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EXECUTIVE DIRECTOR'S TASK FORCE  
FOR THE  
SECRETARIAL OCCUPATION

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30 September 1985

MEMORANDUM FOR: Executive Director

FROM: Secretarial Profession Task Force

SUBJECT: Modernizing the CIA's Secretarial Profession

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1. This memorandum is in response to your verbal tasking of May 1985 which set up a Secretarial Profession Task Force

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2. The Task Force has been meeting regularly to develop an action plan to reform the secretarial pay and career structure within the Agency. In the course of this effort, extensive discussions have been held within each of the Directorates. The results of the efforts of the Task Force are embodied in the attached report which we are prepared to discuss with you at your convenience.

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## Task Force Recommendations for the Agency's Secretarial Occupation

1. The Secretarial Task Force was formed by the Executive Director on 3 June 1985 with the requirement to examine the compensation system, job classification methodology, and career structure for the Agency's secretarial occupation, and to recommend changes as appropriate.

2. BACKGROUND AND ISSUES: We began this task by examining the current system, by reviewing some of the concerns raised by secretaries and managers, and by looking a bit into the future. We noted, for example, Department of Labor statistics which portray the secretarial occupation as a career field which increasingly will be in demand. On the other hand, we noted Census Bureau projections indicating that the number of men and women entering the work force will decrease year by year through the end of the century and, with respect to this decreasing work force, it appeared that more women were eschewing traditional female occupations such as secretary. The question arose: Will CIA continue to be able to compete for and attract the secretaries it needs?

We also reviewed some of the complaints which had been raised about the current system. A number of managers felt they needed more flexibility to put senior secretarial positions where the need was greatest, without regard to the grade of the supervisor. A number of managers were concerned that our compensation system was not sufficiently competitive because vitally needed secretaries with specialized clearances and specialized skills were being snapped up by the private sector. Finally, it was noted that the way the secretarial occupation was structured in the Agency and in the government, key job functions regularly were stripped away into other occupations as a method of upgrading positions; and, instead of growing in their career field, many experienced secretaries were forced to become administrative assistants, computer assistants, etc.

The concerns raised by many of the secretaries mirrored the concerns of the managers. Most secretaries came into the occupation, worked hard, got two promotions, reached a "pay cap" and then found themselves with little to look forward to in the way of job advancement. They often felt they were being treated as second-class citizens rather than full members of the team, often were not used to their fullest potential as secretaries and were being told, in essence, that if they wanted to get ahead they should get out of the secretarial field.

From this review we arrived at certain guiding principles:

- a. Despite office automation the need for secretaries in the Agency was not likely to diminish.
- b. Agency officials needed to have greater flexibility in managing their secretarial work force.



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c. Secretarial attrition should be kept to the lowest possible level.

(1) From a security standpoint it was not desirable to have secretaries come into the Agency, be exposed to very sensitive information and then leave after a few years.

(2) Even where secretaries were not leaving the Agency, only leaving the secretarial field, this often was undesirable. There was no concern about the true upward mobility case where a secretary left to become an engineer or a doctor. There was great concern, however, about the loss of experienced secretaries who wanted to remain in their career field but left because the occupation, as presently structured, did not provide career direction or career progression.

With these guiding principles in mind we set about to design a system which would be attractive to both managers and secretaries. We provided managers with greater hiring flexibility to attract better entry-level secretaries and to better attract experienced secretaries. We attempted to ensure that managers would be better able to monitor secretarial performance and have more control over secretarial advancement. We propose allowing managers to create senior and executive secretarial positions as required and put them exactly where they are needed.

Having reviewed the options available to us under the General Schedule (GS) pay system, we determined that the problem required nothing less than a total restructuring of the existing job classification methodology and compensation system. Our objective was not to maintain the occupational status quo while simply raising secretarial salaries. Rather, we set about designing a system which would enrich, enhance and expand the secretarial occupation so that, as a result of this job enrichment, better salary potential and career incentives could be provided.

3. PROPOSAL: We recommend a new secretarial career system which encompasses the four levels of complexity we were able to discern within the secretarial career field. This system would be similar to that used in private industry and reflect our unique tasking requirements as follows:

- Level I Secretary Trainee: designed for entry into the occupation with minimum qualifications.
- Level II Secretary: encompasses the full performance skills and knowledge required in the field.
- Level III Senior Secretary: requires specific Agency experience and training above the full performance level.
- Level IV Executive Secretary: defined by work which requires experience and training of an office expediter/manager.

Our proposed definitions of the four secretarial levels, to become a new Agency Secretarial Standard, are contained in Attachment A. We recommend hiring an external compensation and job evaluation consultant to study and,

if necessary, modify this standard, as well as review the proposed pay plan to compare it with the current federal government and private sector compensation systems. We expect the consultant to analyze our concept and to determine whether it is sound and equitable.

4. IMPLEMENTATION:

Positions: During the conversion we would include positions titled Secretary, Clerk Typist, and Clerk Steno since the basic skills of these occupations are closely related. Positions identified by each Directorate in levels II, III, and IV will be validated by PMCD and the private consultant prior to implementation of the new system. Validation will take place by having the consultant conduct position interviews with the incumbents and supervisors, the end result of which will be exemplar position descriptions for levels II, III, and IV unique to the Directorate in which they exist. The Senior Directorate Personnel Officers will serve as a focal point for scheduling and preparing for the interviews. Conversion of the positions will be accomplished by using benchmarks and the new Agency Secretarial Standard which will have been validated by the external consultant and PMCD. Not only will each Directorate be responsible for identifying where level II, III, and IV positions are required, it will have full authority to assign secretaries to those positions, and, as with other occupations, where volunteers are not available, directed assignments will be made.

Thereafter, each Directorate would have full administrative control, establishing secretarial position levels as required. Although PMCD would provide guidance as to the nature and level of the work, the Directorates, using allocated percentages and representative position descriptions, could vary the distribution of secretarial positions based on tasking requirements. In a mature system, we envision a ceiling of not more than 20 percent of the positions at Level IV and the remainder distributed among the other three levels with approximately 30 percent at Level III.

