



THE SECRETARIAL CAREER SYSTEM IN THE CENTRAL INTELLIGENCE AGENCY

May 1986



**THE SECRETARIAL CAREER SYSTEM
IN THE
CENTRAL INTELLIGENCE AGENCY**



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SECTION I
INTRODUCING THE NEW SYSTEM

The Director of Central Intelligence approved a new Secretarial Career System for the Central Intelligence Agency on 24 February 1986. The new system was developed by a task force with Agency-wide representation in conjunction with a compensation and classification consulting firm.

Certain principles guided the development of this secretarial career system:

a. Despite office automation the need for secretaries in the Agency is not likely to diminish.

b. Efficient human resource use is achievable only by designing a more flexible system.

c. A Secretarial Career System should achieve several objectives:

(1) From the secretarial standpoint, there must be opportunities for professional growth, job satisfaction, and compensation which reward experience and excellence.

(2) From a management standpoint, the system should encourage secretaries to remain in their chosen profession thereby avoiding the disruptions and expense involved in constant turnover in this vital area.

(3) From a security standpoint, the system should make long term secretarial careers attractive so that employees do not leave prematurely after being exposed to very sensitive information.

The task force set about to design a system which is attractive to both managers and secretaries. The major highlights of the plan are as follows:

Four new secretarial levels are established—Secretary Trainee, Secretary, Senior Secretary, and Executive Secretary. These four levels are based on a career development program which ties the secretary's job level, training, experience, and performance to pay. These levels are the heart of the new system and are predicated on the commitment of Agency management and the secretarial workforce to build an attractive, progressive career system.

The outline of a comprehensive career development, training, and job enrichment program has been developed to provide a career road map for the participants. Achievement of the required skills and experience in the occupation will be a major determinant for individual career advancement.

The new pay plan encourages long-term retention in the occupation; establishes stringent skill, experience, and training requirements for promotion; rewards experience and excellence; and introduces an expanded performance recognition program. There are a number of significant new elements in the plan:

- New hiring guidelines to allow more flexibility in considering prior salary history and experience.
- Eligibility for pay increases every six months for new employees in the Secretary Trainee and Secretary levels.
- Eligibility for annual pay increases for employees with two or more years of Agency service.

- Expanded pay ranges to provide long-term salary growth potential within a pay level.
- A performance award program to encourage and reward excellence. This program allows up to 30 percent of the secretaries in all but the entry level to receive performance awards each year. Secretaries and Senior Secretaries will be eligible to receive awards of \$1,000. Executive Secretaries will be eligible for awards of \$2,000 or \$3,000.

SECTION II
QUESTIONS AND ANSWERS

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1. Why was a Secretarial Career System developed?

Because, unlike other occupations in the Agency, the secretarial workforce did not have one. As a result, secretaries were frustrated and dissatisfied with their opportunity to fulfill their career potential in helping the Agency achieve its mission. Through the careful design of the Secretarial Career System, Agency management has an affirmative action commitment to enrich this occupation which is predominately female. It has a means to promote career retention of skilled secretaries by offering greater job satisfaction. We know of no similar system elsewhere in the Federal government.

2. Who is to be included in the Secretarial Career System?

Positions and personnel titled Secretary, Clerk Typist, Clerk Steno, and Legal Secretary automatically will be converted to the new system. Closely related occupations will be considered on a case-by-case basis thereafter.

3. Are part-time and contract secretaries included in the new system?

Yes, part-time and contract secretaries are fully included and will be converted at the same time as the full-time secretaries.

4. What advantages does the new system have for secretaries?

The new secretarial system will provide a career path with better training, increased responsibilities, and levels of compensation commensurate with skills and performance.

5. What advantages does the new system have for management?

The system is designed to help attract well-qualified secretaries to the Agency, provide significantly better training for secretaries and provide sufficient incentive for them to remain in the secretarial field. Because the system is flexible, management will have the tools to enrich secretarial job content and to upgrade secretarial positions to meet organizational needs.

6. How does the new system help to attract secretaries to the Agency?

We have developed new hiring guidelines for secretaries which will be more competitive with private industry.

7. How will the new secretarial system be different from the Agency Secretarial Pattern and the General Schedule?

The majority of our secretaries now reach the GS-07 level rapidly and then have little job and salary advancement opportunity. The new career system reduces this compression and provides for increased compensation commensurate with increased responsibility, experience, and performance.

The existing system does not adequately capture the unique demands the Agency places on its secretaries. Rather, by use of the Agency Secretarial Grade Pattern, the grade of the secretary's position is tied to that of the supervisor. The new system replaces the Pattern and is explicitly linked to the secretary's knowledge, skill, and experience level. It establishes four secretarial job levels which are related to four secretarial pay levels.

8. How are the four secretarial levels defined?

Level I Secretarial Trainee

Level II Secretary

Level III Senior Secretary

Level IV Executive Secretary

A full description of the levels can be found in Appendix D.

9. How are the four secretarial pay levels defined?

The four pay levels make up a pay schedule called the Intelligence Secretarial Pay Schedule (IS). Each of the levels is divided into 20 increments (for example, Level I, increment 1 through 20). The salary range of each level is as follows:

Level I: IS-01: \$13,240 to \$19,852

Level II: IS-02: \$16,398 to \$24,587

Level III: IS-03: \$20,061 to \$30,093

Level IV: IS-04: \$22,089 to \$33,128.

There is also an Overseas Secretarial Pay Schedule (ISO) for secretaries assigned overseas which is 9.6 percent higher than the IS schedule. The pay schedules are found in Appendix C.

10. Will I earn more money on the Intelligence Secretarial Pay Schedule than on the General Schedule?

There is greater earning potential in the new system because the salary levels are higher and the waiting periods for within-grade-increases are shorter than on the General Schedule. However, the new pay schedule is not designed to be a salary windfall for secretaries. The increases in salary are tied to performance and experience in the Agency.

11. How does a secretary advance within a pay level?

In the first two years of Agency service, a secretary in Levels I or II who has been certified by the supervisor to be performing at a fully satisfactory level will receive a one-increment pay increase twice per year; thereafter, a secretary is eligible for an annual, one-increment increase in pay.

12. Is it necessary to pass through all 20 increments within a level before advancing to the next level?

No.

13. How does a secretary advance in job responsibility and move between levels?

Promotion to the higher level is based on meeting the experience, training and performance criteria defined in the secretarial profiles (see Appendix D). Once eligible, the secretary may be recommended by a secretarial career service panel for advancement subject to the availability of promotion funds.

14. Are there time-in-level guidelines?

Yes. After conversion, there are guidelines defining how many years of experience a secretary must have at a particular job level before being eligible for promotion to the next level. The time-in-level guidelines used by the secretarial career service panels are as follows:

Level I: 2 years experience

Level II: 3 years experience

Level III: 5 years experience

For current employees converted to the new system, the date of grade will be the date of the last GS promotion. Thus, a GS-08 with a date of grade of 6 July 1983 will retain that date of grade at conversion on 6 July 1986. The employee will be credited with three years toward the five years required for promotion to Level IV.

15. What is a Secretarial Career Service Panel?

There are panels at the Component and Directorate level which annually evaluate all personnel under their cognizance for promotion, recommend performance awards, and monitor training and experience requirements.

