Role Description Template & Tips

Create clarity, accountability, and meaning

Website
scarletspark.org

Instagram
@ScarletSpark1

Email
hi@scarletspark.org

Role description goals

Equip people with clarity to prioritize and improve their work and have a sense of meaning and security, while minimizing misalignment and making it possible to assess performance.

Three essential role description components:

1. Purpose:

Why does this role exist? (When people understand the core reason for their role, they make better decisions and feel more inspired by their work.) Examples:

- *Increase the practicality and accessibility of our resources for all users.*
- *Build internal systems that let our team to flourish.*

2. Outcomes:

How will you know if the role is fulfilling its purpose? (Aim to identify 2-6 measurable success criteria to help people prioritize work and assess their progress.) Examples:

- *Earn a monthly usefulness score of 4 out of 5 from at least 200 responders.*
- *Achieve a bi-annual employee engagement score of 80% with 75% participation.*

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3. Activities:

What are the key actions needed for this role to achieve its purpose? (Stick to the most important responsibilities and actions expected of the role.) Examples:

- *Produce monthly events that give advocates access to our resources.*
- *Identify and minimize obstacles to employee success.*

Additional Components

Commitments:

What norms or agreements do we have related to the role? Examples:

- *Respond to email within 48 hours on weekdays.*
- *Keep project status up-to-date on Asana.*

Authorities:

What are the decision-making rights of the role? Examples:

- *Budget decisions under $10,000 per year; event timing, design, and agenda*
- *Department strategy and tactics; department hiring; department role design*

Even / overs:

How should tensions between role responsibilities be resolved? Examples:

- *High attendance even over more events; teaching even over community-building*
- *Stable systems even over more systems; employee systems even over contractor systems*

Other components to consider:

Reporting structure, links to resources, approximate time allocation

Role description dos and don'ts

Dos	Don'ts
List essential responsibilities and results	List every possible activity and metric
Ensure the scope of work is reasonable	Include too much work or too many areas
Match metrics to the level of the role	Expect too much or too little accountability
Design the role based on org needs	Design the role around a specific person
Use clear, specific, and visible verbs	Use vague words like: oversee or consider
Discuss and refine the role together	Define it and assign it
Review and update the description often	Set it and forget it

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Role description pro-tips:

Role transparency: Make all your role descriptions easily accessible (e.g., in one Google Doc that's open to the entire company) to create shared context and accountability.

Onboarding: Incorporate a role description discussion into new hire onboarding with opportunities for new folks to ask questions and check their understanding.

Foundational role: Create a description of everyone's core role as a member of the company. Outline expectations, norms, commitments, and company values in action.

Inform hiring: Use your role descriptions to inform your external job postings and your candidate assessments. Work backwards by asking: "To achieve these outcomes, what skills and qualities would someone need? How can we test if they have these qualifications?"

Want more tools?

Join us for Office Hours and check out our Tool Library for more resources on leadership and org systems!

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Sample Role Description

Copy and edit the sample role description <u>linked here</u>.

Title	Events Manager
Purpose	Grow the number of advocates, donors, and supporters of our mission by producing inspiring and informative events.
Outcomes	• 80% of attendees agree they would recommend the event (minimum 50% survey participation rate) • 30% year over year increase in new attendees • 80% of coworkers agree they found it easy to collaborate (minimum 50% survey participation rate)
Activities	• Develop a strategy and plan for each event • Research, select, and secure event venues, vendors, and speakers • Create and share an event agenda and highlights with Marketing • Provide information and training to all event staff and volunteers • Project manage production to ensure each event is a success • Gather and use stakeholders feedback (e.g., attendees, partners)
Even/Overs	• Attendee learning and inspiration even over community building • Number of attendees per year even over number of events • Attract new attendees even over recurring attendees
Authorities	• Approve all financial decisions that fit the per-event budget (contact Finance to recommend budget changes) • Decide on venues, venders, speakers, and event programming • Consult on event dates and marketing (Marketing approves)

About Scarlet Spark

Scarlet Spark is a nonprofit dedicated to the people side of the animal protection movement. We offer evidence-based training, consulting, and coaching focused on improving organizational culture, leadership, performance, engagement, retention, diversity, equity, inclusion, and overall impact.

Our goal is to help build workplaces that lead all animals to flourish, humans included.

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