

**U.S. Office of Personnel Management  
Office of Merit Systems Oversight and  
Effectiveness  
Classification Appeal and FLSA Programs**

Atlanta Oversight Division  
75 Spring Street, SW., Suite 972  
Atlanta, GA 30303-3109

**Classification Appeal Decision  
Under section 5112 of title 5, United States Code**

**Appellant:** [Appellant]

**Agency classification:** Training Specialist  
GS-1712-11

**Organization:** Department of the Army

**OPM decision:** Training Specialist  
GS-1712-11

**OPM decision number:** C-1712-11-01

/s/

\_\_\_\_\_  
Kathy W. Day  
Classification Appeals Officer

1/2/01

\_\_\_\_\_  
Date

As provided in section 511.612 of title 5, Code of Federal Regulations, this decision constitutes a certificate that is mandatory and binding on all administrative, certifying, payroll, disbursing, and accounting officials of the government. The agency is responsible for reviewing its classification decisions for identical, similar, or related positions to ensure consistency with this decision. There is no right of further appeal. This decision is subject to discretionary review only under conditions and time limits specified in the Introduction to the Position Classification Standards, appendix 4, section G (address provided in appendix 4, section H).

### **Decision sent to:**

[Appellant]

[Appellant's personnel office]

Deputy Assistant Secretary  
Civilian Personnel Policy/Civilian  
Personnel Director for Army  
U.S. Department of the Army  
Room 23681, Pentagon  
Washington, DC 20310-0300

Director, U.S. Army Civilian  
Personnel Evaluation Agency  
U.S. Department of the Army  
Crystal Mall 4, Suite 918  
1949 Jefferson Davis Highway  
Arlington, VA 22202-2004

Chief, Position Management and  
Classification Branch  
Office of the Assistant Secretary  
Manpower and Reserve Affairs  
U.S. Department of the Army  
Attn: SAMR-CPP-MP  
Hoffman Building II  
200 Stovall Street, Suite 5N35  
Alexandria, VA 22332-0340

Chief, Classification Appeals  
Adjudication Section  
Department of Defense  
Civilian Personnel Management  
Service  
1400 Key Boulevard, Suite B-200  
Arlington, VA 22209-5144

## **Introduction**

On August 10, 2000, the Atlanta Oversight Division, U.S. Office of Personnel Management (OPM), accepted an appeal for the position of Training Specialist, GS-1712-11, located in [organizational location], Department of the Army, [city and state]. The appellant is requesting that his position be classified as Lead Training Specialist, GS-1712-12.

This appeal has been accepted and processed under Section 5112(b) of title 5, United States Code. This is the final administrative decision on the classification of the position subject to discretionary review only under the limited conditions and time outlined in part 511, subpart F, of title 5, Code of Federal Regulations.

## **General issues**

The appellant believes that, as the senior person in the [organizational element], he has functioned as the “lead” and has been responsible for managing the day-to-day functions of the organization. He believes that his agency should have revised his position description to reflect those duties and responsibilities and upgraded his position. The appellant filed a formal grievance with his agency requesting that his position description be rewritten and classified as Lead Training Specialist, GS-1712-12. The agency determined that the appellant’s position description was accurate and that he did not have sufficient functions or responsibilities to be considered a leader.

The appellant provided a proposed position description which was not officially classified by the agency and to which he has not been assigned. An appellant may appeal only the position to which he is officially assigned. For purposes of this appeal, our decision will be based on the official position description of record supplemented by the information provided by the appellant, his supervisor, and his agency.

The appellant makes various statements about his agency’s actions regarding his attempts to have his position upgraded and the accuracy of the position of his immediate supervisor. In adjudicating this appeal, our only concern is to make our own independent decision on the proper classification of the appellant’s position. By law, we must make that decision solely by comparing his current duties and responsibilities to OPM standards and guidelines (5 U.S.C. 5106, 5107, and 5112). Therefore, we have considered the appellant’s statements only insofar as they are relevant to making that comparison.

## **Position information**

The appellant is assigned to job description number [#]. The appellant’s supervisor and his agency certified the accuracy of the position description. The appellant disagrees.