- Career panels at the Component level will evaluate Level I secretaries and make recommendations for promotion to Level II to the Head of the Career subgroup.
- Career panels at the Component level will evaluate and recommend performance awards for Level II secretaries and make recommendations for promotion to Level III to the Head of the Career subgroup. Directorate-level panels then review the Component nominations for promotion to Level III, prepare a composite Directorate—level ranking list, and make final recommendations to the Deputy Director or Head of the E Career Service for approval.
- Directorate-level panels evaluate the Level III Secretaries for promotion to Level IV and make recommendations for promotions and performance awards to the Deputy Director or Head of the E Career Service.
- Directorate-level panels evaluate and recommend performance awards for Level IV secretaries.

16. Who serves on the panels?

Panel membership for Level I, II, and III is determined by each Component and Directorate and includes secretarial representation senior in rank to those being evaluated. Members of the Level IV career service panels consist of senior officer representatives from each major Component within a Directorate.

17. Will shorthand be a requirement to advance to Level IV?

Yes.

18. Will supervisors need new guidelines in writing secretarial performance appraisal reports (PARs)?

The procedures for PAR writing will not change; however, supervisors and employees will need to be briefed on the training requirements and other performance criteria for advancement.

19. Aside from the within-level increments and between-level promotions, what other monetary incentives are available?

The new system provides for annual performance awards. Thirty percent of the Level II and 30 percent of Level III secretaries can receive \$1,000; 20 percent of the Level IV secretaries can receive \$2,000 and 10 percent of the Level IV secretaries can receive \$3,000.

20. Are there still quality-step-increases (QSI's) like in the General Scheduling (GS)?

No. The QSI has been replaced by the cash performance awards. However, secretaries are still eligible to receive the other special recognition awards currently within the Agency's award system.

21. What role does training play in the new system?

Training plays a key role in professional secretarial development. A certain number of courses are required for advancement from level to level. Training may be obtained within the Agency, at external institutions, or in a self-study program. Where appropriate, equivalency tests may be taken in lieu of required course work. Because training plays such an important role, Executive Secretaries will participate in the design and teaching of secretarial courses.

22. What is job enrichment?

It is a program to increase job satisfaction through skill development and utilization. This must be accomplished as a team effort between secretary and manager.

23. How will it work?

Over the next several years, the nature and performance of "secretarial work" will be redefined. First, the Office of Personnel will conduct a job analysis program recommending ways to enhance the duties and responsibilities of secretarial positions. Second, the Office of Training and Education will continue to assess training needs and develop secretarial/managerial courses. Third, the Office of Medical Services will assess satisfaction of secretaries and managers concerning the new system through the administration of confidential attitude surveys. Finally, it is the responsibility of the Agency's secretaries and managers to make the system work.

24. Can a secretary transfer between Directorates without loss of grade?

Yes. One of the attempts of the program is to provide skilled, experienced secretaries to meet the Agency's needs wherever they might be. A Level III Secretary in the DS&T is a Level III Secretary in the DI, etc.

25. How will secretaries be converted to the new Secretarial Pay Schedule?

The secretary will be converted to the Intelligence Secretarial Pay Schedule or to its overseas counterpart at the point nearest to, but not less than, their current salary.

Credit will be given for the time completed toward a within-grade-increase (WGI) and added to the General Schedule base salary to establish the salary level for conversion (base salary + WGI due = conversion salary). The appropriate level a secretary is converted to is outlined in the Secretarial Conversion Guidelines (Appendix B).

26. Will all secretaries be converted on the same date?

Yes.

27. Will all the secretarial positions be converted?

Yes, all secretarial positions will be converted to either Level I, II, III, or IV by 1 October 1986. Using the draft Position Descriptions contained in Appendix A, the Components are working with the Office of Personnel to convert the appropriate positions. Generally, all Clerk Typist, Clerk Steno, Secretary, and Legal Secretary positions will convert to the Secretarial Career System.

28. What is the Executive Director's Secretarial Board and what are its functions?

This Board consisting of Executive Secretaries has been established to assess and monitor the new system, provide periodic reports on the health of the occupation and recommend adjustments as necessary to the Director of Personnel. The Board also will be responsible for recommending additional training courses, participating in recruitment efforts and providing a forum for the exchange of ideas and information among the Board, managers, and secretaries in each Directorate. The Board chairperson and members will be appointed by the Executive Director with nominations provided by each Deputy Director and the Head of the E Career Service.

29. How will we assure consistent and equitable operation of the new secretarial system throughout the Agency?

As with any evolving system, there is a need for feedback from those the system affects as well as the technical monitoring of such things as secretarial retention, promotion, performance award, and hiring rates. Many Agency services will help monitor the Secretarial Career System, such as the Office of Personnel, the Office of the Inspector General, the Office of Finance, the Office of Medical Services, and the Office of Training and Education. Above all, managers and secretaries will be responsible for evolving an equitable system by becoming as knowledgeable as possible about that system and working toward job enrichment of the manager-secretary team.

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SECTION III
ADDITIONAL INFORMATION ON THE
NEW SECRETARIAL SYSTEM

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JOB ENRICHMENT

In order to enhance the occupation, the narrow job classification levels of the General Schedule were restructured into four broadly defined levels of responsibility:

- Level I Secretarial Trainee
- Level II Secretary
- Level III Senior Secretary
- Level IV Executive Secretary

Secretarial position levels will be based on the duties performed rather than the grade of the supervisor, and more substantive duties and responsibilities will be added to secretarial positions. Some related support functions, such as those found in some Administrative Assistant Positions, will be folded into the secretarial occupation where appropriate.

Eventually, as many as twenty percent of Agency secretaries will be at Level IV and the remainder will be distributed among the other three levels with no more than thirty percent at Level III. The job enrichment program will help to structure the positions at Level III and IV such that there are more of them each year. Although there may be an initial imbalance between the number of people and positions at each level because of the conversion and job enrichment process, it is expected that, by the end of the second year, the number of people will not exceed the number of positions at any given level. The following is a chart showing the percentage objectives for positions and people at Level III and IV:

<u>Level</u>	<u>Year 1</u>	<u>Year 2</u>	<u>Year 3</u>	<u>Year 4</u>
IV	10%	13%	17%	20%
III	20%	25%	30%	30%

For each Level III and Level IV position established, management will assess the current level of responsibilities using the Agency Secretarial Position Guidelines. For each position which does not meet the desired level, the manager will outline a plan for building the position to the target level. This plan will be submitted to the Office of Personnel as part of the implementation process for review and validation. At implementation and each year thereafter, the Office of Personnel will sample audit positions created at Levels III and IV, assess the current level of the position, and validate development plans for achieving the target position level. In this way, not only will there be a plan for enrichment of each position, the guidelines themselves will continue to evolve until they clearly reflect the duties and responsibilities of the Agency Secretary.

In addition to the normal allocation of secretarial slots, each Directorate may be allocated an extra complement of up to 15 secretaries, five at Level IV and ten at Level III, for surge requirements and to provide secretarial coverage during training, home leave, reassignments or other underlaps.

CONVERSION OF PEOPLE

The secretarial population will be converted on the same date to one of the four secretarial levels. To convert people, Conversion Panels will use the Secretarial Conversion Guidelines noted in Appendix B.

Career Panels for each Directorate and the DCI Area will be responsible for initial conversion of the employees to the new system. These Panels, selected by the Deputy Directors, will be chaired by an Operating Official and consist of one other SIS officer and/or a GS-13 – GS-15 officer from the Directorate, two senior secretaries from the Directorate and one SIS officer from another Directorate.

