipment, and labor, necessary transportation, weather conditions, etc. Analyzes costs to ensure that they are adequate as a basis for requests of funds. Computes indirect costs, applying knowledge gained through experience.

Performs as a Project Cost Estimator on routine projects. Combines the civil/structural cost estimate prepared by the incumbent with the inputs developed by the estimators specializing in other disciplines.

Works with personnel in Technical Management, and Contracting Directorates, and Office of Counsel, in coordinating flow of work, checking data, solving problems concerning costs, and meeting deadlines and work schedules. Represents the Division in contacts with architect-engineers, suppliers, contractors, and others to explain the purpose of various planning and special construction requirements, or to secure cost data. Furnishes cost estimating and technical advice to other mechanical engineers on specific constructability and cost estimating problems.



Classification Exercise, Example 7

Civil Engineer, YD-0810, Pay Band _____

Location: Field activity

As an entry-level engineer performs duties designed to provide an orientation in the application of academic theories and basic principles and practices of civil engineering tasks and to ascertain skills and aptitudes for future development and progression to the next level of assignment. Receives formal and on-the-job instruction and training designed to provide familiarization with the functions and operations of the unit and to provide experience in the application of civil, hydraulic, geotechnical and/or structural engineering knowledges to either civil works or military projects.



Classification Exercise, Example 8

Electronics Engineer, YD-0855, Pay Band _____

Location: Field activity

As a Career Intern during advanced training period continues to receive on-the-job training as well as work assignments designed to increase the engineer's knowledge of electronics equipment, systems, components, materials and techniques pertinent to the organization assigned. Applies basic scientific and professional engineering skills and a knowledge of the work processes involved in the organization. Gathers and compiles engineering data and accompanies senior engineers at meetings, etc., to observe work procedures or obtain information.



Classification Exercise, Example 9

Mechanical Engineer, YD-830, Pay Band _____
Location: Developmental Test Command _____

Serves as the senior technical expert in vibration test and evaluation engineering at the Developmental Test Command (DTC) with the responsibility for planning, conducting, analyzing and reporting complex vibration tests of automotive, weapon systems, electronics, and munitions in field and laboratory settings. Exercises expertise in the development, application and interface of mechanical and electronic test instrumentation to measure mechanical vibration, and in the analysis of resultant data. Develops new testing methodologies, instrumentation techniques and facilities for testing new, prototype systems.

Plans, conducts, and completes vibration engineering test programs for all types of systems and systems components where the test items are of an experimental design. Test programs typically contain many phases, and the experimental or foreign nature of the designs require a high degree of technical judgment and expertise to develop new test techniques and procedures where precedent is lacking, and to analyze results. Develops recommendations for correction of deficiencies and shortcomings. Plans, conducts, and completes road shock and vibration and/or laboratory vibration evaluations of current and advanced combat vehicles, electronics, munitions, and weapons systems. Tests involve measurements of accelerations, stress/strain, force, velocities, pressures, temperatures, linear and angular displacements, and others as required to accurately characterize, with high fidelity, the performance of the systems. Develops specialized instrumentation and test procedures to obtain measurements in testing of complex, unique mechanisms.

Performs contract oversight at contractors' facilities to monitor tests performed by contractors on equipment being procured under government contract. Determines whether tests performed are adequate and if equipment performance meets specified requirements. Recommends acceptance or rejection of data obtained for use and inclusion in DTC evaluations.

Serves as a consultant throughout the Component and with engineers at other government installations, agencies, their contractors, and with foreign government representatives to provide technical information on advanced test techniques, instrumentation, and data collection and analysis.



Classification Exercise, Example 10

Mechanical Engineer, YD-830, Pay Band _____
Location: HQ, Test and Evaluation MACOM

Serves as the recognized engineering expert in the assigned area of responsibility on the headquarters staff of a test and evaluation MACOM. Manages, coordinates, reviews, and provides broad engineering/technical advice relative to the overall test and evaluation effort associated with a broad category of equipment, such as all tracked combat vehicle systems, including combat vehicle fire control systems. When leading a group, provides expert advice to group members on the correct approach to problems encountered and on the need for more detailed investigation.

Represents the Command during initial phases of systems development to ascertain impact of the test and evaluation effort on the capabilities and limitations of Command resources. Determines capabilities and resources needed for improvement, or for entirely new or vastly improved techniques, instrumentation, or procedures to adequately test the systems resulting from these design concepts. Develops policies and standards, procedures, and instructions to guide operating personnel.

Advises development agencies contractors, systems analysis activities, and training and doctrine commands regarding development and production tests, and concepts, designs, and quality. Exercises significant decision-making and commitment authority for the Command in influencing development and production programs.

Directs development of test plans, including the broad conditions and specifications to which assigned systems must be subjected under all types of laboratory and climatic field conditions at any of the testing activities. Directs, reviews, and approves preparation of various phases of tests and test plans, ensuring coordination by the various installations and activities. Develops schedules for the phasing of tests to minimize duplication. Conducts test scheduling conferences with development, analysis, and testing personnel to plan long range and rapid response programs.



Classification Exercise, Example 10 (continued)

Ensures that data collected in tests conducted by contractors and other government agencies are adequate and used wherever possible to satisfy Federal developmental test requirements. Conducts continual review and analysis of all test activities related to the broad assigned area of responsibility to prevent unnecessary delays and duplication and to assess the quality of the testing programs. Compiles and analyzes instrumentation, methodology, and other test support requirements and advises Command staff as to the adequacy of test resources.