During the first year of the new system, the Directorates and the DCI area (E Career Service) will work together with the private consultant and PMCD on a job enrichment program. The enrichment program will concentrate on allocating substantive job responsibilities which provide more challenge and opportunity for growth in the occupation.

People: Directorate conversion panels will be established to evaluate and place the secretaries within the Directorate at the appropriate level. The panels 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. All members of the panels and supporting staffs will be fully briefed on the procedures and guidelines for conversion, and both PMCD and the private consultant will be available to provide advice and guidance during the implementation phase. Each component will provide needed information and also recommend placement of its secretaries in the appropriate level. The panel will review the information, consider the recommendations, and make the final decision.

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The conversion process will be accomplished by reviewing the Official Personnel File, supervisory comments, performance appraisal reports, skill levels and training of each employee. The secretary will then be placed on the new pay schedule in the following manner:

a. To a salary level nearest to, but not less than, the secretary's current salary at a level commensurate with the employee's experience, tenure, performance and duty level. Credit will be given for time already spent in a waiting period on a pro-rata basis. For example, an employee who has completed two years of a three-year waiting period toward a Periodic Step Increase will be given credit for two-thirds of the amount of the PSI when the salary is converted to the new schedule.

b. While conversion to a given level in the new scale will not be automatic for any employee, GS-10 and above secretaries normally will be converted to Level IV, and GS-08/GS-09 secretaries normally will be converted to Level III.

c. The Last Equivalent Increase date will change for each employee to the date of the conversion. This will start a new (six month) waiting period for the periodic step increases.

d. The Date of Grade will remain as it was prior to the conversion, thus giving credit for time spent in the last GS grade toward the time-in-grade guidelines.

We propose a phased conversion schedule for employees not to exceed the percentages outlined in the following formula:\*

<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%

To ensure that appropriate position classification decisions have been made, we recommend that PMCD survey a sample of positions immediately after conversion and yearly thereafter.

To ensure consistency and equity in the implementation and subsequent administration of the new Secretarial Career System across Directorate lines, we recommend that the Inspector General Staff (IG) survey the system one year after implementation and every two years thereafter.

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\* It is recommended that the ceiling allocated to each Directorate may not be transferred from one Directorate to another.

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Only employees who are secretaries, clerk typists, and clerk stenos will be included in the initial conversion. Thereafter, each Career Service may recommend to the Office of Personnel other occupations which should be included in the new secretarial system. The Office of Personnel will convene a meeting of the five Career Services to review such recommendations.

5. EVALUATION AND ADVANCEMENT: Evaluation and advancement panels will be established at the Office level for levels I and II, and at the Directorate level for levels III and IV, after initial implementation. Panel members for levels I, II, and III will include secretaries senior in rank to those being evaluated. Members of the Level IV evaluation panel will be senior officer representatives from each office, division, and staff of the Directorate. The evaluation and advancement panels will be responsible for subsequent evaluation, ranking, and recommendations to the head of the Career Service, or his designee, regarding advancement and performance awards.

Each Career Service shall ensure that advancements do not cause an excess of personnel in levels III and IV in relation to the percentage constraints. Advancement shall be based on a mixture of Agency-wide and Directorate-unique criteria (training, experience, skills and performance).

Employees who do not continue to meet the qualification and performance standards in any of the levels will be subject to downgrading or other disciplinary measures in accordance with existing policy and regulation.

6. COMPENSATION AND INCENTIVES: We urge consideration of a Secretarial Pay Schedule, based on an Agency-unique Secretarial Standard, with four pay levels ranging from \$12,800 to \$37,500 per annum as outlined in Attachment C. The current system finds the secretary promoted too quickly without necessarily having solid experience, and then stagnating at the GS-07 level. The new pay plan, with its broader pay range and time-in-level guidelines, is intended to lengthen the time it takes a secretary to reach the equivalent GS-07 pay cap by keeping pay progression in line with experience, and then goes beyond that cap to provide the capacity for greater pay growth over the General Schedule. The pay plan offers the following advantages:

- a. Our recommended pay plan would have 30 increments designed so that, if performance is acceptable, a secretary can expect a pay increase every six months for 15 years.
- b. Pay incentive to advance in the career field is provided by having larger pay increments from the 15th to the 30th step in levels III and IV than at the lower steps. Currently secretaries moving toward the higher steps are forced to wait longer for increments of the same amount they received when they had less experience; the new schedule provides greater salary incentive to those who remain in the secretarial field.
- c. Advancement from level to level which is equivalent to an increase of two increments will provide greater salary potential than the current system.

d. A performance award system is structured into the compensation plan. Superior performance is rewarded by annual cash awards rather than quality step increases. We envision 30 percent of the secretaries in Level II and 30 percent in Level III receiving an award of \$1,000; 20 percent in Level IV receiving a \$2,000 award; and 10 percent in Level IV receiving a \$3,000 award.

e. Secretaries in Level IV have special benefits and responsibilities as outlined in Attachment D.

7. SPECIAL FEATURES: In order to give the occupation a greater sense of identity and cohesiveness, we further recommend the establishment of an Executive Secretarial Board (ESB). The Board will consist of two executive secretaries from each Directorate and the E Career Service and be responsible to the Executive Director for:

- Assessing the new system, providing periodic reports on the health of the occupation, and recommending adjustments as necessary.
- Acting as mentors for secretaries.
- Acting as a clearing house for inter-directorate assignment opportunities.
- Designing training and development programs for secretaries and participating in those programs.
- Participating in the selection of new Agency office automation equipment.
- Recommending secretaries to participate in the recruitment and selection of secretarial applicants. Within appropriate constraints, secretaries involved in recruitment may place applicants in process.

In addition to the normal allocation of Secretarial Level IV slots, each Directorate would have an extra complement of [ ] executive secretaries for surge requirements ( [ ] to provide secretarial coverage during training, home leave, or reassignment of other secretaries, and to eliminate underlaps resulting from separations or reassignments.