Using the guidelines, and based upon a review of the personnel file, the panels will determine the level to which a secretary is to be converted. This review will cover past and current performance, current level of responsibility, skills and current grade level and salary.

Placement on the new pay schedule will be to the salary which is nearest to, but not less than, the employee's current salary. Credit will be given for time completed toward a within-grade-increase (WGI) and added to the General Schedule base salary at the time of conversion to establish the level on the new schedule. For example, an employee who has completed two years toward a three-year waiting period at the time of conversion will have the equivalent of two-thirds of a step added to the current General Schedule salary. The resulting salary rate will be used to determine placement on the new secretarial schedule.

COMPENSATION SYSTEM

The pay plan is a modified pay-for-performance system. The plan will change the focus from promotion between pay levels as the primary means of rewarding excellence to movement within a pay level. The system is established as follows:

Four pay levels are established with a total salary range from \$13,240–\$33,128, attached as Appendix C. The salary range for each pay level is 50 percent from minimum to maximum, with each range divided into 20 equal increments. This differs from the General Schedule, which has salary range of 30 percent from minimum to maximum and 10 equal increments.

Employees performing at a fully satisfactory or above level will be eligible for incremental pay increases. During the first two years of Agency employment, secretaries in Levels I and II may receive pay adjustments of up to two increments per year to reflect their rapid increase in value as they obtain relevant Agency experience. Employees with more than two years of Agency service in Levels I and II, and all employees in Levels III and IV, will be eligible for one incremental increase per year.

Employees whose performance is not considered to be fully satisfactory will be denied incremental increases in accordance with Agency procedures for withholding General Schedule step increases or may be subject to downgrading or other administrative measures in accordance with existing policy and regulation.

A performance award pool will be established that allows up to 30 percent of the Level II secretaries and 30 percent of the Level III secretaries to receive awards of \$1,000 annually. Additionally, up to 20 percent of the secretaries in Level IV may receive awards of \$2,000 and 10 percent of the population of Level IV may receive performance awards of \$3,000 annually.

Eligibility for performance awards will be determined by the appropriate Secretarial Career Panel based on performance during the current evaluation year. Each Directorate will develop criteria for performance awards which takes into account its unique requirements, and will submit the criteria to the Executive Director's Secretarial Board for concurrence and the Director of Personnel for approval. On approval by the Director of Personnel, the evaluation criteria will be published and distributed to personnel within the Secretarial Program.

Comparability increases granted to the General Schedule will be granted to the Secretarial Program participants. At the time a comparability increase is awarded to the General Schedule, the Secretarial Pay Schedule will be adjusted at the midpoint, and the comparability increase distributed throughout each level. Employees will be automatically adjusted to the revised schedule.

PERFORMANCE EVALUATION AND PROMOTION

Employees within the Agency's three-year trial period will continue to be evaluated in accordance with that schedule. Thereafter, employees in the Secretarial Program will have their performance evaluated at least annually. The career development program, attached as Appendix D, describes the training, experience, and performance criteria for advancement within and between levels. Each level has a set of courses, variety of job experiences, and performance standards which must be met before the secretary is eligible for advancement to the next higher level. Evaluations will be conducted using the aforementioned career development and training criteria, and the current Agency performance appraisal system. Supervisors are responsible for communicating performance expectations to individual employees at the beginning of the evaluation year, and reaffirming that there is clear understanding of objectives periodically throughout the year as required by the Agency performance evaluation program.

Annually, in accordance with the published performance evaluation schedule, secretaries will be evaluated and ranked by career panels at the Component and/or Directorate level. Panel membership for Level I, II and III is determined by each Component or Directorate and includes secretaries senior in rank to those being evaluated. Members of the Level IV evaluation panel will include senior officer representatives from each major component within a Directorate.

Career panels at the Component level are responsible for evaluating Level I and Level II employees, and for recommending performance awards for Level II secretaries. Recommendations for promotion to Level II and performance awards at Level II are approved by the Head of the Career Subgroup. Recommendations for propromotion to Level III will be submitted by the Component career panels to the Directorate-level career panels which will review nominations, prepare a composite Directorate-level ranking list and make final recommendations to the Deputy Director or Head of the E Career Service for approval.

Directorate-level career panels will evaluate and rank Level III and Level IV secretaries, make recommendations for promotion to Level IV, and recommend performance awards for above average performers in Levels III and IV. Recommendations will be submitted to the Deputy Director or Head of the E Career Service for approval.

Secretaries will be competitively ranked based on their overall performance record in accordance with Agency Uniform Promotion Guidelines. Those who meet all of the criteria for promotion may be advanced to the next level subject to overall percentage constraints which establish the number of authorized secretarial positions at each level for the Directorate or DCI Area.

Time-in-level guidelines to be used by evaluation panels in making promotion decisions are as follows: Level I-2 years for promotion to Level II, Level II-3 years for promotion to Level III, and Level III-5 years for promotion to Level IV.

Those selected for promotion will be advanced to the next level at a salary closest to, but not less than, the equivalent of two increments in the level from which the promotion is being made, or to the lowest increment of the new level, whichever is higher.

MONITORING THE SYSTEM

To assure consistency and equity of the system throughout each Directorate and the Agency, the following procedures have been established:

First, secretarial career panels convened by individual Career Services will be responsible for monitoring training and experience requirements for secretarial advancement. Secretarial career panels will be established at the Component level for Levels I and II, and at the Directorate or E Career Service level for Levels III and IV, after initial implementation.

Second, the Director of Personnel will monitor compensation, position classification, performance awards, and advancement to determine the effectiveness of the system. The Office of Personnel will conduct an annual survey of a representative sample of secretarial positions to assure accuracy in the classification of positions. Any classification adjustments will be made in accordance with Agency position classification policy and will be brought to the attention of the cognizant Deputy Director or Head of Independent Office.

Third, an Executive Director's Secretarial Board, composed of Executive Secretaries, will be established to assess and monitor the new system, provide periodic reports on the health of the occupation and recommend adjustments as necessary to the Director of Personnel. The Board also will be responsible for recommending additional training courses, participating in recruitment efforts, and developing a mentor system for secretaries. The Board chairperson and initial members will be appointed by the Executive Director with nominations provided by each Deputy Director and the Head of the E Career Service.

Fourth, the Office of the Inspector General (IG) will inspect and assess the secretarial program one year after its implementation, and every two years thereafter to assure equity and consistency in implementation and subsequent administration across Directorate lines. The IG will provide reports to the Director of Personnel and the Executive Director on the findings and will make recommendations as necessary.

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SECRET CONTROL
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APPENDIX A
CLASSIFICATION GUIDELINES FOR
SECRETARIAL LEVELS

** Although PMCD is not planning to establish Level I Secretarial Trainee Positions, we have prepared a guideline to guide the work development of new employees and to be able to establish such positions if it becomes advantageous to the Agency to do so.*

LEVEL I

Secretarial Trainee

Attached is the guideline position description for the Level I Secretarial Trainee position. The duties described in this guideline are representative of those found at the secretarial entry-level.

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LEVEL I

Secretarial Trainee

Positions at this level require basic secretarial skills acquired from previous experience and/or training. While working on-the-job, incumbents of these positions will learn local office work flow(s) and procedures; Agency-unique correspondence formats; records and filing systems; word or data processing systems used in the office; basic Agency organization; and Agency security practices and compartmentation requirements.

