



Staff Planning

A pre-employment consideration that is important in creating a productive working environment

- What is staff planning
- How to write a staff plan
- Uses for staff planning
- Staff planning example
- Staff planning template

1.4 Job Analysis Part One – Staff Planning

Using a simple job analysis to plan how work will get done

Why this is important

Staff planning is the process of determining the work that has to be completed on the whole farm, deciding how many people it will take to do it and how the work will be divided between those people.

This process feeds back into the farm budget and business plan by way of optimising labour inputs and identifying the skills that need to be hired to meet business goals. This process also has implications for the personal goals of the farm owner if they are the employer. It is perhaps the one chance they will have to assert what they do and don't want to do with their time.

In managing employees, staff planning helps communicate the work required to a potential employee during recruitment and selection, and is the first step in managing the performance of an employee.

This fact sheet will cover:

- What is staff planning?
- How to write a staff plan
- Uses for staff planning
- Staff Planning example
- Staff Planning template

What is staff planning?

Staff planning is the process of deciding what has to be done on the farm and who is going to do it. The process will identify the number and type of jobs, and then give an overview of the responsibilities of each staff member; these are detailed in Job Analysis Part Two as tasks, duties and responsibilities.



How to write a staff plan

Use the following procedure to develop a simple staffing plan:

1. Brainstorm all the major work carried out on the farm and write it up in a list. Include the whole team in the brainstorming process to ensure all ideas are captured. Use the example provided as a starting point and cross off or add tasks to the list so it reflects your farm.
2. Start with the owner column. In the example the owner or primary manager on the farm has taken the opportunity to decide what it is they want to be doing. This is closely linked with the business planning process in terms of managing work-life balance and meeting lifestyle goals. The owner ticks off the parts of the work load they want to take responsibility for.
3. Divide the remainder of the work between other farm staff by ticking off tasks in one column per person on the farm. This may include unpaid family labour.

Be sure the responsibilities being assigned to each individual role are realistic. In the case of existing employees, this means they must have the skill sets necessary to complete the assigned responsibilities. In the case of a new job, there is more freedom to assign responsibilities as it is possible to go out and recruit someone to fill that role. Be careful to ensure a realistic mix of responsibilities. A further consideration is whether the job can be done in a reasonable number of hours.

Initially it may not be possible to assign all vacant responsibility areas to staff because of lack of skill or experience. This means the manager will have to do them until the appropriate skills can be hired or trained.

Optional extra

To clarify the role, responsibility levels can be added to the work plan. In the column labelled "Responsibility Level", mark in one of the following for each tick against a work task:

"R" "Responsible" ensures the work is carried out

"A" "Assists" in carrying out the required work

	Owner	Responsibility level	Manager	Responsibility level	Shepherd	Responsibility level
Mustering			p	A	p	R
Dagging					p	R
Fencing			p	A	p	R
Shearing			p	R		A
Docking	p	A	p	A	p	R
Machinery maintenance			p	R	p	A
Feeding out			p	R	p	A
Lambing/calving			p	A	p	R
Shifting stock			p	A	p	R
Administration	p	A	p	R		
Planning - feed management	p	R	p	A		
Planning - financial management	p	R				
Planning - work management	p	A	p	R		

Example only - not based on any real situation

What is the difference between reporting lines and responsibility levels?

Reporting lines denote who a person reports to or who is a person's line manager, e.g. Shepherd reports to the Farm Manager. Responsibility levels refer to who is responsible for ensuring that a range of tasks and duties is completed.

In the previous example, the Shepherd is primarily responsible for shifting stock and therefore must make sure the task is complete. The Farm Manager, through reporting structures, is responsible for making sure that the Shepherd is performing the task to the required standard.



Importance of adapting staff planning to suit you and your business

Business planning

Staff planning links to business planning by optimising staffing levels on a farm and identifying the skills required within the work team to carry out the business plan, thus exercising cost control over wages and salaries.

Splitting work within the team

The completed staffing plan can be shown to all the team and they can use that to indicate areas they would prefer to work in. This will help the manager to better understand their staff and help employees better understand the expectations of their manager. It will also give them a feeling of control over their work and a sense that management is communicating with them, both are key motivators for staff. Obviously not all wishes can be satisfied, but it will help to identify what motivates staff.

Wall chart

The staffing plan template can be used by itself on the wall of the farm office to communicate responsibility areas and to provide reminders of what each duty or responsibility area requires.

Orientation processes

The staffing plan can be used as part of the orientation process to help describe where people fit in the business and how they interact to carry out tasks.

Rostering jobs on farm

Use the staffing plan to rotate people through tasks – this increases their experience and skills in a range of areas on-farm. It also has the benefits of keeping their roles interesting and varied. This may also help to identify training requirements or areas of progression.

Restructuring the workforce

The tick box template can be used to experiment with other job structures and to think outside the square in how to manage the work on the farm. For example, a full time and two half time workers might be hired rather than two full time workers. Experimenting with different structures may also highlight opportunities to streamline roles and improve labour efficiency. This use of a staff plan may be particularly useful in situations where there is a shortage of quality applicants for a job. The selection process will identify a mismatch between the applicant's skills and the requirements of the job. At this point the employer may opt to restructure the job to suit the applicants available. Seek the advice of an employment law specialist before radical restructuring involving redundancy occurs.

Identifying future needs

The employer can use the staff planning template to plan how to structure their workforce as they step back from daily hands-on involvement in the farm. This may identify training needs for current staff, or the need to hire new skills to cover the deficit. This is also referred to as succession planning.

Identifying training needs

Where an employer identifies a shortfall in the ability of their staff to carry out a task, either immediately or in the future, this skill shortage can be developed in the workplace through appropriate training.

What are the benefits to me?

Taking time to work through the staff planning process will increase the likelihood of:

- Achieving optimal staffing levels
- Operating successful teams
- Operating successful performance management
- A successful recruitment and selection process
- Retaining staff
- Clearly communicating peoples roles and responsibilities.

What do I do next?

Try using the templates provided to work out a staff plan that will meet personal and business goals. This can then be discussed with all farm staff to see how it matches their current expectations and what they would like to be doing.

Useful references

Human Resources Kit for Dummies, Max Messmer

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1.5.1 Example – Staff Planning

Responsibility level: Indicate if the person is responsible for the task or will just assist by making an R or an A	Person 1: Farm Owner	Responsibility level	Person 2: Farm Manager	Responsibility level	Person 3: Head Shepherd	Responsibility level	Person 4:	Responsibility level
Feed Management								
Management policies	P	R						
Feed budgeting			P	R				
Pasture allocation			P	R	P	A		
Conserve supplement			P	R	P	A		
Feed crops								
Purchase of supplementary feed	P	R	P	A				
Fertiliser programme	P	R						
Regrassing	P	R	P	A				
Stock								
Stock policies	P	R						
Plan & implement animal health programme (drenches, fly treatments etc)	P	R	P	A	P	A		
Plan and implement docking programme			P	R	P	A		
Plan and implement scanning programme			P	R	P	A		
Plan and implement shearing programme			P	R	P	A		
Regularly weigh/condition score stock			P	R	P	A		
Record animal health treatments			P	R	P	A		
Treat/cull animals as required			P	R	P	A		
Plan and implement mating programme	P	R	P	A				
Manage sale of surplus stock	P	R						
Maintain stock records			P	R				
Asset Management								
Maintenance of all plant & machinery	P	R						
Daily checks on farm					P	R		
Building maintenance	P	R						
Fences/gates	P	R						
Water system			P	R				
Weeds			P	R				
Tracks	P	R						

	Person 1: Farm Owner	Responsibility level	Person 2: Farm Manager	Responsibility level	Person 3: Head Shepherd	Responsibility level	Person 4:	Responsibility level
Financial management								
Budgeting	P	R						
Monitor budgets	P	R						
Monthly reporting	P	R						
Approve purchase orders	P	R						
Account payments	P	R						
Invoicing	P	R						
Liaise with accountant	P	R						
GST returns	P	R						
Reporting								
Work recording			P	R	P	R		
Monthly reporting			P	R				
Staff								
Recruit & select staff			P	R				
Plan & allocate work within the team			P	R				
Manage staff performance			P	R				
Administration	P	R						
Casual staff			P	R	P	A		
General								
Health & Safety			P	R				
Environmental management & consent compliance	P	R						
Maintain a tidy workplace			P	A	P	R		
Liaise with contractors where necessary			P	R				
Liaise with farm advisor			P	R				

