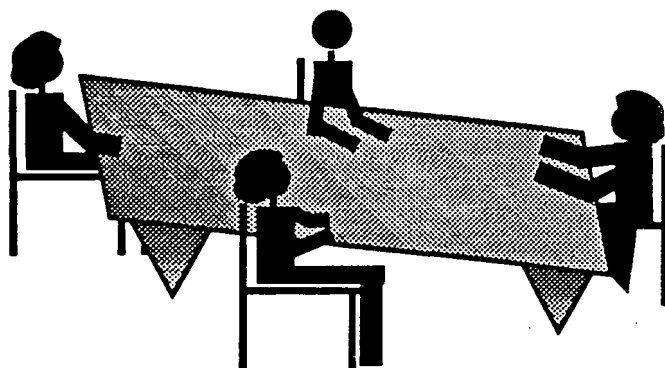
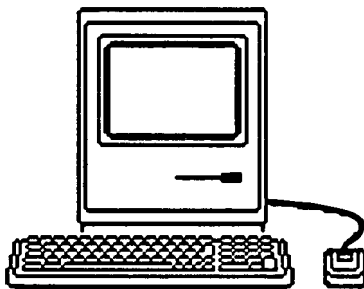




# The Office of the 90s



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# Contents

EXECUTIVE SUMMARY .....	iii
GETTING STARTED .....	1
STUDY METHODOLOGY .....	3
Objectives .....	3
Study Process .....	3
Choosing Pilot Organizations .....	3
Information Gathering .....	4
Building and Maintaining the Information Flow .....	4
Analysis and Findings .....	5
Developing Specific Recommendations .....	5
Developing OW-Wide Recommendations .....	5
OVERVIEW OF KEY FINDINGS AND EMERGING THEMES .....	7
Central Themes .....	7
Organizational Maturity .....	7
Automation .....	7
Support Staff .....	8
FINDINGS, IMPACTS, AND RECOMMENDATIONS .....	9
Organizational Maturity .....	9
Automation .....	14
Support Staff .....	18
TOOLS FOR BUILDING A 1990s OFFICE .....	25
Shaping the Change .....	25
Creating Potential for Office Support Staff .....	26
Managing Time .....	30
Automating Office Tasks .....	30
SUMMARY .....	33

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# Appendices

Appendix A .....	37
Focus Group and Interview Questions .....	37
Appendix B .....	39
Office Task Inventory .....	39
Appendix C .....	47
The Para-Professional Position: A Step Toward the Future .....	47
Para-Professional Tasks .....	48
Para-Professional Competencies .....	51
Specific Knowledge Requirements For Each Of The Three Main Para-Professional Types .....	56
Appendix D .....	57
Office Activity Profile .....	57
Appendix E .....	65
Model Position Descriptions .....	65
Appendix F .....	97
Time Study .....	97
Appendix G .....	113
CompScan Study .....	113
Appendix H .....	123
Automating Office Tasks .....	123
Appendix I .....	127
Further Readings .....	127

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Mary E. Blakeslee, Director  
Resources Management and  
Administration Office

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# EXECUTIVE SUMMARY

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The Environmental Protection Agency's Office of Water (OW) is in a period of transition as OW changes the way it carries out its environmental mission and its program responsibilities. These changes include:

- an increasing emphasis on reducing ecological as well as public health risks from pollution;
- a larger citizen role in environmental decision-making;
- increased state and local responsibility for implementing environmental programs; and
- a rapidly changing computer technology that is impacting the way work is done.

OW is no longer an organization that merely writes National policies and regulations and oversees their implementation by others. OW, instead, is taking a more integrated approach to protecting and restoring the Nation's water resources. This approach has created a need for developing new tools, systems and structures that place more emphasis on, and support:

- education, outreach activities, and programs to influence individual decisions;
- a broader use of technology transfer;
- identifying and modifying market mechanisms (e.g. imposition of fees, availability of tax preferences and Federal subsidies).

These new methods of operation along with the existing regulatory framework will balance the water resources. Both regulatory and non-regulatory tools will empower Federal, state and local agencies to further integrate efforts to protect water resources.

As a result of changes in the way OW approaches its mission, OW is undergoing a self-examination process to look at its current organizational structure, management styles, communication patterns, and staff roles.

The focus of this examination is on communications and management capabilities within OW. Specifically, the Office of Water's investigations looked at some of the themes just discussed and found an organization in a state of change due to:

- a redefinition of how the organization's mission objectives are to be achieved;
- the introduction of automated technology; and
- the change in staff roles, particularly the office support staff.

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# GETTING STARTED

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In 1988 the Office of Water's Human Resources Council recognized that changes were occurring in the OW work environment, specifically, they saw:

- a new focus on the interrelationship and coordination of the work done by individuals and groups that was changing the role and responsibilities of the scientific and technical staff;
- a continued and increased use of the private sector to support OW's mission;
- a change in the support staff's duties and tasks. While office support staff were not doing as much typing and filing as in the past they were still very busy. It was not clear, though, exactly what it was they were busy doing; and
- a change in the way work was being done due to the use of automated tools and systems.

These changes were affecting many aspects of the human resource equation—from the selection of new hires to the management of the existing workforce. It was apparent that the roles of managers and employees were changing. It was, however, not as apparent what those new roles were. For example, office support staff were seen as the primary workgroup in which the greatest role changes were being experienced. As an outgrowth of discussions with the OW Human Resources Council and other members of OW's human resources community, the opportunity arose to develop individual goals and strategies to address the changes in OW's support staff workforce. The Office of Water, Office of Pesticides and Toxic Substances, and Region VII initiated a study to define and identify the changes that were occurring in the diverse roles and responsibilities of support staff. The objective of the study was to come up with a set of recommendations that, when implemented, would ensure that office support staff remained effective and productive.

The initial project concentrated on collecting information and opinions about the changes in the support staff work from a broad spectrum of sources that included:

- the human resources community,
- Agency representatives,
- current literature, and
- interviews with a cross section of the workforce (20 employees) in the Office of Water, Office of Pesticides and Toxic Substances (OPTS) and Region VII.

From the results of the survey it became apparent that functional changes were occurring at all levels of the workforce. In addition to the changes in staff roles, changes were also occurring at the organizational level.

At this point the Office of Pesticides and Toxic substances decided to continue looking at the support staff and did a position classification study, while the Office of Water decided to take a more in-depth look at the changes that were occurring. The initial study, with its narrow

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focus on examining office support staff roles, became Phase I of a much larger project. The information gathered in Phase I was used to design the methodology for Phase II. In Phase II the project was expanded to examine the changes that were occurring from an organizational perspective including all levels of staff from a cross-section of OW organizations.



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# STUDY METHODOLOGY

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## Objectives

The Phase II objectives of the OW study were to:

- identify the changes affecting OW;
- identify the impact of those changes on the workplace, the employees, and OW's mission; and
- recommend actions that would take advantage of the opportunities that the changes presented.

Both individual interviews and focus group sessions were used in the study. The focus groups were the prime source of information gathered for the study. It was felt that the best source of information about how the work/workplace was changing would be from the staff themselves. It was also felt that they would be the best source for determining solutions to address the changes. The intent in using the staff's input was to develop solutions that would be "workable" and to ensure their "buy-in".

Prior to meeting with the focus groups, background information was gathered to develop a profile of the organization's role and responsibilities. Functional statements, position descriptions, and program agendas provided much of the background information.

## Study Process

### Choosing Pilot Organizations

Three organizations volunteered to participate in the OW study:

- State Programs Division in the Office of Drinking Water;
- Marine Operations Division in the Office of Marine and Estuarine Protection; and
- Resources Management and Administration Office, Immediate Office of Water.

These participating organizations represented both line and staff organizations. While it was not possible to study all the organizations within OW, the above three offices provided a good cross-sample of the functions and mission of OW organizations.

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## **Information Gathering**

Information was collected in three ways: focus groups, individual interviews, and review of existing documents and records. This was the most important step in the process because the results of the interviews provided the information needed to identify the changes that were occurring in OW and formed the basis for the recommendations that ensued.

### **Groups**

Three to six focus groups were conducted in each organization. Managers, technical/professional staff, and support staff met separately, in groups of five to eight. Appendix A is a list of the questions asked during the individual interviews and focus group sessions. The sessions were structured to:

- gather information and ideas about present and future office tasks and structure;
- identify problem areas; and
- brainstorm possible solutions.

### **Individuals**

In the individual interviews, managers were asked to define the types of tasks performed in their office. The managers added, deleted, edited and validated a list of generic office tasks to define the types of tasks done in their offices. Appendix B is the list of tasks developed as a result of the interviews. The list represents tasks performed by all staff in the office. In addition to defining office tasks, the managers also helped develop a list of support staff competencies (Appendix C).

### **Records**

Information obtained from an examination of functional statements, position descriptions, program agenda statements and other organizational documentation helped provide additional background information.

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**Building and  
Maintaining the  
Information Flow**

A vital aspect of the study was building and maintaining a flow of information between the study facilitators and participants. Throughout the study the facilitators met with the organization members to verify and validate the information collected. These meetings not only promoted the involvement of the participants but also provided them with a forum in which they could express their thoughts and concerns.

**Analysis and Findings**

The information gathered during the interviews and focus groups was compiled and reviewed to identify the major areas of change that were occurring in OW. Findings or issues related to each area of change were also identified.

**Developing Specific  
Recommendations**

A series of recommendations specific to each participating organization was developed to address the findings identified in the information gathering activities. The recommendations were designed to help each organization prepare to meet the new challenges and workplace changes in the 1990s.

**Developing OW-Wide  
Recommendations**

Some of the trends and issues found in the study were common across the three organizations and represented changes that were occurring throughout OW. Recommendations were developed that could be applied broadly with minimal customization.



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# OVERVIEW OF KEY FINDINGS AND EMERGING THEMES

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## Central Themes

Three central themes arose from the study:

- Organizational Maturity;
- Automation; and
- Office Support Staff.

These themes address major areas of change that are occurring in the way in which the organization achieves its mission and were seen as having the greatest impact on the workplace.

## Organizational Maturity

Current OW organizational structures and management styles at all levels are often limiting factors in cross-program initiatives and appear to impede progress in OW's shift to a more holistic approach to environmental protection.

Current communication patterns throughout OW do not foster inter-organizational interaction. This is exacerbated by the diversity of the workforce and the ineffective communication skills of many members of the organization.

Offices do not have staff with a mix of technical/scientific and communication/management skills to perform effectively and carry out the mission of OW in a changing environment.

## Automation

The potential power of the personal computer (PC) and other office automation technology is not fully understood, nor is full advantage being taken of automation's potential for improving and enhancing the work of support, managerial, and program staff.

Current automation has affected the roles and responsibilities of all OW employees. However, automation provides opportunities to enrich the jobs and to improve the performance of all OW employees.

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## Office Support Staff

The contribution of office support staff to the organization's mission in the new work environment is not well understood by the staff themselves and by their supervisors and other staff in their organization. Work done by office support staff is often perceived as providing minimal value to the OW team.

The current office support staff job series (GS-318/322) do not reflect their emerging role or the potential of their contributions to the office of the future.

OW is having increasing difficulty in hiring and retaining skilled office support staff to meet the needs of the changing office environment.

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## Next. . .

The following section describes the themes and key findings in further detail. Following each finding is an impact statement describing how the change has affected the Office of Water and its workforce. Recommendations for actions or ways to take advantage of the opportunities arising from the changes follow each impact statement.

For ease of understanding and presentation, the themes and findings are presented as separate entities. It is important, however, to remember that the findings are interrelated and interwoven. For example, the type of product that an office provides is as much a result of the office's increasing interaction with outside agencies (Organizational Maturity) as it is a result of the office acquiring a new desktop publishing software (Automation) or an employee learning desktop publishing skills (Office Support Staff).

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# FINDINGS, IMPACTS, AND RECOMMENDATIONS

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The following section presents the key findings with respect to each of the three themes:

- organizational maturity
- automation
- office support staff

A brief synopsis of each finding, shown boxed, is followed by text giving further explanation and clarification. The statements that follow each key finding describe the impact of the finding on the way the organization and staff currently operate. The recommendations following the impact statements present a means for addressing the problems that have been identified. The recommendations also describe ways in which the organization can take advantage of the opportunities for improvement and enhancement of employee and organizational effectiveness that the changes represent.

## Organizational Maturity

**Current organizational structures and management styles at all levels are often limiting factors in cross-program initiatives and appear to impede progress in OW's shift to a more holistic approach in environmental protection.**

Changes occurring in OW's focus and methods of operation are affecting the management of its work activities and programs. In the past, projects or activities were often accomplished by a single person or group working in isolation. This traditional hierarchical structure worked well in types of situations with minimal involvement of parties outside of the primary workgroup. Hierarchical management styles, however, did not impede work-related communication nor activity planning. OW, on the other hand, is continuing to place more and more emphasis on outreach and cross-program activities both in the public and private sector. This has resulted in an increasing need for coordination of the collaborative efforts of parties affected by, and participating in the problem solving activities. This also means that project management must move from a closed, analytical style of operation and decision making to one that is more open and participatory.

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To expedite and facilitate the management of cross-functional projects, there is an ongoing shift from the traditional hierarchical systems and management styles to matrix management systems/styles. Matrix management works well in an environment of continuing change where projects may cross many functional areas. Problems have developed, however, because matrix management is only partially implemented within the constraints of the existing hierarchical structures.

The coexistence of two very different management structures within one organization often causes problems with regard to project management communication, and work planning/coordination. For example, communication regarding cross-functional projects is usually more informal in nature and frequently bypasses the more formal upward communication channels found in the traditional structures. While most employees working on cross-functional projects are usually clear about what their project leader needs to be kept informed of, they are not always as clear about what information they also need to pass on to their "traditional" manager. As a result, supervisors and managers in the traditional structure are often left "out of the information loop." Furthermore, the dual management structures also cause problems in planning and coordinating work assignments. It is not uncommon to find employees who have been assigned tasks by a "project" manager that compete with tasks assigned by their "traditional" manager. Since employees are directly involved with their project managers on more of a one-to-one relationship, conflicts are often resolved first hand and do not involve the upper chain of command. Conflict occurs when priorities are not agreed to by all parties. Also, project managers may not even be part of the organization.

### **Impact**

The formal hierarchical communication approach conflicts with the more informal matrix communication approach and frequently impedes communication between employees and managers.

Employees and managers, therefore, often find it difficult to plan, manage, and assign work, and often find themselves with conflicting or unclear priorities.



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Changes in the work mission require flexibility to move from topic to topic and may require different leadership for each.

### *Recommendation*

Analyze current management structures to identify areas that can be improved to reflect and support cross-functional leadership, flexibility, and communication between employees, managers, and outside parties.

**Current communication patterns do not foster inter-organizational communication. This is exacerbated by the diversity of the workforce and the ineffective communication skills of many members of the organization.**

Current communication patterns within OW facilitate intra-organizational rather than inter-organizational communication. While the current communication patterns facilitate the exchange of ideas within the internal hierarchy or workgroup, they do not facilitate communication across organizations. For example, most staff are aware of priorities within their office or project workgroup (intra-organizational); few, however, are aware of activities in other branches or divisions of the organization (inter-organizational communication). Knowledge about what is going on elsewhere in the organization can be meaningful and provide useful information to support or enhance project activities or to avoid duplication of work efforts.

Many OW employees do not possess effective communication skills such as negotiating, writing, and working in a group environment. This often results in miscommunication and creates problems that might otherwise not exist. Communication is further effected by the diversity of the workforce composed of individuals from different professional, non-professional, educational, and cultural backgrounds. Having to work collaboratively has increased the potential for communication problems and misunderstandings between individuals and workgroups.

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## **Impact**

Duplication of work occurs when managers and staff are unaware of similar or supporting efforts that are going on in other parts of the organization.

Obtaining information about other branches or divisions (inter-organizational communication) is difficult and often impeded by hierarchical, internally focused communication patterns.

## ***Recommendation***

Enhance communication through structures and tools (i.e., E-mail, newsletters, voice mail, interpersonal communication, staff meetings, etc.) that increase awareness of projects and efforts being done by Task Force workgroups, cross-program projects and other parts of the organization.

## **Impact**

Miscommunication often occurs due to the organization's changing functions and the diversity of the workforce.

## ***Recommendation***

Conduct training for staff at all levels to provide or improve the quality of communication between individuals and workgroups, and to increase awareness, understanding and acceptance of the diversity in the workplace.

**Offices do not have staff with the mix of technical/scientific and communication/management skills to perform effectively and carry out the mission of OW in a changing environment.**

As OW focuses more and more on outreach activities and cross-program functional projects (e.g., use of OW's multiple statutes' enforcement, research and regulatory tools to solve environmental problems) it is becoming increasingly important for OW's staff to become skilled communicators and managers as well as being skilled technicians/scientists. To

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work efficiently and effectively all staff must possess good oral and written communications skills in addition to other skills such as problem solving, computer literacy, judgement, and decision making. Also, staff can no longer work in isolation. They must be able to communicate their scientific/technical knowledge to other scientists and technicians as well as to non-scientists/technicians. They must be able to work and communicate with project teams both inside and outside of their office, OW and with people outside of EPA. The profile of a successful staff member in this new environment is one in which "good science" skills are coupled with "good management and communication" skills. However, the OW study found that current staffing practices often pay more attention to the scientific and technical expertise of candidates while little attention is paid to their communication and management expertise and skills. This is not entirely a reflection of OW's hiring practices. Many scientific and technical staff programs at colleges and universities do not provide communication or management courses as part of their curriculum. The available market of skilled scientific/technical staff that are also skilled managers and communicators is limited.

## **Impact**

Many employees are having difficulty in effectively performing their work since they do not possess the communication and management skills necessary to bring their technical and scientific skills to bear in an open, participative decision making environment.

## ***Recommendation***

Assess current staff needs and conduct training to develop staff in all areas of communication; meeting management, electronic communication, interpersonal communication, written and oral presentations, etc.

Reevaluate future organizational staffing needs and recruiting practices to determine the right mix of scientific/technical and communication/managerial skills that will be needed for the 1990s. Develop strategies to ensure current staff is prepared to meet the needs of the 1990s and that new staff is hired

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according to the organization's needs. OW managers should look to EPA programs such *Greater Leadership Opportunities* and *Management Interns* as a source of staff trained in these broader skills.

## Automation

**The power of the personal computer (PC) and office automation technology are not fully understood, nor is full advantage taken of automation's potential for improving and enhancing the work of support, managerial and program staff.**

There is a proliferation of hardware and software in OW offices. Most offices, however, have not yet unlocked the full potential of automation for administrative/management functions or for mission-oriented work (program/technical applications).

Only a few administrative/management staff use, or are trained how to use, automation tools and technology to enhance the productivity of their office. Others are not aware the tools exist. There is also limited or sporadic use of automation tools and systems for tasks such as records management, scheduling, desk-top publishing, electronic communication, and budget/administrative tracking. For example, instead of using a centralized computer-based filing system many employees keep hardcopy duplicates of documents in their personal files. Not only does this result in an unnecessary proliferation and duplication of paper, it also makes it difficult for others to find documents and records in a timely and efficient manner.

As more and more staff share in the development of documents and reports (distributed processing) there is a growing need to systemize the management of computerized records. It is also becoming increasingly difficult to find documents kept in individual employee computer-based media (i.e., on floppy disks). For example, there is no organization-wide policy stating how computer generated documents or files

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will be named and where copies of the files will be kept. This makes it very difficult when more than one person is working on a document and there is a need to access another project member's computer files.

Despite the potential of PCs to facilitate tracking and the availability of automated generic tracking tools (e.g., Lotus 1-2-3, etc.) OW's allocation of time and resources for administrative tracking systems is very limited. Of the computer-based tracking systems that are available within EPA, many are not yet installed in OW or being effectively implemented. This reflects a lack of understanding about the overall program advantages such as increasing productivity as well as skills in using and customizing automated tools.