The appellant functions as a Training Specialist whose primary responsibilities involve conducting basic and advanced faculty development programs. These programs include formal and on-the-job training and support for course instructors and developers, Soldier Training Publication developers, training managers and evaluators. The work requires the appellant to

possess and use a practical knowledge of the theories, principles, and techniques of education and training. The work also requires a practical knowledge of two or more subject-matter areas such as Army finance, comptrollership, personnel management, administration and systems management, recruitment and retention, and the Noncommissioned Officer education system. The appellant instructs courses and counsels students. He evaluates the performance of course graduates, prepares reports of results, and provides recommendations based on the evaluation results. He coordinates, conducts and manages specialized workshops and serves as a consultant on the application of the Systems Approach to Training and other projects assigned by the supervisor. The appellant independently manages projects and evaluates, reviews, and develops training materials, aids, methods and plans within his assigned areas. He develops course materials such as job/task and learning analyses, tests, lesson plans, student guides, practical exercises and training manuals. He performs analysis and design work to develop programs, and he validates and implements new programs.

The appellant works under the general supervision of the [branch chief], who makes assignments on a project or continuing basis. The supervisor identifies objectives to be accomplished and provides general descriptions of methods and procedures to follow. The appellant independently develops and carries out normal assignments and establishes intermediate objectives. The supervisor is informed of problems that are difficult or controversial in nature. Completed work is reviewed for technical adequacy, educational soundness, technical content, and conformance with policies, procedures, regulations and educational philosophy.

### **Series and title determination**

The agency determined that the position is best covered by the Training Instruction Series, GS-1712, and titled *Training Specialist*. The appellant does not contest the series determination; however, he believes his title should be Lead Training Specialist.

In order to be covered by the General Schedule Leader Grade Evaluation Guide and titled *Lead*, the primary purpose of the appellant's position must be to lead a team of other General Schedule employees in accomplishing two-grade interval work. The team leader duties must take at least 25 percent of the time and include responsibilities such as coaching, facilitating, mentoring, balancing workload, assigning tasks, monitoring and reviewing work, representing the team in dealings with the supervisor, evaluating team effectiveness, approving emergency leave, providing information to employees on benefits and services, etc. We find no evidence that the appellant has such Leader responsibilities.

We agree with the agency determination that the appellant's position is properly classified in the GS-1712 series. *Training Instructor* is the title for nonsupervisory positions that primarily involve instruction. *Training Specialist* is the title for nonsupervisory positions that primarily involve development or evaluation of training materials. The appellant spends approximately 50 percent of his time instructing and 50 percent of his time performing other duties related to development and evaluation of training materials. The agency determined that the title *Training Specialist* best represented the function and intent of the position within the organization. We agree.

## **Standard determination**

Training Instruction Series, GS-1712, May 1991.

Grade Level Guide for Instructional Work, March 1989.

## **Grade determination**

The GS-1712 standard does not contain grading criteria. The standard directs that nonsupervisory positions classified in this series be evaluated by reference to the Grade Level Guide for Instructional Work. The grade level criteria in the Guide are divided into two parts: Part I for instructional work and Part II for instructional specialist work. The instructional work performed by the appellant is characteristic of that described in Part I and represents 50 percent of the work of his position. Such work involves preparing daily work (lesson) plans, conducting training in traditional classroom situations, evaluating the progress of students, and advising and assisting them to improve their performance. Those activities covered by Part II represent 40 to 50 percent of the appellant's time. Such work involves ascertaining the needs for training and education; determining the objectives and scope of courses, the subject to be covered and criteria for evaluation; developing, revising, or adapting courses and instructional materials and guides; and evaluating educational and training programs.

Part I will be used to evaluate the appellant's instructional duties, and Part II will be referenced to evaluate his specialist work. The criteria in the Guide cover two broad classification factors: *Nature of Assignment* and *Level of Responsibility*.

### **PART I – Instructional Work**

#### *Nature of Assignment*

This factor encompasses such aspects as the knowledge, skill, and ability required to perform the work, and the complexity and difficulty of the duties and responsibilities assigned.

