



Position Description Guide

Updated 13 September 2017

Executive Summary

As the University embeds its values in accordance with the 2025 Agenda and its strategic plan, we are progressing efforts in modernising our approach to People and Culture activities. Effective from 8 September 2017, the University has streamlined the template and process surrounding Position Descriptions (PDs).

The new <u>PD template</u> emphasises three key elements of a position, including the:

- overall purpose or context;
- intended outcomes and responsibilities; and
- capabilities required to reach these outcomes and responsibilities.

These elements are complemented by style and content initiatives, including:

- using clear and succinct language;
- focusing on outcomes, rather than tasks;
- including the agreed University values; and
- removing content which detracts from the overall description of the position (i.e. "how to apply").

This guide will assist supervisors and hiring managers to use the new PD template. It should be used in conjunction with the prevailing <u>Enterprise Agreement</u>, the <u>Good Practice Guide</u> and relevant University <u>policies</u>. You are also encouraged to seek support and advice from the People & Culture Business Partner or the People and Culture Coordinator allocated to your college/portfolio.

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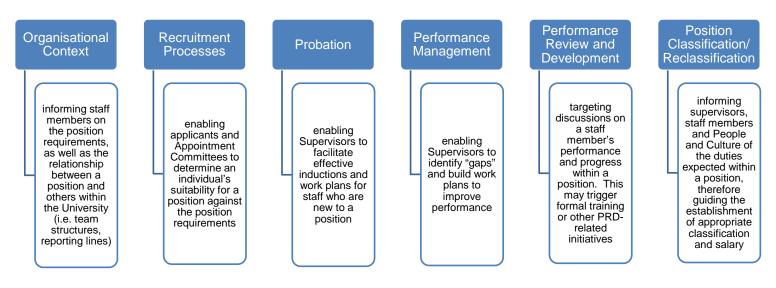
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Functions of a Position Description (PD)

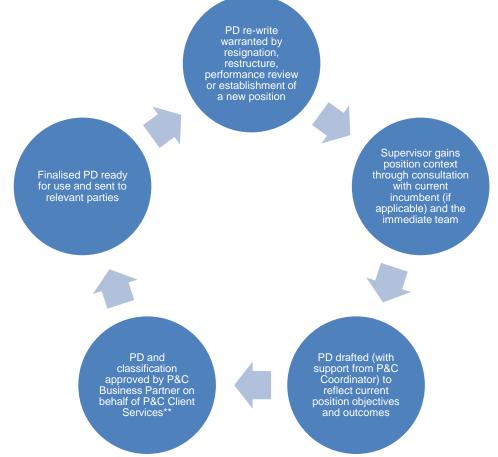
A PD provides a clear and succinct outline of the key outcomes, responsibilities and capabilities required in a position and provides an indicator of the reporting lines and organisational context corresponding to a position at the University. A PD describes a *position*, not a *person*.

PDs are used for:



The PD Review/Creation Cycle

There are many instances where a PD may require review or amendment. A typical PD review cycle will involve:



** For Senior Management positions (HEO10 and above), approval is required from the Director, People and Culture



The PD Template – at a Glance

In addition to this user guide, The PD template includes instructions and hints to guide your development of a PD. These instructions are identified through the use of *italic font*. Remove all italicised text before submitting your PD for P&C Client Services approval.

The PD template has a contemporary look and feel, brought about by the use of:

- bold and eye-catching headings;
- tightly grouped clusters of like information;
- bullet points;
- concise descriptions, with a recommended sentence length of 25 words or less; and
- an "active voice", using current tense and descriptive verbs within descriptors (refer to <u>Appendix 1</u> PD style guide).

