

**BY ORDER OF THE
SECRETARY OF THE AIR FORCE**

AIR FORCE INSTRUCTION 36-2623

1 MAY 1998



Personnel

**OCCUPATIONAL ANALYSIS COMPLIANCE
WITH THIS PUBLICATION IS MANDATORY**

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OPR: HQ AETC, AFOMS/OMY
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Supersedes AFI 36-2623, 18 May 1994.

Certified by: AFOMS/CC
(Lt Col George Kailiwai III)
Pages: 10
Distribution: F

This instruction implements Air Force Policy Directive (AFPD) 36-26, *Military Force Management*. It shows how to request, collect, analyze, distribute, and use occupational survey data to adjust or establish Air Force Specialty (AFS) programs. This instruction directs collecting and maintaining information subject to the Privacy Act of 1974 authorized by 10 U.S.C. 8013. Failure by Air Force personnel to comply with mandatory provisions in paragraph 2.7. may lead to disciplinary action.

SUMMARY OF CHANGES

This AFI supersedes AFI 36-2623, dated 18 May 1994. It modifies the definition of job inventories to include computer-based surveys, changes the type of identification number assigned to job inventories, updates administrative instructions, and reduces the normal revision cycle for surveying enlisted specialties to once every 3 years.

Chapter 1

PROGRAM PURPOSE, POLICY, AND DEFINITIONS

1.1. Purpose. Working under Headquarters Air Education and Training Command, the Air Force Occupational Measurement Squadron (AFOMS) surveys occupations, analyzes resulting data, and reports findings and observations to interested managers.

1.1.1. Personnel decisionmakers will use this information to justify or change personnel policies and programs; to refine and maintain occupational structures; and to establish, validate, and adjust testing and training programs.

1.2. Policy. Headquarters United States Air Force/Deputy Chief of Staff, Personnel; Directorate of Military Personnel Policy (HQ USAF/DPX) develops policies for all Air Force Occupational Survey Programs within the scope of this instruction.

1.3. Terms Explained.

1.3.1. Occupation. A group of jobs having common tasks that allow people to move upward on a career path (for example, an Air Force Specialty (AFS) or a Civilian Job Series) as they meet skill and knowledge requirements.

1.3.2. USAF Job Inventory. A paper and pencil questionnaire or computer-based survey program used to:

1.3.2.1. Collect quantitative information on the tasks Air Force members perform or the knowledge they use in one or more occupational areas.

1.3.2.2. Identify and collect background information on Air Force members and their positions.

1.3.3. Occupational Survey. The job analysis procedure the Air Force uses to collect, process, and analyze data about specific occupations.

1.3.4. Occupational Survey Report (OSR). A narrative description of the process and results of an occupational survey. An OSR describes:

1.3.4.1. How occupational analysis personnel develop the job inventory.

1.3.4.2. How representative the sample is of the larger population.

1.3.4.3. Significant jobs the survey identified.

1.3.4.4. How the jobs relate to the occupation's training and personnel policies.

Chapter 2

SURVEYING OCCUPATIONS

2.1. Planning an Occupational Survey. AFOMS conducts surveys periodically on all enlisted AFSs and for officer AFSs and special management groups upon request.

2.1.1. AFOMS normally surveys enlisted AFSs every 3 years.

2.1.2. For surveys involving Air Force civilians, Air National Guard (ANG), and Air Force Reserve (AFRES) personnel, occupational analysts coordinate with the Director for Civilian Personnel Policy and Personnel Plans (HQ USAF/DPC), ANG, and AFRES, as necessary, for such matters as:

2.1.2.1. Visit clearances and union notification.

2.1.2.2. Unusual data collection procedures.

2.1.2.3. Guidance on reporting survey results.

2.2. Requesting an Occupational Survey. Use the memorandum format at **Attachment 1** for AFOMS survey requests. Describe:

2.2.1. The AFS or family of AFSs you want AFOMS to survey.

2.2.2. The issues you want AFOMS to examine.

2.2.3. The approximate date you need results.

2.2.4. Special Management Group Requests. In their requests for surveys, special management groups must also include a detailed definition of the population to be surveyed and the issues to be addressed.

