

POST OFFICE DEPARTMENT
REGIONAL INSTRUCTIONS

PART 700
PERSONNEL
241-P-27

SUBJECT: Position Evaluation - Guides For Ranking
Specific Types of Positions

DATE
1-31-68

I. Purpose

To reissue, as a Regional Instruction, material previously contained in 757.1 of the Regional Manual.

II. Postmaster Positions

A. Postmasters in Third-Class Offices

1. To qualify for assignment of the postmaster to level 7, an office having rural carrier service responsibility must have a minimum of 45 revenue units which is one of the factors indicating workload.
2. To qualify for assignment of the postmaster to level 7 an office not having rural carrier service responsibility must have a minimum of 71 revenue units.
3. To qualify for assignment of the postmaster to level 8, an office must have a minimum of 140 revenue units unless the service responsibility can be shown to be greater than that reflected by number of employees supervised in the key position description for a level 8 postmaster (2 clerks working the equivalent hours of approximately 1½ full-time employees plus a rural carrier). In such case the postmaster may be assigned to level 8 if the office has a minimum of 119 revenue units. In determining service responsibilities for purposes of meeting the criteria established for this group of positions, each rural route in excess of one may be deemed the service equivalent of one-half clerk.
4. Functions of postmasters in third-class offices are generally identical, but service responsibility, which is reflected largely by variables, namely rural carrier service, clerks, and revenue, may be at different levels.
5. The major difference between key position 20 (PFS-7) and key position 22 (PFS-8) is in the supervisory responsibilities, which, in turn, are a reflection of service responsibilities with only about 25 per cent difference in revenue.
6. The revenue factor is not ignored entirely in differentiating between levels 7 and 8. Therefore, revenue cannot be ignored entirely in differentiating between levels 6 and 7. This becomes particularly evident when it is recognized that the postmaster's

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responsibility for rural carrier service does not include selection of the carrier, selection of his substitute, or authority to change the carrier's work assignment. Thus the requirement of 45 revenue units would give some weight to receipts as well as having a relationship to the receipts brackets in Public Law 134 which was replaced by Public Law 68. At the same time, weight would be given the responsibility for rural carrier service in that the postmaster with this responsibility would fall in level 7 though substantially short of the 110 revenue units requirement of the level 7 key position.

7. The 71 revenue units for postmasters not having rural carrier service responsibility is the approximate mid-point between the 40 revenue units requirement of level 6 and the 110 revenue units requirement of level 7 and also bears a reasonable relationship to the revenue bracket system in force under Public Law 134.
8. For offices having revenue of more than 140 revenue units but very limited service responsibilities, it must be borne in mind that the difference in revenue between the level 7 and 8 key postmaster positions is only about 25 per cent. The major difference between those key positions is in the supervisory responsibilities, which, in turn, are a reflection of service responsibilities. Consequently, a reasonable degree of service responsibility must be present even if the receipts exceed 140 revenue units, for the postmaster's position to warrant placement in level 8.
9. Consideration may be given to the presence of star routes with box delivery or rural service features, as well as to the presence of rural stations, in assessing the service responsibilities of postmasters in third-class offices. If, in the judgment of the Regional Director, such additional service features materially affect the level of responsibilities of the postmaster, to warrant assignment in a level above that otherwise indicated, the position may be ranked in the higher level.
10. Where an office of the third-class has village delivery service within its jurisdiction, the postmaster's position shall be ranked in PFS-8.
11. When extraordinary service responsibilities exist in a particular post office that, in the judgment of the director, industrial relations division, justify an exception to the foregoing grading pattern, a complete description of the postmaster's duties, responsibilities, and work requirements should be submitted to the Bureau of Personnel, with a full justification of the exception which is requested.

B. Postmasters in Second-Class Offices

1. Where an office of the second-class has city delivery service within its jurisdiction, the postmaster's position shall not be ranked in a level below PFS-9.
2. Two standard positions in PFS-8 are available for matching postmaster positions in second-class offices. The first description, SP 2-8, re-

vised, should be used if the office has normal service responsibilities for its revenue range, and does not exceed, in any respect, the requirements stated. The second description, SP-2-211, should be used where service responsibilities are limited, even if the receipts of the office are less than 330 revenue units. It should be noted that there is no limitation on receipts in SP 2-211; therefore, the receipts range is from 190 to 950 revenue units.