Moreover, the program/technical activities of two-grade interval staff have the potential of being greatly enhanced by using the PC for tasks such as modeling, database manipulation, tracking, and project management. Except for a few computer "gurus" within OW this potential has not yet been fully tapped by most OW program/technical staff.

OW has allocated considerable resources for hardware and software but many managers have not yet made the full investment in technology to ensure its ongoing success. For example, some managers budget for external system maintenance contracts but most do not provide the internal user support services and training necessary to carry out projects on a daily basis.

## **Impact**

Productivity for both office support and project/technical functions is not as high as it might be because staff are not adequately trained to understand or use the full capabilities of PCs and other automated technology.

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### *Recommendation*

Conduct an in-depth assessment of the work performed, automation tools available, and level of existing skill needed to carry out office support and programmatic functions to:

- develop an automation education program for all OW employees and managers. The program should not only train the employees and managers in the use of automation but also should provide them with an understanding of the benefits of automation and how automation affects and enhances the conduct of their work; and
- design operational procedures that will most effectively use automated methods and tools in performing office functions.

### **Impact**

An inordinate amount of time is often necessary to respond to information requests because many documents and records are not in an easily accessible central location. This is due to the lack of policies and procedures for manual and computerized records and distributed processing.

### *Recommendation*

Establish a records management program within each office, including policies and procedures, to facilitate document management in a distributed processing environment. Rely on a central file system for official copies of documents and records and limit personal files to working documents.

### **Impact**

Management's ability to obtain an organized and comprehensive view of organizational activities is hindered by the lack of resources spent on administrative tracking systems.

### *Recommendation*

Conduct a study of office needs to design systems for tracking administrative, technical and management activities. Design generic systems that can be easily tailored to each office's specific needs.

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## Impact

Office automation systems are not adequately supported. Rarely is someone internally assigned to ensure proper use, operation and maintenance at the user level.

## *Recommendation*

Ensure that adequate on-site support is provided to coordinate the automation activities (training, use, location, etc.) within each organization. Rely upon or make use of existing resources and support services (i.e., WIC On-site Coordinator) as much as possible.

**Automation has affected the roles and responsibilities and provides opportunities to enrich the jobs and to improve the performance of all OW employees.**

The advent of automation and user-friendly software has changed the roles of employees and managers and given them the capability of performing tasks and activities that previously might have been too difficult or time-consuming to learn or perform.

With more and more two-grade interval staff doing their own word processing, office support staff have more free time to take on other office tasks such as document preparation. Specifically, desk-top publishing and graphics production, previously done by outside contractors, can now be done in-house as access to tools (PCs) and software that can be used with a minimum of training are available.

Privatization should not necessarily decrease, but office support tasks need to be examined to determine what would best be done in-house and what should continue to be done by outside contractors. Contractors are still needed for specialized or custom projects. However, with training on existing software, office support staff could develop many of OW's documents. This type of work also gives office support staff job enrichment opportunities. Tasks such as data entry could, on the other hand, be contracted out to relieve OW office support staff of the drudgery of this task and use their time more effectively.

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## Impact

Most two-grade interval employees are no longer dependent on the traditional office support structure for most of their clerical routine document production needs.

Managers are able to assign clerk-typists and secretaries new/ additional tasks that are outside the normal scope of GS-318/ 322 work. New tasks draw from base skills and add higher level requirements.

OW is developing the capability within its existing workforce to do work that is currently contracted out (i.e., desktop publishing, graphics development, data management, etc.).

## *Recommendation*

Examine the work done by office support, technical, and managerial staff as well as outside contractors to determine the most appropriate distribution of tasks. The analysis should look at both the short- and long-term shifts.

## Office Support Staff

**The contribution of office support staff to the organization's mission in the new environment is not well understood and work done by office support staff is often perceived as providing minimal value to the OW team.**

There is a continuing perception in OW that office support staff are only providers of traditional services such as typing and filing. This perception is reinforced by the lack of involvement in activities beyond a narrowly defined scope. For example, current operating practices often do not include office support staff in the routine information loop in order to keep them informed about, or actively participate in defining the scope of, and their role in organizational activities. For example, office support staff are often given tasks without any explanation of how their work fits into the whole picture of the project/assignment).



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Office support staff are seldom brought into the planning process for organizational activities that significantly affect their work and that could benefit from their expertise (e.g., planning for preparing a major report). In addition, the contributions of office support staff are not acknowledged or are overlooked when recognition is given for projects well done.

### **Impact**

Office support staff do not feel that they are part of the OW team.

### ***Recommendation***

Change operational practices to include office support staff from the beginning of a project/assignment.

### **Impact**

Office support staff do not feel that they are adequately recognized for their role and contributions in helping achieve the organization's mission.

### ***Recommendation***

Revise the formal and informal recognition efforts/programs to include all members of the project/work team. Managers, supervisors, and project leaders should increase their use of recognition systems to acknowledge the contributions of all team members.

### **Impact**

Program staff do not perceive that the office support staff's contributions play an integral part in helping the OW team achieve the organization's mission.

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## *Recommendation*

Design and implement a program to develop and promote an appreciation of the occupational diversity and contributions of OW team members.

Review operational practices to ensure that managers and supervisors take a proactive role as advocates and communicators of the office support staff's role within the organization.

**The current office support staff job series (GS-318/322) do not reflect the office support staff's emerging role or the potential of their contributions to the office of the future to meet the needs of the changing office environment.**

Office support staff members in OW, hired to fulfill traditional office support functions, are finding their roles in transition. This transition is primarily due to the effect of office automation. Automation has freed office support staff from many of their traditional, time-consuming duties and has introduced opportunities for providing a broader range of support services (i.e., desk-top publishing, administrative tracking, conducting initial research, etc.). Traditional duties are being replaced with more sophisticated and highly skilled demands. Automation has created new opportunities for job enrichment and advancement and offers the potential to improve the productivity of all staff members. Many OW offices, however, have not yet taken full advantage of the opportunities and potential that automation offers. In addition there is no guidance available to help managers plan for the new roles that all staff, and in particular the office support staff, will have in today's automated office.

## **Impact**

Current office support staff job series do not allow for the transition of office support staff to the new, emerging role. Many staff continue to operate in the traditional office support staff role.

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## *Recommendation*

Identify the new office support staff duties and responsibilities that will be needed to function in today's and tomorrow's office.

Change the current office support staff job series to one that reflects their emerging role in the office of the future.

Train office support staff to ensure that they are able to carry out their new duties and responsibilities. Recruit in areas of deficiency.

## **Impact**

Managers will need new tools and guidance in order to capitalize on the current and future opportunities that automation offers for office support staff growth and productivity.

## *Recommendation*

Develop and implement new tools and guidance to help managers take a proactive role in seizing the opportunities that automation offers.

Provide manager training, coupled with on-the-job learning experiences, so that managers can assist all levels of staff in taking advantage of the opportunities and improved productivity that automation offers.

## **OW is having increasing difficulty in hiring and retaining skilled office support staff.**

Increasingly, entry-level office support staff are seen to be particularly lacking in both the basic and higher level skills needed to function in today's office. Possessing basic office skills such as good "keyboarding" skills is not enough. Office support staff also need to show initiative and have good communication and problem solving skills.

The problem of inadequate training is not unique to OW. For example, Workforce 2000 reported that the public

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education system does not provide many students with work-related skills. Compounding this problem in OW is the lack of an in-house training program to develop these skills. Specifically, office support staff evolve into active participants in the OW mission they are going to require many of the same skills that are needed by managers and other OW personnel. Although training programs are available to develop these skills in other staff members, most managers do not consider sending, or set aside time, to send office support staff to them; and office support staff members do not perceive the need nor ask to be sent to these types of courses.

The recruitment and retention of trained, experienced office support staff is another area of concern. Many managers are finding it increasingly difficult to compete with the private sector for the recruitment and retention of experienced office support personnel. Managers are also finding that entry-level staff, once trained, leave OW for better opportunities. The lack of opportunities for growth and advancement for OW office support staff and the better salaries offered in the private sector are cited as the primary causes of OW's recruitment and retention difficulties.

## **Impact**

Office support staff, particularly entry-level staff, frequently do not possess the basic skills they need to function in the office.

## ***Recommendation***

Establish programs with local high schools or other educational institutions that will provide OW with trained office support staff.

Work with OHRM to integrate and build upon the current recruiting and training programs for entry-level and experienced office support staff.

---

## **Impact**

Office support staff often do not possess the higher level skills such as writing and verbal communication that they need to be active participants in helping achieve the mission of OW.

## ***Recommendation***

Develop a continuing education program for office support staff to keep their skills current and to develop new, higher level skills.

Allocate sufficient funds/resources for office support staff training.

## **Impact**

The costs associated with recruiting and retaining experienced office support staff are steadily growing worse as office support staff leave for:

- higher paying jobs; and
- more opportunities for advancement and growth in other organizations or in the private sector.

The initial investment up-front to train and keep an employee is less expensive in the long-run, both in productivity and in quality.

## ***Recommendation***

Evaluate the training provided for current office support staff to determine how to improve its effectiveness and its retention/recruitment potential.

Institute a career path that establishes and provides opportunities for growth and advancement.



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# TOOLS FOR BUILDING A 1990s OFFICE

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This section presents the results of the process for Phase III of the study. During this phase of the study, each of the three participating organizations undertook projects that addressed issues raised during Phase II of the study.

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## Shaping the Change

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### **Key Objective**

Test and document a process to assist managers, supervisors, and staff in shaping their organization's response to the changing Office of the 1990s.

### **Key Steps**

There are four key steps an office goes through in shaping its directions for the 1990s.

1. Senior management provides leadership by initiating the project and by communicating their commitment to the process.
2. Establish a team to be the catalyst for defining change and implementation options. This team could be comprised of either representatives of the unit or it could include all unit members.
3. Performing analyses to review and evaluate the unit's:
  - Functions, activities, workload, and their distribution among the members;
  - Staffing patterns and staff skill inventory;
  - Management policies, processes, and procedures; and
  - Management Information Systems (manual and automated); and
  - Use of automation and electronic tools.

### **Lessons Learned**

Members of an organization who undertake this, or any process, for managing organizational change will undergo some level of stress. The amount of stress is dependent upon the values and beliefs the participants bring to the process and the amount of change the organization undergoes. Often, the need for change is brought about by an event or events that the participants may or may not be willing to recognize. In other cases, the changes have been so subtle that they are not easily seen from an internal perspective. Therefore, managers should consider obtaining the services of an external consultant to facilitate the process.

The size of the organization is a critical factor in how well the organization manages the process. The process works best in organizations with 20 to 50 people. Size, however, should not be the factor that deters smaller or larger groups from embarking on the process. Smaller groups may bring in outside members to help round out and provide expertise that may not be available within their own work unit. Larger groups may find it easier to break into smaller units.

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#### 4. Developing an Implementation Plan which identifies:

- Distribution of activities, tasks and workload among the members;
- New skills required to become a 1990s office and how to acquire those skills;
- A staffing structure and staffing action plan (e.g., how will much outside recruitment vs internal training and job enrichment will be used);
- Need for revised or new management policies, processes, and procedures;
- Modification or replacement of existing and development of new management Information Systems (manual and automated); and
- Opportunities to use automation and electronic tools.

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## Creating Career Potential for Office Support Staff

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### **Key Objectives**

Develop and pilot test an approach for office support staff which would, if adopted by the Agency, provide more:

- Effective methods for delivery of office support services; and
- Flexibility for individuals to develop experience that would provide the potential for moving in more than one career path.

### **Overview**

It was apparent from the OW study that an approach was needed for meeting one of the key challenges facing all managers in the 1990s—hiring and retaining office support staff. The major elements of such an approach need to reflect the existing and emerging changes in:

- the way work was beginning to be performed—project teams were increasingly being used as the vehicle for performing work;
- the nature of the work—increased emphasis on outreach, technology transfer, etc.; and
- the potential for office automation—creating new and more effective means of supporting the office's work.

The approach also needed to consider the skills and knowledges that office support staff would require to perform effectively in this emerging environment. Specifically, they would have to:

- acquire specialized skills of their own (through training and experience); and
- become knowledgeable of the administrative, technical, and scientific content of the office's work

in order to effectively participate as a member of a project team or to provide support for all of the project teams within a given office.



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The following approach presented was developed with the assistance of EPA's Office of Human Resources. The Office of Human Resources, however, is reviewing but has not approved the final product of the pilot study.

## **Key Components**

The study reviewed and analyzed the Standards and Guidelines for the Management and Administrative Occupation Group (GS-300) to determine whether or not an existing series would provide a vehicle for the types of office support positions needed in the emerging office environment. The review and analysis revealed that while each series had some of the necessary attributes, none had all of them. Therefore, the approach being presented is an alternative to the existing one which segregates the duties and responsibilities of technical/scientific and management/administrative staff from the clerical/secretarial ones. The approach presented is based more on work content of the organization and emphasizes development and use of the analytic and project management skills required to perform the duties and responsibilities of the management/administrative series (including computer specialists). Figure 1 shows how this new approach would enhance the potential for multiple career options for office support staff.

The approach has four components:

**Assessment of office activities and tasks** to determine the most effective distribution of work within the office unit by using the Inventory of Office Tasks (Appendix B), Paraprofessional Tasks (Appendix C), Office Activity Profile (Appendix D) and Para-professional CompScan Profile (Appendix G).

**Realignment** (based on the results of the assessment) of office activities and tasks into a centralized office staff responsible for five main areas of support services:

- Document Production
- Office Support
- Office Management Information Systems
- Administrative Support
- Electronic Media Support

Each of these office services is designed to support the managers, supervisors and staff who carry out scientific, technical, program, and administrative functions of a given organizational unit. Figure 2 shows the inter-relationships between office support personnel, management, two-grade interval and technical/scientific staff in this new approach.

# Potential Career Paths for Office Support Staff

## Grade Level

12  
11  
10  
9  
8  
7  
6  
5  
4  
3  
2

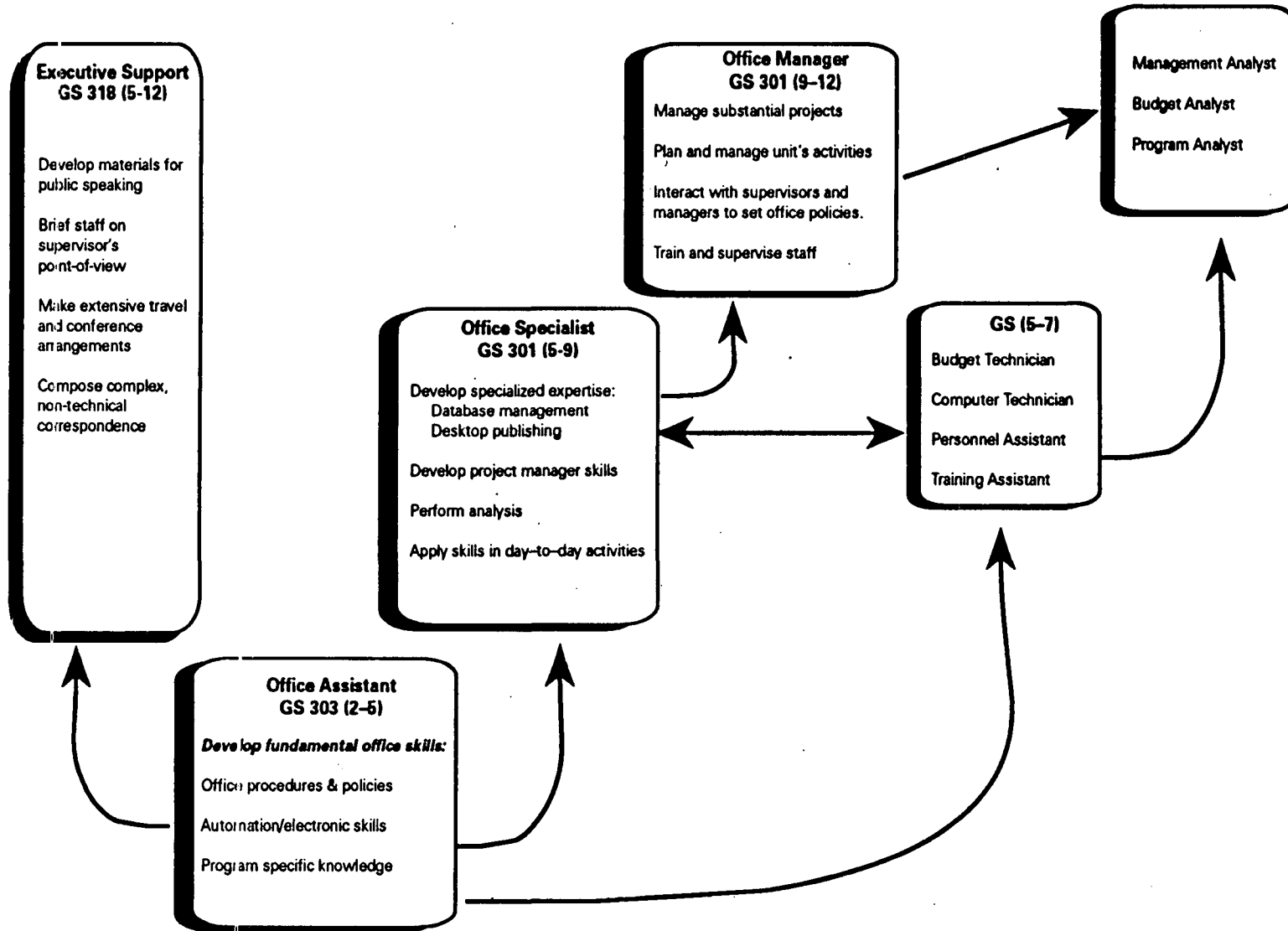
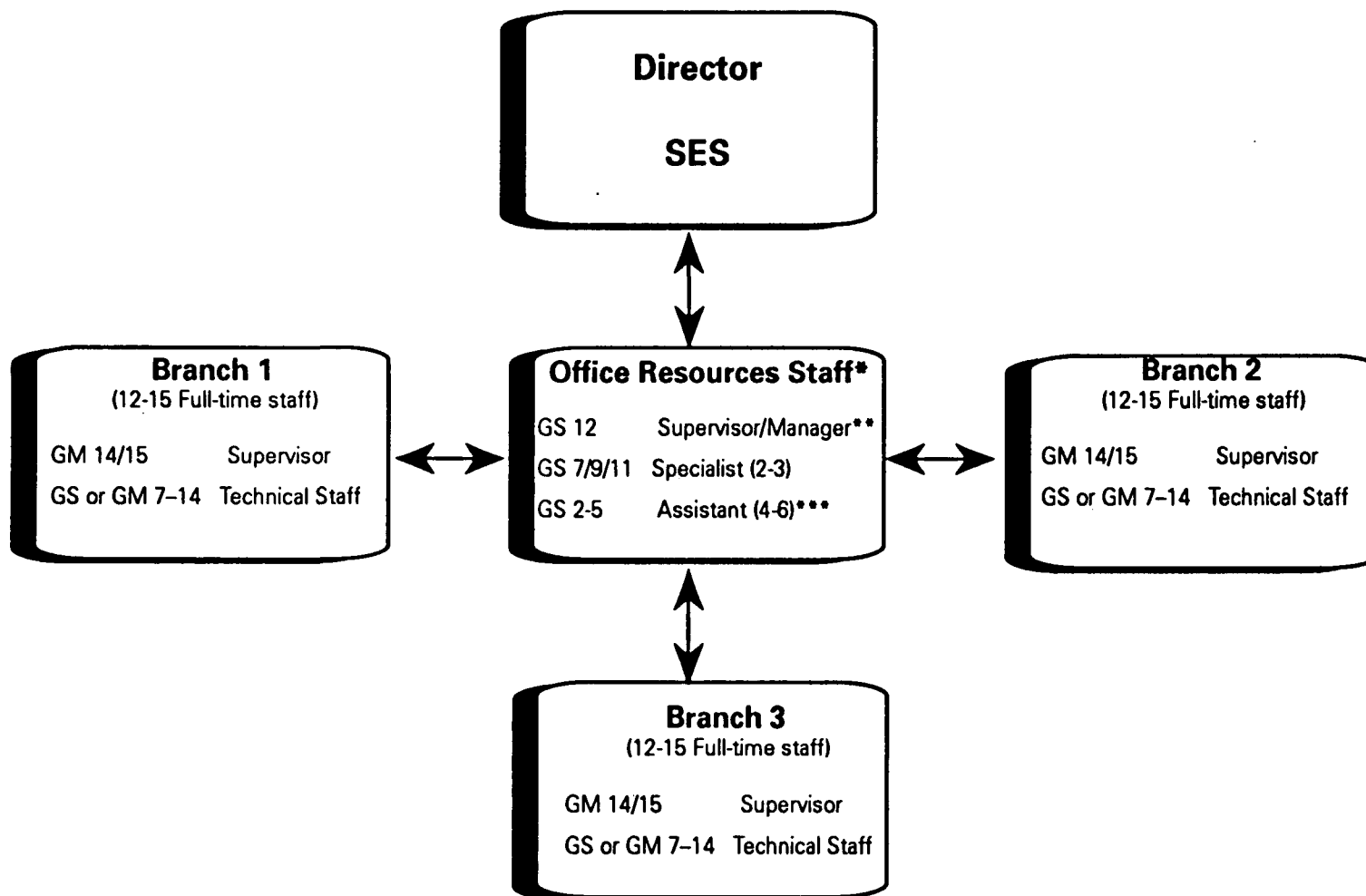


Figure 1

## Model Staffing Pattern Division Level Organization at 20 – 50 Staff



- \* Assumes this office support staff provides services directly related to the mission and general administrative and funds control services are provided by another unit
- \*\* Assumes staff provides support to Director/Branch Supervisor/Technical Staff
- \*\*\* Assumes each person works part-time—about 20 hours per week

Figure 2

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Creation of a new Office Resource Series to include Office Resource Assistants (GS 1-5), Office Resource Specialists (GS 5-11) and Office Resources Managers (GS 9-12 supervisors). The new job series have been developed to address the activities and tasks related to planning, coordinating, integrating, and implementing five key office services (see Appendix E for a more detailed description of each job series). This new series would:

- Use the Standards and Guidelines for the Management and Administrative Occupation Group (GS 300) to establish and classify positions.