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8. Adoption of a new secretarial system is within the DCI's authority under Section 8 of the CIA Act. While notification of our Oversight Committees is not technically required, such notification is recommended.

9. If approved, a new system could be implemented within 90 days of approval. During this period the following would occur:

- a. The Office of Finance Payroll system and the Office of Personnel PERSIGN system would be programmed to accommodate the new salary schedule.



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- b. Directorate implementation panels will be selected, briefed and will complete the conversion process.
- c. Personnel Officers in all Agency components will be briefed on procedures and technical aspects of the new system.
- d. Appropriate regulatory, reference and policy issuances will be revised to reflect the changes required by the new system.

- Attachment A: Definition of Levels, Training Requirements, and Criteria for Advancement
- Attachment B: Hiring Standards
- Attachment C: Pay Plan
- Attachment D: Executive Secretarial Benefits & Responsibilities
- Attachment E: Questions and Answers
- Attachment F: Cost Projections
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- Attachment H: Tentative Implementation Schedule

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ATTACHMENT A

DEFINITION OF FOUR SECRETARIAL LEVELS

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 assigned. The incumbent is indoctrinated into the culture of an intelligence organization and learns the practices and principles 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 OTE Level I 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, 3 days, full-time)
- Correspondence Techniques  
(classroom, 3 days, to be developed)
- Grammar Review  
(self-study, to be developed)
- Word Processing  
(classroom training, 3 days, full-time or self-study)

Recommended Courses:

- Proofreading  
(classroom, 4 days, part-time or self-study)
- Office Orientation  
(classroom or videotape)
- VM or Computer training  
(classroom, self-study, or test)

QUALIFICATIONS: To be placed in Level I, the secretary must pass the Agency Typing Test, the Standard Employment Test (SET), and must have a high school diploma or equivalent (e.g. GED).



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Advancement to Level II: Requires completion of required courses for Level I and normally one year of Agency secretarial experience. Time-in-grade 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.

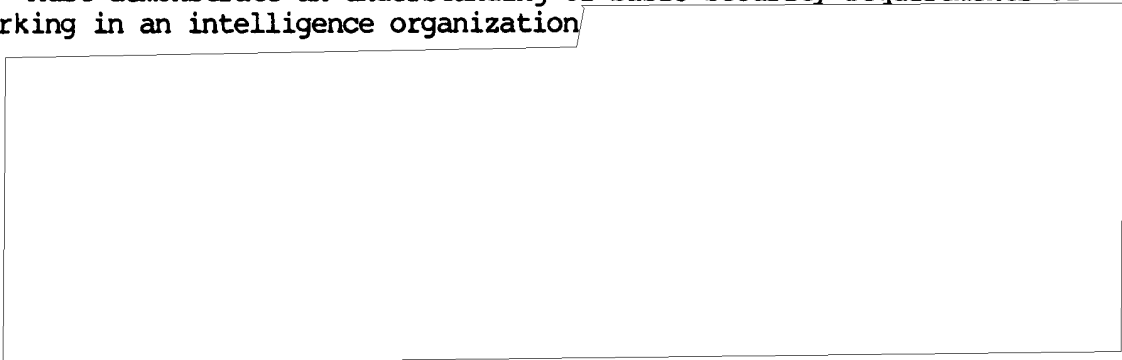
A career service panel will evaluate and rank secretaries, forwarding advancement recommendations to the Head of the Career Service for approval. The Director of Personnel advises on advancement policy, approves advancement personnel actions, and ensures compliance with regulations. The career service panel will also forward secretarial performance award recommendations to the Head of the Career Service for approval.

Entrance on duty into Level II requires passing the Agency typing and SET tests and having five years of relevant experience in the private sector. At least two years of full time (or part time equivalent) related vocational and/or college course work can substitute for the experience criterion (see Agency Secretarial Hiring Guidelines, dated September 1985).

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

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



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Must demonstrate an understanding of basic compartmentation requirements of the Agency,



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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

**CONFIDENTIAL**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 Course:

- Professional Office Protocol  
(classroom, to be developed)
- Directorate Orientation  
(classroom, 1-2 days, part-time)
- CIA Orientation Courses  
(classroom, 3 days full-time)
- Role of Secretary in Automated Office  
(classroom, 1 day, full-time)
- Time Management  
(classroom, 2 days, full-time)
- Stress Management  
(classroom, 2 days, full-time)
- Essentials of Writing  
(classroom 5 days, full-time, to be developed)

Recommended Courses:

- Shorthand\*  
(classroom, 10 weeks, part-time; or self-study)

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\* Shorthand, although not a specific requirement for promotion, is still required in many secretarial positions. Therefore, to be competitive for these positions secretaries should consider taking shorthand.

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## Recommended courses, continued:

- Geography (component specific)  
(classroom or self-study/videotape)
- Employee Development Course  
(classroom, 3 days full-time)
- Wordprocessing & Computer Training, as applicable  
(classroom)
- Language Training (as appropriate)  
(classroom, self-study, or test)
- Proofreading Course  
(classroom, 4 days, part-time or self-study)

Advancement to Level III: Requires completion of the required training at Level II and normally three years experience at Level II. Time-in-grade 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.

A career service panel will evaluate and rank secretaries, forwarding advancement recommendations to the Head of the Career Service for approval. The Director of Personnel advises on advancement policy, approves advancement personnel actions, and ensures compliance [redacted]. The career service panel will also forward secretarial performance award recommendations to the Head of the Career Service for approval.

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Entrance on duty into Level III requires a minimum six years relevant experience in the private sector, three of which must have been in a senior executive secretarial-level position, and passing the Agency typing and SET tests. At least four years of full time (or part time equivalent) in Secretarial Science or a related field may be substituted for the experience requirement. Four years of nonrelated vocational or college course work can substitute for all but two years of the experience criterion (see Agency Secretarial Hiring Guidelines, dated September 1985, Attachment B). Hiring into Level III requires approval of the Head of the Career Service.