2.3. Developing a Job Inventory. AFOMS occupational analysts:

2.3.1. Develop a job inventory by researching specialty classification and training documents such as:

2.3.1.1. The Career Field Education and Training Plan (CFETP)/Specialty Training Standard (STS).

2.3.1.2. AFMAN 36-2105, Officer Classification, and AFMAN 36-2108, Airman Classification.

2.3.1.3. Training course control documents.

2.3.1.4. Appropriate Air Force Instructions.

2.3.1.5. Previous job inventories.

2.3.2. Conduct project initiation workshops for special surveys to:

2.3.2.1. Define the scope of the project.

2.3.2.2. Assign responsibilities.

2.3.2.3. Construct a draft job inventory.

2.3.3. Compile a complete list of tasks members of the survey population perform.

2.3.4. Coordinate issues and schedules with Air Force Career Field Managers (AFCFM) and MAJ-COM functional managers.

2.3.5. Refine the task list by visiting training centers/locations and field sites recommended by career field managers or special management groups, and interviewing subject-matter experts who:

2.3.5.1. Help with the content and organization of the inventory.

2.3.5.2. Identify questions of interest to potential users.

2.3.6. Develop separate questionnaires to collect data from selected samples of survey participants, (e.g., senior craftsmen). These questionnaires take into account factors such as:

2.3.6.1. Task difficulty.

2.3.6.2. Training emphasis.

2.3.6.3. Testing importance.

2.3.6.4. Other special information.

2.3.7. Conduct a project validation workshop for special surveys to:

2.3.7.1. Finalize the job inventory.

2.3.7.2. Get agreement on exceptions to administrative procedures.

2.3.8. Ensure AFOMS support personnel:

2.3.8.1. Format the job inventory.

2.3.8.2. Coordinate printing paper and pencil questionnaires or producing computer-based surveys.

2.3.8.3. Assign an Occupational Survey Study Number (OSSN) to the final job inventory.

2.3.8.4. Distribute the job inventory to eligible AFS members.

2.3.8.5. Receive monthly data tapes from the Air Force Personnel Center to allow generation of mailing lists for active duty, ANG, and AFRES surveys.

2.3.8.6. Coordinate with agencies as needed to generate mailing lists for surveys of civilian and special management populations.

2.4. Distributing the Job Inventory.

2.4.1. For both active duty and civilian surveys, AFOMS normally distributes the job inventories, related questionnaires, and mailing lists to the Survey Control Monitor (SCM) at base training offices.

2.4.2. For surveys of ANG and AFRES personnel, and for some special management surveys, occupational analysts may distribute the job inventories through other organizational channels or direct mail.

2.5. SCM Responsibilities. SCMs administer Job Inventories in support of Occupational Analysis. Additional SCM responsibilities are covered in AFI 36-2201, *Developing, Managing, and Conducting Training*. (Note that SCMs and Survey Control Officers (SCO) are not necessarily the same. SCOs conduct and monitor attitude and opinion surveys per AFI 36-2601, Air Force Personnel Survey Program.)

2.6. Administering the Job Inventory.

2.6.1. SCMs:

2.6.2. Conduct or monitor occupational surveys:

2.6.2.1. Set up due dates.

2.6.2.2. Follow up on late returns.

2.6.2.3. Return the completed job inventory booklets or computer disks to AFOMS using first-class mail or an equally expedient method. Do not return booklets or disks by third-class mail.

2.6.2.4. Make partial shipments of booklets or disks to speed up AFOMS screening and data entry (see the *Air Force Occupational Survey Control Monitor Administration Handbook*).