Be based on the integration of standards and guidelines for six existing series:

- Management and Program Analyst (GS 343/345);
- Computer Specialist (GS 334);
- Administrative Officer (GS 341);
- Budget Analyst (GS 560);
- Secretary (GS 318); and
- Clerk-typist (GS 322)

Use the Management and Administrative Clerk (GS 303) standards and guidelines to establish and classify entry level positions (GS 1-4); and the Management and Administrative (GS 301) standards and guidelines to establish and classify journeymen (GS 5-11) and supervisory level (GS 9-12) positions.

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## Managing Time

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### **Key Objective**

Develop and test a method for examining how managers and staff allocate their time to different projects and activities.

As the project progressed, managers and supervisors began to see the value of the information that was being provided. A time study was initiated by the Office of Marine and Estuarine Protection (OMEP) to further refine and define the roles, functions, and services of the office (Appendix F). OMEP wanted to identify the types of tasks they were being done by the various levels of staff and to track the amount of time spent on each of the tasks. The study supported many of the earlier findings and verified the fact that two-grade interval staff were, indeed, doing many tasks once done by the office support staff. These findings resulted in a redefinition and redistribution of work for the two-grade interval and office support staff. More importantly, the study demonstrated that there were alternate career opportunities to be seized, not only to enhance the office support services that were being provided, but to enrich the job opportunities available to the office support staff.

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## Automating Office Tasks

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### ***Key Objectives***

Develop and test a method for examining office automation potential.

While the main study was being conducted the State Programs Division (SPD) decided to address an automation project that was expected to have a great deal of impact on the organization. The project was long-term in focus and involved the setting up of a Local-Area-Network (LAN) for the next year.

As the project affected everyone in the organization, therefore, it was felt that input was needed from all areas and levels of the organization. A task group was set up to gather information, develop plans and recommendations and to keep both management and other staff informed of the changes as they were being planned and implemented. Appendix H describes the process that SPD used to address the automation issues that it faced.

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### ***Next...***

The key steps of the review process and the tools developed and used were continuously tested and evaluated throughout the study. The tools listed are not inclusive, nor will they be applicable to all organizations. However, the process and the tools which have been described in this report can be adapted and changed to meet the needs of any particular organization.

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The next section describes how the Office of Water perceives it will look in the 90s and how it proposes to meet the challenges and changes it faces.



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# SUMMARY

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The bywords for the Office of Water as it moves in to the 1990s are *change* and *flexibility*. The study revealed that OW has, and is continuing to experience change. Perhaps the greatest challenge facing OW is in the way they need to view change in a different context. It is no longer feasible to view change from the perspective of problems to be solved. Instead, change must be viewed as the opportunities it presents for growth and development. To adapt and be responsive to these new opportunities as they arise, OW must become an organization that is flexible. OW staff must be able to alter what they work on, how they do their work and with whom they work. They must also be willing to accept that change will be continuous. The onus for adapting to change, however, does not fall entirely on the staff's shoulders. The organization, its systems and structures, must also be flexible and ready to support staff in adapting to change.

These changes are stretching the current communication and management capabilities of the office:

- Project teams are becoming more multi-disciplinary with the membership being drawn from organizations within and outside of OW.
- Traditional hierarchical structures and communication channels will continue to exist, but matrix structures and informal communication patterns will become increasingly important and effective.
- Managers and staff will work within both systems.

Changes in the way OW carries out its mission and program responsibilities include:

- greater emphasis on cross-program solutions to environmental and management problems or initiatives;
- increased state and local responsibility for implementing environmental programs;
- a larger citizen role in environmental decision making;
- more emphasis on education, outreach activities and programs to influence individual decisions; and
- a rapidly changing computer technology that is impacting the distribution and way in which work is done

New, dual management structures and systems must also evolve in which the systems neither impede nor bypass the work efforts being done in the other.

Moreover, a new skill profile is developing for OW's managers and staff which includes both technical and scientific expertise as well as communication and management skills. Managers will spend less time directing and controlling and more time leading, facilitating and coordinating their workgroup's activities. At all levels, OW's staff play a greater role in initiating their own activities/assignments and in contributing to the planning and decision making processes. It is becoming increasingly important that project leaders and team members be able to convey their knowledge and expertise, using a multi-media approach, to the non-scientific participants in the decision making process.

Furthermore, automation technology is the single greatest factor affecting the “who, what, where and how” of OW’s work efforts. Automation, when used effectively, has the potential to positively affect productivity, and to enrich jobs at all levels. Automation, however, is not well understood in all offices, and, as a result, the potential of automation has not been fully realized.

To successfully integrate automation into the office, a conscious and concerted effort is needed to plan for its implementation and use. The plan must address how technology will affect a redistribution of work activities as well as consider what new skills the staff will need. Adequate on-site support to train staff in the use of the technology and to ensure that the technology is properly maintained must be included in the plan.

Changes are also occurring at all levels of staff. Although managerial and scientific staff are adding new skills, their basic “job” has not changed. Managers continue to manage, and analysts, scientists, and technicians continue to provide “good science”. Office support staff, however, are perceived as being the largest group undergoing the greatest change. In some offices, the support staff are doing less of the “traditional office support work” and as a result are not being used effectively and productively. In other offices, support staff are effectively assigned new tasks such as desktop publishing and database management to enhance their responsibilities.

More and more, support staff are becoming para-professionals, skilled in database management, graphics production, and desktop publishing. Yet there is a continuing perception of support staff as only typists and receptionists whose services and contributions are considered secondary to the team's mission. These old perceptions must change. OW's staff needs to recognize the contributions, and potential of office support staff in helping the team achieve its goals. Additionally, all staff, including support staff, managerial, analysts, and scientific/technical staff need to enhance their skills repertoire by developing better communication, management, and team-building skills.

Hiring and retaining skilled support staff is a problem that needs to be addressed. Recruiting and training programs do help ensure that OW has the support staff it needs, but additional efforts are needed to ensure that this staff remains satisfied and productive. Continuing education, recognition programs, and revision of the job series to reflect their changing roles and contributions and career advancements are all possible ways in which OW can obtain and keep a cadre of skilled para-professionals.

The successful office will:

- be flexible;
- be able to shift its members to handle changes in its mission;
- put a strong emphasis on planning;
- value the contributions of all staff;
- place more emphasis on the product and less on where the product was produced;
- recognize training for the organizational benefit it represents; and
- emphasize communication.



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The successful office of the future will need to be prepared for change. Technology will continue to provide the workplace with new ways of performing work and the focus of how the organization achieves its mission will continue to change.

Communication will be the primary vehicle by which any office, including OW, attains success. Communication, whether electronic or face-to-face, will:

- keep decision makers aware of and able quickly to respond to changes;
- build trust between staff and management;
- enhance the sense of team; and
- help team members recognize the professional competence and contributions of other team members.

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The successful office of the future will be the one that recognizes the need to change and begins to take the necessary steps now. The unsuccessful office will put off change and hope for the best. As in all endeavors, success will come to those who plan and then act.



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# **Appendix A**

## **FOCUS GROUP AND INTERVIEW QUESTIONS**

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### **Context**

In this meeting we are examining two related issues: Job satisfaction and Self/office effectiveness. They are related because individuals are more productive if they are satisfied with their job and individuals have higher job satisfaction if they think that their abilities are being used to the fullest.

### **Questions**

1. What would make you more effective in the accomplishment of your duties?
2. What would make the office more effective in the accomplishment of its mission?
3. What are the barriers to making you more effective?
4. What are the barriers to making the office more effective?
5. What can you do to eliminate the barriers to effectiveness?

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## **Issues (Cont'd)**

6. What can management do to eliminate the barriers to effectiveness?
7. What are the barriers to self growth?
8. What can you do to overcome those barriers?
9. What can management do to overcome those barriers?
10. What tasks do you want to get rid of?
11. Describe the person that could take up all or part of those tasks. What knowledges and skills would they need?
12. What is keeping you from making better use of automation?
13. Do you have a career plan? Would the development of one be helpful?

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# Appendix B

## OFFICE TASK INVENTORY

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On the following pages is a breakdown of the major tasks performed in an office and the sub-tasks or steps for accomplishing them. This list was developed to help managers and employees who are interested in:

- Enriching a job;
- Forming a team;
- Re-distributing tasks; or
- Looking for developmental assignments.

The list may have other uses as new situations arise. When considering who should perform a specific sub-task, the knowledge and skill level required to perform the sub-task should be considered.

For example, the list can be used to plan a technical developmental assignment for a para-professional. By examining the list it is clear that sub-task C, Research material, under Report Writing is a technical task that requires little technical background if properly supervised. This would be a low-level task for a technical employee but would provide a challenging assignment for a para-professional. Assigning the task to the para-professional involves them in more of the team's work and frees up the technical employee's time.

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### OFFICE TASKS

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#### Report writing

- a. Conceptualize approach.
- b. Develop questions to be answered.
- c. Research material.
- d. Extract pertinent data from material.
- e. Provide technical guidance.
- f. Analyze data.
- g. Develop report format.
- h. Draft report.
- i. Input text.
- j. Produce the document.
- k. Coordinate the review of the report.
- l. Edit report for technical deficiencies.

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## **Report writing (cont'd)**

- m. Edit report for grammatical deficiencies.
- n. Review report for administrative completeness.
- o. Input the changes.
- p. Approve report.
- q. Distribute report.
- r. File report.

## **Document production**

- a. Design document layout.
- b. Design graphics (charts, etc.) needed to support text.
- c. Provide technical input/review.
- d. Produce graphics.
- e. Incorporate graphics into document.
- f. Print document.

## **Contract management**

- a. Develop contract specifications.
- b. Input specifications.
- c. Review the specifications for technical completeness.
- d. Review the specifications for procedural correctness.
- e. Input any changes.
- f. Discuss contract activities with contractor.
- g. Review contractor proposals to confirm that costs are appropriate and that funds will be used in most effective manner.
- h. Monitor contractor activities to determine whether they follow management plan.
- i. Discuss with contractor any deviances from management plan.
- j. Maintain file of contractor products and notes regarding contact with contractor.
- k. Analyze contractor produced products to determine whether they meet specifications.
- l. Identify any changes that need to be made to products.
- m. Communicate changes to contractor.
- n. Approve products.
- o. Determine whether modifications of contract are warranted.
- p. Negotiate price of modifications with contractor.
- q. Draft modification to include new work.
- r. Input modifications to the contract.
- s. Approve modification.
- t. Closeout contract.
- u. Evaluate contractor performance for award fee through review of monitors' description of performance.
- v. Develop Evaluation Report format.
- w. Write report.

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## **Database management**

- a. Input data into proper file/data base.
- b. Develop procedures/systems for data organization.
- c. Organize files/databases.
- d. Edit files/databases to remove outdated/obsolete data/files.
- e. Provide technical input on data viability/usability.
- f. Provide input on database/file configuration.
- g. Retrieve data/files.
- h. Assist others in the conduct of research in files/databases.
- i. Generate reports on request.
- j. Redesign database.

## **Tracking**

- a. Develop tracking system.
- b. Contact program/organization tracked for information.
- c. Read and analyze documentation to obtain needed data.
- d. Input data into tracking system.
- e. Analyze data for trends and problems.
- f. Contact program/organization tracked for additional information.
- g. Contact program/organization tracked to inform them of variances.
- h. Negotiate with program/organization tracked to revise schedule.
- i. Develop recommendations for changes in activity.

## **Regulations and guidelines development/revision**

- a. Identify overall need for regulation/guideline.
- b. Research data needed to develop guidelines.
- c. Extract pertinent data from material.
- d. Analyze data to identify specific needs to be covered.
- e. Provide technical guidance.
- f. Develop regulation/guideline format.
- g. Draft regulation/guideline.
- h. Input on word processing system.
- i. Coordinate the review.
- j. Edit regulation/guideline for technical deficiencies.
- k. Edit regulation/guideline for grammatical deficiencies.
- l. Review for administrative completeness.
- m. Input any changes.

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## **Guidance/ information provision (Policy, Management, Technical, FIOA)**

- a. Receive requests for information/guidance.
- b. Identify the appropriate individual to respond to the request.
- c. Research/collect data pertaining to the request.
- d. Analyze the data.
- e. Provide technical input.
- f. Contact the person making the request for additional information/clarification.
- g. Draft a response to the request, if needed.
- h. Input the response, if needed.
- i. Review the response for technical correctness.
- j. Review the response for grammatical correctness.
- k. Input any changes.
- l. Provide the requested information to the person who made the request.

## **Modeling**

- a. Conceptualize model.
- b. Identify parameters of model.
- c. Identify data needed to develop model.
- d. Research data needed for model development.
- e. Design model.
- f. Develop model.
- g. Maintain model.
- h. Research data for model input.
- i. Validate model.

## **Research/data collection/survey**

- a. Review information/data for possible research needs.
- b. Define the problem/issue to be researched.
- c. Identify the population/data source to be researched.
- d. Identify specific questions to be answered.
- e. Provide technical guidance.
- f. Develop survey/data collection method.
- g. Conduct survey/data collection.
- h. Analyze data.
- i. Write report detailing needs.

## **Liaison/ coordination with other organizations**

- a. Receive communications from other organizations.
- b. Contact other organizations to coordinate activities.
- c. Communicate information received to appropriate internal employees.
- d. Identify changes in internal activities needed to coordinate with other organizations.
- e. Approve changes.



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## **Internal coordination**

- a. Identify the activities/employees to be coordinated.
- b. Determine what each activity/employee must do to coordinate with each other.
- c. Provide technical input.
- d. Provide policy input.
- e. Communicate actions to activity/employee.

## **Grant funds allocation**

- a. Collect documentation on need for grant funds.
- b. Identify pertinent data needed to determine fund allocation.
- c. Evaluate prior grant usage.
- d. Determine needed fund amount.
- e. Prioritize needs.
- f. Negotiate with grantees for amount of fund allocation.
- g. Determine amount of funds to be provided.
- h. Allocate funds.
- i. Document allocation.

## **Project management**

- a. Identify purpose of project.
- b. Design project approach.
- c. Identify activities to be included in the project.
- d. Develop specific actions to be performed in each of the project activities.
- e. Schedule activities.
- f. Identify potential individuals and organizations to be included in the project.
- g. Communicate with potential individuals and organizations to determine their availability/suitability for the project.
- h. Assign activities.
- i. Coordinate conduct of project activities.
- j. Maintain records of project activities.
- k. Write report on project results.

## **Program review**

- a. Identify the need for a review.
- b. Identify the questions to answered in the review.
- c. Plan the conduct of the review.
- d. Coordinate with other employees in regards to the conduct of the review.
- e. Collect data regarding program conduct.
- f. Analyze data on program conduct.
- g. Communicate with program employees to collect additional information.
- h. Write report on program conduct.

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## **Conference conduct**

- a. Identify need for and specific subject to be discussed at conference.
- b. Identify possible geographic locations for conference.
- c. Identify potential conference participants.
- d. Contact potential conference participants to regarding their availability and interest.
- e. Collect information regarding conference site location (cost, availability, etc.).
- f. Recommend location.
- g. Approve location.
- h. Prepare necessary documents.
- i. Arrange details of conference site including facilities and reservations.
- j. Determine conference proceedings including scheduling and presentations.
- k. Conduct conference.
- l. Record conference proceedings.

## **Training**

- a. Identify training needs.
- b. Identify training delivery system that will best meet needs.
- c. Design training materials.
- d. Develop training materials.
- e. Deliver training.
- f. Evaluate training feedback.

## **Workplan review**

- a. Determine if resources (physical and human) are distributed in most efficient manner.
- b. Determine if workload is planned properly.
- c. Review for administrative completeness.
- d. Develop recommendations for changes in plan.

## **Document review**

- a. Coordinate review of document by appropriate employees.
- b. Evaluate documents to insure technical accuracy.
- c. Evaluate documents for policy implications.
- d. Evaluate documents for procedural accuracy and administrative completeness.

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## **Leadership**

- a. Establish priorities, schedules, and objectives for the work unit.
- b. Coordinate the activities of the work unit with other work units.
- c. Report activities of work unit to superiors.
- d. Inform staff of relevant Agency policies and activities.
- e. Determine resources needed to accomplish work unit objectives.
- f. Insure that resources are secured and available for use to accomplish work unit objectives.

## **Procedure development**

- a. Identify the need for procedural development.
- b. Collect technical information.
- c. Draft procedures.
- d. Review procedures to ensure that they are complete and correct.
- e. Edit procedures for grammatical deficiencies.
- f. Approve procedures.

## **Scheduling/ planning**

- a. Identify the activities/resources to be scheduled.
- b. Identify the steps required to accomplish the activities.
- c. Prioritize the activities/resources.
- d. Identify the time it will take to complete the activities and whether they can be completed simultaneously.
- e. Develop a schedule for the activities/resources.
- f. Approve the schedule.

## **Budget development and implementation**

- a. Develop systems for budget materials preparation so that the materials interface with those prepare in other organizations.
- b. Revise systems for budget materials preparation.
- c. Develop guidance and instructions for the development and presentation of the budget and associated documents.
- d. Develop resource targets and ceilings.
- e. Collect material relating to the development of a budget.
- f. Identify the resources needed to perform an activity.
- g. Compile a cost listing of the resources needed.
- h. Prepare documents to establish/justify the resource requirements for a given activity.
- i. Evaluate justifications.
- j. Evaluate budget proposal(s) to identify inconsistencies.
- k. Approve budget details.
- l. Present budget to management.
- m. Develop recommendations regarding initial distribution of funds.