3. Three standard positions in PFS-9 are available for matching postmaster positions in second-class offices. Second-class offices in the upper revenue range with above-average employee complements normally are matched with SP 2-9. SP 2-212 may be used as appropriate, where the service responsibilities of the office, measured by specific delivery service and population requirements, are heavy in relation to revenue or staffing; since this standard position is available for use in any revenue range, particular care should be taken in developing the statistical base on which the specific rankings are made. Use of both SP 2-212 and SP 2-213 will require close collaboration with the director, postal operations division, to obtain or verify the necessary service information.
4. Positions in offices having unusual service responsibilities not reflected in the key position or standard position should be ranked individually.

Other Postal Field Service Positions

A. Clerks in Third-Class Offices

1. The assignment of clerks in third-class offices should be limited to KP-4, post office clerk, level 3.
2. It was never contemplated that any clerks in third-class offices would be assigned to KP-12, distribution clerk, or KP-13, window clerk. KP-12 is applicable only to clerks in first- and second-class post offices, stations, and branches. KP-13 is applicable only to clerks in first- and second-class post offices, stations, and branches.

B. Mail Handler Positions

1. KP-8, mail handler, level 4, provides in item F (ii) for making "occasional simple distribution of parcel post mail requiring no scheme knowledge". To avoid any misunderstanding of the use of the word "occasional" in the key position of mail handler, all mail handlers currently assigned full-time or substantially full-time to the simple distribution of parcel post requiring no scheme knowledge will continue to be designated as mail handler and ranked in level 4. The law is not interpreted as requiring any change in work assignments.

2. Mail handlers may also be assigned to such preferential mail activities as culling, facing, canceling, sweeping boxes as well as work incident to the processing and movement of bulk mail.
3. The Postmaster General is required to rank positions, other than key positions, in relation to the key position which is most closely comparable in terms of the level of duties, responsibilities, and work requirements. Even though the position of a mail handler who regularly performs simple distribution of parcel post mail is not treated as identical with the key position, the position would nevertheless be placed in level 4. Obviously, the work of a mail handler assigned only to simple distribution of parcel post mail requiring no scheme knowledge is more closely comparable to the normal duties of the mail handler described in KP-8 than it is to the duties of a distribution clerk (level 5, KP-12), who separates incoming or outgoing mail in accordance with established schemes.

C. Level 5 Distribution Clerk

Although level 5 distribution clerks are assigned in some field installations to the non-schemes distribution of mail, they are also assigned periodically to separate incoming and outgoing mail, or both, in accordance with established schemes and to qualify for scheme distribution. Under these circumstances, their placement in salary level 4 is proper.

D. SP 2-119 (Foreman, Carrier, Level 9)

The standard position description states, under Organizational Relationships, that the level 9 foreman, delivery supervises approximately 75 or more carriers. To insure uniform grading of these positions, substitutes should be included in the total supervised, inasmuch as the foreman has significant responsibilities for the availability, training, and direction of the substitute carriers as well as for regular carriers. The supervision indicated on the Forms 820 for positions of foreman, delivery must be a realistic total based on a representative period of the year, not inflated by Christmas temporary employment.

E. SP 2-3 (Information Clerk, Level 6)

This description is used only for positions in offices having normal annual receipts of approximately \$5 million or more, when the employees devote full-time, or nearly full-time, to information duties of the nature defined. Only employees with long experience and unusual knowledge of postal services and pertinent regulations and procedures should be assigned to this standard position description. It is principally in the largest cities that the information clerks (at the main post office, or largest midtown stations, or both) are required to perform duties and assume responsibilities that exceed the requirements of the level 5 window clerks covered by key position 13. The size and organization of

the offices make necessary a centralized information activity where the responsible clerk (or clerks) have a specialized knowledge of all postal services offered to patrons and of problems and questions of operations that concern users of the mail system. The service and operating problems in the largest cities, because of the greater population and heavier commercial and industrial concentration, contribute to the variety and difficulty of the information function.