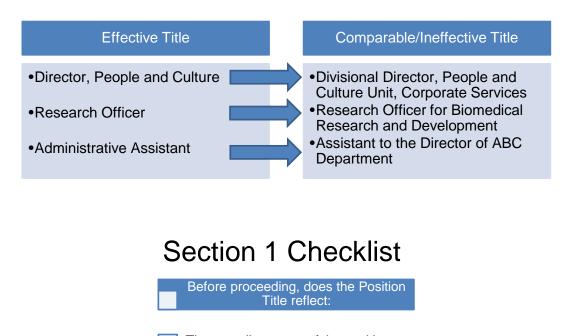
It is essential that the PD format (font size, layout etc.) is not altered, so as to create a consistent University wide approach.

Section 1 - Position Title

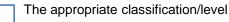
A good position title (a.k.a. job title) reflects the main function of a position. It also provides important contextual information about the level of responsibility as well as the classification attributed to the position. When crafting a position title, aim to:

- keep your position title to around five words (less if possible); and
- avoid the heavy use of jargon. Your title is effective if a non-University employee can easily identify with the underlying function of the position.

Examples:



The overall purpose of the position Gender neutrality (e.g. Chairperson vs Chairman)



Correct grammar and punctuation (refer to Appendix 1 - Style Guide)



Section 2 - Position Details

This section of the PD contains "quick facts" about the position and its context within the University structure.

POSITION DETAILS			
College/Portfolio	Indicate which area of the University this position is based in.		
	Example: i) Portfolio of the Vice-President (Corporate Services) or		
	ii) College of Science and Engineering		
Organisational Unit	Indicate which sub-structure this position is based in within the College/Portfolio you have defined (If applicable).		
	Example: i) People and Culture		
	ii) Biological Sciences		
Supervisor (Title)	Enter the position title to which the position will report – NOT the academic title of the supervisor, nor the name of the individual occupying the supervisory position.		
	Example: Director, People and Culture.		
Classification	Propose a classification you feel appropriately reflects this position as a whole. Where a position has elements of two or more different classifications, make your recommendation based upon which capabilities and responsibilities are most frequently appearing at the same level.		
	Your P&C Coordinator or Business Partner may seek clarification on your recommended classification as part of their approval process.		
	Refer to the online resource regarding <u>Classification, reclassification and role statements</u> .		
Employment Type	Indicate the employment type as defined by the workforce and position planning process. This will be a combination of points 1 and 2 below:		
	1. continuing, convertible, fixed-term		
	2. full-time, part-time, job-share.		
	Example: i) Fixed-term, full-time		
	ii) Continuing, part-time (0.6 FTE), job-share		

Section 2 Checklist

Before proceeding, are the Position Details:
Factual (i.e. - supervisor's title and part-time fraction are correct)
Realistic (i.e - recommended classification matches the Key Position Requirement^{e1}
Reviewed for grammar and punctuation (refer to Appendix 1 - Style Guide)



Section 3 - Position Summary

This is a concise statement about the overall objectives of the position. The Position Summary may be used as the basis of the advertisement text when a PD is to be used in a recruitment process. The Position Summary is usually described in eight sentences or less.

The recommended format for devising the position summary is:

- 3.1 describe the level of autonomy (see <u>Appendix 7</u> for descriptors), followed by;
- 3.2 a summary of the key purpose of this position, focusing on broad objectives (not individual tasks).

NB – for maximum impact, generally your sentences to 25 words or less.

POSITION SUMMARY

3.1: (level of autonomy): select from <Close / Close to Routine / Routine / Routine to General / General / General to Broad / Broad / Generally Unguided>

3.2: a snapshot of position expectations and why the position exists (usually no more than five sentences)

Example: "Under broad direction, the Communications and Marketing Officer will be responsible for developing and implementing communications strategies, marketing plans and activities that support and raise awareness of the College's teaching and learning, research, international and community service activities. The position will support senior management in promoting the core values and achievements of the College to the full range of internal and external stakeholders. The incumbent will work closely with peers to support the College and University needs".

Section 3 Checklist

Before proceeding, does the Position Summary:

Describe the position in eight sentences or less



State the overall level of autonomy in the position



Highlight the 'big picture' objectives (not tasks or duties)

Maintain current tense, gender neutrality and other style considerations from Appendix 1 - Style Guide



Section 4 – University Expectations and Values

This section contains pre-filled text, which will require some editing by the Supervisor when creating the PD.

