



HERA

Guidance to role holders

To enable role holders prepare for
a meeting with a Role Analyst

Higher Education Role Analysis

© ECC Ltd August 2002

WHAT IS HERA

HERA is a tool used to analyse roles found in Higher Education. It creates role descriptions and profiles to support recruitment, selection and promotion, training and development needs analysis and career planning. It also produces a total points score to assess the relative value of the roles in a consistent and equitable manner. This score can be used to assign roles to grades or bands in a salary structure.

It is made up of fourteen elements which reflect the values of higher education and the aspects of roles seen as the most important. Each element has a series of questions which draw out evidence of what is required by role holders.

Guidance for Role Holders

This document is to help you prepare for a meeting during which your role will be analysed by a trained analyst. The following pages contain descriptions of the elements and an outline of the areas to be covered during the meeting.

You will also find some prompt questions to help you think about your role in HERA terms. You may wish to make some notes in the spaces provided of examples of what you do and how you do it. Please use additional pages if there is not enough space for you. Some of the questions may seem obvious, but they are there to ensure that you cover all aspects of your role so the analyst understands it in detail.

Remember the main *requirements* of your role will be analysed, not activities or responsibilities you have become involved in for personal interest. You should try to think of activities and responsibilities that are typical of your role, not just the most recent, rare or extreme ones. You should try to use different examples for each element but, if you cannot think of another example, your manager may be able to help.

You may also wish to discuss what you have written with your manager or another person to make sure that the examples you have noted best reflect your role. This is entirely optional but preparation will speed up the meeting. You may also find it helpful to discuss what to expect with your staff representative or, if you are a member of a Trade Union, the union representative.

During the meeting, you will be asked to outline the purpose and main parts of your role. Your job description (if you have one) and a simple diagram showing your key relationships will also help the analyst understand your role and how it fits with others.

You will then be taken through each element and will be asked to provide evidence of the skills you use, the activities you engage in and responsibilities you hold. It would be helpful if you could think about the main or most important aspect for each element. The analyst will make notes of the evidence you give during the meeting.

After the meeting, your manager, or someone who knows your role well and has the necessary authority to do so, will confirm the information you have given. If there is any difference, this will be discussed with you so that, at the end, an accurate and full outline of your role can be compiled. Once the profile of the role has been drawn up you will be given feedback and answers to questions you may have.

If you have any questions before the meeting, please do not hesitate to contact the analyst.

1 Communication.

This element covers communication - be it through oral, written, electronic or visual means - in both informal and formal situations. Signing, using hand signals or using other means of communication with people with disabilities are also included. Communication includes the need to convey basic factual information clearly and accurately, conveying information in the most appropriate format and explaining complex or detailed specialist information.

Oral Communication:

This first part is about oral communication and includes situations in which you may need to give or receive information by speaking and listening.

Examples might include giving directions to students to help them find their way around the institution, answering telephone enquiries, giving presentations, attending or chairing meetings or engaging in negotiations.

You may find it helpful to consider:

- Who do you talk to as part of your role?
- What type of information you exchange, i.e. what do you talk about?
- Why do you need to exchange this information?
- How do you decide what to say and when to say it?

Written Communication:

The second part covers the need to communicate in writing or through electronic media such as e-mail, as well as the need to use visual media such as film or slides. Examples might include responding to requests for information from the public, drafting internal letters about meetings, or writing a paper for publication.

You may find it helpful to think about:

- Who do you write to?
- What do you write about?
- Why do you need to send this information?
- How do you decide what to write?
- How do you structure the information?

2 Teamwork and Motivation:

This set of questions is about team work and team leadership. A team is defined as a number of people who work together to achieve a common purpose. This could include internal or external teams, teams which are fixed or those that change.

Examples might include departmental, research, course development or project teams, teams involving students or people outside the institution (but not networks).

The role you hold in the team may include contributing as an active member, motivating others in the team or providing leadership and direction for the team.

You may find it helpful to think about:

- In which teams are you mainly involved?
- What is the function of these teams and what are they working to achieve?
- Who is in the team and what is your main role?
- Who identified the need for the team and set it up?
- Who is responsible for setting the direction of the work of the team?
- How are team members encouraged and motivated?

3 Liaison and Networking:

These questions cover occasions when you are required to liaise with others both within and outside the institution and create networks of useful contacts. They also explore the reasons for doing this. They may include passing on information promptly to colleagues, ensuring mutual exchange of information, influencing developments through one's contacts or building an external reputation.

You may find it useful to think about:

- Who do you liaise with and why?
- Why is it important and how often does it happen?
- What information are you typically passing on or receiving?
- What networks (if any) do you belong to and why?
- What is the purpose of the network and what is your role in the network?
- What would happen if you were not part of this network?

4. Service Delivery:

These questions cover the help, assistance and services you are required to give to students, visitors, members of staff and other users of the institution. This may include reacting to requests for information or advice, actively offering or promoting the services of the institution to others and setting the overall standards of service offered.

You may find it helpful to think about:

- What service do you provide and to whom?
- Do you usually actively offer the service or do your customers come to you?
- Is there a standard service which is the same for all customers?
- How do you find out what the customer wants?
- Who sets the overall standards and decides which services will be offered?

5 Decision Making Processes and Outcomes:

This set of questions covers the impact of decisions which impact on your work or team, those which impact across the institution or those which may have significant impact in the longer term within or outside the institution. It is assumed that you make the best decision in the circumstances, rather than considering what might happen if you made the wrong or a poor decision.

You might want to consider:

- How are decisions made and who makes them?
- What authority do you have to make decisions without the agreement of others?
- How do you take typical decisions and what are the results of making them?
- Who else is involved in making your decisions and what is their contribution?
- How regularly do you make these types of decisions?
- Who or what do they impact and over what timescale?