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1.5.2 Template – Staff Planning

Responsibility level: Indicate if the person is responsible for the task or will just assist by making an R or an A	Person 1:	Responsibility level	Person 2:	Responsibility level	Person 3:	Responsibility level	Person 4:	Responsibility level
Feed management								
Management policies								
Feed budgeting								
Pasture allocation								
Conserve supplement								
Feed crops								
Purchase of supplementary feed								
Fertiliser programme								
Regrassing								
Stock								
Stock policies								
Plan & implement animal health programme (drenches, fly treatments etc)								
Plan and implement docking programme								
Plan and implement scanning programme								
Plan and implement shearing programme								
Regularly weigh/condition score stock								
Record animal health treatments								
Treat/cull animals as required								
Plan and implement mating programme								
Manage sale of surplus stock								
Maintain stock records								
Asset management								
Maintenance of all plant & machinery								
Daily checks on farm								
Building maintenance								
Fences/gates								
Water system								
Weeds								
Tracks								

	Person 1:	Responsibility level	Person 2:	Responsibility level	Person 3:	Responsibility level	Person 4:	Responsibility level
Financial management								
Budgeting								
Monitor budgets								
Monthly reporting								
Approve purchase orders								
Account payments								
Invoicing								
Liaise with accountant								
GST returns								
Reporting								
Work recording								
Monthly reporting								
Staff								
Recruit & select staff								
Plan & allocate work within the team								
Manage staff performance								
Administration								
Casual staff								
General								
Health & safety								
Environmental management & consent compliance								
Maintain a tidy workplace								
Liaise with contractors where necessary								
Liaise with farm advisor								

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1.6 Job Analysis Part Two – Analysing Individual Roles

Using job analysis to identify tasks, duties and responsibilities involved in a job and the knowledge, skills and abilities required to perform it

Why this is important

This fact sheet uses the information gathered in the Staff Planning Fact Sheet 1.5, to further define an individual job in the farm system, and the requirements of the person who will fill that role.

Analysing an individual role in more depth will mean that the job can be more clearly explained to a potential employee during recruitment and selection. Research shows that the more clearly a job can be defined, the more likely it is that an employer will select an employee that is suited to the job.

Analysing individual roles is also a great tool for communicating expectations to staff and a good starting point for performance management.

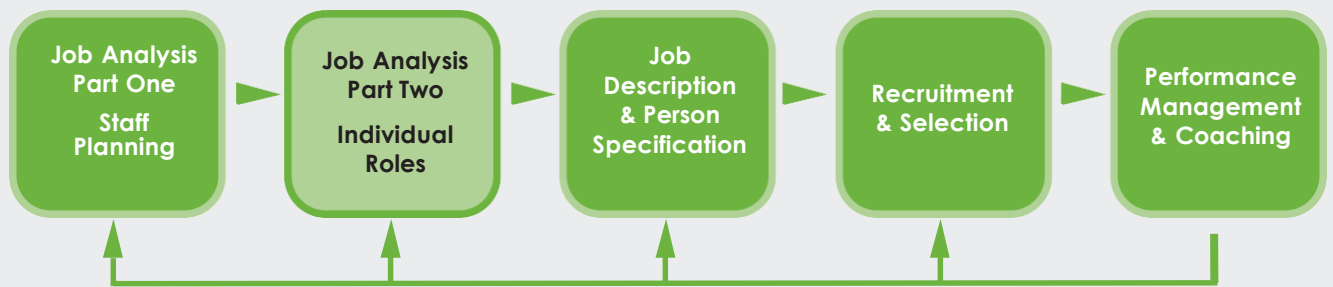
Please note that this part of the staff management toolkit is optional. The Staff Planning Fact Sheet provides an overall picture of staffing on the farm and working through the staff planning process gives enough information to be able to implement other parts of the staff management toolkit.

This fact sheet will cover:

- Where the analysis of individual job roles fits
- How to analyse an individual job role
- Differentiating between an element, task, duty and responsibility area
- Uses for job analysis at an individual level
- Reviewing current job descriptions
- Job Analysis examples
- Job Analysis templates

Where the analysis of individual job roles fits

Once a staffing plan has been completed, the employer will have an outline of each role and the responsibilities of that role. Using a more detailed job analysis expands on each role to look in more detail at the tasks involved and the attributes of the person who will be most suited to that role. This detail can then be used to make up a job description and person specification and is useful in performance management.



How to analyse an individual job role

The process is a systematic study of the tasks, duties and responsibilities that an employee would be required to perform in an individual job and the knowledge, skills and abilities they will require to carry out those duties. This description of the work and person is then used to make a job description and person specification.

To complete a job analysis use the following procedure:

1. Brainstorm all the tasks that the person in the role will have to carry out. This can be done in the following ways:
 - Get the current employee to help in the brainstorm
 - Get the current employee to keep a diary of work tasks
 - Spend time doing the job yourself
 - Use the manager of the position to brainstorm the role.
2. Use a form like the template/example provided and list all the tasks required in the role. Group them into duties and then responsibility areas. To reduce the amount of time it takes, you may only want to list duties or responsibility areas. However, the more detailed you are at this point the better, because it is important for an individual staff member to know what is expected. Personal attributes should be grouped together for use in the Person Specification 1.8.
3. Be sure that the responsibilities being assigned to each individual role are realistic in terms of time requirements and skill level required. This can be done in the following way:

Hours

Pick a week between lambing and weaning and assign the total time that will be spent on each task or group of tasks during that week. There will be areas that have no time against them because of seasonal issues. If the total hours add up to more than what is considered a reasonable week's work then some of the tasks or duties have to be reallocated to other staff members or reprioritised.

Note: Some form of basic record keeping around allocation of time to different tasks will help to refine time estimation.

Skill level

Assign a skill level required to each task or group of tasks by labelling each with "High", "Medium" or "Low" skill level required. If there is too much variation or too much "High" skill requirement for a junior position or vice versa for a senior role then the mix of tasks will have to be reassigned.

Optional extra

To clarify the role, responsibility levels can be added to the job analysis. In the column labelled "Responsibility Level", mark in one of the following for each tick against a work task:

"R" "Responsible" ensures the work is carried out

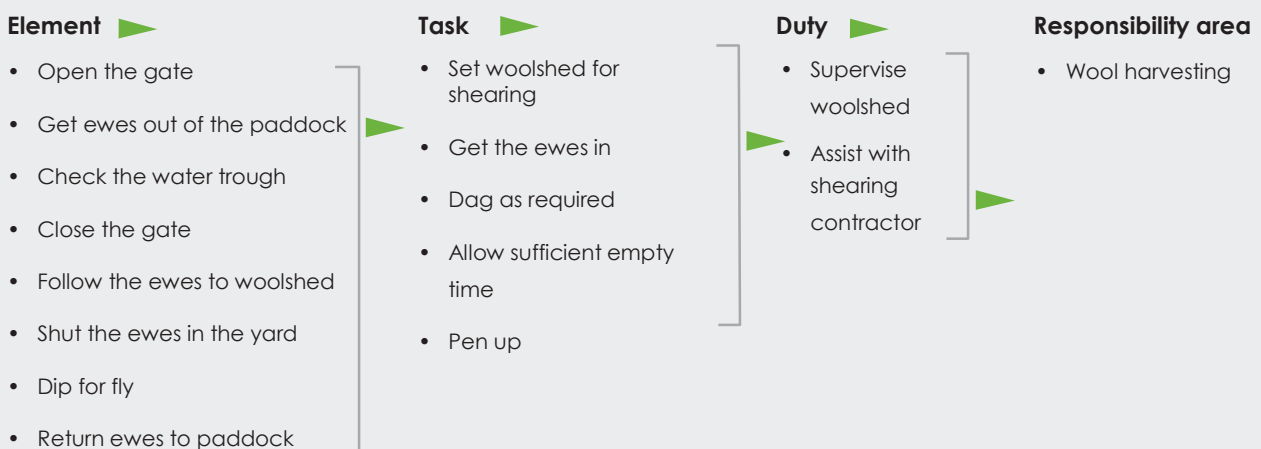
"A" "Assists" in carrying out the required work

Job Analysis - Head Shepherd	Hours/week	Responsibility Level	Skill Level
Lambing/calving			
Organise lambing equipment/ animal health requirements	0.5	R	Low
Do a lambing/calving beat daily	10	R	Low
Lamb ewes/calves as required, mark for culling	2	R	High
Mother on/rear orphan or mis-mothered lambs/calves	5	A	Medium
Catch, tag and record stud lambs/ calves	5	R	Medium
Move drystock (bulls, steers, late lambers)	5	R	High
Monitor feed levels	2	R	Medium
Weed control			

Differentiating between an element, task, duty, responsibility area

An element is the most basic component of work carried out on the farm. Elements are then grouped into tasks, which in turn can be grouped together to form duties and duties are grouped together to form responsibility areas.