Duties

1. Performs typing duties. Level I positions require Agency-qualified typing skills.
2. Provides telephone and receptionist services to include escorting and assisting visitors.
3. Maintains records of leave and attendance.
4. Obtains office supplies, calls for repairs on office equipment, and prepares routine request forms.
5. Reserves conference rooms for meetings.
6. Files material and maintains office filing systems. Level I Secretarial Trainees are usually learning the Agency's filing system and thus maintain the stand alone filing systems which do not require integration of material with other files. Some of the files may be automated, requiring word processing skills to update, delete, or change them.
7. Keeps abreast of various procedural requirements, for example, procedures required to route newly received reports/information.
8. Maintains information needed for office functions; for example, logs, card files, etc.
9. Disseminates incoming and outgoing correspondence and reports.
10. Searches and obtains information from files on request.

Impact of the Position

Assignments at this level involve the performance of routine secretarial and procedural tasks. As outlined above, Level I secretarial positions would typically provide typing services, maintain time and attendance records, maintain office files, and refer phone calls and visitors to staff members. The work has little impact beyond the local office.

Nature of Contacts

Contacts are with employees within the immediate organization, office or work unit, or in related units involved in functions similar to those of the office served. The purpose is to obtain, clarify, or give facts or information directly related to the work; for example, exchanging information when performing telephone or receptionist duties, obtaining factual information requested by staff members, informing staff members of meeting arrangements, etc.

Supervision Received

The immediate supervisor provides assignments, indicating generally what is to be done, deadlines and priority of assignments. Positions at this level consult with the immediate supervisor, as needed, on all matters not specifically covered in the original instructions. The work is closely controlled, either by the structured nature of the work itself or by the immediate supervisor's review which may include checking progress or reviewing completed work for accuracy and adequacy.

Supervisory Responsibilities

None

LEVEL II

Secretary

Attached is the guideline position description for the Level II Secretary position. The duties described in this guideline are representative of those found at Level II but are not meant to be all-inclusive.

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LEVEL II

Secretary

Positions at this level require incumbents to assist one or more individuals by performing general office secretarial and administrative work auxiliary to the substantive work of the office/organization. The work requires (1) knowledge of an extensive body of clerical and administrative rules, procedures, and operations; (2) various office skills; and (3) the ability to apply these knowledge and skills so as to facilitate the smooth operation of the office. The work requires knowledge of the organization's mission, function, and key players.

Positions at this level often require the incumbents to perform duties found in Level I positions; however, Level II duties must be performed for the majority of the time.

Duties

1. Types and prepares in final form a variety of office memoranda, reports, etc., from written sources or voice recordings using a typewriter or word processor.
2. Reviews outgoing office correspondence for format, grammar, punctuation, and typographical accuracy.
3. Establishes and maintains office filing and suspense systems. Files maintained by a Level II Secretary are often automated, requiring word processing capability to integrate files among separate ADP systems. Manual files are usually multidisciplinary and necessitate integration among files to keep them up to date.
4. Requisitions for office supplies, printing services, and/or the repair of office equipment. Follows up to ensure services are rendered.
5. Maintains an appointment calendar for the supervisor. Usually checks with the supervisor before confirming appointments.
6. Drafts routine and recurring non-technical correspondence and/or statistical/information reports from established examples.
7. Makes arrangements for routine travel, meetings, and conferences.
8. Locates and assembles background information for reports, meetings, and briefings. Usually provided guidance from supervisor on what is needed.
9. Prioritizes the supervisor's mail, telephone calls, and visitors.
10. Controls and distributes incoming, outgoing, and internal correspondence to include Codeword and Top Secret material.
11. Receives telephone calls and visitors, answers questions, and/or refers to the appropriate officer.
12. Assists in training Secretarial Trainees to the office filing systems, correspondence format, etc.

13. May record and transcribe stenographic notes of correspondence, meetings, etc.
14. May prepare time and attendance cards or review their accuracy. Contacts and resolves routine problems with the Office of Finance payroll person.
15. Assigns appropriate compartmented security markings and related dissemination indicators for office correspondence under the guidance of the document originator.
16. Disseminates sensitive documents to Intelligence Community elements via multitransmissions (hard copy, facsimile, electronic message, and ADP computer networks).

Impact of the Position

At this level, incumbents are responsible for providing secretarial and administrative support so as to facilitate the smooth functioning of the office and consequently its efficiency and effectiveness. The tact, judgment, and competence with which the work is performed impacts on the image of the office.

Nature of Contacts

The position requires regular contact with all levels of personnel within the office supported and frequent contact with personnel from other Agency offices. Contacts are for the purpose of obtaining or providing information, resolving administrative matters, expediting the flow of correspondence, and coordinating work efforts. Contacts with external agencies and organizations may occur for the purpose of supplying information between agencies.

Supervision Received

The incumbent receives general direction from the supervisor who sets the overall objectives and deadlines for priority items. Administrative and procedural direction may also be received from a Senior Secretary.

At this level, the position requires expertise in the secretarial field, thus the incumbent is responsible for independently planning and carrying out assignments, prioritizing tasks, and coordinating the work with others. The employee is expected to use judgment and initiative in performing the work and in resolving most problems that arise.

Supervision Given

Most positions at this level have no supervisory responsibilities. Some positions, however, may require guiding the work of Level I Secretarial Trainees.

LEVEL III

Senior Secretary

Attached is the guideline position summary for the Level III Senior Secretary position. The duties described in this guideline are representative of those found at Level III but are not meant to be all-inclusive. Other duties, however, should be of a comparable level of complexity and responsibility. As with any position, however, Level III positions may be evaluated by application of principles used for grading supervisory positions if they require the technical and administrative supervision of at least three subordinate secretarial and/or clerical positions; supervisory grade is determined in part by the base level of the work supervised.

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LEVEL III

Senior Secretary

A Level III Senior Secretary position incorporates the duties and responsibilities of the previous level with office management responsibilities in the fulfillment of Agency missions and functions. While strong secretarial skills are applied, they are not the grade-controlling duties such as found in Level I and II Secretarial positions. Rather a stronger emphasis is placed on the involvement of the Secretary in the team effort of the office to accomplish the work. A thorough knowledge of the Agency's organization, principal managers, practices, and policies is applied in fulfillment of the position's duties and responsibilities. Knowledge of other organizations and systems also is frequently required, for example, Department of State, foreign liaison services, other Intelligence Community agencies, the USG legal system, etc. At this level, the secretary will usually, but not always, have supervisory responsibilities which may include writing performance appraisal reports for subordinates.

Duties

A Level III Senior Secretary position requires the following duties. The Senior Secretary position may include the work or require a comprehensive knowledge of the procedures, policies, and applications sufficient to provide a focal point for the direction and administration of such duties and responsibilities in subordinate positions. Although Level II Secretary positions may have similar duties as defined below, the nature of supervision and depth of involvement is much more restricted than at Level III. A Level III Senior Secretary position requires a minimum of supervision to resolve work processes which often do not have clearly established policies, procedures, or precedents. Forty percent (40%) of the work includes the duties typical of a Level II Secretary. Sixty percent (60%) of the work includes duties from List I and II below. At least two of the six duties from List I and at least six of the sixteen duties from List II must occur in the work:

LIST I

The work must include at least two of the following duties:

1. Contacts other government agencies, private corporations, and/or foreign liaison services for the purpose of obtaining and providing information.
2. Attends meetings and types a record of proceedings. Provides status reports of actions from preceding meetings and keeps track of follow-up action items for all representatives.
3. Schedules domestic and foreign travel which may include developing and coordinating itineraries, booking reservations, obtaining tickets, typing cables, and coordinating with Central Travel and Central Cover Staff offices. May prepare travel orders or coordinate with Personnel Officer to do so.