Courses at the GS-11 level cover advanced technical systems or subject-matter areas comparable to the upper division undergraduate level. These courses are not in standardized or prestructured form, and they typically have source material problems (e.g., source materials may be excessively numerous, may be difficult to locate, or may be difficult to adapt). GS-11 instructors are responsible for overall maintenance of their assigned courses and determine the need for and initiate changes or updates in course content. They are substantially involved in the development or modification of the courses that are taught and frequently demonstrate to trainee instructors and evaluate the performance of lower level instructors.

At the GS-12 level, courses that are upper division undergraduate courses, or courses in advanced technical systems, require the instructor to take a primary role in developing specific course content for the complete course. In addition, GS-12 instructors may arrange and moderate seminars and conferences, provide guidance for students and student projects, give lectures and participate in panel discussions, and/or participate in planning and developing or evaluating and revising the curriculum for their academic department. Courses at this level require extensive factfinding and development of source information, and involve more problems

in selecting, interpreting and adapting materials than at GS-11. For example, the subject-matter area may be in a new or changing field where little research has been done; source information and training materials are lacking; the materials are unsuitable for the particular student body; or the course may be in a well-established subject-matter area which has major gaps in the available literature or unsatisfactory materials.

The duties of the appellant's position are characteristic of the GS-11 level. His primary responsibility involves conducting classes equivalent to upper level undergraduate courses, in both classroom and on-the-job settings, to develop individuals who will be assigned as instructors at various military schools located at the installation. He presents instruction, counsels students and evaluates their performance during the course. He evaluates the performance of course graduates and prepares reports of results and recommends possible corrective actions when needed. The appellant has responsibility for scheduling students for courses, performing administrative duties associated with maintaining records of all training program activities, and administering the Instructor Award Program. He has overall responsibility for maintenance of the materials used in his assigned courses and makes determinations regarding the need for changes in the content of these materials and the most effective training methods to use. The appellant participates in the development and modification of instructional materials used in training courses. He is also involved in the review and evaluation of instructional and educational materials, systems, methods and technologies for possible implementation by his organization.

The appellant's duties and responsibilities do not meet the characteristics of the GS-12 level. Although he participates in the development and modification of the training materials, he does not have primary responsibility for development of the specific content for complete courses that is typical of this level. There is no evidence that his courses require the extensive fact finding and development of source information or present the problems with selecting, interpreting and adapting materials as described at the GS-12 level.

This factor is evaluated at the GS-11 level.

### *Level of Responsibility*

This factor includes such things as independence (e.g., the degree to which work and decisions are supervised and reviewed); the extent to which guidelines for the work are available or must be developed; and the kinds of contacts required to perform the work.

Instructors at the GS-11 level may receive course assignments with the course objectives, topics to be covered and general content in a prescribed form, but they typically participate in original course content development and in its subsequent modification. Within the framework of approved course objectives and topics to be covered, GS-11 instructors use such methods as they believe will be most effective. They determine the need for additional subject-matter information and may meet with representatives of outside organizations in order to obtain it. They develop or adapt new or revised training or testing materials for normal course use. The material may be reviewed by the instructor's supervisor for technical accuracy, consistency with course objectives, educational effectiveness, and program policy.

At the GS-12 level, instructors teaching upper division undergraduate courses or courses in advanced technical systems receive defined objectives, but independently develop the total course content. Supervisors and peers rely upon the accuracy and adequacy of their course content and technical knowledge of specialty areas. They either determine or are consulted in determinations regarding course content development. This includes choice of topics, subject-matter content, organization of the course, and the emphasis to be given. The work of GS-12 instructors is reviewed for consistency with course objectives and program policies and for effectiveness in accomplishing course objectives. The instructors may make extensive outside contacts for source information, gathering information from various sources such as industry, research laboratories, educational institutions, professional associations, libraries, and other agencies.

The appellant's duties equate to the GS-11 level. He is responsible for developing, evaluating and reviewing training materials and aids, training techniques and methods, and training plans for the courses in his assigned areas. He develops course materials such as learning analyses, job or task analyses, lesson plans, tests, student guides, practical exercises, validation plans and training manuals. The appellant's supervisor provides assignments on a project or a continuing basis, identifying objectives that are to be accomplished. Guidance regarding methods and procedures to be followed is general in nature, and the appellant works without supervision in accomplishing assignments. The supervisor is normally consulted only when difficult or controversial issues are encountered during an assignment. Supervisory review of completed work is for technical adequacy, soundness of treatment and conformance with applicable policies, procedures, regulations, etc.