- The first five bullet points (in normal font) are *mandatory* and must remain in every PD.
- Remove any text appearing under the heading, "Delete as appropriate" whenever the bullet point is not relevant to the position. Please maintain the italic formatting of this information.

Example:

UNIVERSITY EXPECTATIONS AND VALUES

All staff at Flinders are responsible for understanding their obligations and responsibilities as set out in the University's code of conduct and are expected to:

- demonstrate commitment to the University's values of Integrity, Courage, Innovation, Excellence and the underlying ethos of being Student Centred;
- contribute to the efficient and effective functioning of the team or work unit in order to meet the University's objectives. This includes demonstrating appropriate and professional workplace behaviours, providing assistance to team members if required and undertaking other key responsibilities or activities as directed by one's supervisor;
- promote and support an inclusive workplace culture which values diversity and embraces the principles of equal • opportunity;
- perform their responsibilities in a manner which reflects and responds to continuous improvement; and •
- familiarise themselves and comply with the University's Work Health and Safety, Injury Management and Equal Opportunity policies.

Delete as appropriate, but maintain italic formatting:

Include if deemed a prescribed position: In addition, it is a requirement of this position that the incumbent maintain a current Child Related Employment Screening which is satisfactory to the University in accordance with the Children's Protection Act 1993 (SA).

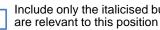
Include for all NT positions: Northern Territory Government legislation (the Care and Protection of Children Act 2007) now requires all individuals in child related employment or whose duties involve, or are likely to involve, contact with a child, to hold a valid 'Working with Children Clearance' (Ochre Card). This position involves child related work and is assessed as requiring a Working with Children Clearance/Ochre Card.

A national Police Certificate which is satisfactory to the University will be required by Flinders University before the successful applicant can commence in this position. If you have any queries in this regard please raise them with the named contact person in this Position Description in the first instance.

Section 4 Checklist

Before proceeding, does the Expectations and Values section:

Contain at least the five first bullet points



Include only the italicised bullet points that



Change the format of any italicised text into standard text format (e.g. Calibri size 11)



Section 5 - Key Position Responsibilities

Key Position Responsibilities (KPRs) describe what outcomes or standards should be achieved in this position - not the tasks or duties (refer to <u>Appendix 2</u> on how to craft KPRs). KPRs should exclude any temporary characteristics or objectives required by a position.

Each KPR will:

- start with a verb/active word (refer to <u>Appendix 4</u> for samples), then describe the responsibility/ies or outcome/s contained in that "cluster" or outcome area;
- include additional requirements, such as interstate or overseas travel, on-call or out-of-hours work wherever it may be required within a position;
- be written in the current tense and generally consist of no more than 25 words per bullet point;
- include no more than eight KPRs;
- describe the level of management or supervisory responsibilities within the position; and
- always include as the last bullet point: "Any other responsibilities in line with the level of the position as assigned by the Supervisor and/or the University".

Example:

KEY POSITION RESPONSIBILITIES

The P&C Business Partner is accountable for:

- 1. "Advising and consulting with senior managers on P&C operational matters, including but not limited to dispute resolution, performance management, industrial relations, organisational capability and culture management.
- 2. Providing functional management of a team of four P&C Coordinators, typically involving the establishment of work practices and the supervision of on-the-job performance.
- 3. Any other responsibilities in line with the level of the position as assigned by the Supervisor and/or the University."

Section 5 Checklist
Before proceeding, do the KPRs:
Describe the broad position outcomes in eight bullet points or less
Appear in a list of most to least important
Wherever possible, describe the stakeholders involved in each outcome
Each align with at least one Key Capability (Section 6)
Use current tense, active language and reflect the style guide in Appendix 1
Include the last point as indicated above
Each descibe something the position holder can demonstrate or measure



Section 6 - Key Position Capabilities

Key position capabilities (KPCs) are the *minimum requirements* (e.g., - qualifications, attributes, knowledge or skills) an incumbent should possess, in order to effectively deliver the KPRs of the position. Each KPC should link to at least one KPR.