In the example below the elements listed describes the process for preparing for wool harvesting. This is one of a group of tasks that describe the duty of assisting with shearing. All the elements, tasks and duties relate to the responsibility area of wool harvesting



Elements

Elements are the most basic components of work. When going through job analysis some elements will be identified, but they are of limited value because of the high level of detail and should be grouped up into tasks.

Elements are very procedure oriented and are useful in training and managing performance and developing procedure manuals. They should not be used in job descriptions unless it is to further clarify a task for a junior employee.

Tasks

Tasks are groups of elements that describe a part of a job on farm. Job analysis is likely to come up with a list of tasks which should be categorised together as duties.

Like elements, tasks are useful in performance management and coaching because of their high level of description. Tasks can also be used in job descriptions either on their own for junior employees, or to breakdown and further clarify duties or responsibility areas for more senior employees.

Duties

Duties are groups of tasks. Duties are commonly used in job descriptions to describe the work of junior staff or to breakdown and clarify responsibility areas for senior staff.

Responsibility areas

Responsibility areas are groups of duties that describe the different parts of the role. Job analysis is unlikely to identify responsibility areas but an effort should be made to group tasks and duties into responsibility areas so that the process can be used to check that all the responsibilities are covered between staff on farm.

Responsibility areas are used in the job descriptions of managers where it is prohibitive to list all the duties involved. However, it is appropriate to expand and list the duties under some responsibility areas in order to clarify the role.



Uses for job analysis at an individual level

Wall chart

The job analysis tables can be used by themselves on the wall of the farm office to communicate responsibility areas and to provide reminders of what each duty or responsibility area requires.

Procedures manuals

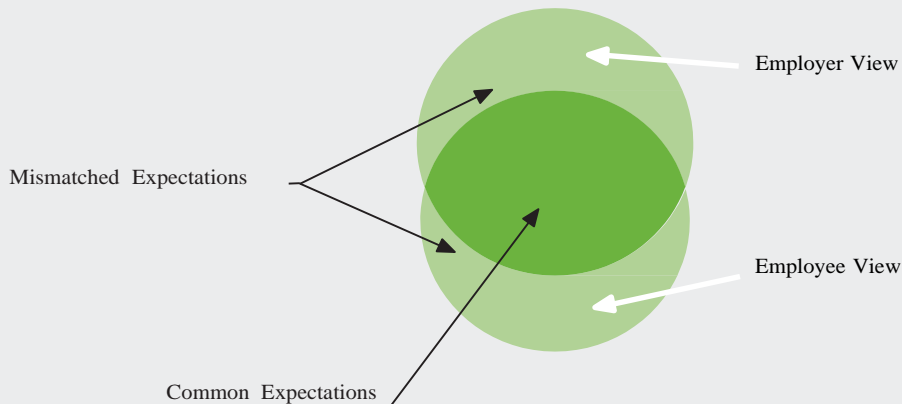
Where job analysis is taken down to the task level this can be easily converted into a procedures manual.

Identifying training needs

Where an employer identifies a shortfall in the ability of their staff to carry out a task either immediately or in the future, this identifies a need to gain the skill. This skill can then be brought into the workplace through appropriate training. Remember too, that for many jobs it is desirable to have a person who can fill about 60% of the role and plan to meet the other 40% with training over time.

Reviewing current job descriptions

It is recognised that generally an employer and employee have a 25% mismatch of their understanding of the responsibilities of a job because the role changes over time as people's confidence grows and they are given more responsibility. Repeating the job analysis process and reviewing the job description on an annual basis can be a valuable tool for managers to better understand their employee's roles. This review can help to motivate staff as managers recognise the employee's growing input into the business. It may also identify a need, such as for employees to be refocused on what is important in the role.



What are the benefits to me?

Taking time to analyse each role will allow a more accurate job description and person specification to be written, enabling more accurate communication of the job content and the desired outcomes to an employee. This will increase the likelihood of:

- Getting the right person into the job
- Getting the job done in line with expectations
- Operating successful performance management
- Retaining staff.

What do I do next?

- Evaluate the necessity of completing a job analysis process with your current staff. Indicators that this is needed are:
 - staff not doing what you expect of them
 - jobs not completed to a satisfactory standard
 - staff confused as to who is responsible for certain tasks
- Complete a job analysis for all positions as vacancies occur and positions are re-advertised.

Useful references

Human Resources Kit for Dummies, Max Messmer

There are a number of rural professionals who specialise in the area of recruitment and selection of farm staff. They will be able to assist in this process or carry out the process on your behalf.



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1.6.1 Example – Job Analysis of a Head Shepherd Role

Job Title: Head Shepherd

Person in Position: Jim

Key	Responsibility level	Skill level	Hours required
Responsibility level: Indicate if the person is responsible (R) for the task or will just assist (A) Skill level: Indicate whether a high (H), medium (M) or low (L) level of skill is required for task Hours required: Indicate how much time would be devoted to this task in a typical day to ascertain if the job is of reasonable size			
Shearing			6.5
Set up plant and woolshed	R	M	
Muster sheep	R	M	
Draft sheep, dag	R	M	
Check fly dip/drench apparatus	R	M	
Drenching	R	M	
Flydipping	R	L	
Identify, and record all shearing cuts/cut teats	R	M	
Ensure all wool sorted and pressed	R	L	
Ensure all bales are branded	R	M	
Put sheep away	A	M	
Order shearing supplies	A	L	
Approve purchase of shearing supplies			
Feed management			0.5
Pasture cover assessment			
Feed budgeting			
Pasture allocation	A	H	
Identify surplus for silage/hay	A	H	
Conserve supplement	A	H	
Book contractors			
Direct contractors			
Plan feed crops			
Order supplementary feed			
Approve purchase of supplementary feed			
Cull /sell stock as required			
Feed out supplement as required			
Identify paddocks for regrassing	A	M	
Approve regrassing			
Oversee regrassing process	A	M	

Key	Responsibility level	Skill level	Hours required
Responsibility level: Indicate if the person is responsible (R) for the task or will just assist (A) Skill level: Indicate whether a high (H), medium (M) or low (L) level of skill is required for task Hours required: Indicate how much time would be devoted to this task in a typical day to ascertain if the job is of reasonable size			
Docking			0
Check docking supplies	R	L	
Order docking supplies	A	M	
Approve purchase of docking supplies			
Set up docking pens	R	M	
Muster sheep	R	M	
Dock, castrate and vaccinate	R	H	
Tally up and record	R	L	
Put sheep away	R	M	
Animal health			0
Plan animal health programme. Issues to consider include:			
Cattle			
• Clostridial disease			
• BVD			
• Facial eczema			
• Leptospirosis			
• Bloat			
• Parasites eg worms & lice			
• Lameness			
Sheep			
• Clostridial disease			
• Toxoplasmosis			
• Facial eczema			
• Footrot			
• Parasites eg worms & lice			
• Flystrike			
• Campylobacter			
Order animal health products			
Approve purchase of animal health products			
Approve administration of drugs			
Inject metabolic solutions into vein			
Inject metabolic solutions under skin	A	M	
Inject antibiotics			
Administer drenches	A	M	
Record animal health treatment	A	M	

