

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

Under sections 5103 and 5346 of title 5, United States Code

Appellant: [the appellant]

Position: Materials Handler Training Leader, WL-6907-06
Position Number: 5107121

Organization: Anaconda Civilian Conservation Center
Job Corps Field Office
Human Resource Programs Staff
Administration
Forest Service
U.S. Department of Agriculture
Anaconda, Montana

Decision: Materials Handler Training Leader, WL-6907-06
(Appeal Denied)

OPM Decision Number: C-6907-06-01

/s/ Judith Frenzel for
Bonnie J. Brandon
Classification Appeals Officer

11/18/96
Date

Copy of decision sent to:

[CCs]

INTRODUCTION

The appealed position is assigned to [the U.S. Department of Agriculture]. The duty station is [a department]. The appellant's position has been recently classified as Materials Handler Training Leader, WG-6907-06. Prior to that, the position was classified as Training Instructor, GS-1712-09. The appellant requests that her position be returned to the General Schedule and classified as a Training Instructor at the GS-09 grade level.

This appeal is filed with the Office of Personnel Management under the provisions of section 5103 of title 5, United States Code. This is the final administrative decision of the Government, subject to discretionary review only under the conditions specified in title 5 of the Code of Federal Regulations, section 532.705.

POSITION INFORMATION

[The department] is involved in the development of student job skills through classroom and shop instruction and on-the-job training in vocations having predetermined employment opportunities. The appellant provides assigned Job Corps members with training in the warehouse trade. The appellant develops a twelve-week program that provides instruction and on-the-job training in the full range of warehouse functions and skills. She evaluates student performance, counsels students, and handles student problems. The appellant also has the responsibility of managing the center's warehouse operations. The work involving the vocational training program and the management of the warehouse comprises the vast majority of the appellant's time. She is also responsible for purchasing supplies and equipment for the center. This accounts for approximately 25 percent of her time. The appellant also serves as the coordinator for the center's recycling program.

The position description (PD) of record is adequate for classification purposes, although there are a few inaccurate statements regarding the appellant's purchasing duties. As mentioned later in this decision, the appellant's purchasing work is not grade controlling, so any misleading information in the PD does not impact the overall grade of the position. However, the inaccurate statements in the PD characterize the purchasing work at a higher level than is actually the case. These statements are discussed under the factors of complexity and purpose of contacts.

PAY CATEGORY DETERMINATION

The appellant requests that her position be classified as a Training Instructor, GS-1712-9. According to the guidance provided in the Introduction to the Position Classification Standards, if a position requires trade, craft, or manual-labor knowledge and experience as a requirement for the performance of its primary duty, and this requirement is paramount, the position is properly classified under a prevailing rate system. If not, the position is subject to the General Schedule.

The Position Classification Standard for Training Instruction, GS-1712, is appropriately used to evaluate a position when the paramount requirement of the work is a combination of practical knowledge of the methods and techniques of instruction and practical knowledge of the subject matter being taught. Positions in this series do not have either a paramount requirement of professional knowledge and training in the field of education or mastery of a trade, craft, or laboring occupation. Instructors covered by this series are not required to provide on-the-job training, to demonstrate a broad range of trade skills, or to possess full knowledge of the trade occupation being taught to students.

Agency management officials have established and stated the intent of and requirements for the position. The primary duty and purpose of the appellant's position is training Job Corps students in the warehouse trade. The paramount qualification requirement for this is the knowledge, skill, and ability in the warehousing trade. Official documents show that an in-depth knowledge of warehousing plans, requirements, methods, procedures, and techniques are required for the position. The position also requires knowledge and experience in instruction and the ability to develop individual vocational training programs and to evaluate student aptitudes and performance. The appellant provides instruction and on-the-job training in the full range of warehousing functions and skills.

The appellant's position is appropriately classified in the Federal Wage System due to the paramount requirement of trade knowledge and experience to perform the position's primary duty.

GRADE DETERMINATION

In the Federal Wage System, the appropriate standard to use for evaluating the appellant's position is the Job Grading Standard for Leader. The Leader standard is used to grade the jobs of employees, who as a regular and recurring part of their jobs, and on a substantially full time basis, lead three or more workers to (a) accomplish trades and labor work, or (b) train them in the work of a trades and labor occupation. Part II of the Leader standard is used to grade the jobs of training leaders. Training leaders require sufficient skill in and knowledge of the trade to carry out the training leader duties described in the standard and, as a second requirement, a practical knowledge of the methods and techniques of instruction. Under this standard, training leader jobs are graded on the basis of (a) the grade level of trades and labor work involved and (b) the type of training leader job involved.