6. Planning and Organising Resources:

These questions are about organising, prioritising and planning time and resources, be they human, physical or financial. This may include planning and organising your own work or that of others, on day to day tasks or in projects. The questions explore operational planning and planning for coming years.

You may find it helpful to think about:

- What do you plan or organise?
- What resources are involved (e.g. people, equipment, money etc)?
- Who else is involved in creating or working on the plan?
- What is the time scale?
- How do you prioritise?
- What else do you have to take into account?
- Does anything impact on your plan?
- How is progress monitored?

7 Initiative and Problem Solving:

This set of questions is about identifying or developing options and selecting solutions to problems that typically occur in your role. This may include using your initiative to select from available options, resolving problems where an immediate solution may not be apparent, dealing with complex problems and anticipating problems which could have major repercussions.

You may find it helpful to think about:

- Examples of typical problems
- How often does this type of problem occur?
- What do you do about it?
- What options do you consider and how do you select the best course of action?
- Do you have to generate new or creative approaches to these types of problems?

8 Analysis and Research:

These questions cover the occasions when you are required to investigate issues, analyse information and carry out research. These may include following standard procedures to gather and analyse data, identifying and designing appropriate methods of research, collating and analysing a range of data from different sources and establishing new methods or models for research, or setting the context for research.

You may find it helpful to think about:

- What are you investigating or researching? Why?
- Who else is involved?
- What data do you have available or need to obtain?
- How do you obtain this data?
- How do you chose which method or approach to use?
- Who decides that the investigation or research is needed or would be beneficial?

9 Sensory and Physical Demands:

This set of questions covers the sensory and physical aspects of your role. These may include physical effort, co-ordination and dexterity, using aural evidence to assess next actions, applying skilled techniques and co-ordinating sensory information and using high levels of dexterity where precision or accuracy is essential.

It may be helpful to think about:

- Do you routinely use any tools or equipment?
- Are you required to lift, carry or handle large or heavy objects routinely?
- Is any assistance given by others or in the form of special equipment?
- Do you work in cramped, confined or difficult spaces or awkward positions?
- How long did it take you to learn or develop the skills needed to carry out your role?
- How did you learn or develop these skills?
- How long would it take to train someone else to do these aspects of the they did not have any experience?

10 Work Environment

These questions explore the impact the working environment has on you in your role and your ability to respond to and control that environment safely. This may include such things as the temperature, noise or fumes, the work position and working in an outdoor environment.

You may find it helpful to think about:

- Where do you work?
- What is the environment like?
- What type of work are you required to do there?
- Do you have to take any special measures to reduce the risk or control the environment before or while working there?
- Do you make use of any safety equipment, special clothing?
- Who is responsible for controlling the environment and making sure that others working there are not at risk?
- Who is responsible for the health and safety of people working there and decides that it is safe to work?
- How are these assessments made?

11 Pastoral Care and Welfare:

This set of questions is about your responsibilities for the welfare and well being of students and staff within the institution, in both informal and formal situations. You may need to be aware of the support services available, give supportive advice and guidance, refer others to someone better able to help them or counsel others on specific issues.

When considering what you are required to do, you may find it helpful to think about:

- Did the other person come to you for help?
- What are the typical issues or problems?
- What did you do and how did you decide to do it?
- Are you able to refer the other person to anyone else for help?
- Have you had any training in this aspect of your role?
- Is there any guidance material to help you?

12 Team Development:

This set of questions covers the development of the skills and knowledge of others in your work team. This may include the induction of new colleagues, coaching and appraising other team members whom you supervise, mentor or manage and giving guidance or advice to your peers or supervisor on specific aspects of work.

You may find it helpful to think about:

- What are you instructing, coaching or guiding others to do?
- How do you do this?
- Are there any materials to help you?
- Have you been trained in this aspect of your role?
- Who identifies the learning needs of the team members and decides whether any one individual should receive training or development?
- How do you assess whether learning has occurred?

13 Teaching and Learning Support:

These questions are about what you are required to do to teach or provide learning support to students and others who are not part of the work team. This may include providing instruction to those who are using a particular service or working in a particular area for the first time. You may be required to carry out standard training, create development opportunities or be involved in the assessment and teaching of students.

If you do not have responsibilities in these areas, please move onto the final set of questions. If you do carry out teaching or provide learning support, you might want to think about:

- What is your subject area or specialism?
- Who do you teach, develop or provide with academic support?
- Is anyone else involved in providing teaching, development or learning support in this subject area?
- Who decides on the content of the activity?
- Who designs and develops the course content?
- Who decides how the content is to be delivered?
- Who else within the institution is involved in teaching, training or learning support in the area?
- How do you assess the effectiveness of your teaching, training or support?

14 Knowledge and Experience:

The final set of questions explores the relevant knowledge and experience you are required to have to carry out your role. This may be having sufficient experience to carry out your basic, day to day responsibilities, having a breadth or depth of experience to act as a point of reference for others, or acting as a leading authority.

When considering the requirements of your role (as against your own personal knowledge and experience) it may be helpful to think about:

- What knowledge and experience, however gained, do you need to carry out your basic day to day responsibilities?
- How do you apply the knowledge and experience?
- How long it takes to obtain your knowledge and experience?
- How do you develop your knowledge and experience?
- How often do you need to up-date your knowledge and experience?
- Who routinely comes to you for advice or guidance?
- What level of knowledge and experience would be required of your replacement, were you to leave your role?

Are there any areas of your role that have not been explored by the questions? If so, please make notes of these areas and discuss with the analyst how best to make sure they are included in the assessment.

Please bring your notes with you to the meeting, along with any other information about your role, e.g. your job description and organisational structure chart, which you think will help the analyst obtain a full and detailed picture of what you are required to do.

Thank you