



# Lead Worker Questionnaire

## Instructions

### Employees:

1. Read all of the questionnaire before starting to answer the questions. Keep in mind that the purpose of the questionnaire is to collect information about the nature of the position and is not designated to evaluate individual performance.
2. Clearly check off all duties **regularly** performed by your position. Add any additional information pertinent to the checklist of duties in the comments box. Please print legibly, using black ink only, or complete this form on your computer, print it out, and sign it.
3. Review the completed questionnaire to make sure that correct and complete information has been provided. Sign and date the form then submit it to your supervisor for review and consideration. Your supervisor will review the questionnaire and comment in the space provided below. Retain a copy for your records.

**Supervisors:** Carefully review the selected duties and comments. Discuss this form with your staff member. Indicate in the space provided your assessment of the employee's responses. Sign and date this form and promptly forward it to your local HR liaison OR to HROS for review. Retain a copy for your records. If the position qualifies for the lead worker role, refer to this document during annual review discussions.

## Position and Employee Information

Position Title: \_\_\_\_\_ Current Grade: \_\_\_\_\_

Employee Name: \_\_\_\_\_ Department: \_\_\_\_\_

Campus Address: \_\_\_\_\_ MC: \_\_\_\_\_

Phone: ( ) - \_\_\_\_\_ Date (mm/dd/yyyy): \_\_\_\_ / \_\_\_\_ / \_\_\_\_

## Questionnaire

<b>Job Responsibilities</b>	<b>Tasks Performed on a REGULAR Basis</b>	<b>HR Use</b>
1. Training	a. Assists in providing on the job training to other employees <input type="checkbox"/> b. Assists in providing orientation to work process, job requirements, and use of technology to new employees <input type="checkbox"/> c. Advises manager of problems <input type="checkbox"/>	
2. Coordination	a. Coordinates the work of two bargaining unit employees OR coordinates the work of at least four bargaining unit employees <input type="checkbox"/> b. Coordinates the work of numerous student workers, temps and/or casuals <input type="checkbox"/> c. Sets priorities for the day's work and monitors work flow <input type="checkbox"/> d. Notifies manager of problems preventing completion of work <input type="checkbox"/>	
3. Schedule Management	a. Performs scheduling of complex tasks or projects <input type="checkbox"/> b. Coordinates logistical support for events and conferences (food, hotel participant materials, rooms, equipment, registration) <input type="checkbox"/> c. Plans itineraries and makes travel arrangements for faculty members and/or officers <input type="checkbox"/>	
4. Liaison Activity	a. With students, parents or employees (advising and counseling on academic choices or benefits) <input type="checkbox"/> b. With other schools and departments within the University (on complex administrative or financial matters) <input type="checkbox"/> c. With outside vendors or contractors (soliciting bids, purchasing, billing and receiving) <input type="checkbox"/> d. Makes purchases of supplies and/or equipment within guidelines (over \$500) <input type="checkbox"/>	

**Note:** The employee will participate in an annual discussion with his/her manager to review the above checklist of duties and to verify that the employee continues to perform the above duties in a satisfactory manner. If the manager determines that the employee continues to perform the above duties in a satisfactory manner, the employee will continue receiving the differential. The manager's determination that the employee no longer performs these duties may be grieved through the grievance procedure.



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## Employee Comments

If you need more space, please attach a sheet of paper.

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## Supervisor Comments

If you need more space, please attach a sheet of paper.

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## Signatures

Employee Signature: \_\_\_\_\_ Date (mm/dd/yyyy): \_\_\_\_\_

Supervisor Signature: \_\_\_\_\_ Date (mm/dd/yyyy): \_\_\_\_\_

Date received by HROS (mm/dd/yyyy): \_\_\_\_\_