

How to Write Position Descriptions

FES

Factor Evaluation System

Under the Factor Evaluation System

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So you need to write a PD!

This guide will help you to write a position description (PD) in the format required by the Factor Evaluation System (FES). It is to be used for jobs in the General Schedule (GS) that will be classified by FES classification standards. Other GS jobs may also be described in factor format if your agency policy permits. You may wish to consult your personnel office for further assistance and explanation.

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A. Facts about PD's

WHY do we need them?

Positions must be classified before employees can be paid. A position description (PD) is an official record of the work assigned by management to an employee. This work is analyzed in classifying the grade of the job. After the grade is decided on, the employee gets the pay of that grade.

Do they have other uses?

Yes. They help in setting qualifications used in filling job and promoting employees. They can be used to orient new employees in their duties. The duties and responsibilities in a PD are also used in developing performance standards for the work and in deciding on training courses related to the work.

WHO writes the PD?

Your agency decides who will write the PD. The PD can be written by anyone who knows the facts about the position. This might be the supervisor, employee, administrative officer or personnel specialist. In any case, the PD should completely and accurately show the duties and responsibilities that are actually performed.

WHEN is a PD rewritten?

The PD should be rewritten when there is a significant change in the duties, responsibilities or supervisory relationships of the position. Such changes can come from reorganizations, new legislation, new work programs or simply updating old, out-of-date PD's. PD's also need to be rewritten in factor format before they can be classified under new FES position classification standards.

WHAT is the FES factor format?

The FES factor format is the distinctive way in which PD's for positions that are covered by FES standards are written. It consists of a brief listing of the major duties followed by a description of those duties in terms of the nine FES evaluation factors. The value of the FES factor format is that it exactly matches the way FES classification standards are written. *(Please see the FES factor format and sample PD at the end of this guide.)*

WHAT is FES?

The Factor Evaluation System (FES) is a method for assigning grades to positions on the basis of their duties, responsibilities, and qualifications required. Under FES, positions are classified using nine factors.

FES Factors:

- 1. Knowledge Required by Position**
- 2. Supervisory Controls**
- 3. Guidelines (for the work)**
- 4. Complexity (of the work)**
- 5. Scope and Effect (of the work)**
- 6. Personal Contacts**
- 7. Purpose of Contacts**
- 8. Physical Demands**
- 9. Work Environment**

B. General approach in writing PD's

WHERE do you begin in writing a PD?

Your task will be easier if you follow these steps.

Read this guide	Step 1
Gather the facts about the job	Step 2
Write the PD in FES factor format	Steps 3 & 4
Get agreement on PD accuracy and completeness	Step 5

Step 1: Before you start to write, you should review this guide, any agency instructions, and the applicable position classification standard. In this way you will have a better idea of:

- The kinds of information and the factors used in classifying the PD.
- How the factors are described in terms of the occupation or the kinds of work in the position.

Step 2: Once you know what kind of information you need, you should begin to assemble the facts about the official duties and responsibilities of the position. Depending upon whether you are writing about your own job or about someone else's job as a supervisor, here are some techniques you might use:

- Keep a list of the things you do and for which you are responsible (*or that the employee does and for which he/she is responsible*). The list may be written as a kind of diary over a period of days or weeks. It will help you identify the major duties and responsibilities of the position.
- Discuss the work of the position with employees, supervisors and management officials as appropriate.
- Review the existing PD to identify and consider any changes in the position since it was last described.
- Review related PD's in the organization to verify working relationships.
- Observe work in progress.
- Review technical manuals or charts.
- Review organizational or program material.
- Review questionnaires or lists of duties prepared by employees, supervisors or management officials (*useful when working with large numbers of similar positions to determine likenesses for purpose of grouping together and describing in single PD's*)

Step 3: List the duties of the position, and some facts about them, as explained in Section C, below.

Step 4: Use the PD format outline and Section D in describing the nine FES factors in terms of the work performed.

Step 5: Get agreement on the completeness and accuracy of the PD. Resolve differences of opinion, if any, and obtain signatures.

The supervisor certifies to the accuracy of the PD by signing the following statement, which appears on the Position Description, OF-8, or its equivalent:

"I certify that this is an accurate statement of the major duties and responsibilities of this position and its organizational relationships, and that the position is necessary to carry out government functions for which I am responsible. This certification is made with the knowledge that this information is to be used for statutory purposes relating to appointment and payment of public funds, and that false or misleading statements may constitute violations of such statutes or their implementing regulations."