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LEVEL III  
SENIOR SECRETARY

Nature of Work: Work at Level III is significantly more complex than Level II because of the integration of work elements from within Agency components and requires a working knowledge of the Agency's organizational structure, principle managers, practices, policies, and programs. Knowledge of other organizations also is frequently required, e.g., Department of State [redacted] 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. The sensitivity of the work increases significantly at this level [redacted]

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[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.

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Training Requirements: To be eligible for advancement, secretaries must have completed the following required courses plus 120 hours of Level III training. Directorate 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 Secretary 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)
- Supervisory Skills for Secretaries  
(STC classroom, 5 days, full-time)
- Management Skills for Secretaries  
(classroom, 3 days, full-time)

Recommended Courses:

- Women in the Work Force  
(classroom, 3 days, full-time)
- Leadership Styles & Behavior  
(STC classroom, 5 days, full-time)
- Advanced Writing Course  
(classroom, 6 days, part-time)

Recommended courses, continued:

- Management Development Course  
(classroom, 5 days, full-time)
- Professional Woman's Course  
(classroom, 5 days, full time)
- Psychological Self-Assessment (Looking Glass)
- Area Familiarization Courses
- Level II courses not yet taken

Advancement to Level IV: Requires five years Agency secretarial experience at Level III 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 [redacted] 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.

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Advancement to Level IV is by Directorate or E Career Service nomination. The Directorate career service panel will evaluate and rank annually those eligible secretaries, nominating candidates for advancement to to the Head of the Career Service who will approve within the Level IV position and personnel ceiling constraints. The career service panel will also forward to the Head of the Career Service for approval secretarial performance award recommendations. 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, the organization structure and functions, principle managers, and have engaged in increasingly more substantive tasking [redacted]. The Level III Secretary must understand the protocol, sources and methods, and political implications of internal and external contacts. The initiative, ability to analyze situations and decide on a course of action, and interpersonal skills are critical.

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Examples of required skills and successful performance include:

- Understanding of the organization, principle 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 organization and office management and expediting skills



LEVEL IV  
EXECUTIVE SECRETARY

Nature of Work: In addition to the duties of Level III, Level IV work is characterized by the substantive tasking of a secretarial office manager who typically coordinates the 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, mandates, philosophy, regulations, and policy 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 principle 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 Secretarial training.

Recommended Courses:

- Mid-Career for Secretaries  
(classroom, to be developed)
- Program on Creative Management  
(classroom, 5 1/2 days, full-time)
- Management Skills for Secretaries  
(STC classroom, 3 days, full-time)
- Management Development Course  
(classroom, 5 days, full-time)

Recommended courses, continued:

- Briefing Techniques Course  
(classroom, 5 days, full-time)
- OTE Courses for GS-11 and above
- Level II & III courses not yet taken
- External seminars & symposiums

Advancement

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

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## ATTACHMENT B

## AGENCY SECRETARIAL HIRING GUIDELINES

GENERAL SCHEDULE CURRENT POLICY		LEVEL I SECRETARIAL TRAINEE		
<u>GS</u>	<u>SALARY</u>	<u>STEP</u>	<u>SALARY</u>	<u>SKILL &amp; EXPERIENCE</u>
4/1	12,862	1	12,862	No EXP/AQT/SET
	No current hiring equivalent	5	13,670	No EXP/AQT/SET/AQS
5/1	14,390	9	14,478	1 yr related vocational or college/AQT/SET
5/1	14,390	9	14,478	1 yr EXP/AQT/SET
5/3	15,350	14	15,488	1 yr EXP/AQT/SET/AQS
5/3	15,350	15	15,690	1 1/2 to 2 yrs EXP/AQT/SET
	No current hiring equivalent	17	16,094	1 1/2 to 2 yrs EXP/AQT/SET/AQS
5/3-5/4	15,350 - 15,830	18	16,296	2 to 3 yrs EXP/AQT/SET
	No current hiring equivalent	20	16,700	2 to 3 yrs EXP/AQT/SET/AQS
6/3	17,110	22	17,104	2 yrs steno & sec EXP/AQT/SET/AQS
5/4-5/5	15,830 - 16,310	24	17,508	3 to 4 yrs EXP/AQT/SET
	No current hiring equivalent	26	17,912	3 to 4 yrs EXP/AQT/SET/AQS
6/4-6/5	17,645 - 18,180	27	18,114	3 yrs steno & sec EXP/AQT/SET/AQS

KEY: AQT = Has Agency Qualified Typing Skill  
 AQS = Has Agency Qualified Shorthand Skill  
 SET = Has passed the Standard Employment Test  
 EXP = Indicates years of relevant experience

AGENCY SECRETARIAL HIRING GUIDELINES

GENERAL SCHEDULE  
CURRENT POLICY

LEVEL II  
SECRETARY

<u>GS</u>	<u>SALARY</u>	<u>STEP</u>	<u>SALARY</u>	<u>SKILL &amp; EXPERIENCE</u>
No current hiring equivalent		6	16,105	2 yrs related vocational or college/AQT/SET
6/3	17,110	10	17,477	2 yrs related vocational or college/AQT/SET/AQS
5/5	16,310	15	19,192	5 yrs EXP/AQT/SET
6/5	18,180	16	19,535	5 yrs steno & sec EXP/AQT/SET/AQS

GENERAL SCHEDULE  
CURRENT POLICY

LEVEL III  
SENIOR SECRETARY

<u>GS</u>	<u>SALARY</u>	<u>STEP</u>	<u>SALARY</u>	<u>SKILL &amp; EXPERIENCE</u>
No current hiring equivalent		1	17,824	4 yrs related vocational training/college or 4 yrs nonrelated college plus 2 yrs of secretarial experience/AQT/SET/SET
No current hiring equivalent		2	18,186	4 yrs related vocational training/college or 4 yrs nonrelated college plus 2 yrs of secretarial experience/AQT/SET/AQS
No current hiring equivalent		7	19,996	7 to 10 yrs EXP (3 yrs as Exec Secretary)/AQT/SET OR match <u>base</u> salary plus 10%