KPCs should:

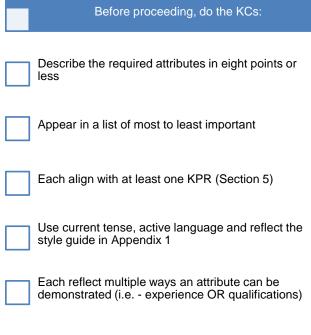
- be clear and balance experience with demonstrable skills or qualifications in the one context;
- reflect a mix of capabilities to expose the best "all round" candidate in recruitment processes;
- consist of no more than eight bullet points and
- only refer to a KPC as "essential" where a KPR is inextricably reliant upon this experience, skill or qualification.
- KPCs will assumed to be essential unless the word 'desirable' is specifically mentioned in brackets after the sentence. This should be used sparingly and with clear justification.

Example:

KEY POSITION CAPABILITIES

- "Degree-qualified with post qualification experience, or demonstrating extensive experience in at least one of the following areas: service design, process/operations improvement, business strategy/operating models and Customer Experience Management.
- Proven ability to lead, motivate and develop high performing teams including the ability to undertake task, performance and development planning and review and support teams through change."

Section	6	Checklist
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PD Approval – People and Culture Business Partner

Please provide your draft PD in *word format* to your allocated P&C Business Partner for final approval.

Once approved, if your PD is being created as part of a recruitment process, please email it to recruitment@flinders.edu.au along with other relevant paperwork such as the Request to Fill a Vacancy Form.

If your PD is being created as the result of organisational change, performance review or reclassification, please email it to employment@flinders.edu.au.

Please *note:* a PD should not be published or distributed without the approval of an authorised P&C representative.

PD Support

P&C Client Services are available to support you in creating and amending PDs. Each College and Portfolio has two P&C staff who support with your Recruitment and PD requirements as follows:

P&C Coordinator: your first point of contact in most instances, who will discuss your requirements, provide support and advice as required and can also source examples of other relevant PDs to assist you. Whilst they are not expected to write your PD for you, they can certainly provide on-going support throughout the process.

P&C Business Partner: Assists their College or Portfolio with Workforce Planning and strategic recruitment needs and plays a key role in classifying and approving the PD. They and may also be the first point of contact for more senior or complex positions.

To find the name and contact details of the P&C Client Services staff servicing your College or Portfolio, please visit the <u>P&C Client Services Contact Page</u>.

For further information and assistance on PD development, we recommend reviewing:

- 1. the series of <u>Appendices</u> at the back of this document; and/or
- 2. the Sample Position Descriptions.



Appendix 1 – Style Guide

PDs are used in a variety of University processes and may be consumed by a number of internal and external parties. This document outlines the style and editing parameters established for PDs, ensuring consistency and professionalism across the University.

Overall principles

- PDs will usually not exceed two A4 pages in total length.
- No section should pass over two pages. If the text spills from one page to the next, the entire section will need to be moved to commence on a new page. Minor adjustments to font size and table width may be acceptable, to ensure the information "fits".

Typeface

- Approved font is Calibri, size 11 (with discretion to use size 10 where needed, to reduce overall pages numbers).
- Only four weights of Calibri are to be used—Regular, Italic, Bold and Bold Italic.

Tense

PDs are written in the current tense and use an active voice. This is particularly important when crafting the KPRs or KPCs.

Words to use		Words to avoid	
• does is are		• will might had	

No reference to the position holder

• A PD describes a position, *not* a person. Avoid the use of person-specific phrases such as the incumbent/the appointee/the position holder/he/she/they.