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## **Budget development and implementation**

- n. Collect information concerning the relationship of funds expended to program accomplishments.
- o. Prepare reports concerning the relationship of funds expended to program accomplishments.
- p. Review reports concerning the relationship of funds expended to program accomplishments.
- q. Reprogram funds when needed.

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## **Appendix C**

# **THE PARA-PROFESSIONAL POSITION A STEP TOWARD THE FUTURE**

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This document evolved out the Office of Water's "Office of the Future" study. During the study, interviewees and focus group members were asked, "What duties should support staff perform in the new office environment and what competencies do they need to perform them?" The following reflects the information provided by their answers.

In addition to some of the more administrative activities, there was a marked need for a person to perform certain semi-technical duties. These duties are often being performed by two-grade interval staff despite the fact that the duties do not require their level or type of expertise. This is due to the rapidity with which change has been occurring at OW and in the office.

Many of these semi-technical duties are relatively new and deal to some extent with automation technology. Others are more traditional duties that have been expanded due to increased public interest in OW's mission. An example of a duty that has expanded is "Respond to outside requests for information." Traditionally, this task has fallen to the two-grade interval staff despite the fact that the requests often do not require a high level of technical expertise to answer. Two-grade interval staff tend to be more familiar with, and interested in the potential of office technology than other office personnel. Because of this, they have assumed non-technical computer-based duties as they developed. In some cases, they were responsible for the development of these new duties. Desk top publishing and database management are two examples of these types of duties. These duties can take an inordinate amount of the two-grade interval staff's time, time that could be spent on the duties that they were trained and hired to perform.

While some new duties have been created and old ones have been expanded, other office support duties have been disappearing. For example, two-grade interval staff often creating their own first drafts using word processing software. This has resulted in a reduced need for clerk typists. It is also becoming increasingly rare to find a secretary who supports just one person. Instead, most support staff work for many individuals. Since the change has been gradual and unplanned, there now exists a pool of support staff who perform a wide variety of duties but do so under the GS-318 job classification which office support staff perceive to be descriptive of the duties they are now performing. This makes the selection and training of support staff difficult since the competencies required for a secretarial position may be very different from those required to support the new duties.

On the other hand, office support staff are in a good position to perform some of the duties that are currently done by two-grade interval staff. These duties are beyond what office

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support staff have traditionally done, but do not take the level or type of technical expertise held by two-grade interval staff.

These duties would be best performed by this new group of support staff employee—the Para-Professional. The Para-Professional is a highly capable and motivated team player who has expertise in technical areas, such as PC operation or desk-top publishing, and demonstrates initiative and the ability to problem solve.

On the following pages are draft lists of potential Para-Professional duties and the competencies required to perform them. For the purposes of this paper a competency is a capacity, skill, or ability that is required to perform a duty or set of duties. Each competency is defined and has an example of the type of duty that demonstrates the competency. The list of duties is not meant to be comprehensive nor a description of everything a Para-Professional should perform. Rather, it is meant as a laundry list of duties that could be assigned to a Para-Professional.

Model staffing patterns and position descriptions are provided in Appendix D. The competencies, roles, and tasks of support staff are presented in Appendices B and C.

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## **Para-Professional Tasks**

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### **Technical**

1. Conduct data collection activities e.g., telephone surveys, library research. Includes:
  - a. Assist in the identification of the specific questions to be answered.
  - b. Conduct survey/data collection.
  - c. Conduct preliminary data analysis.
2. Respond to standard requests for documents and information.
3. Attend meetings for the purpose of data collection and reporting back.
4. Prepare fact sheets and Q&As.
5. Prepare FOIA responses.
6. Compile the bi-weekly report.
7. Assist in the development of RFPs.
8. Provide on-site PC support and training.
9. Develop workload models with input from technical experts.

### **Data Management**

1. Archive and file material
2. Maintain mailing lists and make labels
3. Manage databases including:
  - a. Input data into proper file/data base.
  - b. Develop procedures/systems for data organization.

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## **Data Management (cont'd)**

- c. Organize files/databases.
- d. Edit files/databases to remove outdated/obsolete data/files based on prepared guidelines and input from others.
- e. Retrieve data/files.
- g. Assist others in the conduct of research in files/databases.
- h. Generate reports on request.
- i. Redesign database.

## **Communication**

- 1. Coordinate with other organizations including:
  - a. Receive communications from other organizations.
  - b. Contact other organizations to coordinate activities.
  - c. Communicate information received to appropriate internal employees.
- 2. Communicate information internally.
- 3. Facilitate document review including:
  - a. Coordinate review of document by appropriate employees.
  - b. Evaluate documents for procedural accuracy and administrative completeness.
- 4. Prepare briefing material.
- 5. Prepare routine correspondence.

## **Document production**

- 1. Compile memo packages, etc. and route them properly.
- 2. Perform quality control of documents.
- 3. Format reports.
- 4. Proofread documents.
- 5. Edit documents.
- 6. Perform desk top publishing including:
  - a. Design document layout.
  - b. Design graphics (charts, etc.) needed to support text.
  - d. Produce graphics.
  - e. Incorporate graphics into document.
- 7. Produce charts and graphs

## **Administration**

- 1. Coordinate/arrange both internal and external meetings/conferences including:
  - a. Identify possible locations for meeting/conference.
  - b. Contact potential participants regarding their availability and interest.
  - c. Collect information regarding meeting/conference site location (cost, availability, etc.).
  - d. Recommend a location.
  - e. Prepare necessary administrative documents.

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## **Administration (cont'd)**

- f. Arrange details of site including facilities and reservations.
  - g. Record conference proceedings.
- 2. Arrange travel
- 3. Prepare forms (travel and p.r.s)
- 4. Route, track, and distribute documents
- 5. Conduct contract administration and accounting including:
  - a. Review the specifications for procedural correctness.
  - b. Track expenditures and other administrative data.
  - c. Maintain a file of contractor products and notes regarding contact with contractor.
  - d. Conduct contract closeout activities.
  - e. Develop Evaluation Report format.
- 6. Perform custodial officer duties
- 7. Maintain a supply inventory including office supplies and common administrative forms.
- 8. Schedule activities and resources.
- 9. Track activities and resources (e.g. monies, etc.) including:
  - a. Develop the tracking system.
  - b. Contact program/organization tracked for information to collect documents/information.
  - c. Read and analyze documentation to obtain needed data.
  - d. Input data into tracking system.
  - e. Analyze data for trends and problems.
  - f. Contact program/organization tracked for additional information.
  - g. Contact program/organization tracked to inform them of variances.
  - h. Develop recommendations for changes in activity.
- 10. Collect personnel information and prepare paperwork.
- 11. Develop administrative procedures including:
  - a. Identify the need for procedural development.
  - b. Collect technical information.
  - c. Draft procedures.



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## PARA-PROFESSIONAL COMPETENCIES

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### **Dependability**

Being worthy of trust in the conduct of work. Working reliably and dependably at tasks whether they are assigned by others or by yourself. Getting the job done on time.

**Task:** Maintain a supply inventory including office supplies and common administrative forms.

### **Judgement**

Making a decision or forming an opinion objectively and wisely especially in matters affecting action. Choosing a sound course of action based on the realities of the situation.

**Task:** Perform quality control of documents.

### **Decision Making**

Recognizing decision-making situations. Anticipating and defining problems. Being willing to make decisions and accept responsibility for the outcomes of those decisions. Rendering judgements, taking initiatives, making commitments, and knowing when to amend or escalate decisions.

**Task:** Identify the need for procedural development.

### **Business-like**

Presenting an image in keeping with the organizational context. Following the practices and methods of the organization.

**Task:** Contact potential participants regarding their availability and interest in participating in a conference/meeting.

### **Computer Literacy**

Performing tasks through extensive use of the computer. Understanding the use of the advanced functions in software and how they save time.

**Task:** Manage automated databases.

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## **Problem Solving**

Understanding what the situation is now and what it is expected to be in order to determine possible solutions. Recognizing the value of the range of available options, organizing, integrating, synthesizing information and drawing inferences.

**Task:** Contact program/organization tracked for additional information.

## **Written Communication**

Preparing and presenting written material effectively and clearly following generally accepted style rules. Developing material that is creative, informative, and appropriate for the audience. Presenting ideas clearly and concisely in a way that people can easily understand and accept.

**Task:** Prepare FOIA responses.

## **Oral Reporting**

Orally presenting information clearly, precisely concisely, and effectively in order to inform, influence, or persuade others. Presenting ideas in a way that people can easily understand and accept.

**Task:** Communicate information received to appropriate employees.

## **Listening**

Listening actively to recognize and clarify verbal and nonverbal messages. Understanding the context and the content of what is being said as well as the affective aspect of the message.

**Task:** Attend meetings for the purpose of data collection and reporting back.

## **Teamwork**

Building trust, demonstrating support, and establishing effective communication channels. Demonstrating sensitivity and awareness of the feelings and thoughts of others.

**Task:** Provide on-site PC support and training.

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## **Interpersonal**

Working with other team members and facilitating the interaction among the team so that the team's goals are reached effectively. Building collegial relations and alliances. Creating and leading small work groups. Building openness, team spirit, cohesiveness within work groups.

**Task:** Assist in the development of administrative data bases.

## **Leadership**

Creating a vision and conveying it to others. Inspiring others to carry out the vision by demonstrating the appropriate leadership style. Influencing others to strive willingly toward goal achievement in a given situation.

**Task:** Provide other staff with sense of mission and need to carry it out.

## **Initiative**

Seeing things that need to be done and doing them without being told. Self-starting and independent.

**Task:** Identifies the need for a tickler file and develops it.

## **Influencing**

Swaying others thoughts and/or actions in order to accomplish tasks and fulfill the need of the group.

**Task:** Recommend a location for a conference and/or meeting.

## **External Communications**

Understanding the formal and informal context (including culture and image) of the organization in order to communicate with others outside the organization. Familiar with the organization's mission and plans and how they relate to external groups.

**Task:** Contact other organizations to coordinate activities.

## **Problem Escalation**

Understanding the formal and informal context of the organization and knowing when a problem is beyond your position's ability to solve it. Choosing the correct individual/organization to handle the problem.

**Task:** Inform appropriate parties when systems are not operating correctly.

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## **Scheduling**

Specifically describing/arranging activities so that they occur in the most efficient and logical way. Minimizing delays and unused resources that adversely affect the accomplishment of goals.

**Task:** Schedule activities and resources.

## **Organization**

Arranging own activities and/or the activities of others to attain specific results and provide effective courses of action. Identifying priorities and arranging activities so that high priority activities are accomplished in a timely manner.

**Task:** Arrange daily schedule to allow for completion of all required activities.

## **Supervisory**

Building constructive environments for effective communications with supervisors, peers, and subordinates. Using planning, organizing, coaching, and counseling skills effectively. Providing frequent and detailed performance feedback. Providing guidance, follow-up, and control. Taking charge, directing, and developing as well as coordinating the activities of others.

**Task:** Plan subordinates staff daily schedule and activities to be accomplished.

## **Delegating**

Giving people the responsibility and authority to complete a task; allowing them to use their judgement when performing the task. Giving clear responsibility, allowing the necessary authority, assuming accountability, and understanding the worker's abilities and motivational level.

**Task:** Distribute appropriate assignments with sufficient instruction and authority.

## **Negotiation Skills**

Securing win-win agreements while successfully representing a special interest in a decision situation.

**Task:** Arrange for consensus in review of documents by appropriate employees.

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## **Risk Taking**

Acting upon a calculated risk. Making decisions when the outcome is not clear. Accepting responsibility for actions, initiatives, and outcomes. Creating and promoting an atmosphere in which individuals feel they can try new things, risk failure, and still get support.

**Task:** Develop recommendations for changes in activity as a result of tracking events.

## **Innovating**

Seeing beyond the current state of affairs. Developing new responses to situations and having enough insight to encourage, recognize, and apply useful and unique approaches and solutions to problems even when they are presented from other sources.

**Task:** Develop procedures/systems for data organization.

## **Organizational Know-how**

Understanding the formal and informal context of the organization in order to accomplish actions. Familiar with the organization's environment, mission, plans, structure, culture, management systems, and operating procedures.

**Task:** Route, track, and distribute documents to appropriate party.

## **Meticulousness**

Concentrating on a task being performed in order to produce an error free product. Understanding the need for quality. Reviewing, detecting, and correcting errors whenever possible.

**Task:** Review specifications for procedural correctness.

Determining the relevant facts and ideas in a situation, recognizing the range of options available, organizing, integrating, synthesizing information and drawing inferences.

**Task:** Identify, read and interpret documentation to obtain needed data.

## **Teaching**

Understanding and applying the principles of learning theory in order to teach people and make difficult subjects easy to understand.

**Task:** Provide on-site PC support and training.

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## **Specific Knowledge Requirements For Each Of The Three Main Para-Professional Types**

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### **Para-librarian duties**

**(Duties that involve  
database**

A knowledge of:

1. Program activities and responsibilities
2. Specialized software package operation (DBase3, etc.)
3. Database set up and operation

### **Para-publisher duties**

**(Duties that involve  
desktop publishing)**

A knowledge of:

1. Editing
2. Specialized software package operation (Ventura, etc.)
3. Graphics
4. Design and typography

### **Para-manager duties**

**(Duties that involve  
supporting the  
management of an  
office)**

A knowledge of:

1. Program activities and responsibilities
2. Specialized software package operation (Lotus123, etc.)
3. Management systems
4. Tracking systems

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# Appendix D

## OFFICE ACTIVITY PROFILE

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### Introduction

The Office Activity Profile is designed to assist you in evaluating the types of activities performed by your office staff and to ensure appropriate assignment of tasks (i.e., entry-level tasks are assigned to entry-level staff).

### Description of the form

In the shadowed boxes at the top of each page under the column titled, “Service/Activity/Task” are the five main areas of office support work:

- a. Document Production Services;
- b. Office Support Services;
- c. Office Management Systems Services;
- d. Administrative Support Services; and
- e. Electronic Media Support Services.

Under each Service area are the main activities (shown in bold print) for that particular function followed by a more detailed list of related tasks (shown in italics).

### Example

Under the Service Area, Document Production, a main activity area is:  
**Data collection.**

A sample task for the above activity is:

*Conduct survey/data collection and input data.*

The tasks listed are differentiated based on complexity or the specific skill requirements involved in performing the task. The breakdown of tasks is as follows:

- a. basic tasks;
- b. specialized endeavors such as budgeting, analysis or editing; and
- c. managerial/communication activities.

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The three types of office support staff are listed to the right of the Function/Activity/Task column :

**Office Resource Manager (OM)** Supervises the rest of the office management support staff and performs management related duties.

**Office Resource Specialist (OS)** Performs technical or specialized office support and coordination duties such as document production, office services or accounting.

**Office Resource Assistant (OA)** Performs entry level and/or general office support duties thereby freeing other staff to perform specialized duties.

In the columns to the right of each task are the role assignments for each of the three office staff positions (OM, OS, and OA). The role assignments indicate the level and type of involvement of the different staff positions for each task:

- |                  |   |
|------------------|---|
| <b>Leader</b>    | Primarily works as a advisor or facilitator, motivating or initiating the work of others but is not usually involved in the “hands-on” part of the task. This person often serves as the conduit for information about the task or project. |
| <b>Performer</b> | The person who actually does the “hands-on” work related to the task.   |
| <b>Assistant</b> | The person who supports the Performer in doing the work. This person’s work is usually assigned and supervised by the Performer.  |

Each role assignment varies according to the type of activity or task being considered and the skill/knowledge level needed to perform the task. Note that all three roles can be assigned to any one of the three support staff positions. For some tasks, there may not be an appropriate support staff position in your office for each role assignment. For example, on policy-related tasks the Leader role may be assigned to someone outside the support staff group. In this case, the Office Manager might be designated as the Performer, directed by a Leader outside the office support group.

The pre-set role assignments serve as a guideline. The profile can provide insight into whether or not the tasks currently performed in your office are assigned appropriately. For example, you may realize after looking at the profile that your desktop publisher (Office Specialist) is often assigned the initial text entry for reports --- a task that would be more appropriately assigned to someone at the Office Assistant level. In addition to evaluating current activities and tasks the profile also provides guidance when reorganizing or planning new services/programs. Each office is unique, therefore, it is important to review and adjust the assignments to reflect functions and needs of your particular office.



# OFFICE ACTIVITY PROFILE

Service/Activity/Task	Staff Participation Level		
	Office Manager	Office Specialist	Office Assistant
<b>A. Document Production</b>			
<b>Data collection</b> <i>Conduct survey/data collection and input data.</i>	L	P	A
<i>Define the problem/population to be researched and identify questions to be answered. Develop survey and analyze data using application data management tools.</i>	L	P	A
<i>Write reports detailing needs/results.</i>		P	A
<b>Document development and support to document writers</b> <i>Input text/graphics for office documents.</i>	L	P	A
<i>Edit and coordinate text/graphics for office documents.</i>	L	P	A
<b>Document publishing services</b> <i>Design and produce document layout and graphics using desktop publishing tools.</i>	L	P	A
Other (Specify)			

# OFFICE ACTIVITY PROFILE

Service/Activity/Task	Staff Participation Level		
	Office Manager	Office Specialist	Office Assistant
<b>B. Office Support</b>			
<b>Internal information management</b> <i>Identify and contact individuals/organizations to collect and disseminate information/comments using application communications tools—automated and non-automated.</i>	L	P	A
<i>Collect, record, and collate information/comments using application word processing or data management tool.</i>		L	P
<i>Organize data into proper files/databases. Edit and retrieve data/files and assist others in research of files/databases.</i>		L	P
<b>Meeting and conference management</b> <i>Identify meeting locations, develop, collect and disseminate meeting site information to meeting participants.</i>	L	P	A
<i>Organize, oversee, and prepare and distribute briefing materials.</i>	L	P	A
<i>Arrange details and documents for facilities and reservations.</i>	L	P	A
<b>Project and staff, schedules management.</b> <i>Receive and prioritize activity requests.</i>	L	P	A
<i>Evaluate and recommend management activities to resolve issues conflicts in staff projects/schedules.</i>	P	A	
<i>Consult with individuals/organizations to select and schedule the activity.</i>	L	P	A
<i>Tracks and monitors progress.</i>		L	P
<b>Telephone and reception services</b> <i>Develop policies and procedures.</i>		L	P
<i>Answer telephone and greet visitors. Refer calls /visitors to appropriate staff members. Take and forward messages to appropriate staff members.</i>		L	P
<i>Maintain and monitor voice communication and voice mail.</i>		L	P
<b>Distribution services</b> <i>Develop, establish, evaluate, and modify distribution and delivery systems.</i>		L	A
<i>Prepare and deliver items by the most efficient method to the correct address (i.e. electronic or manual).</i>		L	P
<b>Other (Specify)</b>			

# OFFICE ACTIVITY PROFILE

Service/Activity/Task	Staff Participation Level		
	Office Manager	Office Specialist	Office Assistant
<b>C. Office Management Systems</b>			
<b>External information</b> <i>Develop and establish procedures/systems for information guidance.</i>	L	P	A
<i>Operate manual or automated systems and organize data pertaining to the request.</i>		L	P
<i>Draft, input, edit, and review responses to request.</i>	L	P	A
<b>Office records management</b> <i>Develop and establish procedures/systems for office records management.</i>	L	P	A
<i>Operate manual or automated systems and update records management system.</i>		L	P
<i>Organize data into proper files/databases. Edit and retrieve data/file and assist others in research of files/databases.</i>	L	P	A
<i>Generate reports on request.</i>		L	P
<b>Correspondence management</b> <i>Interpret correspondence policy.</i>	L	P	A
<i>Receive, log, track and direct correspondence to appropriate individual.</i>		L	P
<i>Maintain correspondence and request for information/guidance and tracking system.</i>		L	P
<b>Management Tracking Systems</b> <i>Develop and establish policies, procedures, and systems.</i>	L	P	A
<i>Develop and recommend changes for tracking system.</i>	L	P	A
<i>Operate system and update records.</i>		L	P
<i>Contact appropriate program, organization, or individual for information to be input into system.</i>	L	P	A
<i>Analyze reports and notify appropriate program, organization, or individual of variances. Negotiate to revise schedules.</i>	L	P	A