SP 2-41 (Special Distribution Clerk, Level 6)

This description is used only for positions involving full-time, or nearly full-time, special distribution work in offices having normal annual receipts of approximately \$1½ million or more. In only a few instances will post offices below the \$1½ million receipts size have the mail distribution problems that would support a level 6 special distribution clerk position. In these instances, individual rankings will be required. The strength of the level 5 position derives from the variety, complexity, and volume of special distribution problems and the particular knowledges required of clerks to resolve these problems. Principal factors contributing to the complexity of the work are: large population served by the office, heavy concentration of commercial and industrial concerns, expansion and development of industrial and heavily populated residential areas, changing of street names, changing of community designations, discontinuance of offices, and movement of business firms, and organizations within and to and from the area. Employees assigned to this standard description must be the last ones within the office to make the determination as to the routing of the mail in question and must have had long experience and outstanding service in mail distribution work.

6. Claims Clerk Position

Part 365 of the Postal Manual provides for the adjudication at all post offices of indemnity claims for losses of insured and COD mail. Claims cases that cannot be settled at either the post office of mailing or post office of address are sent to the appropriate postal services center for final determination as to certification or disallowance. Under previous instructions, clerk positions in post offices involving claims examining work which met the requirements for level PFS-6 were ranked on an IP basis. It has been determined that claims examining positions should now be matched with KP-17, Claims Clerk, Paying Office, PFS-6, if (a) the position involves substantially the duties set forth in the KP description and (b) the position involves the approval or disallowance of more than 100 claims per month. (Volume of claims handled should be determined on basis of a representative period of 3 consecutive months.) Approval involves the determination of the amount to be paid and disallowances involves making the decision to disallow the claim after consideration of the facts and evidence in the case. Claims clerk positions which do not meet the above criteria should be ranked in level 5 by matching with an appropriate key or standard position, e.g., KP-13, Window Clerk, SP 2-43, Classification and Inquiry Clerk, or by individual ranking.

H. Low Level Custodial Positions

1. Laborer, Custodial Positions

- a. Although paragraph (A) (v) of SP 6-13 provides for the performance of cleanup work, the primary purpose for the existence of this position is to perform custodial laboring work as defined in the standard position description. Therefore, all of the cleanup duties and responsibilities of key position 1, custodian, may be performed in this position, but in addition to the defined custodial laboring work.
- b. As reflected in the basic function and in paragraphs (A) (i) and (ii) of this standard position, it is contemplated that the custodial laborer may share in all of the work connected with the operation and maintenance of the heating plant, and minor maintenance of the building and equipment. The essential difference between the laborer, custodial and the fireman-laborer in a small building is that the latter has the overall responsibility for such activities. The firing duties and responsibilities of the laborer, custodial are judged to be comparable in level with those reflected in the duty of a level 3 elevator operator, as defined in key position 3, who may tend the heating plant in the vicinity of the elevator.
- c. In the larger post offices, laborer, custodial is the proper ranking for positions involving essentially full-time work in the operation of a variety of power driven equipment such as that covered in paragraph (a) (iii) of SP 6-13; it is proper also for positions involving the full-time moving of furniture, or the full-time performance of general laboring duties and responsibilities such as those outlined in paragraph (A) (iv) of this standard position.
- d. The need for determining carefully the exact nature of an assignment cannot be overemphasized. For example:
 - (i) Sharing in the work involved in the operation of the heating plant can serve as a basis for ranking a position in PFS-3 if it requires that a significant degree of assistance be provided on a regularly scheduled basis. In some small post offices, however, there may not exist a requirement for providing any significant degree of assistance to the fireman-laborer. This would be presumed to be the case where a position only occasionally involves boiler tending during absences of the fireman-laborer on leave. Such work, by itself, would not provide a basis for the PFS-3 level but it might be creditable as service in a higher level for 204 (b) purposes.
 - (ii) Similarly, occasional operation of some of the equipment mentioned in paragraph (A) (iii) of SP 6-13 (such as a floor waxer and polisher), or occasional performance of the duties outlined in paragraph (A) (iv) of this standard position, probably would not justify the PFS-3 level. As discussed in 757.12h (1)

(a), key position 1 contemplates that some work of this nature will be performed by the custodian.