Key	Responsibility level	Skill level	Hours required
Responsibility level: Indicate if the person is responsible (R) for the task or will just assist (A) Skill level: Indicate whether a high (H), medium (M) or low (L) level of skill is required for task Hours required: Indicate how much time would be devoted to this task in a typical day to ascertain if the job is of reasonable size			
Mating			0
Nominate lambing/calving date			
Plan mating programme			
Order bulls/ram for mating			
Implement mating programme			
Rotate bulls/rams	A	M	
Record matings			
Order scanning technician			
Maintain scanning records	R	M	
Plant and machinery maintenance			0.25
Organise scheduled maintenance for all machinery			
Carry out daily checks on motorbikes	R	M	
General building maintenance	A	M	
Record keeping			0.25
Record daily actions on time sheet	R	L	
Record mating details	A	M	
Record animal health treatments	A	M	
Record stock weights	A	M	
Tractor work			0
Carry out checks on tractor before use	A	M	
Cultivation			
Pasture topping	A	M	
Pasture spraying	A	M	
Feeding out	A	M	
Regrassing/undersowing			
Stock work			2
Carry out all stock work, taking into account animal health guidelines	A	H	
Identify lambs and ewes in stud flock	A	M	
Weigh stock			
Move stock	A	M	
Administer drenches as required	A	M	
Identify culls			
Organise sale of surplus stock			
Maintain stock records	A	M	

Key	Responsibility level	Skill level	Hours required
<p>Responsibility level: Indicate if the person is responsible (R) for the task or will just assist (A)</p> <p>Skill level: Indicate whether a high (H), medium (M) or low (L) level of skill is required for task</p> <p>Hours required: Indicate how much time would be devoted to this task in a typical day to ascertain if the job is of reasonable size</p>			
Financial management			
Prepare annual budget			
Prepare cashflow budget			
Monitor budget against actual income and expenditure			
Provide monthly expenses			
Sign off purchase orders			
Pay accounts			
Generate invoices of sales			
Bank payments of invoices			
Prepare GST returns			
Prepare IRD wage returns			
Liaise with accountant in preparation of financial accounts			
Planning			0
Determine and implement farm management policies			
Determine and implement mating policies	A	H	
Monitor progress against actions	R	M	
Staff			0
Recruit and select appropriate staff			
Orientate new staff at beginning of employment. Consider:			
• Health & Safety			
• Work policies			
Set appropriate salaries			
Plan work within the team			
Update job descriptions for all staff annually			
Conduct performance reviews			
Train staff as needed			
Roster staff time off			
Maintain health and safety programme			
Allocate daily work to staff			
Organise relief staff	A	H	
Fill out own timesheet weekly	R	M	
Collect timesheets			
Maintain staff records			
Complete PAYE returns			

Key	Responsibility level	Skill Level:	Hours Required:
<p>Responsibility level: Indicate if the person is responsible (R) for the task or will just assist (A)</p> <p>Skill level: Indicate whether a high (H), medium (M) or low (L) level of skill is required for task</p> <p>Hours required: Indicate how much time would be devoted to this task in a typical day to ascertain if the job is of reasonable size</p>			
Farm maintenance			0.5
Spot spray weeds	A	M	
Maintain fences	A	M	
Patch holes in races/repair tracks	A	M	
Health and safety			0.25
Maintain health and safety plan in the workplace			
Identify hazards and report them to the manager	A	M	
Report injuries to Farm Manager			
Wear personal protective equipment	R	L	
General			0.25
Maintain a tidy work place	R	M	
Liaise with contractors where necessary			
Liaise with farm advisor			

1.6.2 Example – Job Analysis of a Farm Manager Role

Job Title: Farm Manager

Person in Position: Glenn

Key	Responsibility level	Skill level:	Hours required
Responsibility level: Indicate if the person is responsible (R) for the task or will just assist (A) Skill level: Indicate whether a high (H), medium (M) or low (L) level of skill is required for task Hours required: Indicate how much time would be devoted to this task in a typical day to ascertain if the job is of reasonable size			
Shearing			
Set up plant and woolshed			
Muster sheep			
Check drench			
Check fly dip			
Drenching			
Fly dipping			
Identify and record shearing cuts/cut teats			
Ensure all wool sorted and pressed	A	M	
Ensure all bales branded			
Put sheep away	R	M	
Order shearing supplies (packs, clips, emery papers)	R	M	
Approve purchase of shearing supplies	R	M	
Docking			
Check docking supplies			
Order docking supplies	R	M	
Approve purchase of docking supplies	R	M	
Set up docking pens			
Muster sheep			
Dock, castrate and vaccinate			
Put sheep away			
Tally up and record	R	M	
Feed Management			
Pasture cover assessment	R	H	
Feed budgeting	R	H	
Pasture allocation			
Identify surplus for silage/hay	R	H	
Conserve supplement			
Book contractors	R	M	
Direct contractors	R	M	

Responsibility level: Indicate if the person is responsible (R) for the task or will just assist (A) Skill level: Indicate whether a high (H), medium (M) or low (L) level of skill is required for task Hours required: Indicate how much time would be devoted to this task in a typical day to ascertain if the job is of reasonable size	Responsibility level	Skill Level:	Hours Required:
Plan feed crops	R	H	
Order supplementary feed	R	H	
Approve purchase of supplementary feed	R	H	
Cull/sell stock as required	R	H	
Feed out supplement as required			
Identify paddocks for regrassing	R	H	
Approve regrassing	R	H	
Oversee regrassing process	R	M	
Animal Health			
Plan animal health programme. Issues to consider include			
Cattle			
• BVD			
• Clostridial diseases			
• Leptospirosis			
• Bloat			
• Facial eczema			
• Parasites e.g. worms, lice			
• Lameness			
Sheep			
• Clostridial diseases			
• Toxoplasmosis			
• Campylobacter			
• Salmonella			
• Footrot			
• Facial eczema			
• Parasites e.g. worms, lice			
• Flystrike			
Order animal health products	R	L	
Approve purchase of animal health products	R	M	
Approve administration of drugs	R	H	
Inject metabolic solutions into vein			
Inject metabolic solutions under skin			
Inject antibiotics			
Record animal health treatments	R	M	
Administer anthelmintic drenches			
Calve cows and ewes in difficulty (record for culling)			
Identify/treat lame cattle and sheep			
Mating			
Nominate lambing/calving date	R	H	
Plan mating programme	R	H	
Implement mating programme	R	M	
Record matings			
Order bulls/rams for mating	R	H	

Responsibility level: Indicate if the person is responsible (R) for the task or will just assist (A) Skill level: Indicate whether a high (H), medium (M) or low (L) level of skill is required for task Hours required: Indicate how much time would be devoted to this task in a typical day to ascertain if the job is of reasonable size	Responsibility level	Skill Level:	Hours Required:
Plant & Machinery Maintenance			
Organise scheduled maintenance for all machinery	R	M	
Carry out daily checks on motorbikes			
General building maintenance	R	M	
Record Keeping			
Record daily actions on time sheet			
Record mating details	R	M	
Record animal health treatments	R	M	
Record stock weights	R	M	
Tractor Work			
Carry out checks on tractor before use	R	M	
Cultivation			
Pasture topping			
Pasture spraying			
Feeding out			
Regrassing/undersowing			
Financial Management			
Prepare annual budget	A	M	
Prepare cashflow budget	A	M	
Monitor budget against actual income and expenditure	A	M	
Provide monthly expenses			
Sign off purchase orders	R	M	
Pay accounts			
Generate invoices of sales			
Bank payments of invoices			
Prepare GST returns			
Prepare IRD wage returns			
Liaise with accountant in preparation of financial accounts	R	M	

Responsibility level: Indicate if the person is responsible (R) for the task or will just assist (A) Skill level: Indicate whether a high (H), medium (M) or low (L) level of skill is required for task Hours required: Indicate how much time would be devoted to this task in a typical day to ascertain if the job is of reasonable size	Responsibility level	Skill level	Hours required
Planning			0.25
Determine and implement farm management policies	R	M	
Determine and implement mating policies	A	M	
Monitor progress against action plans	R	H	
Reporting			0.25
Complete daily diary of work carried out	R	M	
Complete monthly report for owner	R	H	
Staff			
Recruit and select appropriate staff	R	H	
Orientate new staff at beginning of employment. Consider:	R	H	
• Health & safety	R	H	
• Work policies	R	H	
Set appropriate salaries	A	M	
Plan work within the team	R	H	
Update job descriptions for all staff annually	R	H	
Conduct performance reviews	R	H	
Train staff as needed	R	H	
Roster staff time off	R	M	
Maintain health and safety programme	R	H	
Allocate daily work to staff	R	H	
Organise relief staff	R	M	
Fill out own timesheet weekly	R	M	
Collect timesheets	R	M	
Maintain staff records	R	H	
Complete PAYE returns			
Farm Maintenance			0.5
Spot spray weeds	R	M	
Maintain fences	R	M	
Patch holes in races/repair tracks	R	M	
Maintain water supply	R	M	
Organise hedge cutting			

