

*Memo*

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DATE: March 23, 1989

TO: Agency Personnel/Labor Relations  
Directors/Designees

FROM: Nancy McClure  
Assistant State Negotiator  
Labor Relations Bureau

PHONE: 296-2599

RE: SUPERVISORY STATUS QUESTIONNAIRE

We are revising the supervisory status questionnaire agencies use when submitting requests for positions to be declared supervisory. The new one page questionnaire will replace the old eleven page form.

In so doing, we must reemphasize the importance of describing the supervisory responsibilities in the position description, because when disputed supervisory designations go to the Bureau of Mediation Services for hearing, the BMS relies heavily on the information in the position descriptions.

Thus, please ensure that the position description clearly identifies supervisory responsibilities. Specifically, the position description should state whether a supervisor can perform or effectively recommend each of the following supervisory responsibilities: hire, transfer, suspend, promote, discharge, assign work to, reward, discipline, direct, and adjust grievances.

This is an example of a well-written supervisory responsibility in a position description:

<u>Resp. No. 1</u>	<u>Principal Responsibilities, Tasks and Performance Indicators</u>	<u>Priority</u>	<u>% of Time</u>	<u>Discretion</u>
1.	Exercise supervisory authority so that applicable labor agreements and plans are equitably administered and employees under my jurisdiction will effectively perform assigned job duties to achieve the annual objectives of the section.  a. Assess the qualifications of candidates and hire employees to perform job duties to achieve section objectives.  b. Assign employees to work units to meet program objectives.  c. Evaluate employee performance, rewards or discipline employees and promote, suspend, discharge or change their status according to their performance.  d. Assign job duties, train and direct employees in the execution of job responsibilities to achieve annual work plan objectives.  e. Mediate and adjust grievances of employees according to the requirements of the appropriate contract or plan.  f. Direct the writing of employee position descriptions and approves the establishment of assigned work tasks.	A	30%	A

- g. Administer applicable labor contracts and/or plans fairly and equitably and in accordance with statewide employer policy.
- h. Perform all supervisory tasks in accordance with established equal opportunity/Affirmative Action, non-harassment, and employee safety policies and procedures.

NOTE: If a supervisor “effectively recommends” the preceding specific functions to be taken by higher authority, the above Task Step Examples should be modified in a position description to illustrate this action.

If you have any questions, please contact your Staffing Division Account Supervisor or your Labor Relations Liaison.

**SUPERVISORY STATUS QUESTIONNAIRE**

- 1. What percentage of your time is spent on supervisory activities? \_\_\_\_\_%
- 2. Do you work the same hours as your immediate supervisor? \_\_\_\_\_ Yes \_\_\_\_\_ No

If no, explain: \_\_\_\_\_  
\_\_\_\_\_

- 3. Is the area you direct geographically separated from your immediate supervisor's location? \_\_\_\_\_ Yes \_\_\_\_\_ No

If yes, explain: \_\_\_\_\_  
\_\_\_\_\_

- 4. For the employees you directly supervise, please list their job classifications, employment condition (e.g., full-time, part-time, intermittent/unlimited, seasonal, temporary, emergency) and the number of employees in each category. This information should also appear on page 1 of the position description.

<u>Class</u>	<u>Employment Condition</u>	<u>Number of Employees</u>
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**TO BE COMPLETED BY PERSONNEL/LABOR RELATIONS DIRECTOR**

- 5. Please attach an organization chart showing names, classifications, and managerial, supervisory, or non-supervisory designation of employees two levels above, on the same level, and two levels below the employee for whom this request is being processed.
- 6. Has the position previously been declared supervisory or non-supervisory by a Bureau of Mediation Services determination? \_\_\_\_\_ Yes \_\_\_\_\_ No  
Date \_\_\_\_\_
- 7. Has the exclusive representative of the unit this position would be in if not supervisory (i.e., the residual unit) agreed that the position is supervisory? \_\_\_\_\_ Yes \_\_\_\_\_ No

If yes, which exclusive representative?  
\_\_\_\_\_

Who acted on their behalf? \_\_\_\_\_