2. Fireman-Laborer Positions

- a. This employee is the key custodial employee in a small building where there is limited mechanical work to be performed, and the heating facilities consist of a small handfired or automatic system. The fireman-laborer's functions are diverse in nature consisting of boiler room, mechanical, laboring, and janitoria duties.
- b. Typical, in small buildings, the fireman-laborer has overall responsibility at all times for heating the building; for insuring that the heating plant is being operated properly and economically and for the checking and servicing required, exclusive of major repairs and overhaul work, to keep the system in operation, or ready it for operation. Additionally, he is responsible for performing the necessary minor mechanical and electrical work on the building and equipment as well as the manual and cleaning work, and he usually serves as the working leader of any employees who are assigned to assist him in these activities. He usually is responsible also for custody of the cleaning supplies and equipment, and issuing them to other custodial employees as required. Thus, while in buildings of this size the heating and minor maintenance work are not the only reasons for his employment, the responsibility for them nevertheless is in large part the level controlling factor in his position.
- c. Fireman-laborer may also be an appropriate ranking in small buildings where commercial steam is utilized for heating purposes, if the overall responsibility outlined above is present in the position. The title itself does not appear to be inappropriate, in such cases, because usually the ability to start and operate the building's standby heating equipment is a qualifications requirement of the position. Although no heating plant normally is in operation, the incumbent of this position may be held responsible at all times for the proper and economical heating of the building, for checking and servicing the steam distribution system, and for maintaining the standby equipment in operating condition. These considerations, together with performance of the necessary minor mechanical work on the building and its equipment, the responsibility for insuring that the manual and cleaning work are performed in a timely and proper manner, as well as the custody and proper usage of the cleaning supplies and equipment, justify a level 4 ranking.
- d. In medium-size buildings where operations, systems, and equipment are more complex, and where there is a greater amount of maintenance and repair work than in the smaller buildings, the overall responsibility for such activities typically is exercised by a superintending engineer (SP 6-38, for example) or other custodial

supervisor established on an individual position basis, rather than a fireman-laborer. In general, the more complex the heating system and auxiliary equipment in these buildings, the greater the likelihood that boiler room functions will be sufficiently specialized and time consuming to warrant the position of fireman. In some cases, however, there will be assignments that entail a combination of boiler room, minor mechanical, laboring, and janitorial activities for which the ranking of fireman-laborer is appropriate.

3. Fireman Positions

- a. This position (SP 6-14) usually is found in work situations which call for the substantially full-time assignment of an employee to the boiler or furnace room and its auxiliary equipment. Thus, the purpose for his employment has to do with operation and maintenance of the heating facilities.
- b. Depending on the size of the building, the fireman typically works under a superintending engineer (or other custodial supervisor established on an individual position basis), an engineman, or an assistant engineman.

I. Working Supervisor or Group Leader Positions, PFS-6 or PFS-7

Elements involved in the evaluation of working supervisor or group leader positions are identified below, with suggestions as to the relative influence of these elements on the determination of salary level:

- a. Base Level of Work. The highest level of work performed by an individual worker in the unit should be evaluated to determine the base level. When the working supervisor performs, as an individual worker, functions that are different from those of the employees over whom some degree of supervision is exercised, it is possible that this work exceeds in level the work of the other employees in the unit. It is especially important in these situations that this work be identified as the base level of work in the unit. If the base level of work in the unit is equal to or above the level of supervisory responsibilities exercised, some problem may arise in proper titling.
- b. Nature of Supervision Exercised. Supervisory responsibilities in these positions range from the negligible amounts involved in work pacing to the full administrative control expected of a first-line supervisor, as contemplated in foreman, mails, SP 1-25. The organizational relationships described on the Forms 820 are not always reliably indicative of the type of supervision, if any, exercised in the position. While the concept of a working supervisor generally connotes some responsibility for technical

or functional processing of work, this element may not be present in all cases. Absence of functional or technical responsibility in situations where administrative control is limited both in degree and in amount of time and effort called for may so qualify the position as to remove it from consideration as that of a group leader or working supervisor. When the working leader assists a first-line supervisor by overseeing a segment of the unit, it is particularly essential to identify the extent of delegation and identify the extent of delegation to the subordinate supervisor.

- c. Number of Employees Supervised. The problem of the level of working supervisors or group leaders is circumscribed by the position of special postal clerk, SP 2-157, PFS-6, which involves no supervision over postal employees and foreman, mails, KP-21, PFS-8, where supervision is exercised over a larger number of employees than commonly found in working leader positions. For all practical purposes, the number of employees supervised is not of significance in determining the level of the working supervisor.
- d. Work Situation. SP 2-157 establishes the principle that isolation or removal from direct supervision is a level-determining factor. In the ranking of the various positions which include "in charge" responsibilities (such as assistant to the postmaster, SP 2-186, PFS-6), the work situation has also been recognized. This factor may be considered as raising the position one level above the base level of work in the unit. This factor does not have sufficient weight, by itself, to affect the level of supervisory responsibilities otherwise involved.