C. How to Write FES duty statements

The **Major Duties** section of the PD answers the question, "What does the employee do in this position?" It should briefly describe the major duties performed in plain, clear language. It may be preceded by an introductory statement or paragraph which describes the general nature of the position and how it fits into the organization. For example, "Performs nursing care in Outpatient Clinic."

The order in which duties are described may vary. You may wish to list duties in the order of their importance or by following the sequence in which the work is performed day by day, over a longer period of time, or during an entire cycle. Another way might be to group related duties according to function. For example, you might separately describe the clerical duties and the technician duties performed in the same position. In such a case, you should include percentages of time spent on these distinctly different kinds or levels of work.

Duties are best described by using active verbs, for example:

- **Balances** cash in register against the total on register tape locating and correcting errors.
- **Types** memoranda, letters, and reports in final form from handwritten notes.
- **Designs** art work for multicolor posters to meet specified needs of requestors.
- **Posts** test score to record cards.
- **Establishes** food standards and plans regular menus complying with nutritional and cost allocations.
- **Develops** plans, specifications, and estimates for urban expressways with separated intersections, dividing strips, weaving lanes and ramps.

If it is necessary to describe incidental or occasional duties, then explain how often they occur, for example: once a month....., in the absence of....., as requested....., in emergencies. . . .

D. How to describe the FES factors

The major duties statements and the descriptions of the evaluation factors (See Section D) should complement each other. That is, the factor descriptions should be drawn from (*and be supported by*) the major duties.

Most of the nine FES evaluation factors have two or three parts (*individual concepts or subfactors*) which are illustrated in the outline for a PD on page 31. To emphasize the parts, we have used a simple identification scheme in the examples which follow. The first part of any factor is written in regular fashion. The second part is in parenthesis. The third part is in brackets. The parts or sub-factors appear in the same sequence as shown in the outline of the PD.

NOTE: See page 29 for information on how to describe positions that have more than one **kind or level** of work.

Factor 1, Knowledge required by the position

What levels of knowledge and skills are required and used in doing acceptable work in the position? This includes:

- The nature or kind of knowledge and skills needed, and
- How these knowledge and skills are used in doing the work.

Under FES, knowledge are information or facts such as procedures, work practices, rules and regulations, policies, theories and concepts, principles, and processes which the employee must know to be able to do the work. When you list a particular knowledge, it is understood that skill is used in applying that knowledge.

Knowledge Example # 1,

Engineer

- a. Kind of Knowledge: A professional knowledge of the theories, principles, practices, and techniques of civil engineering
- b. How Used: *(to design flood control structures such as high retaining walls and closed box channels.)*

Knowledge Example #2,	Clerk
a. Kind of Knowledge	Knowledge of the terminology used with a variety of diagnostic and treatment procedures provided general medical patients
b. How used:	<i>(to record and report medical information such as x-ray and test results.)</i>

Knowledge Example #3,	Clerk-Typist
a. Kind of Knowledge	Knowledge of English grammar, spelling, and punctuation
b. How used:	<i>(to correct obvious errors in the materials being typed.)</i>

Sometimes, it is easier to describe a requirement as a skill rather than as a knowledge. A knowledge exists before skill can be demonstrated, for example: A person who knows the typewriter keyboard can acquire a particular level of proficiency through practice to show "skill in typing." Skills (as used for FES) usually can be observed, that is, you can see a person type and review the typed material easily to decide that the person has "knowledge of the typewriter keyboard." Therefore, it is common practice, to describe skills associated with a certain dexterity as shown below.

Skill Example #1,	Voucher Examiner
a. Kind of skill:	Skill in using a calculator
b. How used:	<i>(to compute totals, discounts, taxes, transportation charges, etc.)</i>
Skill Example #2,	Shorthand Reporter
a. Kind of skills:	Skill in taking dictation
b. How used:	<i>(at higher speeds to provide verbatim transcriptions.)</i>

If you aren't sure whether to describe a requirement as a knowledge or skill, describe it as a level of knowledge.