2.6.3. The SCMs normally schedule personnel eligible to take the job inventory and administer a group survey under controlled conditions.

2.6.3.1. When group administration is not practical, SCMs distribute job inventories following locally developed procedures (see the *Air Force Occupational Survey Control Monitor Administration Handbook*).

2.7. Survey Participation. Occupational Surveys provide information essential for developing personnel programs, classifying occupations, developing training programs, and writing enlisted promotion tests. Therefore, all Air Force members (active duty, ANG, AFRES, and civilians under Air Force authority) must participate in occupational surveys.

2.7.1. Commanders at all levels are accountable for ensuring that selected members of their organizations complete and return job inventories promptly and accurately.

2.7.2. Failure of Air Force personnel to complete and return occupational surveys when ordered to do so may lead to disciplinary action.

2.8. Analyzing and Reporting Information. AFOMS occupational analysts:

2.8.1. Track job inventory returns to:

2.8.1.1. Ensure the quality and quantity of the database.

2.8.1.2. Decide when to end administration and begin data processing.

2.8.2. Analyze subsets of the data to identify:

2.8.2.1. Natural groupings of incumbents according to jobs and tasks.

2.8.2.2. Similarities and differences among those jobs and tasks.

2.8.2.3. Patterns of career progression.

2.8.2.4. Background characteristics of skill and experience groups, MAJCOM groups, and other special subsets.

2.8.2.5. Patterns formed by members of identified groups in response to questions about job satisfaction.

- 2.8.2.6. The relevance of classification policies by comparing the survey results to descriptions of AFSs in AFMAN 36-2105, *Officer Classification*, AFMAN 36-2108, *Airman Classification*, and the CFETPs/STSSs.
- 2.8.2.7. The relevance of training programs by comparing the survey results to training program control documents such as: CFETPs/STSSs, Course Training Standards, and Plans of Instruction.
- 2.8.3. Prepare an OSR documenting:
 - 2.8.3.1. The background of the survey.
 - 2.8.3.2. The methods the occupational analysts used.
 - 2.8.3.3. Specific information on how the analysts developed the job inventory.
 - 2.8.3.4. The results of analyses.
 - 2.8.3.5. The implications of the analyses.
- 2.8.4. Organize computer files and analysis products to provide a historical database for:
 - 2.8.4.1. Personnel researchers.
 - 2.8.4.2. Future occupational analysts doing longitudinal research on Air Force occupations.
- 2.8.5. Brief users (including those in testing, training, and career field management) on survey results and help them understand, interpret, and apply the results.

Chapter 3

USING OCCUPATIONAL ANALYSIS INFORMATION

3.1. Building Promotion Tests. Psychologists in the AF Occupational Test Development Program will use the results of occupational surveys to build tests for promotion testing.

3.1.1. Psychologists will ensure tests are valid and relevant by using:

3.1.1.1. Ratings of testing importance.

3.1.1.2. Knowledge of the job structure.

3.1.1.3. Performance by pay-grade groups of specific tasks.

3.2. Classifying Occupations. People who make classification decisions will use occupational analysis information to:

3.2.1. Verify the proper boundaries between occupations.

3.2.2. Verify the need to correct classification documents.

3.2.3. Remove tasks personnel no longer perform.

3.2.4. Identify new responsibilities.

3.3. Developing Training Programs. People involved with training decisions will use occupational analysis as part of instructional systems development. Surveys provide a basis to update training programs.

3.3.1. In developing training programs, focus training on:

3.3.1.1. Tasks a large percentage of people perform.

3.3.1.2. tasks with high difficulty ratings.

3.3.1.3. tasks with high training emphasis ratings.