4. Manages, controls, and performs accounting for representational and/or discretionary funds.
5. Processes information, maintains files, and assists in the administration of sensitive personnel, financial, or operational cases using judgment and discretion.
6. Maintains manager's engagement calendar with the authority to set, shift, cancel appointments based on the knowledge of the manager's priorities, commitments, and policies.

LIST II

In addition, Level III Senior Secretary positions include the following duties and responsibilities. While not every position requires all the duties listed, the duties reflect the nature and majority of the grade-controlling duties found at this Level. Other duties found, but not listed, should therefore be commensurate with the level of in-depth tasking defined below.

At least six of the sixteen duties must occur in the work:

1. Researches, assembles, and analyzes factual information for issues or topics of current or potential interest to the office concerned. For example, searches litigation or legal files and data bases for support material in preparation of legal briefs. Seeks administrative/research support from other offices (for example, Office of Central Reference).
2. Makes all necessary administrative arrangements for meetings and conferences involving participants from other government agencies, private industry, or Congress. For example, the Senior Secretary prepares agenda; arranges transportation, housing, and meals; secures clearances; and ensures availability of visual aids and printed material.
3. Reviews outgoing material (correspondence, selected reports, and memoranda) for completeness, for example, determines if additional information is required. Returns to the originator or forwards to the responsible officer for further action as required.
4. Oversees, directs, and reviews the work of subordinate secretarial employees. Serves as referent on correspondence formatting, protocol, and office procedures. Reviews appropriate compartmented security markings and related dissemination indicators of office correspondence for accuracy.
5. Develops, defines, coordinates, and implements clerical and related administrative procedures germane to the staff functions being supported.

6. Applies a comprehensive knowledge of manuals, regulations, and statutes pertaining to the work. For example, has knowledge of the CIA Correspondence Handbook, GPO Style Manual, nine Canons of Ethics and the Ethical Considerations and Disciplinary Rules incorporated in the American Bar Association's Code of Professional Responsibility (similar Code applied in the Office of Medical Services, etc.). While Level II Secretary positions require a working knowledge of the manuals, Level III Senior Secretary positions require a comprehensive knowledge so as to serve as a referent to other personnel.
7. Oversees and administers multiple office automation systems; for example, trains users; recommends system upgrades and modifications; troubleshoots problems; assesses new requirements and applications; loads new software, making minor programming changes and quick fixes to the system; and coordinates with vendors as required.
8. Provides quality control review of documents for compliance with compartmented security requirements and initiates corrective actions where necessary.
9. Focal point for search, retrieval, and dissemination of sensitive or classified material and documents. Requires knowledge of, and often involvement in, records management programs related to office and/or Community component documentation and archiving.
10. Performs training functions, for example, identifies secretarial training needs for subordinates. Provides input to the development of secretarial training programs.
11. Takes action when the supervisor is not available by coordinating, investigating, and researching priority items.
12. Compiles and performs preliminary analysis on statistical data. May prepare reports, summaries, charts, and/or graphs as appropriate.
13. Plans for and acquires office supplies and equipment with authority to make local purchases.
14. Maintains the cryptographic account and provides necessary protection for associated key material and documents.
15. Shorthand is often found in Level III positions.
16. Serves as office control officer for compartmented information and is responsible for coordinating administrative security requirements.
17. Maintains regular contact with component records management personnel and is responsible for coordinating the archiving of official records.

Impact of the Position

Implicit in this level is the responsibility for performing functions and taking independent intermediate actions which free more senior Agency managers and employees from the more routine aspects of the substantive work of the organization. Responsibilities at this level also ensure uniform and efficient administrative direction and secretarial support within the office.

Assignments involve coordinating work efforts and conducting low-level/fundamental research and factual analyses that require knowledge and application of a variety of basic methods, techniques, and/or approaches of a professional occupation; for example, logistics, intelligence analyses, operations, foreign affairs, etc. Incumbents are often required to participate in, and sometimes chair, evaluation panels for secretaries at Levels I and II.

Judgments and decisions made at this level serve to clarify, advise on, resolve, define, and anticipate issues/problems which are of importance to Agency managers and in some cases officials outside the Agency.

The total support provided by the incumbent of the position has impact that extends beyond the local unit and affects actions, products, and/or services in both subordinate and higher-level organizations.

Nature of Contacts

The position requires regular contact with all levels of personnel within the office supported, and frequent contact with officials from other Agency components and/or officials from external organizations; for example, Dept. of State, FBI, other Intelligence Community agencies, Congressional Oversight Committees, President's Foreign Intelligence Advisory Board, private industry, and foreign liaison service officials. The purpose is to plan and coordinate work efforts and provide and obtain information in support of daily activities, meetings, or conferences.

Supervision Received

The incumbent works independently and receives general guidance from the supervisor/manager. Administrative and procedural direction may also be provided by an Executive Assistant.

The employee is responsible for planning, coordinating, and ensuring the timely completion of work, and individually resolving most difficulties that arise.

Completed work is considered technically correct. Statistical reports, research, and other substantive work are reviewed for compatibility with other office data.

Supervision Given

Incumbents are responsible for overseeing, directing, coordinating, and reviewing the work of subordinate secretaries. This is the first level where positions may provide full technical and administrative supervision. In cases where administrative supervision is provided by the manager, technical guidance and direction are provided by the incumbents of these positions.

LEVEL IV

Executive Secretary

Attached is the guideline position summary for the Level IV Executive Secretary position. The duties described in this guideline are representative of those found at Level IV but are not meant to be all-inclusive. Other duties, however, should be of a comparable level of complexity and responsibility. As with any position, however, Level IV positions may be evaluated by application of principles used for grading supervisory positions if they require the technical and administrative supervision of at least three subordinate secretarial and/or clerical positions; supervisory grade is determined in part by the base level of the work supervised.

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LEVEL IV

Executive Secretary

In addition to the knowledge, skills, duties and responsibilities typical of a Level III position, a Level IV Executive Secretary position also requires office expediter-management and administrative work to organize and direct the activities of the office in the fulfillment of Agency missions and functions. A more in-depth level of knowledge of the rules, regulations, and policies, as defined below, as the knowledge impacts and applies to the work, characterizes this level of responsibility from that of a Level III Senior Secretary position. At this level, the Secretary usually has supervisory responsibilities for other Secretaries and/or other technicians which usually includes writing performance appraisal reports for the subordinates.

Duties

As in the Level III Senior Secretary positions, the Level IV Executive Secretary positions require the following duties. The Executive Secretary position may include the work or require a comprehensive knowledge of the procedures, policies, and applications sufficient to provide a focal point for the direction, administration, and/or integration of such duties and responsibilities in subordinate positions. The work often requires formulating and advising on necessary changes in policy, procedures, and methods to accomplish the work in an expeditious and efficient manner. Thus, an in—depth knowledge of the Agency's policies, regulations, and procedures, USG statute, Executive Orders, etc. is necessary to apply and direct others as to how the knowledge impacts on and relates to the work. Twenty percent (20%) of the work can include duties of a Level II Secretary, twenty percent (20%) of a Level III Senior Secretary and sixty percent (60%) of a Level IV Executive Secretary.