J. Tour Superintendent/Tour Director, Mails, Positions

Positions for which one or the other of these titles is appropriate are those of second-line or higher supervisors who have charge, during a tour, of all the mail distribution and associated processing operations performed in a post office mail handling center. (Compare with 757.12 (2) (a), Tour Foreman, Mails.) Standard positions of these titles, in PFS-8 through PFS-15, are contemplated. The items of information listed below should be obtained and incorporated in the descriptions on Forms 820 of all positions for which either of these titles is appropriate:

- a. The position and the span of control of the immediate supervisor. (The immediate supervisor's span of control may be expressed in terms of the organizational elements whose supervisors are direct subordinate to himself, specifying the functions and employment sizes of these elements.)
- b. The complexity of the tour organization. (Organization complexity may be expressed in terms of the number of subordinate supervisors and the numbers of levels of organization between the nonsupervisory work force and the tour superintendent.)

- c. The salary levels of subordinate supervisory positions in the tour organization.
- d. The size of the nonsupervisory work force in the tour organization, as evidenced by:
 - 1. The largest number of employees (engaged in mail distribution and associated processing operations) supervised for at least 4 hours, and
 - 2. The variation from time to time during the tour in the number of such employees supervised (minimum and maximum numbers).
- e. The difficulty of the work supervised, as evidenced by:
 - 1. The variety of operations--both their identity and the percentage distribution of supervised man-hours (nonsupervisory work force only) among them; and
 - 2. The skill level of operations--the percentage of supervised man-hours (nonsupervisory work force only) used in scheme distribution of mail and in other work of equal or greater difficulty.
- f. The depth and importance of the responsibility for work supervised, as evidenced by:
 - 1. The percentage of the tour superintendent's work schedule during which he is the senior supervisor on duty in the center, and
 - 2. The number of deadlines the tour superintendent is responsible for meeting, a deadline being a time by which mail being worked during the tour must be ready for an advance dispatch or a final dispatch or transfer. (One dispatch or transfer creates only one deadline, for this purpose, irrespective of how many times before departure cases may be "swept" to get ready for it.)

K. Foreman, Mails (SP 1-25, PFS-7; KP 21, PFS-8; SP 2-242, PFS-9)

Positions of foreman, mails, can be differentiated into salary levels PFS-7, PFS-8, and PFS-9 on the basis of two evaluation factors: size of the work force supervised and difficulty of the work supervised. The items of information listed below should be obtained and incorporated in the descriptions on Forms 820 of all positions for which this title is appropriate.

- a. The size of the work force supervised as evidenced by:

1. The largest number of employees (engaged in mail distribution and/or associated processing operations) for at least four hours of the work schedule of the Foreman, Mail on a typical work day; and
 2. The variation in the number of these employees during the entire work schedule of the Foreman, Mails, on a typical work day, the extent of variation being the difference between the smallest and the largest numbers of these employees at time.
- b. The difficulty of the work supervised, as evidenced by:
1. The variety of operations--both their identity and the percentage distribution of supervised man-hours among them; and
 2. The skill level of operations--the percentage of supervised man-hours used in scheme distribution of mail and in other work of equal or greater difficulty.

L. Professional Nursing Positions

a. Nurse

1. PFS-6

Work assignments to which this title and salary level are applicable are generally within the scope of the description of Standard Position 1-18 (Revised).

2. PFS-7

- (a) A work assignment to which this title and salary level are applicable is distinguished by its inclusion of responsibility for the administration of a health unit. The organization and complement of the post office do not contain a superior position of Head Nurse or Medical Officer. The Nurse, PFS-7, is directly subordinate to the supervisor in charge of the entire personnel management program of the post office. The Nurse, PFS-7, is required to spend, regularly, a substantial proportion of time in planning and organizing the activities of the health unit; determining and obtaining its requirements; controlling the use of its facilities and medical supplies; conforming its activities to applicable policies and professional standards; and representing the health program (to the extent appropriate for a nurse) both within the post office and in relationships with outside organizations.
- (b) When the health unit employs only one nurse, the work assignment ordinarily includes no supervisory responsibilities.