



Oregon

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To: State Human Resource Managers and Analysts

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Subject: 2008 Update - Clarification on the use of lead work in the state classification plan

BACKGROUND

The state classification unit has received many questions about the meaning of lead work; whether a certain classification includes lead work; or how lead work is different from project and team lead.

Some collective bargaining agreements and DAS policy allow for a lead work differential payment in certain circumstances, provided that lead work is *not included in the classification specification for the employee's classification*. State human resource analysts frequently must decide whether or not to pay an employee a lead work differential. The confusion begins when trying to decide if the employee's classification does in fact include lead work.

This memorandum will clarify the definitions for the different type of leadership duties, how lead work is addressed in the class plan, and which state classifications now include lead work. We hope this information helps you decide if assigned duties are in fact lead work, or if lead work is included in an employee's class.

If you have questions about whether or not your agency should pay a differential for lead work, contact the Labor Relations (if the employee is represented by a union) or HR Management and Consultation units of DAS for guidance.

DISCUSSION

Definitions of leadership functions

Many positions have leadership tasks. Many of these tasks are not "lead work".

We define *lead work* as, on a recurring daily basis, an assignment of the following duties:

- Orienting new employees
- When needed, assigning and reassigning tasks
- Directing others on work procedures and performance standards

- Reviewing work and providing an assessment of performance to the supervisor. (E.g., input into performance evaluations)

For purposes of identifying lead work, substantially all of these functions must be present.

Team leadership is similar to lead work. Usually, a team leader does the same duties as a lead worker and other functions. Examples of additional functions include deciding methods to accomplish work, timelines, priorities, and the needed resources and training. Team leaders also may coordinate project schedules, develop technical standards and monitor work for compliance. Many occupations use team leaders to accomplish work. The most prevalent are information technology positions. The SEIU/OPEU contract and DAS policy allow for a differential payment for Information System Specialist positions assigned team leader duties. The key distinction to note is that team leadership includes the work traditionally identified as “lead work” and additional duties. When an employee’s class is not in the information systems specialist class series and the employee leads a team, a lead work differential may be appropriate only if the work activities also include those defined as “lead work”.

A position that *leads or manages a team to complete projects* may include the tasks of a lead worker or team leader for the duration of the project. However, not all project leadership includes the tasks defined as lead work. Many project team members report to different agencies, organizations or divisions. The project is led by a professional that gives direction for purposes of completing project work, but due to the organizational relationships does not function as a lead worker.

Although a supervisor does all the duties of a lead worker, state policy does not allow a differential payment for supervision whether included in the classification specification or not.

To decide if a position is functioning as a lead worker, it is best to analyze the job tasks formally assigned to the employee. Position working titles or functional assignments may not be a good indicator. Supervisors, when writing position descriptions, often use team leader, lead worker and project leader interchangeably. It is often difficult to decide if lead work is present from only reviewing a position description. It is best to verify that the supervisor formally assigned substantially all of the duties defined as “lead work”.

How lead work is addressed in the state class specifications

Many of the State’s class specifications use the words “lead”, “lead work”, and “team lead”. However, the classification history files often do not contain good information about the class specification development or the meaning and intent of the specification language. At the end of this document there is a list of classes that include lead work as defined in this memorandum. Please use this list as a guide when making decisions. Our class plan is large; we identified these classes by reading and analyzing each specification in the class plan. We may have missed some. Please contact our office if you believe we should modify our list.

Unless it is the purpose and a significant characteristic of work, the class unit does not usually include lead work in the class specification. This is because we try to write broad classes whenever possible. Also, state classifications are used by many agencies, the organizational structures vary and not all positions in a class do lead work. Lead work is rarely the sole reason for a job class. Other work complexities typically drive the need for different levels within a class series.

In the rare situation that we include lead work in a class specification we currently use these classification standards. The standards may not be consistent in classifications developed before 1997.

1. We only include lead work in a class specification when it affects every employee in a classification.
2. The term “lead work” includes substantially all of the following activities:
 - Orienting new staff to the work process, policy and procedures of doing the work
 - Scheduling staff, and assigning tasks to accomplish the work
 - Directing standards of performance to workers
 - Using human relation skills to motivate workers
 - Reviewing work for conformance to standards
 - Giving an assessment of staff performance to the supervisor
3. Lead work is a regular recurring assignment.
4. We write lead work into the description of class and distinguishing features sections of the class specification. Lead work is not supervision and therefore does not appear in the supervision exercised section of the specification. We also write the lead work tasks into the duties and responsibility section.
5. When the class specification describes leadership of projects or teams it does not mean lead work. The class specifications will use the word “lead work or lead worker” when describing the lead work function.
6. We include the knowledge and skill of leadership techniques in the class specification only when needed upon entry.
7. The classification specification is written with the following assumptions:
 - The lead worker is responsible for the work output of those led
 - The positions of those led may be of a lower or equal pay level.

SUMMARY

- Many state positions have leadership tasks. Not all of these are lead work.

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- There is confusion between the terms lead work, team leadership and project lead. The terms have different meaning. This memorandum defines the differences between the terminologies.
- Supervisory employees are not eligible for a lead work differential.
- To decide if a class specification includes lead work, please contact the Classification & Compensation Consultant assigned to your agency. A list of these assignments can be found at <http://www.oregon.gov/DAS/HR/classcomp.shtml>
- If you have questions about whether or not it is appropriate to pay a lead work differential; in the case of represented employees, contact the State Labor Relations unit at 503-378-3141; or for non-represented positions, contact the HR Management and Consultation unit at 503-378-4309.

On the next page is a list of current classes that include lead work.

**CLASSIFICATIONS THAT INCLUDE
LEADWORK**

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CLASS TITLE	CLASS #
Cartographic Program Specialist	3121
Cook 2	9117
Corrections Production Coordinator 3	2336
Data Entry Control Technician	1475
Epidemiologist 2	6217
Executive Support Specialist 1	0118
Executive Support Specialist 2	0119
Financial Examiner 3	5677
Fish and Wildlife Technician 3	8322
Food Service Worker 3	9102
Force Protection Leader	5521
Forestry Communications Dispatch Coordinator	0316
Forestry Nursery Worker 3	8203
Group Life Coordinator 3	6752
Habilitative Training Technician 3	6727
Human Resource Analyst 2	1321
Human Resource Analyst 3	1322
Human Services Specialist 4	6660
Maintenance Labor Coordinator	4118
Mental Health Therapy Coordinator	6718
Mental Health Therapy Shift Coordinator	6717
Motor Carrier Enforcement Officer 2	5858
Public Safety Training Specialist 2	1348
Research Analyst 3	1117
Social Services Specialist 2	6613
State Fair Representative	0800
State Library Specialist 2	0252
Timber Auditor / Appraiser 3	0741
Traffic Systems Technician 3	4311
Transportation Service Office Leader	0333
Transportation Maintenance Coordinator 1	4162
Transportation Maintenance Coordinator 2	4161
Vehicle Emissions Technician 2	3808
Youth Corrections Unit Coordinator	6755

All classifications with Supervisor in the title
All positions with an MMS representation code