**C**

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ATTACHMENT C

Four-Level Secretarial Pay Plan\*

Level	Increment	1	2	3	4	5	6	7	8	9	10	11	12	13	14
<b>SECRETARIAL TRAINEE</b>															
I	\$202	12862	13064	13266	13468	13670	13872	14074	14276	14478	14680	14882	15084	15286	15488
<b>SECRETARY</b>															
II	\$343	14390	14733	15076	15419	15762	16105	16448	16791	17134	17477	17820	18163	18506	18849
<b>SENIOR SECRETARY</b>															
III	\$362 \$450	17824	18186	18548	18910	19272	19634	19996	20358	20720	21082	21444	21806	22168	22530
<b>EXECUTIVE SECRETARY</b>															
IV	\$475 \$595	21804	22279	22754	23229	23704	24179	24654	25129	25604	26079	26554	27029	27504	27979
15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30
15690	15892	16094	16296	16498	16700	16902	17104	17306	17508	17710	17912	18114	18316	18518	18720
19192	19535	19878	20221	20564	20907	21250	21593	21936	22279	22622	22965	23308	23651	23994	24337
22980	23430	23880	24330	24780	25230	25680	26130	26580	27030	27480	27930	28380	28830	29280	29730
28574	29169	29764	30359	30954	31549	32144	32739	33334	33929	34524	35119	35714	36309	36904	37499

\*Subject to modification once our compensation consultant reviews.

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**D**



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ATTACHMENT D

EXECUTIVE SECRETARY BENEFITS & RESPONSIBILITIES

1. Enhanced pay rates.
2. Enriched performance awards program.
3. Participation in recruitment trips for secretaries.
4. Participation in the development of OTE secretarial training courses.
5. Briefing at secretarial training courses.
6. Eligibility for long-term training at Agency expense.
7. Admittance into training courses without regard to minimum grade requirement.
8. Attending annual symposia and conferences.
9. Attending external seminars (secretarial, management, or special area topics of interest).
10.
11. Orientation at other government agencies.
12. Reserved parking spaces.
13. Invitation to DCI and DDCI special events.
14. Annual luncheon in Executive Dining Room to present selected performance awards.
15. Invitations to White House, Congressional, and embassy social events.
16. Others to be determined.\*

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\* One task force representative proposed unlimited annual leave accrual be added to the list. The task force, as a whole, disagreed with that proposal.

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**E**

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**ATTACHMENT E**

**QUESTIONS & ANSWERS  
ON THE NEW SECRETARIAL CAREER PLAN**

1. Q. What warranted development of a new secretarial system?

A. From management's perspective, our present secretarial system is not attracting a sufficient number of secretaries at the entry level, nor attracting well-experienced secretaries; and too many Agency secretaries are leaving the field. Furthermore, management has little flexibility in establishing secretarial positions where they are most needed and is forced to function in a system where secretarial upgrades often are derived by building administrative assistant positions, thus creating a void of job substance in the secretarial career field. From the secretaries' point of view, career development and salary progression, currently based on the Agency Secretarial Grade Pattern, reaches a plateau at the GS-07 level, forcing secretaries to change occupations for career and salary advancement.

Recognizing the valuable service our secretaries provide this Agency, our goal in developing a new secretarial system was to structure a career path for secretaries which has discernible levels of accomplishment, is related to our organizational needs, provides challenge throughout a career, stimulates job productivity, satisfaction, and professionalism, and offers greater participation in the Agency's mission.

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

A. First, the Pattern ties the position grade of the secretary to that of the supervisor and is not linked to skill level. The new system replaces the Pattern and is explicitly linked to the secretary's skill level. It establishes four secretarial levels defined by job duties and responsibilities, training, and experience criteria.

Second, the use of the OPM secretarial standard to establish job classification levels does not adequately capture the unique demands the Agency places on its secretaries. Therefore, an Agency-unique secretarial standard, which better defines our job evaluation levels and tasking of secretaries, has been developed.

Third, the majority of our secretaries now reach the GS-07 level rapidly and then have little to look forward to in the area of job and salary advancement. We lose more secretaries at this grade level than at others. The new pay schedule, based on the four secretarial levels, lifts the grade compression so that many more secretaries will receive salary commensurate with their experience and performance.

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Fourth, the new secretarial system allows managerial flexibility in the assignment and tasking of secretaries. Each Directorate will be able to place its positions at the level it requires to get the work done, within the percentage constraints for each level, and assign its secretaries accordingly.

3. Q. What is the most salient feature of the new secretarial system?
  - A. Job enrichment. Under the new secretarial system greater emphasis is being placed on the duties and responsibilities in each secretarial position. Substantive duties will be added to more positions, thus increasing the demands and variety of the work. These positions will warrant a higher level without regard to the grade of the supervisor's position. The result of job enrichment will be to establish more substantive secretarial positions at higher job levels and provide a reasonable career ladder for competent, professional secretaries.
4. Q. How are the four secretarial levels defined?
  - A. Each of the four secretarial levels (Level I/Secretarial Trainee, Level II/Secretary, Level III/Senior Secretary and Level IV/Executive Secretary) has job classification, training, experience, and advancement descriptors which outline a secretary's work profile for that level. The profiles thus provide a career road map for the secretary to advance in experience and salary.
5. Q. What will the new Secretarial Pay Schedule look like?
  - A. The Secretarial Pay Schedule is a departure from the General Schedule (GS). It is divided into four pay levels with 30 increments per level as compared with the 10 incremental steps per level on the General Schedule. Pay Level I ranges from \$12,862 to \$18,720; Level II ranges from \$14,390 to \$24,337; Level III ranges from \$17,824 to \$29,730; and Level IV ranges from \$21,804 to \$37,499.
6. Q. How does this system differ from "Banding"?
  - A. Banding requires annual evaluation of each employee to determine how many increments (up to four) in a given level will be awarded based on the employee's performance, with no periodic step increases. The proposed secretarial system allows periodic step increases every six months for acceptable performance, and lump sum awards for exceptional performance.
7. Q. Does the system provide a salary windfall for secretaries?
  - A. No. While the potential for greater salary increase is incorporated into the new system, more stringent training and performance benchmarks are required of the secretary to be eligible for higher pay.