Monitors the progress of tests conducted and keeps superiors informed of general progress and any controversial problems. Prepares safety engineering evaluations of tested systems, recommending corrective action regarding safety deficiencies.

Represents the Command on test integration working groups and systems teams, representing the Command in the assigned broad area of responsibility. Makes recommendations and decisions, which are universally accepted as technically sound even though final approval may depend on formal action by others.



Classification Exercise, Example 11

Budget Analyst, YA-560, Pay Band _____

Location: Field activity

This is the entry-level trainee position. As a trainee budget analyst, performs a variety of clearly defined tasks assigned to increase the employee's knowledge and understanding of the functions of budget administration, and to provide a general familiarity with governing policies, procedures and regulations. Receives intensive on-the-job and classroom training in the application of concepts, principles, practices, and procedures of budgeting.



Classification Exercise, Example 12

Budget Analyst, YA-560, Pay Band _____

Location: Field activity

This is the intermediate developmental level. Assignments are selected to broaden analytical ability and to provide practical experience with methods and procedures in budget formulation, justification and execution. Performs routine and recurring budget administration duties that facilitate the conduct of more complex and detailed review and analysis functions conducted by co-workers at the full performance level.



FLSA Evaluation Outline

PD # _____ PS/Occupation/PB _____

Foreign Exemption

Executive Exemption

- Exercises appropriate supervisory responsibility (primary duty)
- Customarily and regularly exercises independent judgment
- 80% test, **if applicable** (GS-5/6; Sit 1 & 2 WS supervisors; law enforcement & firefighter supervisors thru GS-9)

Professional Exemption

- Professional work (primary duty)
- Intellectual and varied work (more than dealing with procedures/precedents)
- Discretion & independent judgment
- 80% test, if applicable (This virtually never applies since GS-5/6 positions are trainees and other eligible employees are not professional)

Administrative Exemption

Primary duty

- Policy **or**
- Management or general business or supporting services **or**
- Participation in the executive/administrative functions of a management official

Nonmanual work test

- intellectual and significant (more than dealing with procedures/precedents), **or**
- specialized & technical in nature requiring considerable training/experience

Discretion & independent judgment

80% test, if applicable

Comments/Explanations (State which major duties/job functions are Exempt):



FLSA Evaluation Outline

PD # _____ PS/Occupation/PB _____

Foreign Exemption

Executive Exemption

- Exercises appropriate supervisory responsibility (primary duty)
- Customarily and regularly exercises independent judgment
- 80% test, **if applicable** (GS-5/6; Sit 1 & 2 WS supervisors; law enforcement & firefighter supervisors thru GS-9)

Professional Exemption

- Professional work (primary duty)
- Intellectual and varied work (more than dealing with procedures/precedents)
- Discretion & independent judgment
- 80% test, if applicable (This virtually never applies since GS-5/6 positions are trainees and other eligible employees are not professional)

Administrative Exemption

Primary duty

- Policy **or**
- Management or general business or supporting services **or**
- Participation in the executive/administrative functions of a management official

Nonmanual work test

- intellectual and significant (more than dealing with procedures/precedents), **or**
- specialized & technical in nature requiring considerable training/experience

Discretion & independent judgment

80% test, if applicable

Comments/Explanations (State which major duties/job functions are Exempt):



FLSA Evaluation Outline

PD # _____ PS/Occupation/PB _____

Foreign Exemption

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Comments/Explanations (State which major duties/job functions are Exempt):



FLSA Evaluation Outline

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- ___ Management or general business or supporting services **or**
- ___ Participation in the executive/administrative functions of a management official

___ Nonmanual work test

- ___ intellectual and significant (more than dealing with procedures/precedents), **or**
- ___ specialized & technical in nature requiring considerable training/experience

___ Discretion & independent judgment

___ 80% test, if applicable

Comments/Explanations (State which major duties/job functions are Exempt):

Camp Southbridge

Background

You are a new supervisor who has been hired for a new tenant organization at Camp Southbridge. You will need to determine the type of employees to hire (positions to establish and recruit) based on the workload information provided below. Subsequently, you will initiate personnel actions (RPAs) to accomplish various staffing decisions.

Your Unit

You have been funded for 21 work years. Your organization is a significant part of one of the two Service Schools located at Camp Southbridge responsible for the training of military students. Your School's mission is to train the students in the required areas of Aviation and Logistics and your organization is specifically charged with the development and/or evaluation of instructional systems/materials concerning the maintenance of aviation systems in general. The organization is also charged with determining training requirements for new and advanced systems developed to accomplish maintenance. Your job is currently classified as a Supervisory Instructional Systems Specialist, GS-1750-14.

Training Plans Evaluation Division

<u>Function/Work Years</u>	<u>Classification Choices</u>
(1) Work year – Supervisory Overhead	Supv Instructional Systems Spec., GS-1750-14
(1) Work year – Supervisory Overhead	Supv Instructional Systems Spec., GS-1750-13
(1) Work year – Supervisory Overhead	Supv Training Spec. (Aviation Logistics), GS-1712-13
(1) Work year – Secretarial Support	Secretary (OA), GS-318-05 or 06
(1) Work year – Office Automation Support	Office Automation Clerk, GS-326-04 or 05
(2) Work years – Media Support	Writer or Editor, GS-1082-09, or 11, or 12 with TV, Motion Picture or Printed Media parenthetical titles
(11) Work years – Direct Mission Support	Training Specialist with either Aviation Maintenance, Aviation Systems or Aviation parenthetical title.
(3) Work years – Direct Mission Support	Instructional Systems Specialist, GS-1750-12