Grade Level Involved

The grade level involved is either (a) the grade level of the nonsupervisory work for which the trainees qualify upon completion of the training course, or, if no target grade can be identified, (b) the highest nonsupervisory level of trade skill and knowledge required of the trainer. Since no target grade is identifiable for Job Corps students in this vocational program, the appellant's position is graded on the basis of the highest nonsupervisory

level of trade skill and knowledge required of the position. Except for the minimum requirement of three trainees in a class, the number of students in the training class does not affect the grade of the training leader.

The standard for Materials Handler, WG-6907, is used to determine the highest nonsupervisory level of trade skill required of the appellant.

At level 06, materials handlers must have an indepth knowledge of the overall warehousing plan, documentation requirements, and accepted warehousing methods, procedures, and techniques. They may serve as the primary materials handler in a small warehouse, such as a base or post supply facility, with responsibility for performing a full range of warehouse functions. These include receiving, locating, storing, shipping, issuing, and rewarehousing materials, commodities, or equipment in accordance with established procedures and operating requirements. They lay out storage space and establish item and material locations; prepare inventory and production reports; screen and identify shipping and receiving documents for discrepancies; and direct shipments to shipping or storage areas. They are skilled in the use of on-site automated equipment and systems and are able to operate large material-moving equipment. Those with hazardous material areas have knowledge of specialized hazardous material handling, storing, and safety procedures.

At level 06, materials handlers work with a high degree of independence and work under the general direction of a supervisor. Review of the work is based on results achieved, including the accuracy of stock balances, orderliness of storage areas, adherence to general warehouse plans, and customer service effectiveness. They are required to stand on hard surfaces for extended periods of time and may lift and carry items that weigh up to 40 pounds. The work is done inside or outside in areas that may be hot, damp, cold, or poorly lighted. They are regularly exposed to the possibility of cuts, scrapes, bruises, falls, and injury from falling stock or moving equipment.

The appellant is in charge of managing the center's warehouse operations. This involves her performing a full range of warehouse functions in the areas of shipping, receiving, ordering, storing, stocking, inventory, security, hazardous materials handling and storing, forklift use, and property management. The appellant determines material locations, the arrangement of materials, and the movement of materials. She prepares inventory and property reports, and tags, assigns, and transfers accountable property. The center's laundry facility is part of the warehouse and is within the appellant's responsibility. This involves overseeing the laundry operations, establishing procedures, and ensuring that the contract laundry service is adhering to the contract. The appellant's warehouse work requires her to have an indepth knowledge of the overall warehousing plan, documentation requirements, and accepted warehousing methods, procedures, and techniques.

The appellant performs her work with great independence. She accomplishes her work with the help of students and one Senior Community Service Employment Program Enrollee. The appellant's supervisor, the Administrative Officer, reviews her work from the general standpoint of orderliness of the warehouse, efficiency of operations, and customer service. The appellant's work requires her to stand, walk, bend, and lift heavy objects at the warehouse and at outlying storage buildings. She is exposed to the possibility of injury and must exercise safety precautions while doing the work.

The appellant's warehouse work meets and does not exceed level 06.

Type of Training Leader Job Involved

Two types of training leaders are described in the standard, Type A and Type B. Type A Training Leaders conduct training to update or expand the skills of full performance workers. Type B Training Leaders conduct training sessions to cover all phases of a recognized trade or line of work that are designed to progressively improve the student's skills. The appellant's position has the characteristics of a Type B training leader, since her training program includes students who are inexperienced in the trade and progressively acquire the appropriate trade skills.

Grade and Title Determination

The highest level of trade skill and knowledge required of the appellant's position is WG-06. The position is a Type B training leader. Using the conversion table in the Leader standard, the appellant's position is graded at level 06.

The titles for jobs covered by the Leader standard are identified by adding "Training Leader" to the job title of the occupation in which the training leader is qualified to conduct training courses. Therefore, the appellant's position is titled Materials Handler Training Leader.

Purchasing Work

Although the appellant's position is primarily concerned with the warehouse trade training program and the management of the warehouse, the position is also involved in purchasing activities. The appellant is involved with purchasing for approximately 25 percent of her time. She receives, reviews, and processes incoming requisitions from the center for supplies and equipment. She purchases mostly routine items through established and mandatory sources and informal open market methods, and uses third party drafts and a Government credit card. She reviews all incoming receipt tickets and reconciles receipts with the credit card statement each month.

This work is evaluated by the GS-1105 Purchasing grading criteria. This standard is written in the factor evaluation system format, and uses nine factors to measure the grade level of duties and responsibilities.

Factor 1, Knowledge Required by the Position

The appellant must have a knowledge of standard purchasing regulations, policies, and procedures to purchase mostly routine and commercial items through mandatory sources, established blanket purchase agreements (bpa's), purchase orders, Government credit card, third party drafts, and noncompetitive open market methods. Her purchasing authority is for \$2500 and below. This level of knowledge required of the appellant for her purchasing work meets level 1-3. At this level, the work requires knowledge of a body of standardized purchasing regulations, policies, and procedures; established commodities and markets; and common business practices to make purchases involving commercial requirements and average complexity. This includes knowledge of solicitation and purchasing methods, such as oral solicitations, calls against bpa's, delivery orders, or priced purchase orders to make noncompetitive open market purchases or purchases under established contracts.