1. Attends and records proceedings at meetings, conferences, and briefings; prepares minutes and reports for the manager; and has delegated responsibility to independently assign action items or task others to follow-up.
2. Serves as the focal point for office correspondence with delegated authority to assign action based on an understanding of office functions and lines of responsibility. Follows-up, coordinates responses, and prepares final reports for the manager.
3. Represents the office's clerical employees at staff meetings and chairs meetings/task forces with other clericals. Meetings often involve or resolve clerical policies, issues, and procedures. Level IV Executive Secretaries may determine that office training is necessary and follow through with organizing skill sessions for subordinates.
4. Responsible for liaison and coordination of administrative and/or protocol matters with external organizations; for example, Dept. of State, Defense Intelligence Agency, foreign liaison services, etc.

5. Serves as the office focal point for Secretary Position requirements. For example, the Executive Secretary determines office secretarial recruitment requirements; prepares vacancy notices, qualification statements, and office-specific clerical recruitment "ads" for publication; and reviews applicant files, conducts interviews with prospective candidates, and recommends clerical placement/reassignment.
6. Coordinates and administers the office's clerical training program; for example, conducts surveys of training needs and submits recommendations to managers; recommends, approves, and schedules clerical employees for internal and external training; works with the Personnel Officer in the counseling of secretaries on training opportunities.
7. Serves as a mentor for clerical personnel.
8. Oversees the execution of secretarial policy, procedures, and evaluation within the Directorate/DCI Area.
9. Coordinates secretarial conferences.
10. Manages clerical support within an office with authority and responsibility to monitor the overall clerical work flow, recommend the restructuring of work and activities of the clerical staff when necessary to accomplish program goals, and recommend movement of personnel to meet surge requirements.
11. Serves as a fully participating member of the office administrative management/resource planning teams.
12. Within clearly defined parameters, represents the manager's views and policies to other office and Agency personnel, as delegated.
13. Researches, assembles, and analyzes factual information; interprets; makes assessments; and recommends action.
14. May serve as a member of working groups dealing directly with senior Directorate officers and/or senior Intelligence Community officers on a regular basis.

Impact of the Position

Characteristic of this level is the responsibility for taking independent actions and performing a variety of moderately complex assignments which directly support and contribute to the work flow, management, and effectiveness of Agency and/or IC functions.

Assignments involve conducting analyses requiring interpretation of data, and offering recommendations and judgments on projects and products. Knowledge and application of a variety of methods, techniques, and approaches of a professional occupation are required. Assignments within a project are of limited depth but often impact other projects of broader scope. Incumbents are often required to participate in, and sometimes chair, evaluation panels for clericals at Levels II and III.

Judgments and decisions made at this level serve to clarify, advise on, resolve, define, and anticipate issues/problems which are of importance to Agency managers and, in some cases, officials outside the Agency.

The work product or service directly aids Agency managers and employees and affects management decisions and projects.

Nature of Contacts

The position maintains regular contact with all levels of personnel within the office supported, with other Agency components, and with counterparts and officials in external organizations; for example, Dept. of State, DIA, FBI, Congress, White House Staff, private industry, and foreign liaison services. The purpose is to plan, coordinate, exchange information, task, advise on work efforts, and resolve operating problems. Situations at this level may involve individuals who are uncooperative.

Supervision Received

The incumbent performs duties under the general direction of the manager. Assignments are in the form of broad tasks and projects which are carried out consistent with general directions and objectives. The incumbent is responsible for planning, coordinating, and completing tasks independently. Completed work is usually reviewed in terms of accomplishment of tasks and/or objectives.

Supervision Given

Positions at this level, while usually non-supervisory, are responsible for managing and monitoring overall clerical support within an office and for ensuring efficient work flow. The nature of the positions is such that they require the incumbents to provide general advice and guidance to subordinate secretarial and clerical staff as well as to other office employees. Guidance given at this level centers on ensuring that others are kept abreast of issues of general interest and are specifically aware of all matters of immediate and/or potential interest to the manager.

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APPENDIX B
SECRETARIAL CONVERSION GUIDELINES

**AGENCY CONVERSION GUIDELINES
FOR
FULL-TIME AND PART-TIME SECRETARIES***

I. STEP ONE:

GS-03 & GS-04 Secretaries

Convert to Level I: All GS-03's and GS-04's.

GS-05 Secretaries

Convert to Level I if: GS-05 has less than 2 years full-time or equivalent secretarial experience OR has not passed the Agency Typing Test.

Convert to Level II if: GS-05 has 2 years or more full-time or equivalent secretarial experience AND has passed the Agency Typing Test.

(Note that the experience does not have to be strictly Agency secretarial experience; it can be with another government agency or private industry.)

GS-06 Secretaries

Convert to Level I if: GS-06 has less than 2 years full-time or equivalent secretarial experience OR has not passed the Agency Typing Test.

Convert to Level II if: GS-06 has 2 years or more full-time or equivalent secretarial experience AND has passed the Agency Typing Test.

(Note that the experience does not have to be strictly Agency secretarial experience; it can be with another government agency or private industry.)

GS-07 Secretaries

Convert to Level II: All GS-07's.

At time of conversion, the GS-07 Secretary who does not have Agency-qualified typing skills will be required to pass the Agency Typing Test within the first six months from the date of conversion. Such employees will not be eligible for advancement, annual incremental increases or performance awards until they have passed the test.

GSB-07 Secretaries

Convert to Level II if: GSB-07 has less than 5 years Agency secretarial experience.

Eligible to Convert to Level III if: GSB-07 has 5 years or more Agency secretarial experience, has a strong performance history, and meets the experience criteria for the Directorate in which assigned.**

*Secretaries are those employees in occupational codes: Clerk Typist 0322.01, Clerk Steno 0312.01, Secretary 0318.01, and Legal Secretaries 0986.04.

**Directorate experience criteria (attached) are those unique experience factors required of the secretaries assigned to a specific Directorate.

GS-08 Secretaries

Convert to Level II if: GS-08 has less than five years Agency secretarial experience. (Secretaries converting to Level II as a GS-08, step 9 or 10, will be granted salary retention for up to two years).

Convert to Level III if: GS-08 has five years or more Agency secretarial experience, has a strong performance history, and meets the experience criteria for the Directorate in which assigned.

GS-09 Secretaries

Convert to Level III: All GS-09's, except as below:

Eligible to Convert to Level IV if: GS-09 has ten years of Agency secretarial experience, has a strong performance history, meets the experience criteria of the Directorate in which assigned, and has passed the Agency Shorthand Test.

- If there is no record of having passed the Agency Shorthand Test, this requirement may be met by written certification from two officers having first-hand knowledge of the secretary's shorthand skills.
- GS-09's who have not passed the Agency Shorthand Test and who do not meet the certification requirement from two officers are to be converted to Level III. If they otherwise would have been eligible to convert to Level IV and subsequently pass the Agency Shorthand Test, they will be converted to Level IV immediately, subject to the availability of headroom, without subsequent panel review. The fact that the conversion panel found the secretary to be qualified for Level IV, except for the shorthand requirement, must be clearly documented in writing at the time of conversion.