Responsibility level: Indicate if the person is responsible (R) for the task or will just assist (A) Skill level: Indicate whether a high (H), medium (M) or low (L) level of skill is required for task Hours required: Indicate how much time would be devoted to this task in a typical day to ascertain if the job is of reasonable size	Responsibility level	Skill level	Hours required
Nutrient Management			0.25
Carry out soil test	A	M	
Determine fertiliser programme	A	M	
Order fertiliser	A		
Apply fertiliser			
General			0.25
Ensure farm operates within the bounds of the RMA	A	H	
Maintain a tidy workplace	R	M	
Liaise with contractors where necessary	R	M	
Liaise with farm advisor	A	M	
Health and Safety			0.25
Maintain health and safety plan in workplace	R	H	
Identify hazards and report them to coordinator	R	H	
Report injuries to coordinator	R	M	
Report near misses to coordinator	R	M	
Provide personal protective equipment (PPE)	R	M	
Wear PPE	R	L	

1.6.3 Template – Job Analysis for Individual Roles

Job Title:

Person in Position:

Key	Responsibility level	Skill level	Hours required
Responsibility level: Indicate if the person is responsible (R) for the task or will just assist (A) Skill level: Indicate whether a high (H), medium (M) or low (L) level of skill is required for task Hours required: Indicate how much time would be devoted to this task in a typical day to ascertain if the job is of reasonable size			
Shearing			
Set up plant and woolshed			
Muster sheep			
Draft sheep, dag			
Check fly dip/drench apparatus			
Drenching			
Flydipping			
Identify, and record all shearing cuts/cut teats			
Ensure all wool sorted and pressed			
Ensure all bales are branded			
Put sheep away			
Order shearing supplies			
Approve purchase of shearing supplies			
Feed Management			
Pasture cover assessment			
Feed budgeting			
Pasture allocation			
Identify surplus for silage/hay			
Conserve supplement			
Book contractors			
Direct contractors			
Plan feed crops			
Order supplementary feed			
Approve purchase of supplementary feed			
Cull /sell stock as required			
Feed out supplement as required			
Identify paddocks for regassing			
Approve regassing			
Oversee regassing process			

Key	Responsibility level	Skill level	Hours required
Responsibility level: Indicate if the person is responsible (R) for the task or will just assist (A) Skill level: Indicate whether a high (H), medium (M) or low (L) level of skill is required for task Hours required: Indicate how much time would be devoted to this task in a typical day to ascertain if the job is of reasonable size			
Docking			
Check docking supplies			
Order docking supplies			
Approve purchase of docking supplies			
Set up docking pens			
Muster sheep			
Dock, castrate and vaccinate			
Tally up and record			
Put sheep away			
Animal Health			
Plan animal health programme. Issues to consider include:			
Cattle			
• Clostridial disease			
• BVD			
• Facial eczema			
• Leptospirosis			
• Bloat			
• Parasites eg worms & lice			
• Lameness			
Sheep			
• Clostridial disease			
• Toxoplasmosis			
• Facial eczema			
• Footrot			
• Parasites eg worms & lice			
• Flystrike			
• Campylobacter			
Order animal health products			
Approve purchase of animal health products			
Approve administration of drugs			
Inject metabolic solutions into vein			
Inject metabolic solutions under skin			
Inject antibiotics			
Administer drenches			
Record animal health treatment			

Key Responsibility level: Indicate if the person is responsible (R) for the task or will just assist (A) Skill level: Indicate whether a high (H), medium (M) or low (L) level of skill is required for task Hours required: Indicate how much time would be devoted to this task in a typical day to ascertain if the job is of reasonable size	Responsibility level	Skill level	Hours required
Mating			
Nominate lambing/calving date			
Plan mating programme			
Order bulls/ram for mating			
Implement mating programme			
Rotate bulls/rams			
Record matings			
Order scanning technician			
Maintain scanning records			
Plant and Machinery Maintenance			
Organise scheduled maintenance for all machinery			
Carry out daily checks on motorbikes			
General building maintenance			
Record Keeping			
Record daily actions on time sheet			
Record mating details			
Record animal health treatments			
Record stock weights			
Tractor Work			
Carry out checks on tractor before use			
Cultivation			
Pasture topping			
Pasture spraying			
Feeding out			
Regrassing/undersowing			
Stock Work			
Carry out all stock work, taking into account animal health guidelines			
Identify lambs and ewes in stud flock			
Weigh stock			
Move stock			
Administer drenches as required			
Identify culls			
Organise sale of surplus stock			
Maintain stock records			

Key	Responsibility level	Skill level	Hours required
Key Responsibility level: Indicate if the person is responsible (R) for the task or will just assist (A) Skill level: Indicate whether a high (H), medium (M) or low (L) level of skill is required for task Hours required: Indicate how much time would be devoted to this task in a typical day to ascertain if the job is of reasonable size			
Financial Management			
Prepare annual budget			
Prepare cashflow budget			
Monitor budget against actual income and expenditure			
Provide monthly expenses			
Sign off purchase orders			
Pay accounts			
Generate invoices of sales			
Bank payments of invoices			
Prepare GST returns			
Prepare IRD wage returns			
Liaise with accountant in preparation of financial accounts			
Planning			
Determine and implement farm management policies			
Determine and implement mating policies			
Monitor progress against actions			
Staff			
Recruit and select appropriate staff			
Orientate new staff at beginning of employment. Consider:			
• Health & Safety			
• Work policies			
Set appropriate salaries			
Plan work within the team			
Update job descriptions for all staff annually			
Conduct performance reviews			
Train staff as needed			
Roster staff time off			
Maintain health and safety programme			
Allocate daily work to staff			
Organise relief staff			
Fill out own timesheet weekly			
Collect timesheets			
Maintain staff records			
Complete PAYE returns			

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Key Responsibility level: Indicate if the person is responsible (R) for the task or will just assist (A) Skill level: Indicate whether a high (H), medium (M) or low (L) level of skill is required for task Hours required: Indicate how much time would be devoted to this task in a typical day to ascertain if the job is of reasonable size	Responsibility level	Skill Level:	Hours Required:
Farm maintenance			
Spot spray weeds			
Maintain fences			
Organise hedge cutting			
Patch holes in races/repair tracks			
Maintain water supply			
Nutrient Management			
Carry out soil test			
Determine fertiliser programme			
Order fertiliser			
Apply fertiliser			
Health and Safety			
Maintain health and safety plan in workplace			
Identify hazards and report them to the co-ordinator			
Report injuries to co-ordinator			
Provide personal protective equipememnt (PPE)			
Wear PPE			
General			
Ensure farm operates within the bounds of the RMA			
Maintain a tidy work place			
Liase with contractors where necessary			
Liase with farm advisor			
Total			

1.7 Job Descriptions

Communicating responsibilities, duties and tasks to employees

Why this is important

Under the Employment Relations Act (2000) ERA, every employer must provide the employee with an outline of the duties to be performed. A job description therefore enables the employer to fulfil this legal obligation.

It is important to clearly communicate to potential and current employees the tasks, duties and responsibilities their job encompasses and the standard to which the work must be completed. The advantages of providing a job description include:

- More appropriate applicants for a job
- Knowing what is expected of them is likely to help employees perform well
- Employees are easier to manage, resulting in less stress
- Employees tend to be more contented, because they are able to choose a job that suits them.

This fact sheet will cover:

- What is a job description?
- Uses of a job description
- How to write a job description
- How the job description links to performance management
- Job description examples
- Job description template

What is a job description?

The job description is a summary of the key responsibilities identified in the job analysis. Its aim is to communicate to applicants and existing staff members, as clearly as possible, the expectations of the employer in the job. The job description is not going to be exact, but should cover all main points and any differences to other similar jobs.

A job description links to the employment process as illustrated in the diagram below.