Language

- Avoid the use of jargon or industry/site-specific language that a non-University person would not understand.
- Place any abbreviations next to the first full phrase in the document. e.g. Position Description (PD). The abbreviation can then be used throughout the remaining document.
- Other than when using a numbered list, anything below 10 should display as a word (e.g. "two"). Any figure that is 10 or higher should be reflected as a number.
- Wherever possible, use plain English and clear, short sentences of 25 words or less.
- Ensure the PD does not inadvertently discriminate. e.g. "significant experience in xyz" instead of "x years' experience in xyz".
- UK/Australian English conventions apply, e.g. "analyse" over "analyze", etc.

Punctuation

- Capital letters should appear at the beginning of sentences, even when a sentence appears as a bullet point.
- Full stops appear at the end of bullet points, if the bullet point forms a complete sentence.
- If a bulleted list is preceded by an opening statement (as per this example), the bullet points will:
 - o <u>not</u> start with a capital letter;
 - o usually finish with a ";" mark;
 - link the second-to-last and last bullet point with a joining word (i.e. and/or); and
 - the final point in the list will finish with a full stop.
- If a bulleted point has additional bullets, these should appear as indented, black circles with no filling (as per the indented bullet point list above).
- Bullet points appearing in Key Position Responsibilities will appear as numbers.
- Bullet points in the Key Position Capabilities will appear as solid black, round bullet points.

Paragraph Formatting Requirements

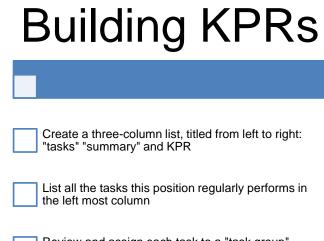
You are asked not to alter the formatting from the way it is set out in the template.



Appendix 2 – Crafting Key Position Requirements

A common mistake when crafting KPRs is to provide an exhaustive list of tasks, responsibilities or requirements. However, well crafted KPRs and KPCs act in partnership, to describe the overall objectives of a position, as well as the required profile that may be required of the position holder.

So how do you morph a list of duties and tasks into KPRs and KPCs?



Review and assign each task to a "task group" which best summarises the role or function

Re-organise your tasks in KPR column, arranged by like "task groups" and starting with the most frequent task areas

Example:

Position – Accounts Officer

Task	Task Group	KPR	
Scanning AP invoices	Administration / data integrity / records management	Assisting in the efficient operations of the business unit, by undertaking a range of administrative support duties, which may vary from time to time	
Filing AP invoices	Administration / data integrity / records management		
Ad-hoc support to the Accountant	Administration / data integrity / records management		
Creditor liaison	Customer service	Achieving customer service excellence through creditor	
Internal customer liaison	Customer service	and debtor liaison and resolving queries from internal stakeholders regarding operational finance issues	
Coding AP invoices	Data entry		
Entering AP data	Data entry	Processing financial related data, including but not limited to AP, AR and general ledger functions	
Entering AR data	Data entry		
Reconciling AP Data	Data integrity	Efficiently and accurately manage the integrity of electronic and manual financial data, typically involving reconciliations, end of month processing and file	
General ledger entries	Data integrity		
End of month processing	Data integrity	management	



Appendix 3 - Suggested Examples of Key Position Responsibilities

Leadership

- Managing the development and implementation of effective and efficient policies, procedures and practices relevant to the full range of professional services across the University, reflective of its strategic, operational and governance requirements.
- Providing strategic advice, analysis, forecasting and recommendations to resolve actual, potential and perceived risks and acting as a critical liaison between the College leaders and key University stakeholders as required.

Customer Service

- Making a pro-active and positive contribution to the customer service culture and goals of the University, promoting a culture of service excellence.
- Maintaining a positive customer experience, by identifying and prioritising service issues which are compliant to best practice solutions, while providing feedback which may contribute to ongoing customer service satisfaction and improvements.
- Championing the customer throughout the University, balancing customer needs with business requirements and presenting a compelling case for internal change and improvement as required.

Team Management

- Developing staff capabilities within the portfolio leadership team through training and mentorship, therefore enabling these leaders to provide effective, efficient and compliant customer service to academic units.
- Motivating and inspiring others to perform at their best by setting clear direction and expectations, recognising and valuing their work and encouraging them to learn and reflect.