# OFFICE ACTIVITY PROFILE

Service/Activity/Task	Staff Participation Level		
	Office Manager	Office Specialist	Office Assistant
<b>C. Office Management Systems (continued)</b>			
Office management policies/ procedures/guides. <i>Develop, recommend, evaluate, and approve procedures.</i>	L	P	A
<i>Identify needs and collect technical information.</i>	L	P	A
<i>Test procedures, coordinate review process, and edit procedures.</i>		L	P
Other (Specify)			

# OFFICE ACTIVITY PROFILE

Service/Activity/Task	Staff Participation Level		
	Office Manager	Office Specialist	Office Assistant
<b>D. Administrative Support Services</b>			
<b>Supply services</b> <i>Develop, interpret and disseminate information on supply policies.</i>	L	P	A
<i>Conduct regular supply inventories. Store, issue and replenish supplies.</i>		L	P
<i>Determine supply level and identify storage space. Determine best available sources of supplies.</i>		L	P
<b>Procurement of goods and services</b> <i>Interpret and keep staff informed on procurement policies/procedures.</i>	L	P	A
<i>Negotiate acquisition of goods and services.</i>	L	P	A
<i>Prepare necessary forms/documents and track status of requests.</i>		L	P
<b>Facility support services</b> <i>Develop and interpret facility management policies.</i>	L	P	A
<i>Collect information on, plan, negotiate and execute furniture moves.</i>	L	P	A
<i>Develop and follow-up on building modification requests.</i>	L	P	A
<b>Human resource activities</b> <i>Advise and assist staff in acquiring human resources services.</i>	L	P	A
<i>Prepares appropriate forms/documents as required.</i>		L	P
Other (Specify)			

# OFFICE ACTIVITY PROFILE

Service/Activity/Task **	Staff Participation Level		
	Office Manager	Office Specialist	Office Assistant
<b>E. Electronic Media Support</b>			
Support office PC and electronic media users <i>Manage computer support or maintain central software and hardware manuals.</i>	L	P	A
Collect information, answer questions and solve problems related to software and hardware use. <i>Install hardware and software.</i>	L L	P P	A A
<i>Provide limited training on software/hardware use.</i>	P	A	
Maintenance services for electronic equipment. <i>Perform and/or request routine and preventative maintenance on computer hardware and software.</i>	L	P	
<i>Maintain inventory of and identify needs for office software and hardware. Develop and maintain familiarity with automation-related developments.</i>	L	P	A
Support managers on automation-related issues <i>Oversee planning for office automation requirements.</i>	L		
<i>Identify automation-related training needs. Make recommendations and evaluate hardware and software automated office activities.</i>	L	P	A
<i>Develop and interpret automation-related policies and procedures.</i>	P	A	
Other (Specify)			
<b>** Please note that this function could be performed by a contractor. If this is the case, the Office Manager would be the project officer and the contract staff would function in the performer and assistant role.</b>			

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# **Appendix E**

## **MODEL POSITION DESCRIPTIONS**

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This appendix contains samples of position descriptions (PDs) for the Office Manager, Office Specialist, and Office Assistant. The PDs contained in this appendix are **not** official position descriptions. Rather, the sample PDs are meant to serve as a reference tool to assist managers in developing support staff PDs that meet the needs of their particular organization. The roles and responsibilities contained in the sample PDs reflect the findings that arose during the OW's Office of the Future study.





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## **Office Resources Manager**

### **GS 301    Grade 12**

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THIS MODEL POSITION DESCRIPTION REFLECTS THE DUTIES AND RESPONSIBILITIES FOR SOMEONE MANAGES A STAFF OF OFFICE RESOURCE SPECIALISTS AND OFFICE RESOURCE ASSISTANTS AT THE ASSISTANT ADMINISTRATOR OR OPERATING PROGRAM OFFICE LEVEL. IT ALSO REFLECTS THAT THE MANAGER AND STAFF PROVIDE A FULL RANGE OF OFFICE RESOURCE SERVICES AS WELL AS SOME SPECIALIZED OFFICE SERVICES TO THE ORGANIZATION. IT ASSUMES THAT:

- THIS POSITION PROVIDES THE BASIC POLICY DIRECTION AND LEADERSHIP FOR THE FUNCTIONS PERFORMED.
- THE ORGANIZATION'S WORKLOAD HAS DEFINED A STAFFING PATTERN OF:
  - TWO OR MORE OFFICE RESOURCE SPECIALISTS WITHIN THE ORGANIZATION; AND
  - THREE OR MORE OFFICE ASSISTANT POSITIONS WITHIN THE ORGANIZATION.

### **Introduction—Staff Level Organization**

This position is located in the Office Resources Team (Branch) within the Staff Level Office which reports to the Assistant Administrator for \_\_\_\_ or the Office Director for \_\_\_\_\_. The Staff Office Director for \_\_\_\_ is responsible for implementing the following major scientific or technical, administrative, and program functions:

- (list three to five major functions of the organization.)
- 

The Office Resources Team (Branch) provides effective and efficient planning, coordination, integration, and implementation of office resource functions which support the scientific/technical, administrative and program functions to the Staff Office Director within the Immediate Office of the Assistant Administrator for \_\_\_\_ or the Office Director for \_\_\_\_\_.

## Major Duties and Responsibilities—Staff Level Organization

The purpose of this position is to:

- Supervise a Team (Branch) of office resource specialists and assistants who perform one or more of the following office resource functions which support the managers, supervisors, and staff of Office of \_\_\_\_: Document Production Services; Office Support Services; Management System Services; Administrative Services; and Electronic Equipment and Support Services.
- Work with managers, supervisors, and staff of all organizational units within this Office to develop and implement work plans; management policies, procedures, processes systems; automated systems and tools; and office products which result in the delivery of effective and efficient office resource services to the managers, supervisors and staff.
- Coordinate the development, implementation, and use of electronic tools and systems which support office resource functions. This coordination is to ensure that the managers, supervisors and staff in the Office of \_\_\_\_ are aware of already developed electronic and automated tools and to ensure that the Office conforms to applicable EPA and OW policies and standards.

The incumbent exercises management, leadership, and oversight in the conduct of the following activities:

1. Review, evaluation, development, and implementation of Office Resource Services' (i.e., Document Production, Office Support, Management Systems, and Administrative Services) policies, procedures, processes, delivery systems, and practices. Specific activities include:
  - Analyses of Office Resource Services to determine relevance, effectiveness and efficiency of policies, procedures, processes, delivery systems and practices. This includes:
    - ➔ Conducting studies and analyses in areas such as document preparation, document control, procurement, supply, etc.;
    - ➔ Preparing summaries of pertinent facts and issues;
    - ➔ Developing options and recommendations for Office (Division) Director's review and decision.
  - Revising, developing, and implementing Office Resource Services' policies, procedures, processes, delivery systems and practices to meet evolving Office requirements.
  - Overseeing the development and implementation of new automated (and/or electronic) or manual productivity tools and practices.
  - Overseeing the operation and maintenance of existing automated (and/or electronic) or manual productivity tools and practices.

- Providing advice on personnel actions, procurement, space realignment and union requirements, ethics and conduct requirements, telecommunication services, and related documents.
  - Overseeing and managing the delivery of the following Office Resource Services to the Office.
    - Document Production
    - Office Support
    - Management Tracking Systems;
    - Administrative Support Services;
2. Review, evaluation, development, and implementation of information and records management policies, procedures, processes and systems as they relate Office Resource Functions. Specific tasks include:
- Analyses of Office information requirements to determine relevance, effectiveness and efficiency of policies, procedures, processes and systems.
  - Revising, developing, and implementing information and records management policies, procedures, processes and systems to meet evolving Office requirements.
  - Overseeing the development and implementation of new automated and manual information and records management systems.
  - Overseeing the Operation and maintenance of existing automated and manual information and records management systems.
3. Interprets Federal, Agency, and Office Policies and Procedures.
- Provides guidance and advice on the application of Federal, EPA, and Office of \_\_\_ applicable policies, guidelines, and regulations that impact the Office of \_\_\_. Keeps the Director, managers, supervisors, and staff abreast of all significant matters. The policies, guidelines, and regulations include facility management, human resources, delegations of authority, ethics, procurement, budget, financial management, information resources, etc.
4. Manages Office's Operating Budget (i.e., work-years and funds). (This function may not be performed in all offices.)
- Manages the operating budget for the Immediate Office of \_\_\_. In this capacity, the incumbent:
- Performs or directs studies and analyses of budgetary data to ensure that the utilization of all resources is within fiscal allowances, is consistent with overall program goals, and that resources are used to maximum effect.
  - Evaluates the work-year use and financial expenditures against available ceilings and funds and their impact on organizational program needs and operating costs.

- Reconciles financial reports and develops detailed financial reports to show expenditures, available balances, and projection of funding requirements for current fiscal year and for future fiscal years. Resolves discrepancies with Financial Management Office.
- Certifies that funds are available for procurement requests, contracts, and all funded documents.
- Recommends reprogramming of funds when necessary due to new initiatives that require changes in emphasis of financial data, changes in assumptions, plans and objectives, cost accomplishments, etc.
- Coordinates closely with the Budget Team (Office), and processes change requests as needed.

## 5. Exercises Supervisory Control

Exercises supervisory personnel management responsibilities over staff members, making assignments and determining responsibilities and priorities, evaluating employee performance, recommending appropriate incentives, initiating corrective actions, assuring safety practices, keeping employees informed of management and personnel policies, counseling regarding their benefits and salaries and the status of requirements of Federal civil service. Additionally, the incumbent exercises continuing responsibility to support the Equal Employment Opportunity policies. Responsible for communicating this support to subordinates and taking positive action which will motivate and furnish career development opportunities to the staff.

## Factor 1

### ***Knowledge Required By the Position— Level 1-7: 1250 pts***

Incumbent develops and/or implements resource guidance for Office of \_\_\_ activities to support the Office of \_\_\_ programs and performs continuous appraisal; of the utilization of resources in accomplishing program objectives and goals. Incumbent has mastered a wide range of qualitative and/or quantitative methods for assessing and improving program effectiveness or complex management processes. Assignments require knowledge and skill in applying analytical and evaluative methods and techniques to issues or studies concerning the efficiency and effectiveness of program operations carried out by administrative or professional personnel, substantive administrative or professional personnel, or substantive support functions. Examples may include internal activities or functions involving supply, budget, procurement, or personnel which serve to facilitate line or program operations). Contractual examples may include: (1) IFMS-Budget

Automation (2) Grants-Office Support, (3) Office Services, etc.

This level includes knowledge of pertinent laws, regulations, policies and precedents which affect the use of program and related support resources (people, money, or equipment) in the area studied. Projects and studies typically require knowledge of the major issues, program goals and objectives, work processes, and administrative operations of the organization. Knowledge of relationships with other programs and key administrative support functions is also required.

Knowledge is used to plan, schedule, and conduct projects and studies to evaluate and recommend ways to improve the effectiveness and efficiency of work operations in a program or support setting. The assignments require knowledge and skill in adapting analytical techniques and evaluation criteria to the measurement and improvement of program effectiveness and/or organizational productivity. Knowledge is applied in developing new or modified work methods, organizational structures, records and files, management processes, staffing patterns, procedures for administering program services, guidelines and procedures, and automating work processes for the conduct of administrative support functions or program operations. Knowledge may also be applied in analyzing and making recommendations concerning the centralization or decentralization of operations.

Knowledge of available computer and other electronic support services with the ability to provide support to organization managers on automation-related issues. Skills are required in developing and interpreting automation-related policies and procedure, and to develop recommendations for optimizing office activities through the use of automation.

### ***Illustrations:***

1. Ability to interact with all levels of individuals internal and external to the organization in order to coordinate the varied human resources, personnel management, and office services; to obtain data from a multitude of sources for planning purposes; engage in human resources, financial management, and related environment planning.

Supervise office resource staff to carry out a variety of personnel, administrative, financial, office automation, and general office functions for the Immediate Office of Water (including, the immediate Assistant Administrator's staff, the Water Policy Office, and the Resources Management and Administration Office).

2. The duties require the development and implementation of an application systems design area, and a variety of potential informational needs which are sufficient to identify the feasibility of automation to the activities performed by the staff. Must be knowledgeable of the service organization and programs in order to manage an effective and efficient introduction of ADP into all appropriate segments of the services. Sufficient knowledge is required to direct the technical development and maintenance of complex and moderately administrative information systems.
3. Knowledge of administrative support services in order to develop office policy, procedures, and guides. Skills are required to identify the need for and draft policy, procedure, and guidance development; to collect technical information; to test procedures; to coordinate review process; and to edit and approve procedures.
4. Knowledge of the management and administrative processes with skill to develop and interpret policy and procedures. The management and administrative services include supply services, procurement, records management, and correspondence.
5. Ability to manage tracking systems and to develop appropriate tracking system. Ability to interpret information retrieved from administrative tracking systems aimed at troubleshooting in order to identify potential pitfalls and offer viable solutions.
6. Knowledge of available facility support services. Ability to provide facility support services with skills to develop and interpret facility management policy and to negotiate space or furniture moves with participants.

7. Knowledge of available distribution services. Ability to provide distribution services with skills to develop and establish distribution and delivery systems; in prioritizing workloads of varying degrees and complexity, which depend upon coordination and cooperation of others, as well as some negotiating skills in working out adverse situations.
8. Knowledge of available computer support services with the ability to interpret policies and procedures, and provide support to organization managers on automation-related issues. Skill to develop recommendations for optimizing office activities through the use of automation.

## **Factor 2**

### ***Supervisory Controls—Level 2-4: 450 pts***

Within a framework of priorities, funding and overall project objectives (e.g. cost reduction, improved effectiveness and efficiency, better workload distribution, or implementation of new work methods, the employee and supervisor develop a mutually acceptable project plan which typically includes identification of the work to be done, the scope of the project, and deadlines for its completion. Assignments result from discussions, conferences, directives, and organizationally-driven tasks with clear objectives outlined.

Within the parameters of the approved project plan, the employee is responsible for planning and organizing the study, estimating costs, coordinating with staff and line management personnel, and conducting all phases of the project. This frequently involves the definitive interpretation of regulations and study procedures, and the initial application of new methods. The employee informs the supervisor of potentially controversial findings, issues, or problems with widespread impact.

Completed projects, evaluations, reports, or recommendations are reviewed by the supervisor for compatibility with organizational goals, guidelines, and effectiveness in achieving intended objectives. Completed work is also reviewed critically outside the employee's immediate office by staff and

line management officials whose programs and employees would be affected by implementation of the recommendations.

## **Factor 3**

### ***Guidelines—Level 3-4: 450 pts***

Guidelines consist of general administrative policies, and management and organizational theories which require the incumbent to exercise considerable adaptation and/or interpretation for application to issues and problems studied. At this level, administrative policies and precedent studies provide a basic outline of the results desired, but do not go into detail as to the methods used to accomplish the project (i.e., Water Quality Act, Federal Acquisition Regulation, EPA Acquisition Regulation, OPM and EPA Personnel Management and Human Resources Regulations, GSA Property and Space Regulations, etc.). Prepares documents in accordance to established manuals. Performs technical evaluations of proposals, etc.

Administrative guidelines usually cover program goals and objectives of the employing organization, such as productivity targets, and similar objectives. Within the context of broad regulatory guidelines the employee may refine or develop more specific guidelines such as implementing regulations or methods for the measurement and improvement of effectiveness and productivity in the administration of operating programs.

## **Factor 4**

### ***Complexity—Level 4-5: 325 Pts***

The work consists of projects and studies which require analysis of interrelated issues of effectiveness, efficiency, and productivity of substantive mission-oriented programs. Typical assignments require developing detailed plans, goals, and objectives for the management of and implementation of a full range of administrative, budgetary, management, contractual activities for office support.

Decisions about how to proceed in planning, organizing, and conducting studies are complicated by conflicting program goals and objectives which may derive from changes in policy



or procedure guidelines, productivity, and/or variations in the demand for office/program services. Assignments are further complicated by: the need to deal with subjective concepts such as value judgements; the quality and quantity of actions are measurable primarily in predictive terms; and findings and conclusions are highly subjective and not readily susceptible to verification through replication of study methods or reevaluation of results.

Options, advice or recommendations, and conclusions developed by the employee require analytical and technical ability which take into account and give appropriate weight to uncertainties about the data and other variables which affect long-range program performance. For example, the employee may need to consider and assess the relative advantages and disadvantages of centralizing, decentralizing, or contracting work operations.

In some instances, work is complicated by the need to develop data about workload and program accomplishments which is currently unavailable. Current measurements of program effectiveness may be ambiguous and susceptible to widely varying interpretations. Under these circumstances the employee develops new information about the subject studied and establishes criteria to identify and measure program accomplishments, develops methods to improve the effectiveness with which programs are administered, or develop new approaches to program evaluation which serve as precedents for others. Innovative techniques must be utilized to resolve both isolated and common problems or requests in order to meet the multiple-vendor and multiple-office-demands within a changing office environment.

Analyses, formulates, or implements program requirements for resource management information systems to support resource allocation targets intended to support the national environmental program. Work may involve developing overall systems concepts for the resources management systems data base, defining new information requirements, and developing procedures and formats for timely and accurate reporting. Leads evaluations to insure that resource allocation objectives are being met and to assess effectiveness from a systems standpoint.

**Factor 5*****Scope and Effect—Level 5-5: 225 pts***

The purpose of the work is to assess the productivity, effectiveness, and efficiency of office operations or to analyze and resolve problems in the staffing, effectiveness, and efficiency of administrative support and staff activities pertinent to the immediate and program offices, as well as the Regions.

Work involves establishing and enhancing procedures, systems, or criteria to measure and/or predict the attainment of office, program, or organizational goals and objectives.

Work at this level may also include implementing related administrative regulations, such as those governing the allocation and distribution of personnel, supplies, equipment, and other resources, or promulgating program guidance for application across organizational lines. Work results in presenting major recommendations to senior management which substantially affects the quality and quantity of benefits and services provided to the program clients or at the operating level.

Work contributes to the improvement of productivity, effectiveness, and efficiency in program operations and/or administrative support activities at different echelons. Work affects the plans, goals, and effectiveness of missions and programs. Work involves identifying and developing ways to resolve problems or cope with issues which directly affect accomplishment of program goals.

**Factor 6*****Personal Contacts—Level 6-3: 60 pts***

Contacts are routinely and extremely diverse ranging from administrative, technical, managerial, and operational personnel within the Agency (Headquarters and Regional offices). Incumbent deals directly with program managers and their supervisors and/or subordinates on sensitive issues concerning resources, deadlines and timeliness, accountability and billing procedures.

Contacts outside the agency are routine and include consultants and contractors (such as information systems, equipment facilities contractors, or business executives in a moderately unstructured setting).

This level may also include contacts with the head of the employing agency or program officials several managerial levels removed from the employee when such contacts occur on an ad-hoc basis. Contacts are to provide office services within a full range of budget, personnel, and administrative functions.

**Factor 7*****Purpose of Contacts—Level 7-3: 120 pts***

To influence managers or other official to accept and implement findings and recommendations on organizational improvement or program effectiveness. These duties involve encountering resistance due to such issues as organizational conflict, competing objectives, or resource problems. Contacts are for the purpose of receiving work requests, implementing projects, exchanging technical or programmatic information, and providing status reports and advice/guidance to managers and staff. Coordination with representatives of other organizations and management is usually required to insure consideration of new priorities, methods, or changes in long term objectives. Continues to update Agency policy and procedures, processing requirements in services required by the offices, and maintain compatibility of systems with program needs. Incumbent may encounter resistance due to resource requirements, funding constraints, and/or program function issues.

**Factor 8*****Physical Demands—Level 8-1: 5 pts***

The work is sedentary in nature.