Uses of a job description

Job descriptions are a means of communicating the requirements of the role to job applicants and existing staff. Ideally, a job description should be given to applicants prior to an interview, or during the interview at the latest. This is important because it gives applicants the opportunity to decide for themselves if they are really suited to the job being offered. This self-selection helps ensure a more successful employment outcome. The job description is also used in the ongoing management of employees.



A job description can also be useful for:

- Developing competency-based interview questions
- Orientating the new employee to the job
- Identifying performance objectives and training requirements
- Terminations.

How to write a job description

There are many different ways to write a job description, provided the outcome allows quality communication between employer and employee. For this reason there are no “stock standard” job descriptions, because every role is different depending on the level of responsibilities. The good news is that they don’t have to be perfect to have value as a communication tool in employment relationships.

The basis for drawing up a job description is a job analysis (see Job Analysis 1.5 & 1.6 Fact Sheets) where the job is broken down into tasks, duties and responsibilities that the potential employee will need to be able to perform to carry out the role effectively. A job description is a factual statement that covers the following:

- Job title
- Purpose of the job
- Reporting lines
- Tasks, duties and responsibility areas
- Performance standards.

Including performance standards in a job description is a good idea (see Performance Management Fact Sheet 4.1), but the starting point of performance management is to write the job description itself.

Some people prefer to separate the job description from performance issues and have separate performance management documentation. The advantage of communicating performance standards in the job description is that it helps to further clarify expectations to the applicant. However, to help give the employee ownership of the performance objectives, they should be discussed and negotiated once the employee is on board.

A suggested example job description template is outlined below. The first part is self-explanatory and the section on responsibility areas is explained further below.

- Job title:** e.g. Head Shepherd
- Strategic business focus:** This should be a short statement reflecting farm goals. The required accountabilities will in part reflect this focus. For example:
 "Our goals for the farm over the next three years includes fairness, trust. To produce 400kg meat/ha which represents a 20% lift in current performance levels. To increase stock numbers to 10,000su. and to ensure all staff complete their ATV tractor and agri-chemicals training."
- Purpose of position:** A three-to-four sentence summary of the role. For example:
 "To manage the feeding and reproductive performance of all stock, carry out farm maintenance and to take full responsibility for the farm during the farm owner's absence."
- Reporting lines:** Who does the person report to and who reports to them? For example:
 "This position reports to the farm owner. The position has one junior shepherd as a direct report."
- Hours of work:** It is good practice to break this down on a seasonal basis. For example:
 Lambing/Calving - July to September: 60 hours/week
 Shearing - November to 1 February: 55 hours/week
 Summer: 45 hours/week
 Scanning/Winter: 35 hours/week
- Special requirements:** Any unique requirements of the position should be detailed here.
 Example: boarding another employee, providing a motorbike or attending a specialist course.

Responsibility areas, tasks and duties: (see below)

Accountabilities	'Responsible' or 'Assist'	Performance Measure
Accountabilities are the duties and responsibilities of the person in the job	Are they responsible for ensuring the work is carried out, or do they assist in carrying out the required work?	How does the person know they have been successful?

Completing responsibility areas, tasks and duties:

- List seven to ten duties or responsibilities as identified in the job analysis that will be key to success in the role. Each duty or responsibility may be expanded to improve understanding of the role (see Job Analysis 1.5 & 1.6 Fact Sheets). For example it is dangerous to assume that everyone in the industry knows what is meant by "doing a farm walk". For one person it may mean just having a look to see what's going on, while for another it will mean assessing pasture cover and completing a feed budget, so it is necessary to clarify what is meant in the accountability area.
- Develop performance measures that indicate the outcome or standard required for each accountability in the job description, where required. Where performance measures are included in the job description, it is not necessary to have a measure against every accountability. Select the most important drivers of the business (See Performance Management Fact Sheet).

More or less detail?

The level of detail to include in a job description is often debated. Job descriptions need to be comprehensive to have value in communicating expectations to an employee.

For a junior position a higher level of detail can be provided, as they will not have as many responsibilities so tasks or duties can be listed which are quite detailed.

Duty: Assist with managing sheep for shearing

Accountabilities	'Responsible' or 'Assist'	Performance Measure
• Pens in good condition	A	Pens are checked and all repairs made a least 3 days before shearing
• Muster mobs	R	All sheep are brought in, arrive to the shed on time and with their health and welfare considered at all times
• Carry out dagging	A	No shearer complaints
• Ensure sufficient entry time	R	No shearer complaints
• Pen up	A	No shearer complaints
• Count out	A	Accurate count
• Return sheep to paddock	R	All sheep are returned to their paddock within the expected timeframe

For a more senior person less breakdown of each responsibility is required, although key points should still be expanded where appropriate such as in the example below.

Responsibility area: Manager

Accountabilities	'Responsible' or 'Assist'	Performance measure
• Supervise and support other permanent and casual staff	R	Staff satisfaction survey results 4.0+
• Be on call to assist during lambing on rostered days off	R	Always available when needed
• In conjunction with Head Shepherd draw up a roster to ensure lambing work is fairly split	A	The roster is completed at least 3 days in advance with workload spread evenly amongst all staff

How a job description links to performance management

Job descriptions fit into the start of the performance management process because they are the first step in describing expectations to employees, whether or not they have performance measures in them. Because of this job descriptions should be reviewed annually with all staff.

Bear in mind that the job description deals with responsibilities, duties and tasks. There may be other measures stemming from the person specification (see Person Specification Fact Sheet 1.8) regarding attitudes and behaviours, which need to be incorporated in the performance management system.

What are the benefits to me?

Communicating the content of the job and the desired outcomes to an employee:

- Clarifies the employer's expectations of the job to employees
- Leads to better relationships between employers and employees
- Is the first step in managing employee performance.

What do I do next?

- Think about completing a job description with current staff. Indicators that this is needed are:
 - staff not doing what you expect of them
 - jobs not completed to a satisfactory standard
 - staff are confused as to who is responsible for certain tasks
- Remember, having a job description is a legal requirement as well as best practice
- Complete a job description for all positions as vacancies occur and the position is re-advertised
- Review existing job descriptions on an annual basis to ensure they reflect expectations or changes in responsibility.

Useful references

There are a number of rural professionals who specialise in the area of recruitment and selection of farm staff. They will be able to assist in this process or carry out the process on your behalf.

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1.7.1 Example – Job Description for Head Shepherd

Job title	Head Shepherd															
Strategic business focus (A short statement reflecting farm goals)	<ul style="list-style-type: none"> Operate an all-grass system Maximise production within seasonal constraints Control the cost of production to achieve a system that is sustainable under varying product returns To minimise amount of human work required to achieve the production and profit goals through allowing the stock to harvest the feed and only make supplement where quality is being compromised. 															
Purpose of position (A short summary of the role)	<ul style="list-style-type: none"> The position of Head Shepherd is designed to assist the Farm Manager in the day to day running of the farm This position has particular responsibility for stock work From time to time the Head Shepherd will be required to take charge of daily operations in the absence of the Farm Manager. 															
Reporting lines (Who does the person report to and who reports to them?)	<ul style="list-style-type: none"> The Head Shepherd reports to the Farm Manager The Head Shepherd will be required to supervise casual workers from time to time. 															
Hours of work	<table border="1"> <thead> <tr> <th>Period</th> <th>Approx dates & number of weeks</th> <th>Hours/week</th> </tr> </thead> <tbody> <tr> <td>Lambing</td> <td>1 August - 14 Sept 6 weeks</td> <td>60</td> </tr> <tr> <td>Docking to tugging</td> <td>15 Sep - 18 April 32 weeks</td> <td>50</td> </tr> <tr> <td>Scanning to lambing</td> <td>19 April - 1 Aug 14 weeks</td> <td>35</td> </tr> <tr> <td colspan="2">Average:</td> <td>45</td> </tr> </tbody> </table>	Period	Approx dates & number of weeks	Hours/week	Lambing	1 August - 14 Sept 6 weeks	60	Docking to tugging	15 Sep - 18 April 32 weeks	50	Scanning to lambing	19 April - 1 Aug 14 weeks	35	Average:		45
Period	Approx dates & number of weeks	Hours/week														
Lambing	1 August - 14 Sept 6 weeks	60														
Docking to tugging	15 Sep - 18 April 32 weeks	50														
Scanning to lambing	19 April - 1 Aug 14 weeks	35														
Average:		45														
Special requirements (Any unique requirements of the job)	<ul style="list-style-type: none"> Must have a good team of dogs 															