Additional "Tips" in Writing Factor 1

1. Benchmarks and factor-level descriptions in the FES classification standards may be used as references for how knowledge is treated in the occupation. **Exception:** FES classification standards sometimes describe a level of education, training, or experience. Such criteria are developed by occupational specialists after a comprehensive study of the occupation to provide guidance in the point rating process. Educational requirements or arbitrary degrees of proficiency **Should Not** be described in PD's unless there is documentation backup to prove that these requirements specifically apply to the position being described.
2. Show only the knowledge and skills that are essential for full performance of the work. Generally Factor 1 can be adequately described with four or five knowledge and/ or skills. If you have a list of twenty, some of them can probably be combined into a broader description.
3. Label a knowledge as "professional" only when the nature of the work meets the definition of a professional occupation:

“Professional occupations or series are those that require knowledge in a field of science or learning customarily and characteristically acquired through education and training that meets the requirements for a bachelor’s or higher degree with major study in or pertinent to the specialized field, as distinguished from general education. The work of professional positions is creative, analytical, evaluative, or interpretive, and is characterized by personal responsibility to keep abreast of and exercise judgment and broad perspective in the application of an organized body of knowledge that is constantly studied to make new discoveries and interpretations or to improve the data, materials and methods. Also included are positions filled by trainees who meet the basic knowledge requirements and who perform work in preparation for fully professional.”

Professional occupations are identified as such in the series definition of the occupational standard.

4. As appropriate, include any “special” knowledge or skill that would be required as a selective factor in recruitment such as “Skill in using conversational Spanish to interview witnesses.”
5. Do not copy knowledge/skill requirements from qualification standards. The qualification standard gives the minimum requirements needed for applicants. Non-trainee PD’s describe the kind of knowledge and skills needed to perform the work satisfactorily after the “break-in” period.
6. Avoid listing “abilities.” For example, “ability to examine vouchers” is too vague to be used in evaluating Factor 1. Instead, show what the employee has to know to do the examination. The example below shows how two positions involving “ability to examine vouchers” would require different knowledge because of differences in what the vouchers and the mental processes, insights, and understandings needed.

Wrong

Better

Ability to examine vouchers.

Knowledge of domestic travel regulations to check vouchers for compliance and accuracy of terminology.

Ability to examine vouchers and transportation accounts.

Knowledge of professional accounting concepts, principles, and theories to audit the total accounting system.

7. Don't describe personal characteristics such as patience, adaptability, integrity, or creativity under Factor 1. *(When important, job-related aspects of personal characteristics are credited in other ways, e.g., the need for patience is inherent in considering Factor 7, Purpose of Contacts, aspects of creativity involve Factor 2, Supervisory Controls, in the independence of action, Factor 3, Guidelines, in the judgment used, and Factor 5, Complexity, in the nature of item created.)*

8. After you have completed Factor 1, double check the listed knowledge and skills to assure they agree with the duties described. For example, if you list "Skill in operating an electric typewriter," the duties statement should show what the employee types.

Factor 2, Supervisory controls

“Supervisory Controls” has three parts:

- How the work is assigned.
 - The employee’s responsibility for carrying out the work,
and
 - How the work is reviewed.
- a. *How is the work assigned?* Supervisors have direct or indirect controls over the work in the way assignments are made, instructions given, priorities and deadlines are set, and objectives and boundaries are defined, for example: a supervisor might make assignments with detailed instructions concerning how to do the work; with instructions only for new, difficult, or unusual aspects of the work; with suggestions for procedures; or with information only about the objective to be achieved, priorities, and deadlines.
- b. *What is the employee’s responsibility for carrying out the work?* To what extent is the employee expected to develop the sequence and timing of various aspects of the work, to modify or recommend modification of instructions, and to participate in establishing priorities and defining objectives? For example: an employee might do the work exactly as instructed; do routine assignments independently without specific instruction; refer situations not covered by instruction

to supervisor; handle all work independently according to policies, previous training, or accepted practice; or resolve conflicts which arise by determining approaches to be taken and methodology to be used.

- b. *How is the work reviewed?* What is the nature and extent of the review of work? For example: there may be close and detailed review of each phase of the assignment; detailed review of the finished work; spot-check of finished work for accuracy; or review only for adherence to policy.

TIP: Supervisory controls in the employee's PD should "dovetail" with "supervision exercised" in the supervisor's PD. For example, if the employee's PD states that the work is accepted as being technically accurate without review, but the supervisor's PD states that detailed review is given the employee's work, one of the PD's is wrong. The facts must be rechecked and appropriate changes made.