GS-10 & GS-11 Secretaries

Convert to Level IV: All GS-10's and GS-11's, except as below:

- Passing the Agency Shorthand Test is a prerequisite for conversion to Level IV. If there is no record of having passed the Agency Shorthand Test, this requirement may be met by written certification from two officers having first-hand knowledge of the secretary's shorthand skills.
- GS-10's and GS-11's who have not passed the Agency Shorthand Test and who do not meet the certification requirement from two officers are to be converted to Level III. If they otherwise would have been eligible to convert to Level IV and subsequently pass the Agency Shorthand Test, they will be converted to Level IV immediately, subject to the availability of headroom, without subsequent panel review. The fact that the conversion panel found the secretary to be qualified for Level IV, except for the shorthand requirement, must be clearly documented in writing at the time of conversion.

(Secretaries converting to Level IV as a GS-11, step 9 or 10, will be granted indefinite salary retention.)

II. STEP TWO:

Once the secretaries tentatively have been placed in appropriate levels, the Conversion Panel needs to separately rank all full-time and part-time Level III and Level IV secretaries to ensure that the total number of secretaries does not exceed the first-year ceiling for Levels III and IV.

Full-time Secretarial Ceiling

Level IV 10%

Level III 20%

Part-time Secretarial Ceiling

Level IV

5%

Level III

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APPENDIX C
INTELLIGENCE SECRETARY PAY SCHEDULE

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APPENDIX D
SECRETARIAL CAREER PROFILES

DEFINITION OF FOUR SECRETARIAL LEVELS

Note: Overseas training requirements are not addressed in this definition.

LEVEL I

SECRETARIAL TRAINEE

NATURE OF WORK: Work requires basic secretarial skills and knowledge of basic or commonly used rules, procedures, and office operations. Duties include routine typing, receptionist, correspondence control, and filing services for the office. The incumbent learns Agency-unique formats, the Agency record systems, and any word or data processing systems used in the office to which assigned. The incumbent is indoctrinated into the culture of an intelligence organization and learns the principles and practices of security and compartmentation. While the work at this level normally has little impact outside the immediate office, the incumbent is familiarized with the mission and functions of the office and how it fits into the larger organization.

TRAINING REQUIREMENTS: While in Level I, secretaries are expected, as a condition of advancement, to have completed the following required courses and, as availability permits, some of the recommended courses. Component career panels have responsibility for monitoring secretarial training against requirements and space availability.

Required Courses:

Agency Orientation & Office Procedures
(classroom training, 5 days, full-time)

Correspondence Workshop
(classroom training, 2 days, full-time)

Word Processing (classroom training, 3/7 days, full-time)

Proofreading (Including Grammar Review)
(classroom training, 4 days, full-time)

Recommended Courses:

Office Orientation
(classroom or videotape)

VM or Computer Training
(classroom training, 2 1/2 days, full-time)

Shorthand *
(classroom, 10 weeks, part-time)

Typing
(classroom, 3 weeks, part-time)

Electronic & Pouched Communications
(classroom, 2 days, full-time)

* Shorthand is a requirement for promotion to Level IV.

QUALIFICATIONS: Entrance on duty into Level I, the secretary must pass the Agency Typing Test and the Standard Employment Test (SET), and must have a high school diploma or equivalent (e.g., GED).

Advancement to Level II: Requires completion of required courses for Level I and normally two years of Agency secretarial experience. Time-in-level guidelines may be waived by the Head of the Career Service for exceptional performance. Each Directorate and the E Career Service can specify the type and range of experience required.

An Component career service panel may evaluate and rank secretaries and forward advancement and performance award recommendations to the Head of the Career Subgroup for approval. The Director of Personnel advises on advancement policy, approves advancement personnel actions, and ensures compliance with regulations.

Entrance on duty into Level II requires passing the Agency typing and SET tests and having over three years of relevant experience in the private sector or other government agency. At least two years of full-time (or part-time equivalent) related vocational and/or college course work can substitute for the experience criterion.

The following are examples of experience requirements to be obtained in Level I:

Must demonstrate basic understanding of the organization of the Agency and familiarization with names of key officials.

Must demonstrate an understanding of basic security requirements of working in an intelligence organization, for example:

- Familiarization with classification guidelines (the handbook, handling and mailing classified material, especially TS and compartmented)
- Proper disposal of classified trash
- Opening, monitoring, and securing safes, vaults, typewriters, and other office equipment
- Monitoring visitors, including char-force, maintenance personnel, and foreign liaison personnel

Must demonstrate an understanding of basic compartmentation requirements of the Agency, for example:

- A general understanding of sources and methods (need-to-know principle and what should not be discussed outside the office)
- Understanding of document and file control procedures
- Understanding of the principle against release of information to an unknown person, either on the telephone or in person

Must demonstrate an understanding of Agency secretarial procedures, for example:

- Understanding of correspondence formats and dissemination procedures
- Understanding of office filing system
- Telephone message procedures
- Appointment calendar procedures

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LEVEL II

SECRETARY

Nature of Work: Work requires knowledge of an extensive body of rules, procedures, and office operations. Work may require knowledge of the organization, mission, and key players of other offices. The secretary, in addition to Level I work, establishes and maintains filing and suspense systems; drafts routine and recurring statistical/information reports; arranges routine travel and meetings; maintains the supervisor's calendar; reviews outgoing correspondence for format and accuracy; relays information from the supervisor to his/her subordinates and helps set priorities by organizing the supervisor's mail, telephone calls, and visitors. The work of Level II requires an understanding of office responsibilities within the Directorate and usually a general knowledge of the discipline (e.g., Personnel, Geography, Area-specific Analysis, Security, Logistics, Operations). In this operational context, the secretary must be able to prioritize tasks, plan work, and handle interruptions without disruption to the overall functioning of the office. The secretary at Level II helps in the orientation and acculturation of new secretaries.

Training Requirements: To be eligible for advancement, must have completed the following required courses and 20 hours of recommended training while in Level II. Component career panels have the responsibility of monitoring secretarial training against requirements and space availability.

Required Courses:

Career Management Workshop
(classroom, 2 days, full-time)

Developing Writing Confidence
(classroom, 3 days, full-time)

Essentials of Writing
(classroom, 1 week, full-time)

Directorate Orientation
(see your training officer)

Stress Management
(classroom, 1 day, full-time)

Time Management
(classroom, 1 day, full-time)

Professional Office Protocol
(classroom, 1 day, full-time)

Employee Development Course
(classroom, 4 days, full-time)

Recommended Courses:

Geography (Component Specific)
(classroom, 1 day, full-time)

Language Training

(As appropriate—Assignment specific)

Level I Courses Not Yet Taken

Advancement to Level III: Requires completion of the required training at Level II and normally three years experience at Level II. Time-in-level guidelines may be waived by the Head of the Career Service for exceptional performance. Each Directorate and the E Career Service can specify the type and range of experience required. For example, a combination of headquarters and field assignments, staff and line positions, and exposure to more than one component or unit may be required by a Directorate for advancement to Level III.

A Level II Secretary should have demonstrated an ability to manage the supervisor's appointments; to completely and efficiently coordinate messages, meetings, and office routines; to give guidance to more junior secretaries on formats, work management, and office techniques; and to accomplish most aspects of the job independently, asking for guidance only in unique or first-of-a-kind situations. The secretary at this level should have a good grasp of the bureaucratic structure and operations of the immediate office and how it relates to other components. Knowledge of major operations, key foreign political and liaison service figures, and the operating environment and stations supported by the component is an important factor in the quality of support the secretary is able to provide.