Forward Planning

- Leading the establishment and implementation of resource planning and decision making activities, drawing evidence and insights from data, consultation, benchmarking and other relevant sources to meet the professional services needs of the University.
- Influencing and directing others to ensure student, academic and professional staff administration services and activities are enabled and carried out in a collaborative manner.



Appendix 4 – Verbs for Key Position Responsibilities

While not exhaustive, this list contains action verbs which can be used to begin each KPR.

accommodating	compiling	editing	interpreting	reducing
achieving	completing	eliminating	interviewing	regulating
acquiring	composing	enforcing	investigating	reporting
addressing	computing	engaging	issuing	researching
adjusting	conducting	establishing	leading	resolving
administering	conferring	evaluating	lifting	reviewing
advising	consolidating	executing	maintaining	scheduling
allocating	constructing	expanding	managing	searching
analysing	consulting	exploring	monitoring	selecting
applying	controlling	facilitating	motivating	solving
appointing	coordinating	formulating	negotiating	specifying
approving	corresponding	furnishing	observing	strategising
arranging	counselling	generating	operating	streamlining
assessing	creating	guiding	organising	strengthening
assigning	customising	handling	participating	summarising
assisting	delegating	hiring	performing	supporting
auditing	delivering	identifying	planning	teaching
augmenting	demonstrating	illustrating	predicting	training
authorising	designing	implementing	preparing	translating
budgeting	developing	improving	presenting	troubleshooting
calculating	devising	incorporating	processing	updating
circulating	direct	increasing	programming	validating
clarifying	disseminating	informing	providing	verifying
clearing	distinguishing	initiating	quantifying	
collaborating	distributing	instructing	recognising	
collecting	documenting	interacting	recommending	
combining	drafting	interfacing	recording	
communicating	driving	instigating	recruiting	



Appendix 5 – Crafting Key Position Capabilities

KPCs outline what knowledge, skills and experiences would generally allow a position holder to successfully achieve the KPRs. Each KPC should therefore link to *at least* one KPR.

A balanced list of capabilities may include:

- ✓ Qualifications and/or experience
- ✓ Leadership and strategic thinking
- ✓ Management/supervision of people and/or processes
- ✓ Relationship building

- ✓ Personal excellence
- ✓ Information technology skills
- ✓ Communication skills (written and/or oral)
- ✓ Professional knowledge or specialisation

Building KPCs
Create a two-column list, titled from left to right: "KPR and KPCs required
List each KPR in the left hand column
List the skills, background or training which would lead to each KPR being achieved

Re-write each KPC using the recommended formula in Section 6

Example:			
KPR	КРС		
Data entry "Process financial related data, including but not limited to AP, AR and general ledger functions"	Qualifications at Certificate III or higher within administration, business or finance, or a combination of relevant experience and training in these areas		
Data integrity "Efficiently and accurately manage the integrity of electronic and manual financial data, typically involving reconciliations, end of month processing and file management"	KPC above would cover this KPR		
Customer service "Achieve customer service excellence through creditor and debtor liaison and resolving queries from internal stakeholders regarding operational finance issues"	An ethical approach to the provision of service to others, ideally as demonstrated through a client-servicing position or environment		
Administration "Assisting in the efficient operations of the business unit, by undertaking a range of administrative support duties, which may vary from time to time"	The first KPC listed above would cover this KPR		



Appendix 6 - Suggested Examples of Key Position Capabilities

1. Qualifications and/or Experience

- Degree-qualified, or demonstrating significant work experience in one or more of the following areas: service design, ethnographic research, process/operations improvement, business strategy/operating models and Customer Experience Management.
- Postgraduate degree or equivalent work experience in management or an area relevant to the position.
- Demonstrated experience in University administration/management.