Responsibility areas/tasks/duties	Level	Performance measure	Employee rating	Employer rating	Agreed rating	Additional comments
<p>Shearing</p> <ul style="list-style-type: none"> Set up woolshed for shearing and assist shearers to achieve the wool harvesting standards outlined in the farm policy manual Clean and maintain the woolshed plant and equipment to the standards outlined in the farm policy manual. 	A R					
<p>Stock</p> <ul style="list-style-type: none"> Plan and implement stock movements Plan and implement grazing rotation based on feed budgeting plan Undertake regular checks of stock to minimise losses and identify potential issues. 	R					
<p>Animal Health</p> <ul style="list-style-type: none"> Identify and treat stock according to the farm policy manual Keep records of all treatments administered Identify other animal health problems and report to the Farm Manager.. 	R					
<p>Machinery Maintenance</p> <ul style="list-style-type: none"> Undertake daily checks as outlined in the maintenance schedule Undertake monthly machinery checks as outlined in the maintenance schedule. 	R					
<p>Weeds</p> <ul style="list-style-type: none"> Undertake weed control as directed. 	A					

Key

Level: R = Responsible A = Assists

Rating: 1 2 3 4 5

 Unacceptable performance Acceptable performance Exceptional Performance

Refer to the Performance Management Fact Sheet 4.1 to find out how to use the rating scale



Training and development required

How can your manager help you to improve your job performance?

Amendments to be made to job description

What needs to be changed in the job description to more accurately reflect the work carried out in the job?

Any points of disagreement remaining after discussion?

Staff member to complete

Staff member's signature

Manager's signature

Date

Date

These job description examples and templates include columns pertaining to performance management. Not all job descriptions include performance management standards, however, including them from the start of the employment relationship can help to communicate performance expectations.

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1.7.2 Example – Job Description for a Farm Manager

Job title	Farm Manager															
Strategic business focus (A short statement reflecting farm goals)	<ul style="list-style-type: none"> Operate an all-grass system Maximise production within seasonal constraints Control the cost of production to achieve a system that is sustainable under varying product returns To minimise amount of human work required to achieve the production and profit goals through allowing the stock to harvest the feed and only make supplement where quality is being compromised. 															
Purpose of position (A short summary of the role)	<ul style="list-style-type: none"> The position of Farm Manager has full responsibility for the day to day management of the farm including stock, resources and staff, and to achieve the production and performance goals for the property. To effect the day-to-day management of "Top Farm" in consultation with the owner. This includes responsibility for coordinating feeding of stock and directing staff to achieve the goals of the farm. 															
Reporting lines (Who does the person report to and who reports to them?)	<ul style="list-style-type: none"> The Farm Manager reports to the Farm Owner All other farm staff report to the Farm Manager. 															
Hours of work	<table border="1"> <thead> <tr> <th>Period</th> <th>Approx dates & number of weeks</th> <th>Hours/week</th> </tr> </thead> <tbody> <tr> <td>Lambing</td> <td>1 Aug-14 Sept 6 weeks</td> <td>55</td> </tr> <tr> <td>Docking to tupping</td> <td>15 Sept-18 Dec 32 weeks</td> <td>50</td> </tr> <tr> <td>Scanning to lambing</td> <td>19 April-1 Aug 14 weeks</td> <td>35</td> </tr> <tr> <td colspan="2">Average:</td> <td>50</td> </tr> </tbody> </table>	Period	Approx dates & number of weeks	Hours/week	Lambing	1 Aug-14 Sept 6 weeks	55	Docking to tupping	15 Sept-18 Dec 32 weeks	50	Scanning to lambing	19 April-1 Aug 14 weeks	35	Average:		50
Period	Approx dates & number of weeks	Hours/week														
Lambing	1 Aug-14 Sept 6 weeks	55														
Docking to tupping	15 Sept-18 Dec 32 weeks	50														
Scanning to lambing	19 April-1 Aug 14 weeks	35														
Average:		50														
Special requirements (Any unique requirements of the job)	<ul style="list-style-type: none"> Board the Shepherd Junior 															

Responsibility areas/tasks/duties	Level	Performance measure	Employee rating	Employer rating	Agreed rating	Additional comments
Stock <ul style="list-style-type: none"> Provide stock management tools eg scanning, feed budgeting Undertake periodic checks of stock condition to support Head Shepherd. 	R					
	A					
Feed management for all classes of stock <ul style="list-style-type: none"> Plan the feeding programme for the season Monitor the feed supply on farm at all times and compare against the season feed plan Manage deviations from the season feed plan in order to meet animal needs and farm profit goals. 	A					
Mating <ul style="list-style-type: none"> Plan the mating programme. 	R					
Reporting <p>Report to the farm owner monthly on:</p> <ul style="list-style-type: none"> Production Feed cover Repairs and maintenance Supplies required. 	R					

For details about using this part of the Job Description template see Performance Management - Section 3.3

Key
 Level: R = Responsible A = Assists
 Rating: 1 2 3 4 5
 Unacceptable performance Acceptable performance Exceptional Performance

Refer to the Performance Management Fact Sheet 4.1 to find out how to use the voting scale

Responsibility areas/tasks/duties	Level	Performance measure	Employee rating	Employer rating	Agreed rating	Additional comments
Asset management <ul style="list-style-type: none"> Water leaks identified and repaired Control of weeds. 	R					
Staff <ul style="list-style-type: none"> Recruit and select staff in consultation with the owner Plan and allocate work within the team Prepare an annual roster for time off and notify owner of relief staff requirements Complete performance reviews with staff. 	R					
General <ul style="list-style-type: none"> Ensure compliance among staff with health and safety policies Liaise with contractors where necessary Liaise with farm advisor to set farm policy and seasonal management policies. 	R					

Key

Level: R = Responsible A = Assists

Rating: 1 2 3 4 5
 Unacceptable performance Acceptable performance Exceptional Performance

Refer to the Performance Management Fact Sheet 4.1 to find out how to use the rating scale



Training and development required

How can your manager help you to improve your job performance?

Amendments to be made to job description

What needs to be changed in the job description to more accurately reflect the work carried out in the job?

Any points of disagreement remaining after discussion?

Staff member to complete

Staff member's signature

Manager's signature

Date

Date

These job description examples and templates include columns pertaining to performance management. Not all job descriptions include performance management standards, however, including them from the start of the employment relationship can help to communicate performance expectations.

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1.7.3 Template – Job Description

<p>Job title</p>	
<p>Strategic business focus (A short statement reflecting farm goals)</p>	
<p>Purpose of position (A short summary of the role)</p>	
<p>Reporting lines (Who does the person report to and who reports to them?)</p>	
<p>Hours of work</p>	
<p>Special requirements (Any unique requirements of the job)</p>	

Responsibility areas/tasks/duties	Level	Performance measure	Employee rating	Employer rating	Agreed rating	Additional comments

Key
 Level: R = Responsible A = Assists
 Rating: 1 2 3 4 5
 Unacceptable performance Acceptable performance Exceptional performance

Responsibility areas/tasks /duties	Level	Performance measure	Employee rating	Employer rating	Agreed rating	Additional comments

Key

Level: R = Responsible A = Assists

Rating: 1 2 3 4 5
 Unacceptable performance Acceptable performance Exceptional performance

Training and development required

How can your manager help you to improve your job performance?

Amendments to be made to job description

What needs to be changed in the job description to more accurately reflect the work carried out in the job?

Any points of disagreement remaining after discussion?

Staff member to complete

Staff member's signature

Manager's signature

Date

Date

These job description examples and templates include columns pertaining to performance management. Not all job descriptions include performance management standards, however, including them from the start of the employment relationship can help to communicate performance expectations.

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1.8 Person Specification

What knowledge, skills and abilities does a person require for the job?

Why this is important

It is important to clearly identify what sort of person is best suited to the role you have created, so that during the recruitment and selection process you will have a greater chance of objectively choosing the best applicant for your job. The person specification also allows an employer to identify values and traits that are important to themselves, and will therefore have an impact on creating a harmonious and effective working environment.

This fact sheet will cover:

- What is a person specification?
- Why is a person specification valuable?
- How to write a person specification
- Characteristics to be considered
- Linking a person specification to performance management
- Person specification examples
- Person specification template

What is a person specification?