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8. Q. Will secretaries get legislative pay raises under the new system?
- A. Yes. If, for example, Congress grants federal employees a three percent pay raise, the secretarial pay schedule will be increased by the same amount.
9. Q. What impact will this system have on the Agency average grade?
- A. By removing  positions from the lower pay levels of the GS population, implementation of this system will effectively raise the Agency average grade by about .50 of a point from its current level. However, this is a technical change which the Comptroller adjusts with the Office of Management and Budget.
10. Q. Are there quality step increases in the new pay system?
- A. Instead of quality step increases, the new system provides for performance awards. Superior performance can be rewarded by annual cash awards for secretaries. This performance award does not preclude the secretary from receiving other nonduplicative special recognition awards currently within the Agency's award system.
11. Q. What are the administrative limitations on granting performance awards?
- A. In any given year, up to 30 percent of Level II and up to 30 percent of Level III can receive \$1,000; up to 20 percent of Level IV can receive \$2,000, and up to 10 percent of Level IV can receive \$3,000.
12. Q. If the system offers the potential for increased salary, why do we need performance awards?
- A. Most successful personnel management systems employ some kind of performance award system to allow special recognition of superior employees. The secretarial profession is no different in this regard than any other profession. The new award system, which replaces the quality step increase for secretaries, is based on an annual lump-sum payment, rather than a step increase which is carried in an employee's base salary even if performance drops. We have also placed a percentage limitation on the number of awards given.
13. Q. Exactly who is to be included in the new secretarial career system?
- A. Positions and personnel currently titled Secretary, Clerk Typist, and Clerk Steno will automatically be converted to the new system, since the basic skills of these occupations relate closely to those of secretaries. Other related occupations will be considered on a case-by-case basis thereafter. Each Career Service may recommend to the Office of Personnel other occupations which should be included in the new secretarial system. The Office of Personnel will convene a meeting of the five Career Services to review such recommendations.

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14. Q. What advantages does the new system have for management?
- A. The system will help attract secretaries to the Agency and provide sufficient incentive for them to remain in the secretarial field. The new system is designed to reduce secretarial attrition and subsequent vacancies, as well as provide a better trained secretarial population. Because the system is designed to be flexible, and because there is a new Agency Secretarial Standard, management will have the tools to enrich secretarial job content and to upgrade secretarial positions. Each Career Service will be able to determine where level II, III, and IV secretarial positions should be placed without regard to the grade of the supervisor and managers will assign individual secretaries where they are needed.
15. Q. What is the relationship between the Career Services' decision concerning the designation of a position at a particular level and the placement of the secretary at a particular pay level?
- A. These are two separate processes. The decision as to the level at which the position is placed is determined by the knowledge and complexities inherent in the job duties and responsibilities. The decision as to the placement of the secretary at a pay level is determined by that secretary's accumulated skills, experience, training, and performance. It is possible, therefore, to have a secretary in one pay level in a position at another level.
16. Q. How will secretaries be converted to the new Secretarial Pay Schedule?
- A. No one will take a pay cut. Secretaries will be converted at or nearest to, but not less than, their current salary into a level commensurate with their skill level, experience and training. Credit will be given for time already spent toward waiting for the next Periodic Step Increase and computed on a pro-rata basis at the time of conversion. In each Directorate a conversion panel will be responsible for deciding to which level a secretary will be converted.
17. Q. Is there a pay increase for the secretary at the time of conversion?
- A. Generally, no. The conversion to the new pay schedule places the secretary at a pay point nearest to, but not less than, the secretary's current salary and is not intended to be a pay windfall. The pay schedule is intended to provide pay incentives over the long term through incremental increases and promotions based on experience and performance.
18. Q. Will conversion be automatic by grade level?
- A. No. The conversion process will be similar to the evaluation ranking and recommendation for promotions you are already familiar with. Thus, supervisory input, performance appraisal reports, experience, and training will all factor into the conversion decision. As a guideline, secretaries at grade GS-10 and above will normally be converted to Level IV, and secretaries at grades GS-08, and GS-09 will normally fall into Level III.

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19. Q. What will ensure conversion equity and consistency?

A. The conversion process will be accomplished consistently across Directorates.

First, each of the five career services will establish a conversion panel, which will include a representative from another career service.

Second, these panels will be briefed to gain a common understanding of the procedures and guidelines for conversion.

Third, these panels will use the same secretarial guidelines and profiles approved by the DDCI for all Directorates.

Fourth, the Position Management and Compensation Division of the Office of Personnel and the private classification and compensation consultant will be available for guidance during the process.

Fifth, PMCD will survey a sample of positions on a yearly basis to ensure the duties and responsibilities are commensurate with the job level definitions.

Sixth, the Office of the Inspector General will inspect the new secretarial program one year after its inception and every two years thereafter to ensure equity and consistency in implementation and subsequent administration of the secretarial occupation.

20. Q. How does a secretary advance in job responsibility and pay?

A. Once converted to a secretarial level, the four secretarial profiles defined above illustrate the training, experience, and performance criteria necessary to be eligible for advancement to the next level. The profiles thus serve as a counseling and development road map from which a secretary can anticipate progress through a career. Career service panels will evaluate and recommend secretaries for advancement against ceiling constraints.

Each level profile has a time-in-grade guideline which allows the secretary to gain experience and training before being considered for advancement to the next level. "Time-in-grade" is a guideline which the career service can lengthen or shorten according to the secretary's demonstrated readiness to advance. The time-in-grade guidelines are one year for Level I Secretarial Trainee, three years for Level II Secretary, and five years for Level III Senior Secretary.