An Component career service panel will evaluate and rank secretaries and forward advancement and performance award recommendations to the Office Head. The Head of the Career Subgroup approves performance awards for Level II secretaries. Advancement recommendations will be forwarded to the Directorate-level career panel which will review the nominations from the various Components and develop a rank order of candidates. The final candidate list will be submitted to the Deputy Director or Head of the E Career Service for approval. The Director of Personnel advises on advancement policy, approves advancement personnel actions, and ensures compliance with regulations.

Entrance on duty into Level III requires a minimum seven years' relevant experience in the private sector or other government agency, three of which must have been in a Senior or Executive Secretarial-level position, and passing the Agency typing and SET tests. At least four years of full time (or part-time equivalent) vocational or college course work in Secretarial Science or a related academic field and three years related experience may be substituted for the seven year experience requirement. Hiring into Level III requires approval of the Head of the Career Service.

LEVEL III

SENIOR SECRETARY

Nature of Work: Work at Level III is significantly more complex than at Level II, because of the integration of work elements from within Agency components and requires a thorough working knowledge of the Agency's organizational structure, principal managers, practices, policies, and programs. Knowledge of other organizations also is frequently required, e.g., Department of State, foreign liaison services, Federal Bureau of Investigation, President's Foreign Intelligence Advisory Board, Intelligence Oversight Board, or other Intelligence Community agencies. The secretary's work at this level clearly impacts on other components, and contacts maintained in the other components are at a higher level than those of the Secretaries and Secretary Trainees. Secretaries in Level III usually have supervisory responsibility for other clerical staff members. Duties at Level III may include assembling background information for the supervisor; attending meetings and preparing a record of the proceedings; drafting regular and recurring statistical/information reports; arranging travel and conferences involving multiple participants and/or overseas itineraries; screening the supervisor's mail and assigning to other officers items which require preliminary work before being brought to the attention of the supervisor; initiating action on priority items when the supervisor is not available; and supervising and reviewing the work of subordinate secretaries and clerical employees, including having input to their Performance Appraisal Reports, as appropriate.

[Redacted]

[Redacted] Judgment and discretion are absolutely essential at Level III and above. Secretary may be required to apply writing skills in the drafting of memoranda, responses, and cables.

Training Requirements: To be eligible for advancement, secretaries must have completed the following required courses plus 120 hours of Level III training. Directorate-level career panels have the responsibility of certifying substitute course work using curriculum guidelines to be drawn up jointly by the Office of Personnel, the Executive Director's Secretarial Board, and the Office of Training.

Required Courses:

Effective Oral Presentation
(classroom, 4 days, full-time)

Getting Your Ideas Across
(classroom, 2 days, full-time)

Women in the Work Force
(classroom, 3 days, full-time)

Management Skills for Secretaries
(out of town, 3 days, full-time)

Supervisory Skills for Secretaries
(out of town, 5 days, full-time)

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Recommended Courses:

Leadership Styles & Behavior
(out of town, 5 days, full-time)

Advanced Writing Course
(classroom, 6 sessions over a 2 week-period, part-time)

Professional Woman's Course
(out of town, 1 week, full-time)

Management Development Course
(classroom, 5 days, full-time)

Area Familiarization Courses
(Component specific)

Level II Courses Not Yet Taken

Advancement to Level IV: Requires five years' Agency secretarial experience at Level III, certification of Agency-qualified shorthand, and successful completion of OTE training requirements. Time-in-grade guidelines may be waived by the Head of the Career Service for exceptional performance. Career services can specify the type and range of experience required. For example, a combination of headquarters and field assignments, staff and line positions, and exposure to more than one component or unit may be required by a Directorate for advancement to Level IV.

Advancement to Level IV is by Directorate or E Career Service nomination. The Directorate-level career service panel will evaluate and rank annually those eligible secretaries and forward nominations for advancement and for performance awards to the Deputy Director or Head of the E Career Service for approval within the Level IV position and personnel ceiling constraints. The Director of Personnel advises on advancement policy, approves advancement personnel actions, and ensures compliance with regulations.

Level III candidates must have demonstrated a strong working knowledge of all Agency correspondence formats, the Agency records system, travel and accounting systems, Agency structure and functions, principal managers, and have engaged in increasingly more substantive tasking in the field. The Level III Secretary must understand the protocol, sources and methods, and political implications of internal and external contacts. Initiative, the ability to analyze situations and decide on a course of action, and interpersonal skills are critical.

Examples of required skills and successful performance include:

- Understanding of the organization, and its principal managers, practices, policies, and programs
- Knowledge of other organizations (e.g., Department of State, FBI, domestic and foreign organizations)
- Demonstration of supervisory capability
- Understanding of statutes, policies & regulations
- Demonstration of strong organizing, office management, and expediting skills
- Superior typing and shorthand skills

LEVEL IV

EXECUTIVE SECRETARY

Nature of Work: In addition to performing the duties of Level III, Executive Secretaries function as an office expediter in the coordination and integration of work flow from many different components and often from inter-agency working groups. The skills and knowledge required to perform effectively require a thorough understanding of the statutes, regulations, policy, and philosophy under which the Agency functions in the Intelligence Community. Work often requires regular contact with counterparts and officials in other Agencies to coordinate conferences, tasking deadlines, and liaison for the manager the secretary supports. The scope and effect of the manager's responsibilities impact on an Agency-wide or national level such that discretion and sophistication are required of the secretary in performing the work. Work requires a thorough working knowledge of the Agency, the manager's primary views and policies, and principal managers and secretaries in the Intelligence Community. The Level IV Secretary organizes and directs the day-to-day activities of the office, restructuring the work activities of subordinates to better accomplish program goals when necessary.

Secretaries performing Level IV work have the management skills and knowledge of the organization to be able to fulfill surge requirements throughout the Agency. Work at this level may require short- or long-term rotational assignments to meet crisis requirements when world events require an immediate Agency intelligence response or to support National Security Council tasking (e.g., secretarial support to the Arms Control Intelligence Staff). During these situations, the secretary expedites and oversees tasking deadlines of the office, coordinates with other components who must respond to cable traffic (e.g., personnel, security on travel arrangements of officials), and supervises the typing, record keeping, and tasking of subordinate secretaries, clerk typists, administrative assistants, or other support occupations. Assignments at this level may require secretarial coverage in offices where the principle secretary is in training, on leave, away on TDY, or is otherwise not available to perform the job. At times, the work may require TDY trips in advance of the manager's TDY travel or independent of the manager in support of Agency tasking requirements.

Training Requirements: While in Level IV, secretaries are eligible to take the Level IV courses listed below (some of the courses are by Directorate nomination). Directorate career panels have the responsibility for monitoring Executive Secretary training.

Required Courses:

None

Recommended Courses:

Briefing Techniques Course
(classroom, 4 days, full-time)

Intelligence Issues
(classroom training, 7 days, full-time)

Mid-Career Course

(out of town/local/field trips, 4 weeks, full-time, 5th week optional)

OTE Courses for GS-11 & Above

Level II and III Courses Not Yet Taken

External Seminars and Symposiums

(see your training officer)

Advancement

Directorate-level career service panels have the responsibility to rank and evaluate Executive Secretaries annually. Career development recommendations and nominations for performance awards will be forwarded to the Deputy Director or Head of the Career Service for approval. The Director of Personnel advises on advancement policy, approves advancement personnel actions, and ensures compliance with regulations.