The appeal record does not reflect that the appellant has a significant role in determining the choice of topics, subject-matter content, organization, or the emphasis of courses in the training programs in which he works. Although his position has some responsibilities associated with developing, evaluating, or reviewing certain components of courses (e.g., training materials and aids, training techniques and methods, training plans, etc.), this does not reach the level of responsibility for complete course content typical of the GS-12 level.

This factor is evaluated at the GS-11 level.

Both factors under Part I are evaluated at GS-11.

## **PART II – Instructional Specialist Work**

### *Nature of Assignment*

At the GS-11 level, specialists produce complete, self-contained training products (e.g., courses, aids, methods, training plans, etc.) along subject-matter or functional specialty area lines. Work at this level may also involve reviewing and evaluating new audiovisual aids which affect an entire type of course, or planning and conducting validity and reliability studies to analyze test results.

At the GS-12 level, specialists establish instructional design, development, or evaluative criteria through the analysis of educational or instructional problems or questions. Assignments may be in a functional specialty area, a subject-matter area, or may involve a grouping of courses. Specialists at this level deal with matters which are controversial, unconventional, or novel. Assignments frequently require substantial adaptations or extensions of available guides and established procedures or, in some instances, the development of new approaches, methods, or techniques for specific applications.

The appellant's duties are characteristic of the GS-11 level. His specialist work involves developing components of courses, training aids, training plans, training methods, guides, manuals, etc., in his subject-matter specialty areas for use in instructor development. He is also involved in the review and evaluation of new materials and/or programs to determine their adequacy for possible inclusion in the training programs run by his organization. The appellant designs and conducts research studies to identify the latest developments in instructional technology and advances in instructional systems and educational technology. He evaluates these to determine if their application to the organization's training programs would improve their efficiency and effectiveness. The appellant also maintains professional contacts with subject-matter experts, both civilian and military, to stay informed regarding advances in systems and technology.

The appellant's duties do not meet the GS-12 level. The appeal record does not reflect that the appellant's subject-matter areas are controversial, unconventional, or novel. In addition, there is no information in the appeal record to indicate that his assignments frequently require substantial adaptations or extensions of available guides and established procedures or the development of new approaches, methods, or techniques.

This factor is evaluated at the GS-11 level.

#### *Level of Responsibility*

Assignments at the GS-11 level are made on a continuing or a project basis. The specialist independently performs work which requires original development and revision of materials or methods. Completed work is usually reviewed for technical adequacy and for educational or training soundness. Specialists at this level frequently establish new contacts within and outside the agency to obtain needed information, often seeking it from primary sources (e.g., direct contacts and reviews with producers or manufacturers).

At the GS-12 level, assignments are made on a continuing or a project basis, or they may be, with supervisory approval, self-initiated. The specialist is relied upon to perform services, develop products, and take actions that are technically sound and valid. Supervisory review of completed work is primarily to determine general effectiveness and consistency with the educational philosophy and objectives of the program and with the policies of the organization.

The appellant's responsibilities equate to the GS-11 level. His supervisor makes assignments on a project or continuing basis, identifying the objectives to be achieved and generally describing the methods and procedures to follow. The appellant independently carries out assignments



involving the development or revision of training-related materials. Review of completed work is in terms of technical adequacy and educational soundness.

The appellant's responsibilities do not meet the characteristics of the GS-12 level. Although assignments at this level are also made on a project or continuing basis, the GS-12 specialist is expected to carry out assignments and take actions that are technically sound and valid without the level of supervisory guidance or assistance provided by the appellant's supervisor. Unlike the review of the GS-12 level work which is focused on the organization's educational philosophy, program objectives and policies, the appellant's supervisor also reviews his work for technical adequacy, content, and conformance with policies, regulations and procedures.

This factor is evaluated at the GS-11 level.

Both factors under Part II are evaluated at GS-11.

### **Summary**

The appellant's duties and responsibilities equate to GS-11 by reference to both Part I (instructional work) and Part II (specialist work ) of the Guide.

### **Decision**

The appellant's position is correctly classified as Training Specialist, GS-1712-11.