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21. Q. Can a secretary look forward to only three pay advancements then?

A. No, far from it. The new pay plan's significant departure from the General Schedule is that it offers greater salary potential within each level. Thus, there are many more advancements which would be equivalent to a promotion on the General Schedule. Here's how it works:

- Each level has 30 increments compared to the General Schedule's ten steps.
- A secretary performing at an acceptable level is eligible for a within level increase equivalent to one increment every six months (rather than having to wait one, two, and three years on the General Schedule).
- Advancement to the next level is equivalent to two steps in addition to the two incremental increases the secretary has already received for that year.
- A secretary performing at an exceptional level is eligible for annual performance awards of \$1,000 in levels II and III and \$2,000 or \$3,000 in Level IV.

22. Q. Is it necessary to pass through all 30 increments within a level before advancing to the next level?

A. No. Advancement to the next higher level is based on meeting the experience, training, and performance criteria defined in the secretarial profiles. Once eligible, the secretary will be recommended by the career service panel for advancement provided there is personnel headroom at the next higher level.

23. Q. How does a secretary advance to the Level IV Executive Secretary?

A. When the criteria have been met, the career service panel will evaluate and nominate candidates for the Executive Secretarial Level. The Deputy Directors and Head of the E Career Service will approve nominations against the Level IV ceiling constraints. The career panels within a Directorate are responsible for overseeing the assignment and training needs of its secretaries to help prepare them for advancement to Level IV.

24. Q. Does the Executive Secretary have special benefits and responsibilities?

A. Yes. The Executive Secretary in Level IV earns a competitive salary and enjoys a variety of privileges such as earning higher performance awards, having reserved parking, being invited to protocol events, and attending special conferences and seminars. There are also additional responsibilities such as participating in the design of secretarial courses and recruiting. Executive secretaries are expected to have the experience and skills to work in virtually any senior secretarial job and respond to any critical tasking requirements.

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25. Q. What role does training play in the new system?
- A. Training plays a key role in professional secretarial development. Within each of the four profiles, training has been divided into required and recommended course work which may be met by classroom training, self-study (includes external academic course work), and pass/fail tests. Training plays such an important role in secretarial development that OTE will have Executive Secretaries participate in the design and teaching of secretarial courses.
26. Q. Will secretaries converted to the new system be penalized for not meeting the new training requirements?
- A. No, secretaries will not be penalized for not having the required training at the time of conversion. They will be expected to acquire the training as soon as is practicable to be competitive in the system.
27. Q. Will shorthand be a requirement to advance to the higher levels?
- A. Although there is not an Agency-wide requirement to gain the shorthand skill, many Senior and Executive Secretarial positions will continue to require shorthand as a specific job qualification. Shorthand in itself is not a requirement for advancement but may make a secretary more competitive for specific positions.
28. Q. How often will promotion panels meet when the new system is in place?
- A. All secretaries will be reviewed on an annual basis by an evaluation panel. Performance Appraisal Reports (PAR's) will be due in April and annual performance awards and promotions will be effective in July. As is now the case, Heads of Career Services may grant out-of-cycle promotions when appropriate.
29. Q. Will supervisors need new guidelines in writing secretarial performance appraisal reports (PAR's)?
- A. The procedures for PAR writing will not change; however, supervisors will need briefing on all aspects of the system such as criteria for advancement between levels, movement within levels, time-in-grade guidelines, performance awards eligibility, and so on.
30. Q. What if the secretary is not performing at an acceptable level?
- A. Advancement to level II, III, and IV presumes the ability to perform at that higher level. Secretaries who do not maintain the performance expected at each level may be downgraded.

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31. Q. Will the new system establish new Agency Secretarial Hiring Guidelines?
- A. Yes, there are new hiring guidelines for secretaries which address more fully the entrance salaries which we believe are more competitive with private industry in the Washington, D.C. area.
32. Q. Are part-time secretaries included in the new system?
- A. Yes. Part-time secretaries are fully included and will be converted at the same time as the full-time secretaries.
33. Q. How will secretaries be converted back to the General Schedule if they leave the secretarial profession?
- A. Existing procedures and regulations will continue to apply to any employee who moves from one pay schedule to another. Stated simply, the employee will not be entitled to the retained rate or save pay if the move is at the option of the employee, and the new job is at a lower pay rate.
34. Q. How will secretaries who have left the Secretarial Career System, and want to return to the profession, be converted from the General Schedule?
- A. Reentry to the Secretarial Career System will occur just as initial entry occurred. The criteria for each level will be used to determine at which level the employee will be readmitted into the system, and the increment will be discretionary on the part of the gaining component. As in #32 above, the employee will not be entitled to the retained rate or save pay if the move is at the option of the employee.
35. Q. How will the new system be monitored?
- A. The Office of Personnel, the Office of the Inspector General and an Executive Secretarial Board will be reviewing the effectiveness of the new system, recommending changes where needed.
36. Q. Is there a mechanism to encourage professional development in the secretarial field?
- A. Yes. Under the Executive Director, an Executive Secretarial Board has been established to assess the health of the secretarial occupation and the effectiveness of the new system. The Board will help coordinate secretarial participation in the recruitment of secretaries, in the development of secretarial training, in acting as a clearing house for inter-directorate rotational assignments, and in the development of the automated secretarial work environment. There will be two secretarial representatives from each Career Service on the Board.

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37. Q. What is the next step?

A. This plan, put forth by the task force, will be reviewed by senior management and by a private consultant. Any suggested changes will be presented to the task force for consideration prior to implementation.

38. Q. Will the private consultant interview secretaries and managers in its review of the proposed secretarial plan?

A. Yes. One task to be performed by the private consultant is to review level II, III, and IV positions. Each Directorate will identify to the consultant representative positions at these levels and the consultant will interview both the secretaries and managers associated with those positions. It is important, therefore, that both the secretary and the manager become familiar with this proposal and be prepared to meet with the consultant.