Supervisory Controls Example #1,

File Clerk

a. How Work Assigned:

The file room supervisor assigns work, advises of changes of procedures, and is available for assistance when required.

b. Employee Resp:

(Routine work is performed independently following set procedures.)

c. How Work Reviewed:

[The work is reviewed for accuracy by spot-checking, the ease with which filed items are found, and through complaints from users.]

Supervisory Controls Example #2,

Clerk-Stenographer

a. How work Assigned:

The administrative law judge dictates without interruption and provides any special instructions that differ from normal procedures.

b. Employee Resp:

(The clerk-stenographer independently transcribes and collates material into final form, with responsibility for format, word usage, and grammar.)

c. How Work Reviewed: [Completed work is relied upon for accuracy; however, errors may be detected when content is reviewed.]

Supervisory Controls Example #3,

Engineer

a. How work Assigned: The supervisor assigns work in terms of project objectives and basic priorities and is available for consultation in resolving controversial issues.

b. Employee Resp: *(The engineer independently plans and carries out the projects, selecting the approaches and methods to be used in solving problems.)*

c. How Work Reviewed: [Projects are reviewed to determine that the objectives are met and for compliance with agency policies and regulations.]

Factor 3, Guidelines

The factor "Guidelines" has two parts:

- The nature of guidelines for performing the work, and
- The judgment needed to apply the guidelines or develop new guides.
 - a. *What guidelines are used in doing the work?* Guides may be operating procedures and policies, traditional practices, or references such as desk manuals, dictionaries, style manuals, engineering handbooks, the pharmacopoeia, and the Federal Personnel Manual. Individual jobs vary in the degree to which the guidelines are specific, applicable, and available for doing the work, for example: dictionaries and style manuals are available, applicable, and specific on matters involving punctuation and spelling; a Federal Personnel Manual is available in the Personnel Office, but may not apply to a particular personnel problem; although three or four standardized tests exist for a diagnostic procedure, the operating policy may state the conditions under which one or the other of these tests may be used.
 - b. *How much judgment is needed in using the guidelines?* The existence of specific instructions, procedures, and policies may limit the opportunity of the employee to interpret or adapt the guidelines. On the other hand, the absence of a

method for a phase of work may require the employee to use considerable judgment in researching related methods to develop a new one.

Explain the nature of guidelines and the extent to which the employee follows them explicitly or uses judgment in deciding between alternatives, in interpreting, in adapting, or in developing guidelines. Below are examples:

Guidelines Example #1,

File Clerk

a. Guides:

Written and oral guides provide specific instructions for filing material.

b. Judgment:

(A substantial portion of these instructions is easily memorized and little interpretation is necessary. When instructions do not apply, the problem is referred to the supervisor.)

Guidelines Example #2,

Engineer

a. Guidelines

Guidelines include agency regulations, and directives, manufacturers' catalogs and handbooks, precedents, and files of previous projects.

b. Judgment:

(While these guidelines are generally applicable, the engineer makes adaptations in dealing with problems such as limited funds or the need to modify the facility for loads and stresses not anticipated in the original design.)

Factor 4, Complexity

Complexity has three parts:

- The nature of the assignment,
- The difficulty in identifying what needs to be done, and
- The difficulty and originality involved in performing the work.

Be sure to study the FES classification standard, if available, before describing this factor in the PD. The kind of information needed to describe "Complexity" differs from occupation to occupation.

- What is the nature of the assignment?* Briefly describe the general nature and variety of the tasks, methods, functions, projects or programs carried out in the position being described.
- What facts or conditions does the employee consider in identifying what needs to be done?* The employee may have little or no choice about what needs to be done. On the other hand, certain facts may have to be developed, checked, analyzed, interpreted, or evaluated by the employee before work progresses. The level of difficulty in carrying out the work varies depending on whether the facts or conditions are clear-cut and directly apply to the

problem or issue; vary according to the nature of the subject matter, phase, or problems being handled; or involve unusual circumstances and incomplete or conflicting data.

- c. *After considering the facts, what actions or responses does the employee make?* In some situations, the work is easily mastered; the employee takes the obvious of action. The level of difficulty and originality increases as the employee is required to consider differences in courses of action and refine methods or develop new techniques, concepts, theories, or programs in solving problems.