A person specification analyses the knowledge, skills and abilities required to perform the tasks, duties and responsibilities identified in the job description. It is used to objectively measure the suitability of a job applicant during the recruitment and selection process (see Recruitment and Selection Fact Sheet 2.1).

The person specification is usually intended for those carrying out the selection process and is not disclosed to applicants, although in some cases, where part of the specification is crucial to the role, it may be appropriate to disclose this.

A person specification links into the employment process as illustrated in the diagram below.



Why is a person specification valuable?

A person specification helps:

- Identify the knowledge, skills and abilities required to do the job
- Provide objectivity in the selection process
- In writing advertisements
- Form the basis for subjective performance measures.

How to write a person specification

There are many ways to write a person specification, provided the outcome identifies the knowledge, skills and abilities required. The analysis process may identify many criteria to be included, otherwise the following process can be used:

1. Brainstorm all the characteristics of the person who would be most suited to fill the job available and divide them into essential and preferred characteristics. These are discussed below in more detail.
2. As with the job analysis, involve others in clarifying requirements:
 - Get the current employee to help in the brainstorming
 - Spend time doing the job yourself
 - Use the manager of the position to brainstorm the role.
3. Compile a person specification using the template at the end of this fact sheet or make your own.

Characteristic	Essential	Preferred
Physical		<ul style="list-style-type: none"> • Able to lift 70kg
Experience	<ul style="list-style-type: none"> • 1 year experience 	<ul style="list-style-type: none"> • 3 year experience
Attitude	<ul style="list-style-type: none"> • On time • Positive attitude • Gives things a go 	<ul style="list-style-type: none"> • Shows initiative
Qualifications	<ul style="list-style-type: none"> • Full and current driver's licence 	<ul style="list-style-type: none"> • NCEA • Heavy traffic licence
Fit with team	<ul style="list-style-type: none"> • Cleanliness • Flexibility 	<ul style="list-style-type: none"> • Ability to work with a team
Other	<ul style="list-style-type: none"> • Happy to board with owner • Own dogs 	

Essential versus preferred characteristics

Because it is unlikely any one person will entirely meet your specification, it is useful to differentiate between preferred and essential characteristics. A good question to ask is "Can this be taught?", and "How much will it cost?" If a skill can be taught at a reasonable cost then it is likely to be preferred rather than essential.

Other characteristics may also become preferred, rather than essential, if it is practicable to rearrange work methods. The example above, the characteristic of being able to lift ewes, may be overcome by having a tractor tray that can be dropped to the ground level so the ewes can be walked onto the tray.

Characteristics to be considered

There is a wide range of characteristics that may determine a person's suitability for a position. When writing the specification and considering characteristics, be open to change to avoid overlooking a good employee who doesn't quite fit the mould.

Attitude

Attitude is relatively difficult to measure, but it is still an important quality in an employee. A good idea is to ask previous employers about the applicant's enthusiasm, their punctuality, general outlook on life, whether they are a positive or negative person, etc. The interviewer's 'gut feel' during the interview is also valuable.

Remember, attitude is not about whether the applicant laughs at your jokes!

Fit with the team

How well is the applicant likely to fit in with the existing team in terms of attitude, habits and cleanliness? For example, have they worked in a team before and are they happy to take instructions?

Farming philosophies

Is the applicant a livestock or machinery-oriented person? Do they believe in high or low-input farming and will that influence the way they work?

Initiative

Can they identify work that needs to be carried out and do it without prompting?

Flexibility

How routine is the role? Would they be the sort of person who could manage changes in their daily work routine? Would they need to be able to cope with a lot of change, or is it a role with reasonable amount of routine work?

Time management

Does the role require the person to time-manage effectively?

Communication skills

Consider the level of written and oral reporting required.

Experience

What sort of work history should the person demonstrate? Is experience necessary at all or can the tasks be taught easily?

Qualifications

What, if any, qualifications are required to carry out the role?

Physical abilities

The job may have some physical demands that mean a certain level of fitness or strength is required. On this basis you may ask about health but otherwise it is discrimination (see Legal Responsibilities Fact Sheet 1.1).

Other considerations

There may be special requirements that don't fit into other headings: for example; the ability to travel away from home.

Discrimination in the person specification

The specification must not include anything that is not related to the job performance, as this is considered discrimination. For this reason personal characteristics such as marital status, gender, age, ethnicity or personality that cannot reasonably be expected to predict success in the job must not be included in a person specification.

Linking a person specification to performance management

A person specification is one place where an employer is likely to highlight some of the values of the organisation. These values should be turned into subjective performance measures and included in performance objectives (see Performance Management Fact Sheet). For example, the ability to work in a team is hard to measure objectively but may be one of the most important issues in terms of farm profitability.

Budget

When going through the person specification it pays to keep the budget in mind, as this will influence the type of person employed. For example, there is no point in creating a person specification asking for feed budgeting skills and people management experience if there is only \$25,000 in the budget for salary.

What are the benefits to me?

The benefits of preparing a person specification are:

- A better understanding of the role and the person required to fill it
- A tool that can help in drafting advertisements
- A tool that can help select the best person for the job.

What do I do next?

- Prepare person specifications for the job roles on the farm
- Use person specifications when recruiting and selecting staff.

Useful references

There are a number of rural professionals who specialise in the area of recruitment and selection of farm staff. They will be able to assist in this process or carry out the process on your behalf.

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1.8.1 Example – Person Specification for a Head Shepherd

Characteristic	Essential	Preferred
Physical	<ul style="list-style-type: none"> Physically fit Good health 	<ul style="list-style-type: none"> Able to lift heavy objects
Experience	<ul style="list-style-type: none"> Lambing ewes Calving cows Ability to: <ul style="list-style-type: none"> Vaccinate (sheep and cattle) Drench (sheep and cattle) Dip Muster Shear/dag/crutch Fence (electrical and conventional) Manage staff (casual) 	<ul style="list-style-type: none"> Minimum of 4 years previous sheep and beef farming experience Stud sheep recording Tractor driving Feed budgeting Knowledge of operation of machinery Knowledge of wool clip quality management Knowledge of safe machinery operation Excellent stock handling skills
Attitude	<ul style="list-style-type: none"> On time Positive Honest Strong work ethic Committed to role Punctual Give everything a try 	
Qualifications	<ul style="list-style-type: none"> School Certificate level maths or NCEA qualification equivalent Valid, full driver's licence 	<ul style="list-style-type: none"> National Certificate in Agriculture L3 Class 2 or 3 heavy transport licence
Fit with team	<ul style="list-style-type: none"> Able to work in a team Tidy around house High level of personal hygiene Can communicate with a wide range of people Able to accept differences 	<ul style="list-style-type: none"> Will socialise with team
Other	<ul style="list-style-type: none"> Prepared to travel and live away from home ten nights per year Prepared to share accommodation 	

1.8.2 Example – Person Specification for a Farm Manager

Characteristic	Essential	Preferred
Physical	<ul style="list-style-type: none"> Physically fit Good health 	<ul style="list-style-type: none"> Able to lift heavy objects
Experience	<ul style="list-style-type: none"> One season previous farm management experience, including control over pasture allocation, machinery maintenance Shows ability to think through and solve problems 	<ul style="list-style-type: none"> Previous staff management experience Experience of high stocking rate, all grass feeding systems Experience with monthly oral and written reporting to owners
Attitude	<ul style="list-style-type: none"> On time Positive Honest Strong work ethic Committed to role Give everything a try Punctual Committed to helping others succeed 	<ul style="list-style-type: none"> Goal to progress through the sheep and beef industry to ownership
Qualifications	<ul style="list-style-type: none"> National Diploma in Agribusiness Production, management and financial Management modules Valid, full driver's licence 	<ul style="list-style-type: none"> Diploma in Agriculture, or higher Class 2 or 3 heavy transport licence
Fit with team	<ul style="list-style-type: none"> Able to work in a team Tidy around house High level of personal hygiene Can communicate with a wide range of people Able to accept differences Skilled in interpersonal relationships and negotiation 	<ul style="list-style-type: none"> Facilitation skills to get the best from staff
Other	<ul style="list-style-type: none"> Prepared to travel and live away from home ten nights per year 	

1.8.3 Template – Person Specification

Characteristic	Essential	Preferred

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