

Position Description – template

The following has been prepared as a baseline, which can be adapted by a firm to fit its own unique 'modus operandi'.

[Position title XXX]	
Type of position:	Full time, part time, casual, contract etc
Reporting lines:	Title of the position to which the employee will report
Other staff interactions:	Who will you mainly interact with? Is there any direct responsibility for staff?
Date completed:	Current date
Employee name:	Name of employee. (This section will be left blank for position searches)
Working hours:	The actual days and hours that the employee will work, e.g. the standard working week is Monday to Friday, 8:00 a.m. to 5:00 pm. At times, alternate schedules are required.
Role purpose, key dimensions and 'fit':	A brief description which explains why the position exists, as well as some of the key (and relevant) stats pertaining to it, such as number of clients, size of budget etc. It can also be helpful to explain where the job fits into the overall business and its importance.
Specific responsibilities:	<p>This is the heart of the position description and describes clearly and concisely the essential duties and responsibilities of the position. Rather than setting out the individual tasks or duties which the person is to do each day (for example collecting and distribute incoming mail), it is suggested that a list of the specific things which the person is responsible or accountable for be provided, e.g. all staff to receive mail by specified time each day.</p> <p>The mail example sets out what the person is required to achieve, i.e. the outcome, and not the various steps along the way.</p> <p>An outcome, or responsibility based, position description avoids an examination of how a person does a certain task and focuses on their responsibility to ensure the outcome is achieved. Of course, you may well have certain methods by which you want things done but the</p>

	<p>position description is not the place for this. You should develop policies and procedures manuals for such matters.</p> <p>Sometimes it is also helpful to group tasks/responsibilities into categories such as “customer service”, “sales”, “administration”.</p>
Accountability and authority:	<p>There should be a clear description of the accountability of the jobs performed and the position itself. For example, a department or section may be responsible for the completion of certain duties, but individual accountabilities must be clearly spelt out. Any authority the position has and any limit on this authority should also be spelt out. An example of this is may be a "junior" financial planner authorised to provide advice up to a specified level of funds under advice.</p>
Other responsibilities:	<p>This section lists all other parts of the job.</p> <p>This should document any other responsibilities which may be given to the person. This allows you to add to or amend the responsibilities from time to time without necessarily recording them in the document.</p> <p>Care is needed however to ensure that such additional or amended responsibilities do not substantially change the nature of the position. If there is substantial change, and the person has not agreed to such changes, you could be liable for breach of contract.</p> <p>It is suggested that, when additional responsibilities or changes are made to the position description, no matter how minor, you first discuss them with the person concerned before they are implemented. Any “other” responsibilities should be reviewed, discussed, agreed, rewritten (where appropriate) and signed off by both parties at least once every year. There may also be remuneration considerations for “other responsibilities”.</p>
Measures:	<p>How will you know if you are achieving your goals and objectives?</p> <p>What are the main ways to measure/demonstrate results?</p>
Qualifications:	<p>This section should only contain qualifications (not experience or the skills required as these are covered later).</p> <p>Qualifications are actual verifiable qualifications, i.e. degrees, certificates, Year 12, licenses, DFP subjects completed, CFP, etc. Only the verifiable qualifications required for the position should be listed as mandatory. Not all positions will require a mandatory qualification.</p>
Skills and experience:	<p>This section contains the experience, skills and abilities that are required to undertake the job. Applicants use these to assess their suitability for the job. The key selection criteria must be objective and consistent with the requirements of the position. When preparing the key selection criteria, it is advisable to place more emphasis on</p>

	<p>measurable human qualities rather than abstract ones. There is no point in specifying attributes which cannot be assessed when selecting applicants. Very specific areas of skills/expertise/experience should only be included when absolutely necessary, e.g. a particular software package, because such specification could deter talented and capable applicants who may only need minimal training to meet the specific requirement.</p> <p>Positions would usually have a 4 - 7 criteria. They should be numbered and listed in order of importance. The following categories should be addressed in the key selection criteria.</p>
Experience/knowledge:	<p>What type, how much and what level of previous work experience is required for competent performance in the position. Due to equal opportunity legislation, be wary of specifying experience in the number of years, instead statements such as <i>proven, demonstrated, substantial and extensive</i> can be used.</p>
Technical attributes:	<p>Technical attributes may be of particular importance in client service or paraplanning positions depending on the client base and services provided.</p>
Skills/abilities:	<p>What types of demonstrated abilities are required in this position? For example, if a position supervises staff, it would be expected that an ability would be "demonstrated ability to supervise staff".</p>
Personal qualities:	<p>These are the personal qualities required to perform the duties of the position. These would include personal abilities such as interpersonal relations, working under stress, adaptation to change and communication skills.</p>
Job location:	<p>Specify where the position is located or based. Is 'remote' working an option? If so, are there any mandated times that the employee has to attend the office in person?</p>
Other information:	<p>For some positions this section is not relevant and can be removed from the document. This section can be used to add relevant information about the position that is not outlined in any other section of the position description, e.g. committee membership, out of hours or rostered work, shift work, etc.</p>
Career pathway/ Plans for future:	<p>It can also be important to outline the potential career progression. This is not necessary for every position but should be addressed. It is in no way a promise of career progression, more a guideline for those interested.</p>