Explain the three parts of Complexity for the position being described. Below are examples:

Complexity Example #1,

Mail Clerk

a. Nature of Assignment:

Opens, sorts, and routes mail by general subject matter to approximately 150 delivery points and by specialized subject matter to 70-80 points.

b. Identifying What Needs To Be Done:

(Examines the content of a variety of materials to identify and associate subject matter with closely related technical units.)

c. Difficulty & Originality:

[Determines proper routing or other action to be taken.]

Complexity Example #2,

Clerk Stenographer

a. Nature of Assignment:

In addition to taking and transcribing dictation with highly specialized terminology from many different dictators, performs a variety of duties such as collecting material for inclusion in the final copy.

b. Identifying What Needs To Be Done:

(Checks apparent discrepancies of statements of fact in dictated material by referring to source material in the file.)

c. Difficulty & Originality:

[Makes changes in wording to clarify language and to insure compliance with Bureau correspondence rules.]

Complexity Example #3,

Engineer

a. Nature of Assignment:

Projects involve developing designs, plans, and specifications for plumbing, heating, ventilating, and air-conditioning systems for multi-story office buildings, hospitals, and similar structures.

b. Identifying What Needs To Be Done:

(Considers such factors as unusual local conditions, increased emphasis on energy conservation, and relationship of problems and practices in related engineering fields.)

c. Difficulty & Originality:

[Projects often require departing from past approaches and extending traditional techniques or developing new ones to meet major objectives without compromising design and engineering principles.]

Factor 5, Scope and effect

Scope and Effect" has two parts:

- The purpose of the work, and
- The impact of the work product or service.

a. What is the ultimate goal to be achieved in the position?

"Purpose of work" concerns the end objective such as conclusions reached, decisions or recommendations made, treatment or service provided, reports written, results of tests or research performed, and approvals or denials made. More specific examples are "to prepare statistical charts," "to perform cross-match blood tests," and "to make Voice-of-America broadcasts."

Note: This sub-factor is different from the nature of the assignment under Factor 4, Complexity. Nature of the assignment concerns the kind and variety of tasks, functions or projects required to fulfill the purpose or objective of the work. Factor 4 deals with "how" the work is done.

b. What is the impact of the work product or service? Who or what benefits from the employee's work? For example, statistical charts help supply management officials in identifying areas needing improvement; the cross-matching of blood helps the physician in giving emergency treatment to patients; and many people in foreign countries depend on VOA broadcasts for reliable reporting of the world news.

Describe the impact of work that is performed the right way. For example, for the Construction Analyst, the impact of the work might be described as:

“The work contributes to the marketability, attractiveness, and structural soundness of housing and to the understanding and compliance with requirements for mortgage insurance. Homeowners and lending institutions are protected against major deficiencies in construction or rehabilitation of housing.”

While specific credit cannot be provided for “possible consequences of error,” this element is considered indirectly. It is inferred in the example that, when the Construction Analyst does not do the work properly, insurance might be approved for housing that does not meet the agency’s standards; that structurally unsound homes might be purchased resulting in possible death, injury or financial ruin; that housing might be constructed that is not marketable, etc.

When “responsibility for accuracy” is important in a position, it may also affect the complexity involved and special knowledge required to maintain a level of accuracy.

Below are examples:

Scope and Effect Example, #1,

File Clerk

a. Purpose:

The purpose of the work is to maintain control and reference files for incoming correspondence.

b. Impact:

(This work contributes to the efficiency of daily operations of the Bureau.)

Scope and Effect Example #2,

Engineer

a. Purpose:

The technical expertise provided by the engineer.

b. Impact:

(affects the designs of mechanical systems aboard floating plants and equipment used in dredging activities throughout the agency nationwide.)

Factor 6, Personal contacts

“Personal Contacts” is considered to be a one-part factor covering the people and conditions under which contacts are made. Describe the face-to-face, radio, or telephone contacts which the employee has in terms of the “work relationship” of the people contacted to the employee. Different kinds of contacts might be coworkers on the same project, patients receiving treatment, applicants seeking jobs, students in a class, immigrants entering the U.S.A., manufacturers' representative selling products, contractors providing services, professors giving technical advice, and scientists, consulting with other scientists. If a scientist is treated in a hospital, the “work relationship” of the scientist to the nursing team is as a patient. (*Do not describe contacts with the supervisor because supervisory contacts are included under Factor 2.*)

Indicate if the people come from elsewhere or the contacts occur outside the agency. Describe any unusual circumstances or conditions such as problems in making appointments, (*e.g., inaccessibility of people in high-level positions*) problems identifying the role or authority of the people contacted, or the use of different ground rules for different contacts.