**Factor 9*****Work Environment—Level 9-1: 5 pts***

Work is performed in an office setting.

**Total Points      2890**



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## **Office Resources Specialist**

### **GS 301    Grade 09**

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THIS MODEL POSITION DESCRIPTION REFLECTS THE DUTIES AND RESPONSIBILITIES FOR SOMEONE PROVIDING A FULL RANGE OF OFFICE RESOURCE SERVICES WITHIN THE ORGANIZATION. IT ASSUMES:

- THE ORGANIZATION'S WORKLOAD HAS DEFINED THE NEED FOR GENERALISTS RATHER THAN SPECIALISTS.
- THE BASIC POLICY DIRECTION AND LEADERSHIP FOR THE FUNCTIONS PERFORMED BY THIS POSITION ARE PROVIDED BY A HIGHER LEVEL POSITION. THIS HIGHER LEVEL POSITION COULD BE LOCATED WITHIN THE SAME TEAM OR IN ANOTHER ORGANIZATION.
- A STAFFING PATTERN OF:
  - ONE OR MORE ADDITIONAL OFFICE RESOURCE SPECIALISTS WITHIN THE ORGANIZATION; AND
  - ONE OR MORE OFFICE ASSISTANT POSITIONS WITHIN THE ORGANIZATION.

### **Introduction—Staff Office or Division Level Organization**

This position is located in the Office Resources Staff (Branch) within the Office of \_\_\_\_ (Division) which reports to the Office Director for \_\_\_\_\_. The Office of \_\_\_\_ (\_\_\_\_ Division) is responsible for implementing the following major scientific or technical, administrative, and program functions:

- (list three to five major functions of the organization.)
- 

The Office Resources Staff (Branch) provides effective and efficient planning, coordination, integration, and implementation of office resource functions which support the scientific/technical, administrative and program functions to the managers, supervisors, and staff in the Immediate Office of the Assistant Administrator for \_\_\_\_ or the Office Director for \_\_\_\_, or the Division.

## **Major Duties and Responsibilities—Division Level Organization**

The purpose of this position is to provide the following services to the managers, supervisors, and staff of the Office of \_\_\_ or \_\_\_ Division. In this capacity, the incumbent performs:

### **1. Document Production Services**

- Oversees Data Collection Activities;
- Oversees Development of Documents and Supports Document Writers; and
- Oversees the Delivery of Document Publishing Services.

### **2. Office Support Services**

- Coordinates Internal Information Collection Activities;
- Manages Meetings and Conferences;
- Develops and Tracks Project and Staff Schedules;
- Oversees Telephone and Reception Services; and
- Oversees Office Distribution Services.

### **3. Management System Services**

- Implements the Office's or Division's Records Management System;
- Oversees the Implementation of the Office's or Division's Correspondence Management System;
- Coordinates Internal Information Collection Activities;
- Develops and Implements Management Tracking Systems; and
- Participates in the Development and Leads the Implementation of Office Management Policies, Procedures and Guidelines.

### **4. Administrative Services**

- Implements the Office's or Division's Supply Services System;
- Acquires Goods and Services;
- Obtains Facility Support Services;
- Processes and Tracks Forms and Documents To Acquiring Human Resources Services.

### **5. Participates in analyses of office resource services to determine relevance, effectiveness and efficiency of policies, procedures, processes, delivery systems and practices. This includes:**

- Conducting portions of studies and analyses in areas such as document preparation, document control, procurement, supply, etc.;

- Preparing summaries of pertinent facts and issues;
- 6. Participates in the revision, and development of office resource services' policies, procedures, processes, delivery systems and practices to meet evolving Division requirements.
- 7. Participates in the development and implementation of new automated (and/or electronic) or manual productivity tools and practices.
- 8. Participates in the review, evaluation, development, and implementation of information and records management policies, procedures, processes and systems as they relate Office Resource Functions.

## **Factor 1**

### ***Knowledge Required By the Position— Level 1-6: 950 pts***

Possesses knowledge and understanding of general management and administration principles, practices, methods and techniques, together with a skill in integrating a variety of administrative, management and support services for the overall organization.

- Knowledge of administrative practices and procedures common to the Office of Water and EPA, including and not limited to the following: records management, correspondence control, delegation of authority, procurement, personnel management and financial management, etc.
- Skill in applying fact-finding and investigative techniques to gather factual information and reporting factual information and/or developing recommendations.
- Ability to plan and coordinate activities, such as document development and support services, data collection, administrative and management support services, and meetings/conferences.
- Knowledge of funds control and funds management.

**Factor 2*****Supervisory Controls—Level 2-3: 275 pts***

Incumbent reports directly to the Office Team Manager who makes assignments or specific projects by defining objectives and issues, priorities and deadlines to complete the work. This includes setting deadlines for milestones within a project and providing assistance with unusual situations which do not have clear precedents.

Incumbent independently carries out the assignment and resolves normal work problems in accordance with established offices policies, and procedures... Consults with the supervisor on serious work problems or questionable issues which are not clearly covered by available guidelines.

Work is reviewed for overall conformance with the objectives of the assignment or project. Completed work products are reviewed for thoroughness in identifying and developing required information, consistency and practicality of recommendations.

**Factor 3*****Guidelines—Level 3-3: 275 pts***

Regulations, policies, procedures and/or precedents are available for most of the work at this level, although some work assignments will involve situations not completely covered by existing guidelines, such as administrative regulations and procedural guidelines.

Incumbent must exercise judgment in choosing, interpreting or adapting available guidelines to specific issues or work assignments.

**Factor 4*****Complexity—Level 4-3: 150 pts***

Assignments involve gathering information, reviewing administrative records and reports, coordinating with administrative and support services representatives outside the organization. Uses established guidelines or existing administrative regulations and procedures to complete the assignment or project.



Decisions regarding what needs to be done depend upon the analysis of the issues in the assignment or project, its purpose, the client and suppliers of information, the most effective communication method (oral or written) and other similar factors related to office management to resolve procedural problems affecting the efficiency, effectiveness or productivity of the organization.

**Factor 5*****Scope and Effect—Level 5-3: 150 pts***

The purpose of the work is to plan and carry out office and administrative support activities that directly support the organization, by improving its efficiency and effectiveness of the organization.

Completed assignments and recommendations influence decision and contributes to the efficiency and productivity of administrative and support operations of the organization.

**Factor 6*****Personal Contacts—Level 6-2: 25 pts***

Personal contacts include employees, supervisors, and managers within and outside of the organization. Contacts also include representatives of private concerns in a moderately structured setting.

**Factor 7*****Purpose of Contacts—Level 7-2: 50 pts***

Contacts are for collecting and disseminating information; advising managers, supervisors and staff on administrative and support related issues and concerns, and maintaining effective work relationships with those contacts.

**Factor 8*****Physical Demands—Level 8-1: 5 pts***

The work is primarily sedentary, although some slight physical effort may be required.

**Factor 9**

***Work Environment—Level 9-1: 5 pts***

Work is typically performed in an adequately lighted and climate controlled office.

**Total Points      2890**

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## **Office Resources Specialist**

### **GS 301    Grade 07**

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THIS MODEL POSITION DESCRIPTION REFLECTS THE DUTIES AND RESPONSIBILITIES FOR SOMEONE PROVIDING A FULL RANGE OF OFFICE RESOURCE SERVICES WITHIN THE ORGANIZATION. IT ASSUMES:

- THE ORGANIZATION'S WORKLOAD HAS DEFINED THE NEED FOR GENERALISTS RATHER THAN SPECIALISTS.
- THE BASIC POLICY DIRECTION AND LEADERSHIP FOR THE FUNCTIONS PERFORMED BY THIS POSITION ARE PROVIDED BY A HIGHER LEVEL POSITION. THIS HIGHER LEVEL POSITION COULD BE LOCATED WITHIN THE SAME TEAM OR IN ANOTHER ORGANIZATION.
- A STAFFING PATTERN OF:
  - ➔ ONE OR MORE ADDITIONAL OFFICE RESOURCE SPECIALISTS WITHIN THE ORGANIZATION; AND
  - ➔ ONE OR MORE OFFICE ASSISTANT POSITIONS WITHIN THE ORGANIZATION.

### **Introduction— Staff Office or Division Level Organization**

This position is located in the Office Resources Staff (Branch) within the Office of \_\_\_\_ (Division) which reports to the Office Director for \_\_\_\_\_. The Office of \_\_\_\_ (\_\_\_\_ Division) is responsible for implementing the following major scientific or technical, administrative, and program functions:

- (list three to five major functions of the organization.)
- 

The Office Resources Staff (Branch) provides effective and efficient planning, coordination, integration, and implementation of office resource functions which support the scientific/technical, administrative and program functions to the managers, supervisors, and staff in the Immediate Office of the Assistant Administrator for \_\_\_\_\_ or the Office Director for \_\_\_\_\_, or the Division.

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## **Major Duties and Responsibilities—Division Level Organization**

The purpose of this position is to provide the following services to the managers, supervisors, and staff of the Office of \_\_\_ or \_\_\_ Division. In this capacity, the incumbent performs:

### **1. Document Production Services**

- Participates in Data Collection Activities;
- Participates in Development of Documents and Supports Document Writers; and
- Participates in the Delivery of Document Publishing Services.

### **2. Office Support Services**

- Coordinates Internal Information Collection Activities;
- Manages Meetings and Conferences;
- Develops and Tracks Project and Staff Schedules;
- Oversees Telephone and Reception Services; and
- Oversees Office Distribution Services.

### **3. Management System Services**

- Participates in Implementing the Office's or Division's Records Management System;
- Oversees the Implementation of the Office's or Division's Correspondence Management System;
- Coordinates Internal Information Collection Activities;
- Is Assigned Specific Projects or Components of Projects for Developing and Implementing Management Tracking Systems; and
- Participates in the Development and Implementation of Office Management Policies, Procedures and Guidelines.

### **4. Administrative Services**

- Implements the Office's or Division's Supply Services System;
- Acquires Goods and Services;
- Obtains Facility Support Services;
- Processes and Tracks Forms and Documents To Acquiring Human Resources Services.

5. Participates in analyses of office resource services to determine relevance, effectiveness and efficiency of policies, procedures, processes, delivery systems and practices. This includes:
  - Conducting portions of studies and analyses in areas such as document preparation, document control, procurement, supply, etc.;
  - Preparing summaries of pertinent facts and issues;
6. Participates in the revision, and development of office resource services' policies, procedures, processes, delivery systems and practices to meet evolving Division requirements.
7. Participates in the development and implementation of new automated (and/or electronic) or manual productivity tools and practices.
8. Participates in the review, evaluation, development, and implementation of information and records management policies, procedures, processes and systems as they relate Office Resource Functions.

**Factor 1*****Knowledge Required by the Position—  
Level 1-6: 950 pts***

Possesses knowledge and understanding of general management and administration principles, practices, methods and techniques, together with a skill in integrating a variety of administrative, management and support services for the overall organization.

- Knowledge of administrative practices and procedures common to the Office of Water and EPA, including and not limited to the following: records management, correspondence control, delegation of authority, procurement, personnel management and financial management, etc.
- Skill in applying fact-finding and investigative techniques to gather factual information and reporting factual information and/or developing recommendations.
- Ability to plan and coordinate activities, such as document development and support services, data collection, administrative and management support services, and meetings/conferences.
- Knowledge of funds control and funds management.

**Factor 2*****Supervisory Controls—Level 2-2: 125 pts***

Incumbent reports directly to the Office Team Manager who provides continuing or individual assignments or specific projects by indicating generally what is to be done, limitations, quality quantity expected, deadlines, and priority of assignments. Supervisor provides assistance on unusual situations which do not have clear precedents.

Incumbent independently carries out the assignment and resolves normal work problems in accordance with established offices policies, and procedures... Consults with the supervisor on serious work problems or questionable issues which are not clearly covered by available guidelines.

Work is reviewed to ensure that the overall objectives of the position are met.

**Factor 3*****Guidelines—Level 3-2: 125 pts***

Incumbent performs assignments covered by specific regulations, policies, and/or procedures which are available for reference if needed.

Incumbent must exercise judgement in selecting or applying the appropriate established regulation, policies or procedure to accomplish the assignment. Situations to which existing guidelines cannot be applied or significant proposed deviations from the guidelines are referred to the supervisor.

**Factor 4*****Complexity—Level 4-3: 150 pts***

Assignments involve gathering information, reviewing administrative records and reports, coordinating with administrative and support services representatives outside the organization. Uses established guidelines or existing administrative regulations and procedures to complete the assignment or project.

Decisions regarding what needs to be done depend upon the analysis of the issues in the assignment or project, its purpose, the client and suppliers of information, the most effective communication method (oral or written) and other

similar factors related to office management to resolve procedural problems affecting the efficiency, effectiveness or productivity of the organization.

**Factor 5*****Scope and Effect—Level 5-3: 150 pts***

The purpose of the work is to plan and carry out office and administrative support activities that directly support the organization, by improving its efficiency and effectiveness of the organization.

Completed assignments and recommendations influence decision and contributes to the efficiency and productivity of administrative and support operations of the organization.

**Factor 6*****Personal Contacts—Level 6-2: 25 pts***

Personal contacts include employees, supervisors, and managers within and outside of the organization. Contacts also include representatives of private concerns in a moderately structured setting.

**Factor 7*****Purpose of Contacts—Level 7-2: 50 pts***

Contacts are for collecting and disseminating information; advising managers, supervisors and staff on administrative and support related issues and concerns, and maintaining effective work relationships with those contacts.

**Factor 8*****Physical Demands—Level 8-1: 5 pts***

The work is primarily sedentary, although some slight physical effort may be required.

**Factor 9*****Work Environment—Level 9-1: 5 pts***

Work is typically performed in an adequately lighted and climate controlled office.

**Total Points      1585**





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## **Office Resources Assistant/Specialist**

### **GS 301    Grade 05**

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THIS MODEL POSITION DESCRIPTION REFLECTS THE DUTIES AND RESPONSIBILITIES FOR SOMEONE PROVIDING A FULL RANGE OF OFFICE RESOURCE SERVICES WITHIN THE ORGANIZATION. IT ASSUMES:

- THE ORGANIZATION'S WORKLOAD HAS DEFINED THE NEED FOR GENERALISTS RATHER THAN SPECIALISTS.
- THE BASIC POLICY DIRECTION AND LEADERSHIP FOR THE FUNCTIONS PERFORMED BY THIS POSITION ARE PROVIDED BY A HIGHER LEVEL POSITION. THIS HIGHER LEVEL POSITION COULD BE LOCATED WITHIN THE SAME TEAM OR IN ANOTHER ORGANIZATION.
- A STAFFING PATTERN OF:
  - ➔ ONE OR MORE ADDITIONAL OFFICE RESOURCE SPECIALISTS WITHIN THE ORGANIZATION; AND
  - ➔ ONE OR MORE OFFICE ASSISTANT POSITIONS WITHIN THE ORGANIZATION.

### **Introduction—Staff Office or Division Level Organization**

This position is located in the Office Resources Staff (Branch) within the Office of \_\_\_\_ (Division) which reports to the Office Director for \_\_\_\_\_. The Office of \_\_\_\_ (\_\_\_\_ Division) is responsible for implementing the following major scientific or technical, administrative, and program functions:

- (list three to five major functions of the organization.)
- 

The Office Resources Staff (Branch) provides effective and efficient planning, coordination, integration, and implementation of office resource functions which support the scientific/technical, administrative and program functions to the managers, supervisors, and staff in the Immediate Office of the Assistant Administrator for \_\_\_\_\_ or the Office Director for \_\_\_\_\_, or the Division.

## **Major Duties and Responsibilities—Division Level Organization**

The purpose of this position is to provide the following services to the managers, supervisors, and staff of the Office of \_\_\_ or \_\_\_ Division. In this capacity, the incumbent performs:

### **1. Document Production Services**

- Participates in Data Collection Activities;
- Participates in Development of Documents and Supports Document Writers; and
- Participates in the Delivery of Document Publishing Services.

### **2. Office Support Services**

- Is Assigned Coordination Responsibility for Specific Internal Information Collection Projects;
- Manages Meetings and Conferences;
- Participates in Development and Tracks Project and Staff Schedules;
- Performs Telephone and Reception Services; and
- Performs Office Distribution Services.

### **3. Management System Services**

- Participates in Implementing the Office's or Division's Records Management System;
- Oversees the Implementation of the Office's or Division's Correspondence Management System;
- Is Assigned Specific Projects or Components of Projects for Developing and Implementing Management Tracking Systems; and
- Participates in the Development and Assists in the Implementation of Office Management Policies, Procedures and Guidelines.

### **4. Administrative Services**

- Implements the Office's or Division's Supply Services System;
- Acquires Goods and Services;
- Obtains Facility Support Services;
- Processes and Tracks Forms and Documents To Acquiring Human Resources Services.

### **5. Assists Office Specialists in analyses of office resource services to determine relevance, effectiveness and efficiency of policies, procedures, processes, delivery systems and practices.**

6. Assists Office Specialists in the revision, and development of office resource services' policies, procedures, processes, delivery systems and practices to meet evolving Division requirements.
7. Participates in the development and implementation of new automated (and/or electronic) or manual productivity tools and practices.
8. Participates in the review, evaluation, development, and implementation of information and records management policies, procedures, processes and systems as they relate Office Resource Functions.

**Factor 1*****Knowledge Required by the Position—  
Level 1-4: 350 pts***

Knowledge of standard rules and requirements for a variety of administrative and support areas, such as document production, administrative services, supply, and procurement, recognizing precedent guidelines and relating them to new materials, assignments and projects.

- Skill in fact-finding to locate and obtain necessary information to complete an assignment.
- Skill in performing and completing a variety of concurrent assignments.
- Skill in using office automation technology, e.g., personal computer, packaged software, electronic communications.

**Factor 2*****Supervisory Controls—Level 2-3: 275 pts***

Incumbent receives general guidance from the supervisor, independently carries out assignments and resolves normal work problems in accordance with established offices policies, and procedures. Consults with the supervisor on serious work problems or questionable issues which are not clearly covered by available guidelines.

Work is reviewed to ensure that the overall objectives of the position are met.

**Factor 3*****Guidelines—Level 3-2: 125 pts***

Incumbent performs assignments covered by specific regulations, policies, and/or procedures which are available for reference if needed.

Incumbent must exercise judgement in selecting or applying the appropriate established regulation, policies or procedure to accomplish the assignment. Situations to which existing guidelines cannot be applied or significant proposed deviations from the guidelines are referred to the supervisor.

**Factor 4*****Complexity—Level 4-2: 75 pts***

Assignments involve related steps, processes, and methods for obtaining information, identifying possible issues, explaining steps or procedures to staff or assisting in coordinating activities.

Decisions regarding what needs to be done involves various choices depending on the facts and/or issues of the assignment or project.

**Factor 5*****Scope and Effect—Level 5-3: 75 pts***

The work involves performing a variety of office and administrative support activities, e.g., assisting in preparing personnel or procurement forms, document production, gathering information for reports or answering questions regarding office procedures. The work product has a direct effect on timeliness and completeness of an assignment or project prepared by a higher level specialist or staff member.

**Factor 6*****Personal Contacts—Level 6-2: 25 pts***

Personal contacts include employees, supervisors, and managers within and outside of the organization. Contacts also include representatives of private concerns in a moderately structured setting.

**Factor 7*****Purpose of Contacts—Level 7-2: 50 pts***

Contacts are for collecting and disseminating information; advising managers, supervisors and staff on administrative and support related issues and concerns, and maintaining effective work relationships with those contacts.

**Factor 8*****Physical Demands—Level 8-1: 5 pts***

The work is primarily sedentary, although some slight physical effort may be required.

**Factor 9*****Work Environment—Level 9-1: 5 pts***

Work is typically performed in an adequately lighted and climate controlled office.

**Total Points      985**



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# Appendix F

## TIME STUDY

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### Introduction

The primary goal of the time study initiated by the Office of Marine and Estuarine Protection (OMEP) was to obtain detailed information on the types of activities that its staff were doing and to determine how much time was being spent on each activity.