2. Leadership and Strategic Thinking

- Proven ability to plan and lead change, prioritise and meet deadlines as well as manage resources to ensure operational and service delivery goals are met in high volume and complex environments.
- Significant expertise in delivering an integrated customer experience across multi-channel touch points within a complex environment.
- Demonstrated experience in leading customer-centric business transformation projects.
- Demonstrated ability to create and lead a continuous improvement culture that proactively identifies, prioritises and implements changes that enhance the customer experience and improve the efficiency of business practices and performance.
- Proven ability to conceptualise, develop, implement and review major policies, objectives and strategies involving high level liaison with internal and external client areas.

3. Management and/or Supervision

- Proven ability to lead, motivate and develop high performing teams including the ability to undertake task, performance and development planning and review and support teams through change.
- Proven ability to deal with unsatisfactory performance and/or conduct issues in line with University policies and procedures.
- Highly developed project management and process improvement skills, including the ability to evaluate and apply technology to administration, including process automation, reporting and data manipulation functions.

4. Knowledge

- Comprehensive understanding of relevant government legislation and an appreciation of the contemporary issues surrounding the funding of higher education and research in Australia.
- Understanding of Higher Education sector, and associated industry trends.

5. Relationship Building

- Develops professional networks and engages with industry, community, and practitioners to maintain up to date knowledge.
- Works proactively and collaboratively within and outside own team.
- Establishes and fosters mutually productive relationships in the workplace.
- Challenges others to think creatively.



6. Information Technology

- Proven ability and understanding of CRM tools, customer analytics and other data management to drive insights for customer management strategies and improvement initiatives.
- Accreditation in a recognised process review and improvement methodology such as Lean, Six Sigma or demonstrated ability through equivalent workplace experience and achievements.

7. Written Communication

- Excellent written communication skills, including the ability to produce formal reports, business cases and presentations for a range of audiences.
- Demonstrable experience in writing high-level and persuasive communication pieces which promote change, for the consumption of senior staff.

8. Interpersonal and Oral Communication

• Excellent communication, influencing and negotiation skills, including the ability to produce written information and presentations for a range of audiences and to manage stakeholders with competing interests.



Option 1: Close (HEO level 1)

The incumbent engages in work that is clearly prescribed. They will follow detailed work instructions and seek authorisation for variation to work practices.

Option 2: Close to Routine (HEO level 2)

The incumbent will receive a combination of close to routine supervision, though in the main, the incumbent will engage in work that is prescribed. They will normally follow work instructions and seek authorisation for variation to work practices.

Option 3: Routine (HEO level 3)

The incumbent engages in work that, in the main, is normally prescribed. They will operate within a framework of established procedures, workplace routines, deadlines and expectations.

Option 4: Routine to General (HEO level 4)

The incumbent engages in work that, in the main, is generally prescribed. They will operate within a framework of established procedures, workplace routines, deadlines and expectations. At times the incumbent will be required to work independently and without supervision.

Option 5: General (HEO level 5)

The incumbent will determine their own priorities and operate within the framework of established policies and work systems. Specific outcomes will be reviewed. The incumbent is expected to consult with their supervisor on higher level operational matters and on matters likely to impact on the standing of the work unit in the University.

Option 6: General to Broad (HEO level 6)

The incumbent will receive general to broad direction from their supervisor and, in the main, will determine their own priorities and work plans consistent with the objectives of the work unit. The incumbent is also expected to operate within a framework of established policies and work systems. Both specific and broad outcomes are reviewed.

Option 7: Broad (HEO levels 7 and 8)

The incumbent will receive broad direction from their supervisor and, in the main, will determine their own priorities and work plans consistent with the strategic objectives of the work unit. The incumbent is also expected to operate within a framework of broad operational policies and/or external requirements. Broad outcomes are reviewed. The incumbent is expected to consult with their supervisor on strategic and higher level operational matters and on matters likely to impact on the standing of the work unit in the University and/or wider community.

Option 8: Generally Unguided (HEO levels 9, 10 and above)

The incumbent is expected to determine their own work plans, priorities and courses of action and make proposals on these in the wider organisational context. They will operate within a framework of broad organisational policies and/or external requirements. Performance will be reviewed against strategies/targets.