Below are examples:

Personal Contacts Example #1, Mail Clerk

Contacts are with coworkers, personnel on the mail route in units throughout the installation, and U.S. Postal Service employees who deliver mail to the unit.

Personal Contacts Example #2, Engineer

Intra-agency personal contacts include other engineers and architects on the base, procurement personnel, official and managers of the user services, and headquarters engineering experts who approve construction projects. Meets with architect-engineer firms. Contractors, and manufacturers involved in providing supplies/services for construction projects at the work site and at their places of business.

Factor 7, Purpose of Contacts

“Purpose of Contacts” is a one-part factor.

Explain the purpose of the personal contacts described in Factor 6, for example: to give or exchange information; to resolve problems; to provide service; motivate, influence, or interrogate persons; or to justify, defend, negotiate, or settle matters. As appropriate, include other information which might affect the nature of the contacts, for example: dealing with people who are skeptical, uncooperative, unreceptive, hostile (such as patients, or inmates); and settling controversial issues or arriving at compromise solutions with people who have different viewpoints, goals, or objectives.

Below are examples:

Purpose of Contacts Example #1, Mail Clerk

The personal contacts involve exchange of information regarding the processing, delivering or dispatching of mail.

Purpose of Contacts Example #2, Shorthand Reporter

Contacts are made to arrange for recording the proceedings of the grand jury, identify attorneys, and secure seating charts.

Purpose of Contacts Example #3, Engineer

Resolves difficulties and controls the work performed by engineers within the offices. Some persuasion may be necessary to obtain agreement on technical points and methods that conflict with those of other engineers. Discusses contract requirements or developments with manufacturing concerns, architect-engineers and construction firms.

Factor 8, Physical demands

"Physical Demands" is a one-part factor.

Describe the nature of physical demands placed on the employee such as climbing, lifting, pushing, balancing, stooping, kneeling, crouching, crawling, or reaching. Indicate how often and how intense the activity is (*prolonged standing requires more effort than intermittent standing*). Include any physical characteristics or special abilities needed such as specific agility or dexterity requirements. Below are examples:

Physical Demands Example #1, Engineer

The work is mostly sedentary; however, some walking, bending, and climbing is required to inspect buildings at various stages of construction.

Physical Demands Example #2, Mine Inspector

Regularly conducts, onsite inspections of underground coal mines. Much of the time is spent walking, crouching, standing, carrying heavy sampling and testing equipment, and climbing high ladders to examine shafts.

Factor 9, Work Environment

“Work Environment” is a one-part factor.

Describe the physical surroundings in which the employee works (*for example, in an office where there are normal, everyday risks, in a hospital where there is possible exposure to contagious diseases, or a in coal mine where there is potential for roof falls, explosions, and fires*) and any special safety regulations or precautions which must be observed to avoid mishaps or discomfort (*for example, use of protective clothing or gear such as masks, gowns, coats, hard-toed boots, safety goggles, gloves or shields*).

Note: It is not necessary to describe normal everyday safety precautions such as use of safe work practices in an office observance of fire regulations and traffic signals.

Below are examples:

Work Environment Example #1, Clerk

The work is performed in an office setting.

Work Environment Example #2, Nursing Assistant

Rotates to various hospital wards. Wears a surgical mask, gloves and/or gown and uses special aseptic techniques when providing personal and nursing care to patients who have contagious diseases.

Outline

An outline of all of the nine FES factors and a sample PD in FES format are on the following pages.

IMPORTANT: For positions that have two or more distinctly different **kinds or levels** of work, the classifier must evaluate each separately in order to determine the proper grade. Therefore, in describing the FES factors, you should be particularly careful to show any significant differences in the way the factors apply to the different **kinds or levels** of work.

For example, the factor description for Factor 2, Supervisory Controls might reflect differences in controls due to differences in **kind** of work, as follows: (*Supervisory Controls for a Medical Clerk, who performs receptionist, recordkeeping and miscellaneous clerical duties in a hospital clinic*) "Clerk receives oral or written instructions from Administrative Assistant, Outpatient Service, regarding changes in clinic procedures. Receives instructions from clinic doctors concerning their commitments and the number of patients to schedule each day. The clerk works independently while performing receptionist and recordkeeping duties. Work is mostly spot-checked. The scheduling of appointments are reviewed in terms of results attained (*i.e. absence of conflicting appointments, and patient records being available at time of treatment*)."