Section I describes the types of generic activities that were tracked in the OMEP time study. Section II briefly describes an approach to tracking specific project activities.

Section III contains samples of two types of data collection forms. Both forms are designed to track generic activities but can be easily adapted to track specific project activities.

### Section I

#### ***Generic Activities***

Generic activities are tasks that are common to all types of work performed in an office setting.

For the OMEP study the generic activities were divided into three categories:

***Non-technical:*** Low skill activities performed in support of other activities. (e.g., Filing, photocopying)

***Administrative:*** Skilled activities that indirectly support the accomplishment of the mission of the office or organization. (e.g., Budget analysis, editing, meeting attendance)

***Technical:*** Activities that require specific scientific/technical expertise. (e.g. Technical research, modeling)

By examining the time spent on generic activities OMEP obtained information that:

- Identified how much time was spent on each generic activity within the organization;
- Identified the types of employees that were performing the activities (support, two-grade interval, or management);
- Identified whether or not staff were performing tasks appropriate for their level of expertise/education.

- 
- Provided information about how generic tasks could be redistributed to make better use of staff competencies and to provide job enrichment opportunities for support staff;
  - Provided information for planning, hiring, and training activities.

## ***Non-technical***

1. Distribution or collection of written material: The distribution and collection of material.
2. In-transit: Time spent going places e.g., waiting for the elevator. This differs from the distribution of material (#5) as this is time spent traveling to a meeting while #5 is time spent making a delivery.
3. Operation of office equipment: Operating or monitoring equipment such as copiers and facsimile machines. NOTE: This does not include time spent working on a PC.
4. Other: Activities not included in any of the three activity areas. The activity can be non-technical, administrative, or technical.
5. Preparing items for distribution: Collecting materials to be distributed (e.g., pamphlets, etc.). Putting the material together including addressing, and packaging it.
6. Receptionist duties: Answering the phone, greeting visitors, routing guests.
7. Re-processing of written material: Correcting or changing documents on a PC. Corrections/changes may have been identified by yourself or others. The material may be correspondence, reports, pamphlets, and other documents.
8. Text entry: Entering text drafted by others onto a PC. NOTE: This is different from creating/drafting a document on the PC.

## ***Administrative***

1. Administrative analysis: Analysis of administrative or budget data for program trends, needs, and results.
2. Administrative consulting: Advising, guiding, and informing others on administrative matters.
3. Administrative meeting attendance: Attending meetings to discuss or learn of administrative events.
4. Administrative problem solving: Identification of administrative problems and solutions. Implementation of administrative solutions to problems in the conduct of an activity.



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5. Administrative training/learning: Attending training, reading materials, and/or consulting others in areas not directly to area of specialization but directly related to the conduct of work. For example; Word Perfect training.
  6. Administrative training conduct: Preparing training materials and conducting training on administrative subjects.
  7. Bookkeeping, budgeting, and accounting: Keeping a running balance of accounts, verification, posting, and performing standard arithmetic calculations. Performing an analysis of the accounts.
  8. Conducting administrative research: Searching for administrative or non-technical information through reading written materials and/or questioning others.
  9. Conference arrangement/conduct: Setting up, organizing, and conducting a conference or seminar.
  10. Coordination of activities: Synchronizing the activities of individuals or organizations. Includes setting up meetings, scheduling, contacting other employees, and negotiating the conduct of activities.
  11. Correspondence control: Sorting mail and distributing it to the correct individual based on address. Opening and disposing of organizational mail based on your analysis of the subject matter and knowledge of the duties of individual staff members. Documenting and reporting information related to the correspondence.
  14. Drafting administrative and/or non-technical documents. Drafting FOIA responses, performance standards, reports, memorandum, procedures, or briefing material. Responding to requests for non-technical from inside or outside of EPA. Drafting may be longhand or on a keyboard or typewriter.
  15. Editing and proofreading: Reading written material for procedural and grammatical accuracy, conformance with general policy, factual correctness, and adequacy of treatment; advising the writer of any non-technical deviations or inadequacies.
  16. Executive support: Close support of an executive, including maintaining a calendar, making travel arrangements, setting up appointments, and typing confidential reports. It also involves performing other special, non-standard tasks.
  17. Filing and retrieval of organization information and documents: The filing and retrieval of documents and/or designing and setting up document management systems.
  18. General administration: Maintaining information in all types of records such as account, contract or production records.

- 
19. Graphics production/desktop publishing: Creating and developing graphs and charts. May be by hand or on a PC.
  20. Program review: Reviewing programs to assess if they are being conducted in an administratively correct manner.
  21. Re-Drafting responses, reports, memorandum, etc.: Rewriting administrative and/or non-technical documents based on input from others. NOTE: This would be in response to a suggestion such as "put in more information" rather than a suggestion to add a word.
  22. Supervision of employees: The supervision and evaluation of employees. Functions such as assignment of work, evaluation, and counseling are included. Also included is the selection of employees.
  23. Use of tracking systems: Maintaining and using tracking systems. Designing and setting up a tracking system. Analyzing information developed by tracking system. Documenting or reporting on the information derived from the tracking system.

## ***Technical***

1. Conducting technical/scientific research: Searching for technical/scientific information through reading written materials, questioning others, and/or performing experiments.
2. Drafting reports, memorandum, regulations, procedures, or briefing materials: Writing technical documents. Writing may be longhand or on a keyboard or typewriter.
3. Drafting responses to Congressional inquiries: Responding to requests for information from Congress.
4. Drafting responses to requests for technical information (FOIA, etc.): Responding to requests for technical or semi-technical information from inside or outside of EPA. May be in writing or on the telephone. NOTE: Does not include Congressional inquiries.
5. Modeling: Developing models for use in projecting changes in resources and environments.
6. Outreach: Making speeches and delivering briefings inside and outside EPA.
7. Program review: Reviewing programs to see if they are being conducted in a technically correct manner.
8. Project/contract management: Planning, organizing, overseeing, and/or conducting activities in a project or contracted activity.
9. Technical analysis: Analysis of technical data for trends, needs, and results.

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10. Technical consulting: Reviewing, advising, guiding, and informing others on technical/scientific matters.
  11. Technical editing: Reading written material for technical accuracy, factual correctness, and adequacy of treatment; advising writer of any technical deviations or inadequacies.
  12. Technical meeting attendance: Attending meetings to discuss or learn of technical events.
  13. Technical problem solving: Identification of technical problems and solutions. Implementation of technical solutions to problems.
  14. Technical training/learning: Attending training, reading materials, and/or contacting others in areas of specialization in order to maintain current knowledge.
  15. Technical training conduct: Preparing training materials and conducting training on technical/scientific subjects.
  16. Use/management of EPA data bases: Using various automated administration or program data bases to acquire information. Entering or retrieving information.

## **Section II**

### ***Specific Projects***

In a specific project time study only those activities that are directly related to the achieving the goal or mission of the project are tracked. For example, in a particular week a staff member may spend four hours attending meetings (i.e., 1 hour - Staff meeting; 2 hours - Budget Planning Meeting; 1-hour Project Update Meeting). In a generic activity time study all of the time would be entered under "Meeting Attendance" even though the focus of the meetings was for entirely different and unrelated reasons. In a specific project time study, however, only the one hour spent in the Project Update meeting would be entered.

Specific Project time studies provide information about:

- How much time is required for completion of each project activity and for the project as a whole;
- How much time each type of employee (two-grade interval, management, support) is spending on each project activity;
- What types of staff (two-grade interval, management, support) are needed for each project.

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This information can be used to:

- Compare budgeted vs actual time for projects and project activities. This type of information can be used for analyzing or monitoring current activities or for planning future projects.
- Plan the staffing patterns and determine training needs for future projects.

Project activities are unique. Project activity lists, therefore, must be drawn up individually to reflect the differing organizational and project missions. Project work plans are a good source of information for defining project activity lists.

## **Section III**

### ***Time Tracking Forms***

In this section are samples of two types of forms that can be used for tracking time. The primary difference between the two forms is in how often the information is entered by the participants. The information collected using Exhibit 1 is generally more accurate as the entries are made at the end of each day while the information is still fresh in the participant's mind. Exhibit 2, however, is somewhat easier to use as the data is entered once a week (rather than daily or hourly). In order to minimize the burden on employees, Exhibit 1 is designed to track information on alternate days (the days that are not tracked are shaded). The problem with collecting data on random days, however, is that participants often forget which days they are to track their time. While the sample forms are set up to track generic activities they can be easily adapted to track the time spent on specific projects.

## Exhibit 1

### DETAILED TIME TRACKING SHEET Week 1-2

Employee Name: \_\_\_\_\_

Time Period: From \_\_\_\_\_ To \_\_\_\_\_

Track your activities each day and list the time spent on them in hour or half-hour expenditures.

#### Non-Technical

	Day											
	M	T	W	Th	F		M	T	W	Th	F	Total Hours
Distribution -----												
In-transit -----												
Equipment operation ----												
Other -----												
Preparing items-----												
Reception -----												
Re-Processing-----												
Text entry -----												
Sub Total												

## Administrative

	Day											
	M	T	W	Th	F		M	T	W	Th	F	Total Hours
Administrative analysis--												
Consulting-----												
Meeting attendance -----												
Problem solving -----												
Training attendance -----												
Training conduct -----												
Accounting/budgeting ---												
Research -----												
Conference -----												
Coordination -----												
Correspondence -----												
Drafting -----												
Editing -----												
Executive support -----												
Filing -----												
General Administration -												
Graphics -----												
Program review -----												
Re-Drafting -----												
Supervision -----												
Tracking systems -----												
Sub Total												

## Technical

	M	T	W	Th	F	Sat	M	T	W	Th	F	Total Hours
Research -----		X		X		X	X		X		X	
Drafting -----		X		X		X	X		X		X	
Congressional response -		X		X		X	X		X		X	
Technical response -----		X		X		X	X		X		X	
Modeling -----		X		X		X	X		X		X	
Outreach-----		X		X		X	X		X		X	
Program review -----		X		X		X	X		X		X	
Project/contract mgmt ---		X		X		X	X		X		X	
Technical analysis -----		X		X		X	X		X		X	
Technical consulting ----		X		X		X	X		X		X	
Technical editing -----		X		X		X	X		X		X	
Meeting attendance -----		X		X		X	X		X		X	
Problem solving -----		X		X		X	X		X		X	
Training attendance -----		X		X		X	X		X		X	
Training conduct -----		X		X		X	X		X		X	
Database mgmt. use-----		X		X		X	X		X		X	
Sub Total		X		X		X	X		X		X	
Daily Total		X		X		X	X		X		X	

**Grand Total**

**Notes:** If there are any special circumstances that affected your work on a particular day, please write a brief description below with the date referred to. For example; "Had an unusual number of interruptions on Wednesday the 31st."





# DETAILED TIME TRACKING SHEET

## Week 3-4

Employee Name: \_\_\_\_\_

Time Period: From \_\_\_\_\_ To \_\_\_\_\_

Track your activities each day and list the time spent on them in hour or half-hour expenditures.

### Non-Technical

	Day											
	M	T	W	Th	F		M	T	W	Th	F	Total Hours
Distribution -----												
In-transit -----												
Equipment operation ---												
Other -----												
Preparing items-----												
Reception -----												
Re-Processing -----												
Text entry -----												
Sub Total												

# Administrative

	Day											
	M	T	W	Th	F		M	T	W	Th	F	Total Hours
Administrative analysis--												
Consulting-----												
Meeting attendance -----												
Problem solving -----												
Training attendance -----												
Training conduct -----												
Accounting/budgeting ---												
Research -----												
Conference -----												
Coordination -----												
Correspondence -----												
Drafting -----												
Editing -----												
Executive support -----												
Filing -----												
General Administration -												
Graphics -----												
Program review -----												
Re-Drafting -----												
Supervision -----												
Tracking systems -----												
Sub Total												

# Technical

	Day											
	M	T	W	Th	F		M	T	W	Th	F	Total Hours
Research -----												
Drafting -----												
Congressional response -												
Technical response -----												
Modeling -----												
Outreach-----												
Program review -----												
Project/contract mgmt ---												
Technical analysis -----												
Technical consulting -----												
Technical editing-----												
Meeting attendance -----												
Problem solving -----												
Training attendance -----												
Training conduct -----												
Database mgmt. use-----												
Sub Total												
Daily Total												

Grand Total

Notes: If there are any special circumstances that affected your work on a particular day, please write a brief description below with the date referred to. For example; "Had an unusual number of interruptions on Wednesday the 31st."



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## Exhibit 2

### ESTIMATED TIME TRACKING SHEET

Employee Name: \_\_\_\_\_

Time Period: From \_\_\_\_\_ To \_\_\_\_\_

Estimate how much time you spent on each of the following activities during the last week.

#### Non-Technical

Drafting -----	_____
Re-Drafting -----	_____
Graphics -----	_____
Text Entry -----	_____
Re-Processing -----	_____
Editing -----	_____
Preparing Items -----	_____
Distribution -----	_____
Coordination -----	_____
Equipment Operation ---	_____

Sub Total: \_\_\_\_\_

#### Administrative

Supervision -----	_____
Accounting/budgeting ---	_____
Filing -----	_____
Contract administration	_____
Executive support -----	_____
Correspondence -----	_____
FOIA responses -----	_____
Reception -----	_____
Tracking systems -----	_____
Meeting attendance -----	_____
Training attendance -----	_____
Training conduct -----	_____
Research -----	_____
Consulting -----	_____
Program review -----	_____
Conference -----	_____
Administrative analysis -	_____
Problem solving -----	_____

Sub Total: \_\_\_\_\_

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**Technical**

Drafting -----	_____
Drafting FOIA -----	_____
Drafting Congressionals -----	_____
Technical editing -----	_____
Project management -----	_____
Outreach -----	_____
Database mgmt./use -----	_____
Meeting attendance -----	_____
Training attendance -----	_____
Training conduct -----	_____
Research -----	_____
Consulting -----	_____
Modeling -----	_____
Program review -----	_____
Technical analysis -----	_____
Problem solving -----	_____

Sub Total: \_\_\_\_\_

Grand Total: \_\_\_\_\_

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# Appendix G

## COMPSCAN STUDY

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As the Office of Water moves into the 1990s its para-professionals will play an increasingly significant role in OW's team. The role of the para-professional, however, is an emerging one and has not yet been fully developed. This is due, in part, to the fact that many people continue to perceive the para-professional role in terms of the more traditional office support role. The role of the para-professional is also being greatly impacted by automation and electronic technology. A more forward-looking perspective, therefore, is needed in order to define the emerging role of the paraprofessional. As a result of the initial study it became apparent that in order to understand the roles of the para-professional it was also important to understand what competencies a para-professional would need for success.

### Methodology

A focus group was established to identify and prioritize the core para-professional competencies. The focus group was comprised of OW managers, two-grade interval staff and support staff in line and administrative offices at Headquarters.

In the first step of the process core para-professional competencies were identified. The group reached a consensus, identifying thirteen core competencies:

- Written Communication
- Initiative
- Problem Solving
- Judgment
- Decision Making
- Computer Literacy
- Dependability
- Listening
- Teamwork
- Interpersonal
- Oral Reporting
- Leadership
- Business-Like

The participants were then asked to rate the relative importance of each competency. This part of the process was done individually. The participants were given a list of paired comparisons and asked to rate each competency against every other competency (see sample of paired comparisons in box). The data was entered into the CompScan software which uses an analytical hierarchical process to prioritize and assign a numerical value to indicate the

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relative importance of each competency. The highest possible value assigned to a competency is 100 and the lowest, zero. A high rating value indicates that the participants felt that this competency was more important relative to the other competencies. Since all the competencies are core competencies it is important to remember that they are all important, although some may be more important than others. The CompScan software produced reports on the importance ratings for the overall group as well for each of the sub-groups.

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## Results

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### Overall Group Ratings

For the overall group, *Written Communication* and *Initiative* were rated as being most important. *Oral Reporting*, *Leadership*, and *Business-like* were considered to be the least important, of the core competencies. The low rating for *Business-like* may be due to the nature and extent of the contact the focus group had with outside individuals or agencies. It is likely that, in other OW offices that have more outside contact, the importance of the competency, *Business-like*, would receive a higher rating.

Competency	Overall Group Ratings
Written Communication	100
Initiative	96
Problem Solving	86
Judgement	83
Decision Making	82
Computer Literacy	80
Dependability	78
Listening	74
Teamwork	74
Interpersonal	73
Oral Reporting	61
Leadership	45
Business-Like	38

While all of the competencies are essential to the para-professional role the importance ratings give managers and supervisors insight into those that should be of primary concern when developing:

- Selection criteria;
- Performance standards; and
- Training Interventions.



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## Group ratings

Table 1 presents the results for each of the three participating groups represented in the focus group. The variations in ratings are probably due to the different filters through which each group views the para-professional. For example, managers see the para-professional role through their need for a capable administrative assistant. Two-grade interval staff, however, see the para-professional through the prevailing OW culture of independent contributors and a need to have someone who can take care of administrative work that is encroaching on their scientific or technical work. Support staff see the role through their familiarity with the office support role and their desire for an enriched job.

While all three groups rated the competencies somewhat differently, the two-grade interval and support staff were more likely to be in agreement. This may be attributed to the closeness of their interaction with each other on a daily basis when working on projects and work assignments.

*Dependability* is one area where manager ratings differed from the other two groups. It is possible that managers rated this lower as the support staff they rely on are often the most dependable in the office. Also, manager's requests are given a higher priority by support staff.

*Written communication* was another area where managers differed from the other two groups. The two-grade interval and support staff gave this competency ratings of 94 and 100 respectively, while managers only rated it as 53. This perception may be due to the fact that, before reaching the managerial level, the written communications of support staff have been "cleaned up" by two-grade interval staff.

The fact that *Teamwork* and *Interpersonal* competencies were given high ratings by managers may be a reflection of the types of problems that managers often face.

Interestingly, there were two areas where both support staff and managers were in agreement - *Decision Making and Listening*. Both managers and support staff ranked *Decision Making* as low in importance while the two-grade interval staff gave it a high rating. This may be because the two-grade interval staff feel they are having to make many decisions the could or should be made by the support staff. On *Listening*, however the ratings were reversed. Two-grade interval staff did not feel that this was an important competency while the other two groups gave it a much higher rating.

The variations in how each group rated the competencies provides valuable information and insight into how the role of the para-professional is perceived in both the current job setting and in planning for the office of the future.