39. Q. What if I have additional ideas or concerns?

A. This proposed secretarial pay plan is not set in concrete. Any suggestions or comments should be sent to your Career Service representative on the task force and will be considered carefully.

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ATTACHMENT F

COST PROJECTIONS FOR NEW SECRETARIAL PAY SCHEDULE\*

Year	GS Schedule** Cost	Proposed Levels*** Cost	Average GS Salary	Average Levels Salary	Additional Cost of Levels
Current	32,290,000	32,660,260	19,677	19,902	370,260
1 Year	33,225,000	35,100,159	19,871	20,611	1,875,159
2 Years	32,930,000	34,747,811	19,695	20,438	1,817,810
3 Years	32,920,000	34,887,559	19,689	20,537	1,967,559
4 Years	32,900,000	34,501,596	19,677	20,322	1,601,596
5 Years	32,880,000	34,372,132	19,665	20,239	1,492,132
6 Years	32,890,000	34,405,911	19,671	20,253	1,515,911
7 Years	32,870,000	34,431,103	19,659	20,268	1,561,103
8 Years	32,870,000	34,609,115	19,659	20,367	1,739,115
9 Years	32,860,000	34,609,908	19,653	20,368	1,749,908
10 Years	32,850,000	34,533,213	19,647	20,326	1,683,213

\* Analysis based on occupational codes 318.01, 322.01, 312.01

\*\* GS Schedule costs included a) estimates for WGI's  
 b) projected promotions based on current rate of promotion  
 c) QSI's based on current rate of QSI's  
 d) EOD's and attrition based on historical FY data

\*\*\* Proposed level costs include a) conversion costs  
 b) awards of \$1,000 to 30% of Level II, \$1,000 to 30% of Level III  
 \$2,000 to 20% of Level IV, and \$3,000 to 10% of Level IV  
 c) movement within levels, two increments per year  
 d) advancement between levels equal to two increments with minimum time at each level  
 as follows:  
 Level I - one year  
 Level II - three years  
 Level III - five years  
 e) EOD's and attrition based on historical FY data

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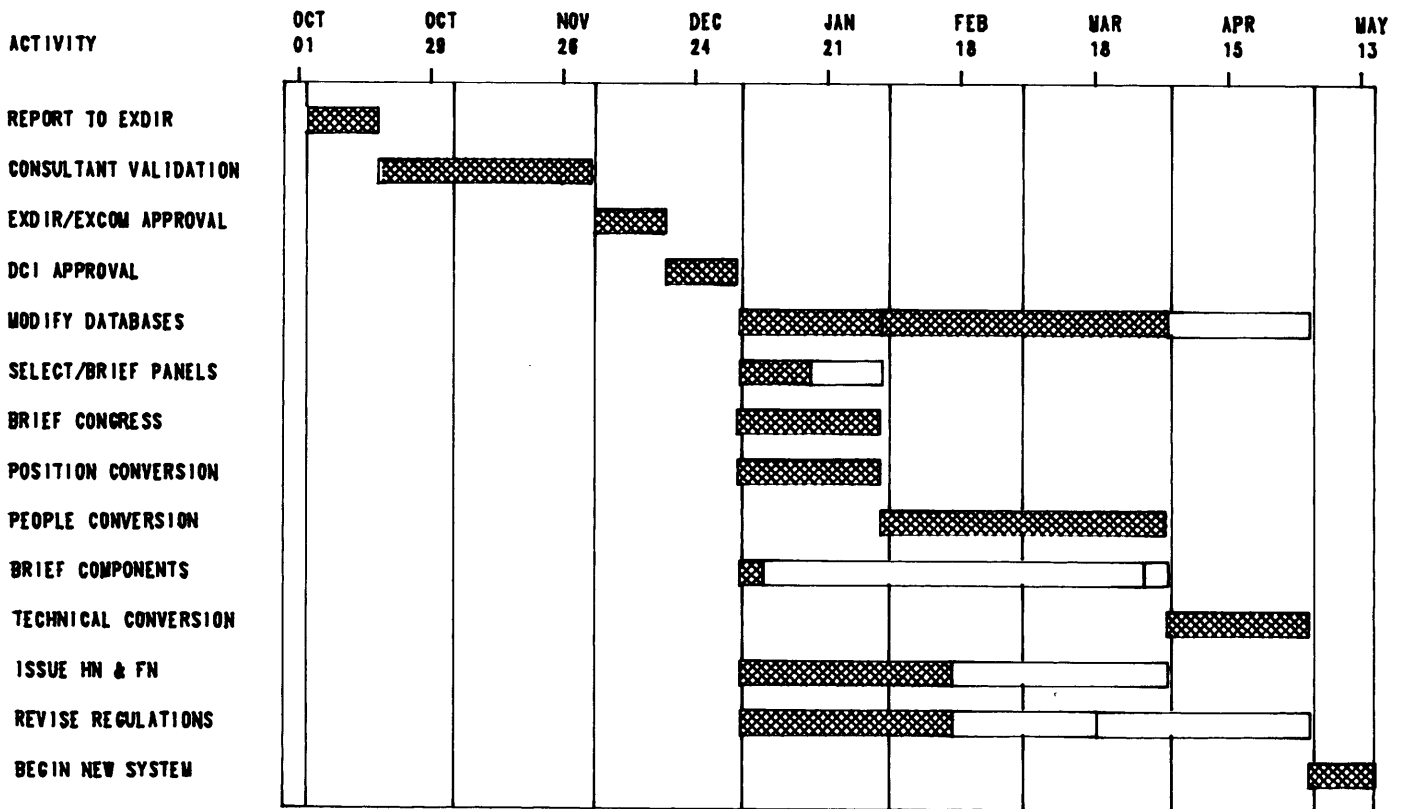
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# SECRETARIAL CAREER SYSTEM IMPLEMENTATION



LEGEND: DURATION OF A NORMAL JOB DURATION OF A CRITICAL JOB SLACK TIME FOR A NORMAL JOB

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