You do not need to separately describe the nine factors for **each** kind or level of work if you can explain the differences in a sentence or phrase.

Outline

FES FACTOR FORMAT FOR PD

Major Duties

Factor 1, Knowledge Required by the Position

- Kind or nature of knowledge and skills needed; and
- How these knowledge and skills are used in doing the work.

Factor 2, Supervisory Controls

- How the work is assigned.
- The employee's responsibility for carrying out the work, and
- How the work is reviewed.

Factor 3, Guidelines

- The nature of guidelines for performing the work, and
- Judgment needed to apply the guidelines or develop new guides.

Factor 4, Complexity

- Nature of the assignment,
- Difficulty in identifying what needs to be done, and
- Difficulty and originality involved in performing the work.

Factor 5, Scope and Effect

- Purpose of the work, and,
- Impact of the work product or service.

Factor 6, Personal Contacts

- People and conditions under which contacts are made (*except supervisor*).

Factor 7, Purpose of Contacts

- Reasons for contacts in Factor 6; skill needed to accomplish work through person-to-person activities.

Factor 8, Physical Demands

- The nature, frequency, and intensity of physical activity.

Factor 9, Work Environment

- The risks and discomforts imposed by physical surroundings and the safety precautions necessary to avoid accidents or discomfort.

Sample

FES POSITION DESCRIPTION FOR MAIL CLERK (marked to show sub-factors)

Major Duties

Performs mail duties in the central mail processing office of the agency:

-Sorts incoming mail and issuances, including packages, telegrams, and special messages. Selects and time-stamps designated mail items. Verifies or secures enclosures. Sorts and racks mail by file designations or subject-matter categories for attachment of required background information by the files section. Loads incoming mail on delivery cart and delivers it.

-Picks up outgoing mail, checks for attachments and calls attention of sender to obvious discrepancies. Sorts mail picked up en-route for immediate delivery to succeeding mail stops. Checks outgoing mail for completeness and conformance to applicable instructions and regulations, and sorts into various categories (*e.g., chain mail, stop mail, air mail, registered, certified, foreign, etc.*) Wraps packages and separates different classes of mail for delivery.

-Detaches file copies from outgoing mail and routes to appropriate sources.

-Makes special messenger trips as requested.

Factor 1, Knowledge Required by the Position

-Knowledge of the functions, locations, and organizational components of the agency (*to sort and deliver mail.*)

-Knowledge of mail handling procedures (*to time-stamp, obtain background information; sort by category, file designation, or subject matter; wrap for mailing and detach tile copies.*)

Factor 2, Supervisory Controls

The mail supervisor makes assignments, giving specific instructions on new or revised procedures to be used. (*The incumbent performs routine work on own initiative.*) [Work is reviewed for conformance to established requirements. Promptness and accuracy of mail distribution is spot-checked.]

Factor 3, Guidelines

Mail distribution points and delivery schedules are pre-established and are updated frequently with changes in organizational designations. Mail-handling instructions are specific. *The employee uses some judgment in expediting delivery to avoid undue delays, e.g., sorting and delivering en-route.)*

Factor 4, Complexity

The work involves recurring mail processing tasks, i.e., sorting, seeing that background material is attached or detached, and delivering mail to approximately 45 delivery points. *(Considers the category of mail or subject matter identifies obvious discrepancies.)* [Different categories of mail receive different treatment.]

Factor 5, Scope and Effect

Accuracy and reliability in the processing and flow of mail *facilitates work accomplishment in the agency.*

Factor 6, Personal Contacts

Contacts are with employees in the immediate office and people within the building who are designated to receive and send mail.

Factor 7, Purpose of Contacts

Contacts are for the purpose of exchanging factual information, reporting problems, making special or routine deliveries, and picking up mail.

Factor 8, Physical Demands

The work involves considerable walking with pushing or pulling of delivery carts. Packages lifted onto the carts occasionally weigh up to 25 pounds.

Factor 9, Work Environment

The incumbent observes normal safety precautions while working in the mail room and delivering mail throughout the office building.