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**Table 1**

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**Relative Rankings by Employee Type\***

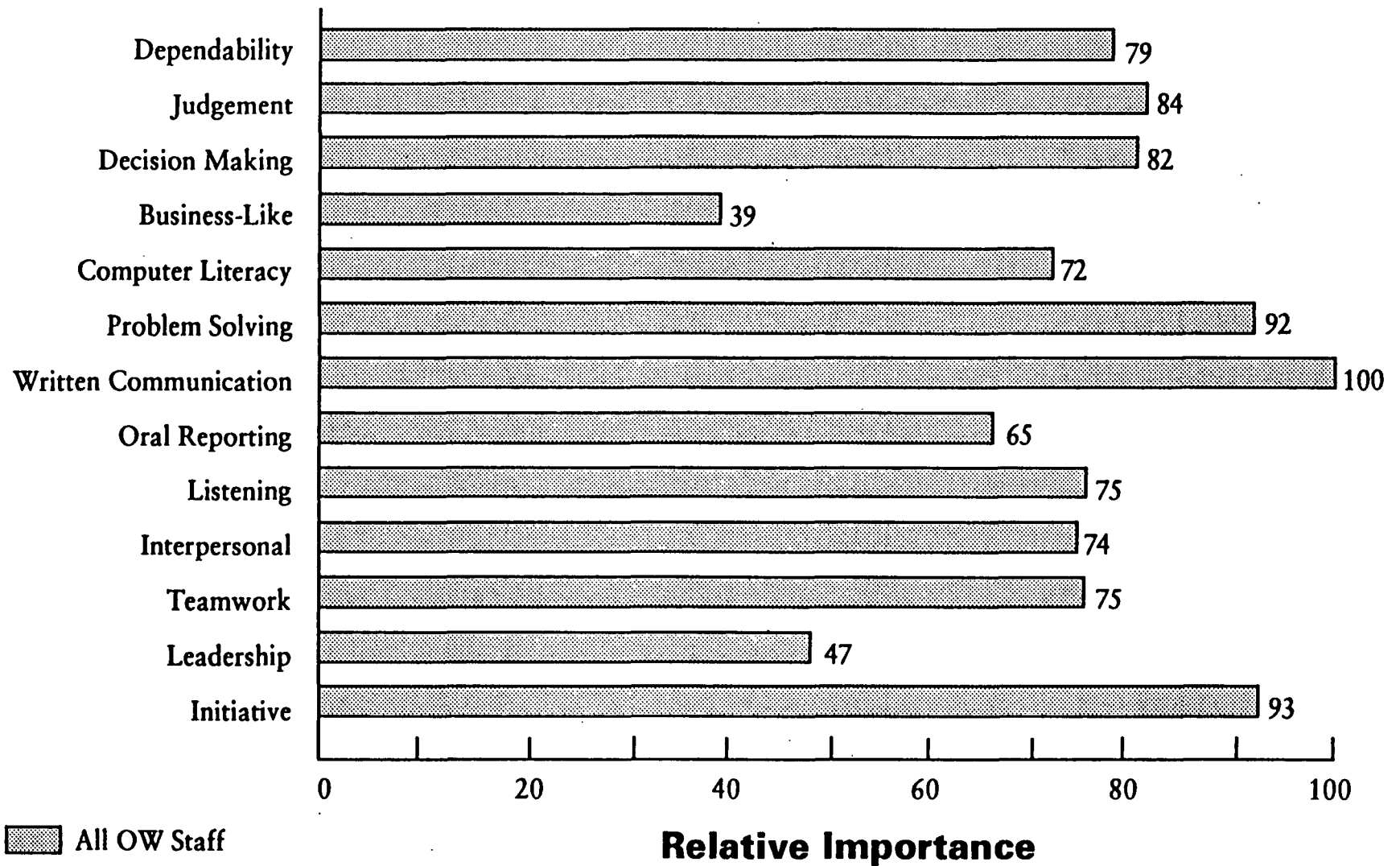
	Managerial	Two-Grade	Support
Written Communication	53	<b><i>94</i></b>	<b><i>100</i></b>
Initiative	<b><i>100</i></b>	78	74
Problem Solving	33	84	67
Judgment	47	<b><i>85</i></b>	49
Decision Making	<b><u>11</u></b>	<b><i>100</i></b>	40
Computer Literacy	50	55	<b><i>76</i></b>
Dependability	12	67	70
Listening	70	45	<b><i>83</i></b>
Teamwork	<b><i>100</i></b>	46	57
Interpersonal	<b><i>76</i></b>	50	54
Oral Reporting	49	40	74
Leadership	23	34	46
Business-Like	22	<b><u>19</u></b>	<b><u>21</u></b>

\* The top three ranked competencies for each employee type is in ***bold italics*** and the lowest ranked competency is **bold and underlined**.



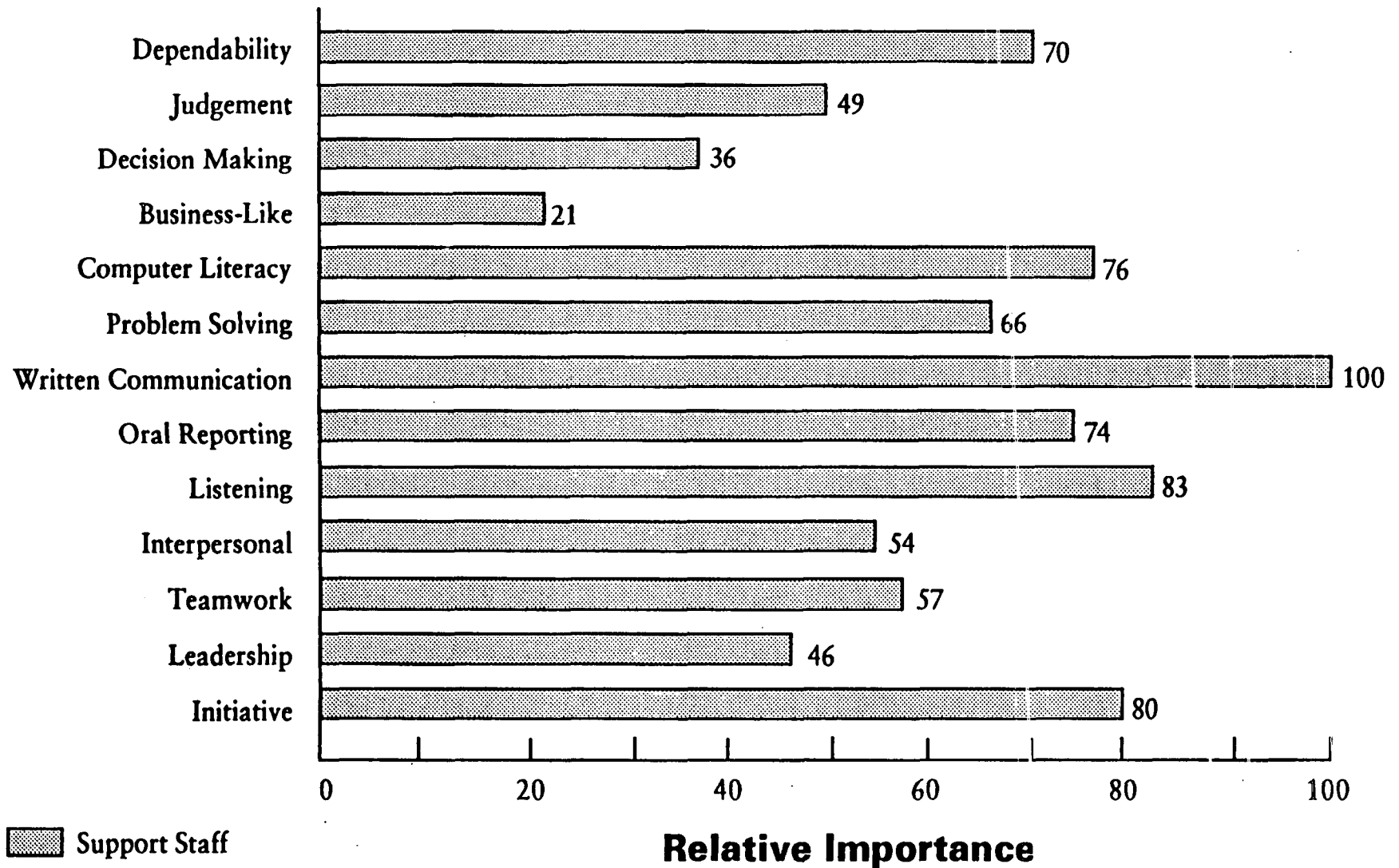
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## Para-Professional Competencies



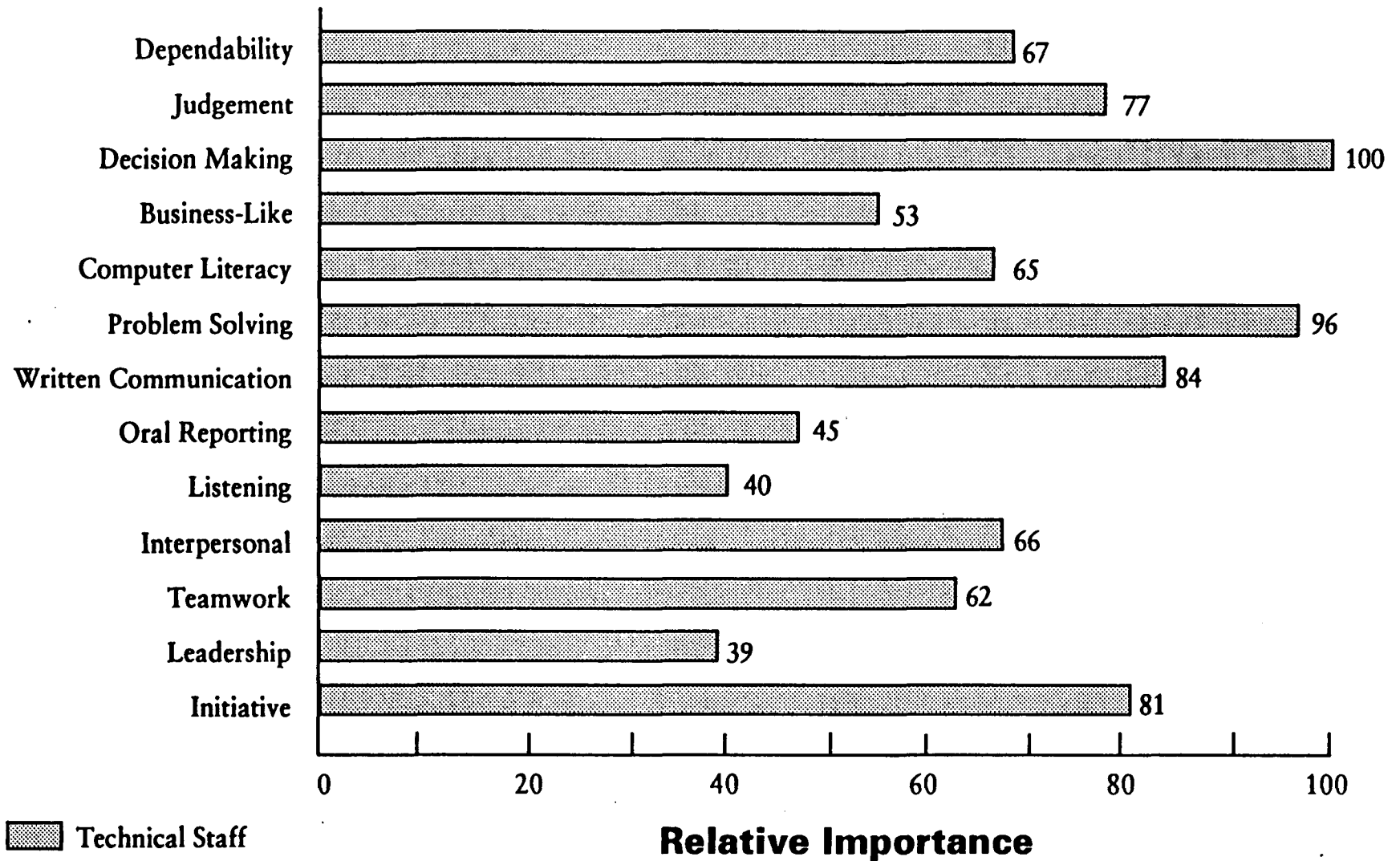
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## Para-Professional Competencies



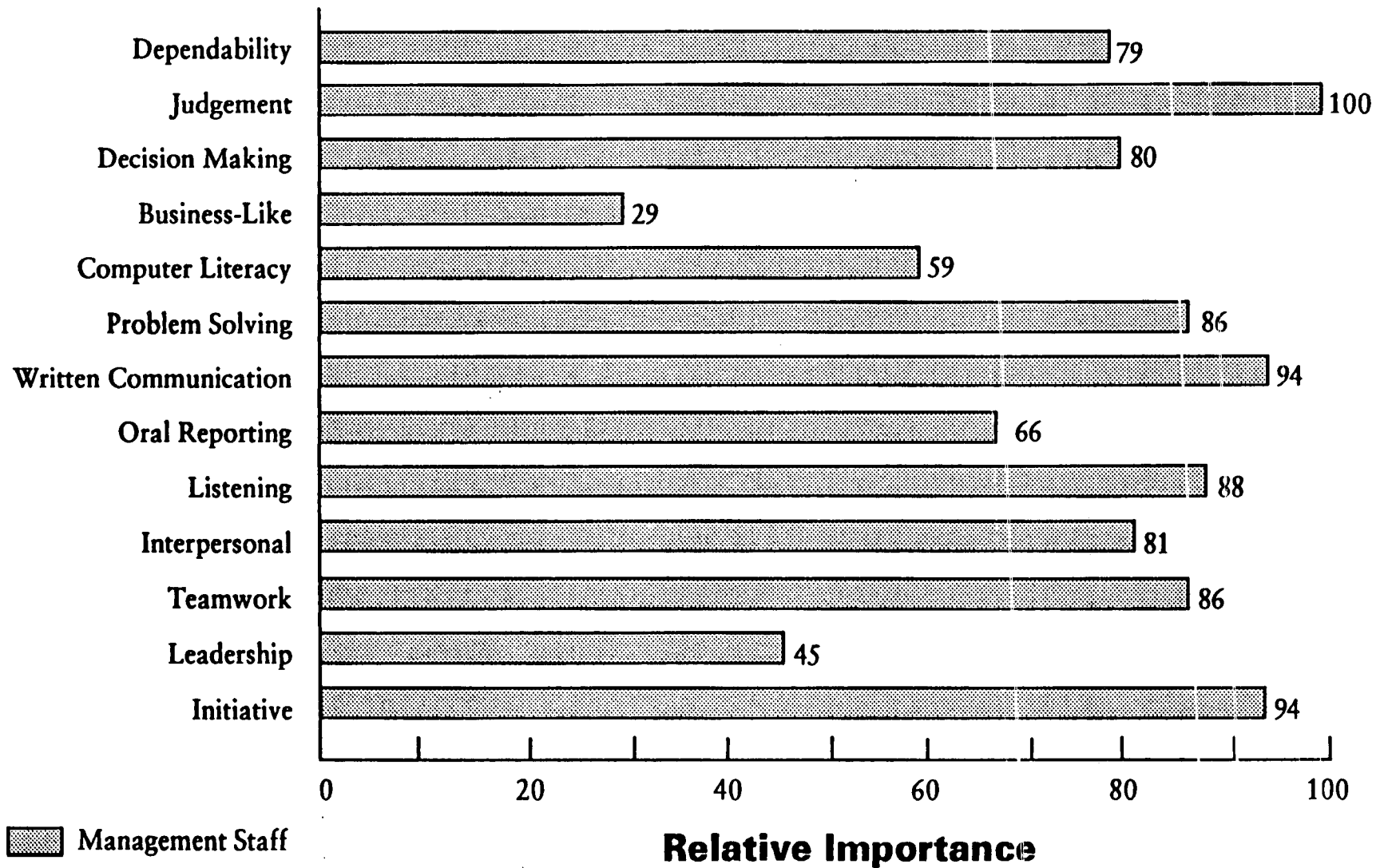
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# Para-Professional Competencies



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# Para-Professional Competencies





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## Appendix H

# AUTOMATING OFFICE TASKS

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The Office of the 90s study identified several automation-related issues in each of the pilot organizations. One organization, State Programs Division (SPD), decided to examine these issues in further detail. In order to address these concerns they needed to develop a mechanism for dealing with them before they became problems.

Traditionally, as problems arose they were handled by the employees most affected by them. While this approach had been used to resolve problems in the past, it had disadvantages. Two disadvantages were:

- A reactive rather than proactive approach to problem solving; and
- A lack of consensus with regard to the solutions developed.

Reactive solutions tend to be focused on immediate need rather than on the entire issue, leaving room for future difficulties. The development of a consensus is vital for the effective implementation of costly solutions to problems that affect everyone in the organization. This is especially true with new technology where there are many opinions and, often, a degree of technophobia.

SPD management decided to focus on two automation-related issues identified as a part of the Office of the 90s study. These two issues were chosen because of a significant level of employee interest. These two issues also had the potential for resolving some problems that were currently being discussed in the organization:

- limited work space; and
- the need for an improved internal communication system.

Furthermore, the issues were a good test situation since they affected everyone in the organization and involved the purchase of costly new equipment. The issues were whether and how to:

- Connect all the PCs to central printers to minimize the number of printers required thereby freeing up desk space currently occupied by printers; and
- Develop a Local-Area-Network (LAN) to be installed in the future.

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By addressing these issues, SPD management was taking a proactive rather than reactive stance. Due to the pervasive nature of the issues, management felt that it was important to develop a consensus among the staff regarding them. Unfortunately, there were some constraints that limited the ability of management to develop a consensus. These constraints were:

- The difficulty of scheduling meetings involving all employees;
- A degree of skepticism by some employees on the need for organization-wide solutions (versus limited branch or section solutions); and
- A lack of available time for some employees to be involved.

The solution to these constraints was to form an automation work group<sup>1</sup>. The criteria for being on the work group was:

- An expressed interest in automation;
- A working knowledge of, or familiarity with automation;
- The ability to represent a part of the organization (e.g., support staff, section).

The work group was responsible for:

- Gathering opinions and reporting back to each section/branch;
- Gathering pertinent cost and technical information;
- Developing solutions satisfactory to most employees;
- Developing detailed, timely recommendations for approval by management; and
- Keeping management informed of progress made and difficulties encountered.

SPD management gave the work group members time to:

- Attend weekly meetings;
- Complete specific work group related tasks outside the meetings (e.g., gather information on a specific issue); and
- Identify additional issues to be examined.

The task group approach is a very effective method for handling automation issues since it puts those who are most concerned with the issues in charge of developing practical solutions to them. By putting them in charge, management is empowering them, thereby, enriching their jobs and giving them a better sense of control over the rapid changes brought about by automation. Management and work group members alike must remember that it takes a while for the work group to reach a high degree of efficiency. This is due to the unfamiliar nature of both the issues and the process. Given time and encouragement, the work group can develop into a highly productive team.

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## **Exhibit A**

### **Steps In The Process**

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1. Management develops an awareness of the need to be proactive in regards to automation-related issues.
2. Management identifies issues that are of particular concern to organization.
3. Management identifies the goals of the work group.
4. Management identifies potential work group members through the solicitation of volunteers and through supervisor or peer nomination.
5. Management develops parameters (time allowed, decision making limits, issue considerations, budget) for the work group.
6. Work group meets and develops protocols (how decisions are made, how much work outside meetings can be required, etc.).
7. Work group develops list of automation-related issues to be examined in future.
8. Work group reports back to rest of organization, including management, to get concurrence.
9. Work group prioritizes the list of issues, identifying general time frame for working on the different issues.
10. Work group reports back to rest of organization, including management, to get concurrence.
11. Work group starts to work on resolving their top priority issue/problems by gathering information and developing recommendations for management.

<sup>1</sup>Steps for creating and implementing an automation work group are listed in Exhibit A.



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# Appendix I

## FURTHER READINGS

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The Impact of Office Automation on Clerical Employment: 1985-2000 by J. David Roessner, et al.

Computer Chips and Paper Clips: Technology and Women's Employment edited by Heidi I. Hartmann, Robert E. Kraut, and Louise A. Tilly for the National Research Council.

The New Managerial Work by Rosabeth Moss Kanter, Harvard Business Review November-December 1989 Pgs. 85-92

The work redesign supplement of The Journal for Quality and Participation December 1989

Civil Service 2000 prepared for the Office of Personnel Management, Career Entry Group

Matrix Management Systems Handbook edited by David I. Cleland, Van Nostrand Reinhold Co., New York 1984

Workforce 2000: Work and Workers for the 21st Century, U.S. Department of Labor

Worklife Visions. Redefining Work for the Information Economy by Jeffery J. Hallet, American Society for Personnel Administration 1987

Here Comes Tomorrow: Technological Change and Its Effects on Professional, Technical, and Office Employment edited by Pamela Wilson, Department for Professional Employees, AFL-CIO, 1988

Desktop Publishing: A Federal Progress Report, U.S. General Services Administration, Information Resources Management Service, 1989

Training America: Learning to Work for the 21st Century American Society for Training and Development, 1989

Opportunity 2000: Creative Affirmative Action Strategies for a Changing Workforce, Employment Standards Administration, U.S. Department of Labor, 1988

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