3.3.2. For initial skills, AFS-wide training courses, advanced, and specialized courses: Consider training tasks performed by substantial percentages (e.g., 20 percent or more) of relevant criterion groups. Such groups may include:

3.3.2.1. Personnel in their first job or first enlistment.

3.3.2.2. MAJCOM groups.

3.3.2.3. Specific job groups.

3.3.2.4. Personnel at the seven-skill level.

3.3.3. AFOMS occupational analysts work with training developers during analysis to construct computer printouts to help trainers:

3.3.3.1. Revise existing courses.

3.3.3.2. Develop new courses.

3.3.4. Training Manager Review. The training manager of a technical training program will review the OSR and accompanying data extract for implications on current courses whenever AFOMS publishes a new OSR.

3.3.4.1. The training manager must report the results of the review to the appropriate AFCFM within 90 days after AFOMS provides the OSR. **EXCEPTION:** If a utilization and training workshop (U&TW) is planned within 6 months of delivery of the OSR, the training manager will conduct the review immediately and must report the results to the AFCFM in time for adjustments to the U&TW agenda.

3.4. Personnel Utilization Practices. AFCFMs will use OSRs as an objective source in:

3.4.1. Constructing and updating CFETPs.

3.4.2. Making other personnel usage decisions.

3.4.3. AFCFMs and MAJCOM managers will consider OSR findings at U&TWs and training planning workshops to:

3.4.3.1. Revise classification structures.

3.4.3.2. Change personnel utilization practices.

3.4.3.3. Establish, modify, or end training programs.

3.5. Researching Personnel Issues. AFOMS sends the results of occupational surveys to authorized researchers.

3.5.1. Personnel researchers use occupational analysis data to research issues in:

3.5.1.1. Manpower.

3.5.1.2. Personnel.

3.5.1.3. Classification.

3.5.1.4. Training.

3.5.1.5. Human factors.

MICHAEL D. McGINTY, Lt General, USAF
DCS/Personnel

Attachment 1

MODEL MEMORANDUM FOR REQUESTING OCCUPATIONAL SUREYS



DEPARTMENT OF THE AIR FORCE
HEADQUARTERS UNITED STATES AIR FORCE
WASHINGTON, DC



(Appropriate Letterhead)

(Date)

MEMORANDUM FOR AFOMS/OMY

FROM: (Your 3-line address)

SUBJECT: Request for Occupational Survey, AFSC _ _ _ _ _

1. Who Should Be Surveyed? Describe the occupational group you want AFOMS to survey. Do you need more than one specialty surveyed? Do you need officers, civilians, ANG, or AFRES groups? Provide separate requests for each, unless you want AFOMS to survey multiple populations together.

2. What Are the Issues or Needs? Highlight issues that create the need for a survey, such as a major change since the last OSR. Cite reports or minutes of meetings that identify or discuss issues. For major changes list:

- a. New equipment and the date it will be fully operational.
- b. Major changes in personnel usage and the date of the changes.
- c. Major changes in work or management procedures.
- d. Career ladder problems in classification, training, or job satisfaction.

3. When Do You Need Occupational Data? State the programmed date for your U&TW, as AFMAN 36-2105, *Officer Classification*, or AFMAN 36-2108, *Airman Classification*, directs. To evaluate changes in classification systems or training, schedule the project no earlier than 1 year after the date of the change (to let the change take effect).

4. How Will You Use the Data? Mention, for example:

- a. Career ladder reorganization, such as shreds and mergers.
- b. Changes in management procedures.
- c. Updating training documents, such as CFETPs/STSs and POIs.

- 5. Where Should We Visit?** List bases, commands, and locations representative of the variety of jobs AFOMS should visit during inventory development. Identify functions or bases critical to both successful survey development and survey administration.
- 6. Who Should We Contact?** Include the AFCFM, MAJCOM managers, and so on.
- 7. How Important Is This Request?** Help us prioritize your survey. Add information helpful in evaluating the priority of this survey. For example, if we delay results for a year, or leave out a subgroup such as the ANG, describe the impact on your projects and programs.
- 8. Who Is Your Project Officer?** Provide name and phone number of the representative who can make decisions for you.

(Signature Block)

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