Factor 2, Supervisory Controls

The appellant performs her work under the supervisor's standing instructions on objectives, priorities, and deadlines. She independently carries out her work and uses initiative and accepted practices to resolve problems, such as those arising due to the remoteness of the center. The appellant's completed work is reviewed for technical adequacy, sound application of principles, and conformance with center policies. The supervisory controls meet level 2-3, where an employee performs work with instructions on objectives, priorities, and deadlines. The employee at this level independently performs the work and handles problems and deviations. The supervisor reviews work to ensure technical soundness, appropriateness, and conformance to policies.

Factor 3, Guidelines

The appellant has established purchasing guidelines, procedures, and requirements that apply directly to her purchasing work. She uses judgment in deciding which procedures apply to varying situations and in resolving issues not specifically covered in the guidelines. The guidelines for the appellant's purchasing work meet level 3-2. At this level, a number of established procedures and specific guidelines are available and apply to work assignments. The employee uses judgment in selecting the appropriate reference and procedure to make purchases. There may be minor gaps in guidelines, and the employee may be expected to use some judgment and initiative in resolving aspects of the work not fully covered by instructions.

Factor 4, Complexity

The appellant's work involves processing requisitions and purchasing commercial, routine supplies and equipment, within her \$2500 authority, through established and mandatory sources, established bpa's, noncompetitive open market methods, purchase orders, Government credit card, and third party drafts. She determines which purchasing methods to use; considers such factors as price, available sources, and urgency of need; solicits oral quotations over the telephone; and decides if prices quoted are reasonable. The PD states that "problems are caused by the complexity of specifications and limited sources of supply. The incumbent considers alternative sources of supply, values, new commodities, and various specialized specifications." Our review did not find evidence of the position regularly dealing with complex specifications, new commodities, or specialized specifications.

The complexity of the appellant's purchasing work meets level 4-2. At this level, the work involves performing a variety of related tasks using primarily simple noncompetitive purchasing methods. The employee makes decisions, such as whether to solicit additional sources or question a price. The employee selects purchasing methods by considering a few factors, such as price, available sources, and urgency of requirement.

Factor 5, Scope and Effect

The appellant's purchasing work involves thorough and specific procedures and guidance. She purchases commercial supplies for the center through various methods and sources. The majority of this work is routine in nature and affects the daily operations of the center. This meets level 5-2, where the work involves providing purchasing services that are covered by well-defined and precise procedures and regulations. The employee's work products affect the smooth flow of everyday operations.

Factor 6, Personal Contacts, and Factor 7, Purpose of Contacts

The appellant has contact with requisitioners in the center, personnel in the Supervisor's Office, vendors, and personnel at other agencies. These contacts are to clarify and obtain information and resolve routine problems. The PD states that the "purpose of contacts is to give and exchange information, to resolve problems, negotiate terms and/or settlements, motivate, influence, justify, defend, etc., relative to procurement activities." We did not find evidence of the position regularly negotiating terms or settlements, motivating, influencing, justifying, or defending while performing her purchasing duties.

The nature and purpose of the appellant's contacts meet level 2a. At level 2, the contacts include employees in the same agency or activity and contacts outside the agency with commercial suppliers, contractors, and personnel at other agencies. At level a, the purpose of contacts is to clarify or exchange information related to purchasing

routine requirements. Contacts with vendors are to obtain information on items, prices, discounts, and delivery dates.

Factor 8, Physical Demands

The appellant's purchasing work requires some physical effort, such as standing, walking, bending, and sitting. This meets level 8-1.

Factor 9, Work Environment

The appellant performs her purchasing work in an office setting involving everyday risks or discomforts. This meets level 9-1.

Summary of Factor Levels

The following shows the factor levels and points given for each of the factors discussed above.

<u>Factor</u>	<u>Level</u>	<u>Points</u>
Knowledge Required	1-3	350
Supervisory Controls	2-3	275
Guidelines	3-2	125
Complexity	4-2	75
Scope and Effect	5-2	75
Contacts and Purpose of Contacts	2a	45
Physical Demands	8-1	5
Work Environment	9-1	5
Total	955	

Using the conversion table on page 12 of the purchasing standard, the total point value is equivalent to the GS-5 grade level. This purchasing work is performed in addition to the primary work of the position. The primary work has a paramount requirement for knowledge of the warehouse trade, and is therefore covered by the Federal Wage System. The appellant's purchasing work does not impact the overall grade of the position.

DECISION

The appellant's position is classified as Materials Handler Training Leader, WL-6907-06.