



# **HERA**

## **Role Holders Information Leaflet: Questions and Answers about the HERA Process**

**HIGHER EDUCATION ROLE ANALYSIS  
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### **What is HERA?**

HERA is a tool used to analyse roles found in Higher Education, this process is sometimes referred to as job evaluation. HERA involves the use of fourteen elements:

1. Communication
2. Teamwork and Motivation
3. Liaison and Networking
4. Service Delivery
5. Decision Making Processes and Outcomes
6. Planning and Organising Resources
7. Initiative and Problem Solving
8. Analysis and Research
9. Sensory and Physical Demands
10. Work Environment
11. Pastoral Care and Welfare
12. Team Development
13. Teaching and Learning Support
14. Knowledge and Experience

These elements have been designed so that roles can be analysed in such a way as to reflect the values of higher education and the aspects of those roles seen as most important.

### **What is HERA used for?**

HERA is used to create a role description or profile and a total points score for a role.

The profile can be used to support recruitment, selection, training and career development. The total points score

can be used to assign roles to grades or bands in a salary structure.

### **Why do roles need to be analysed using HERA?**

The **National Framework Agreement** requires all Higher Education Institutions to implement a new single pay spine and grading structure for all staff by August 2006.

To do this a series of representative roles within each institution has to be identified and analysed before the remaining roles can be allocated into the new pay and grading structure chosen for each institution.

### **What is the process likely to look like?**

The process usually consists of eight steps:

1. Identification of representative roles for analysis.
2. Identification and selection of Role Holders.
3. Briefings for key stakeholders.
4. Preparation of background information about the role.
5. Data collection or gathering information to act as evidence of role requirements.
6. Verification and confirmation of data.
7. Analysis and scoring of data.
8. Feedback provided to Role Holders.

### **Who is involved in the process?**

The key stakeholders in the process are:

- **Role Holder** – the person whose role is being evaluated.
- **Role Analyst** – a member of staff who has been trained to use HERA to explore the various aspects of the role, analyse the data and operate the HERA software to produce a total points score.
- **Verifier** – a person who has been identified as having sufficient working knowledge of the role that is being analysed to sign off data submitted by a Role Holder. The verifier is usually, but not always, a line manager.
- **Line Manager** – if not involved as a verifier, a line manager may be consulted by a Role Analyst or asked to provide help and support to a Role Holder.

### **How will my role be evaluated?**

If your role has been selected as one of the representative roles in your institution that is to be analysed using HERA you will first be invited to a briefing session so that you can learn more about the HERA process.

Data about your role will then be collected by any one of the following methods using HERA:

- **One-to-One Interview** – conducted by a trained Role Analyst. The Role Holder is usually asked to provide some written information in advance.
- **Group Interview** – a group of Role Holders who have the same or very similar roles and is conducted by a trained Role Analyst.

- **Written Record** – a written document completed by the Role Holder and explaining their role against the 14 HERA elements is submitted and then analysed by a Role Analyst.
- **Desk Top Analysis** – a role is identified and written information provided by a line manager. This is then analysed by a trained Role Analyst.

In each case the data to be analysed has to be **verified**. Once the verification process is complete, which involves agreeing and signing off the data with the Role Holder as well as the Verifier, the data will be analysed by the Role Analyst.

#### **What does the analysis entail?**

Data for each role is evaluated against 50 questions that relate to the 14 HERA elements. For each question there is a response and it is the job of the Role Analyst to assign a response to each question based only on the agreed and verified data.

The response for each question is then fed into the HERA software to obtain a total points score for each role analysed.

#### **What happens if there is insufficient evidence to score my role?**

The Role Analyst has been trained not to make assumptions or fill in gaps about roles. If vital data is missing the Role Analyst must always check back with the Role Holder and/or Line Manager.

**Do I have a choice about how my role is analysed?**

You have no choice about how your role is analysed. All roles are analysed using the same questions and responses and same software. However, you should be given the choice to opt for a different data collection method if you can give valid reasons why the method chosen does not suit you.

**Do I have a choice about who analyses my role?**

All Role Analysts have been thoroughly trained how to use HERA and there are quality and consistency checks that have been built into the HERA software to ensure a fair and equitable process. The software has the ability to pick up inconsistencies with responses to data. These inconsistencies could arise from the data supplied or how the Role Analyst interprets the data. In both cases the inconsistencies have to be investigated by checking back with the Role Holder or Line Manager if necessary.

**Do I have a choice about who verifies my role?**

If for any reason you have a valid concern about the choice of verifier for your role, you must contact the HERA Project Manager or relevant contact supplied at the briefing stage of the process.

**What happens if my role is not one of those selected for analysis?**

You will be given information via general bulletins about how the process is going to take place within your institution. If you have any questions about the process you must make contact using the details provided. Do not

be afraid to ask somebody if you have any concerns about the process and how it might affect you.

**How will my role be assimilated onto the new Pay and Grading Structure for the institution without an individual or group HERA analysis?**

This process is largely up to the discretion of each institution in consultation with the recognised Trade Unions. All roles not individually analysed using HERA to obtain a points score must be assimilated using an analytical method that relates information about roles to those identified and analysed as representative roles. A shortened version of the HERA process is most likely to be used for this purpose.

**How will I be notified about the new grade for my role?**

Again each institution can choose how to carry out this process. It is most likely that you will receive a letter from the HERA Project Manager, Personnel or Human Resources Division. The letter will contain information about your existing grade and pay details and new grade and pay details.

**Will there be an appeals process?**

There will be a method for you to appeal or query the decision about your role analysis and new grade. This process will most likely be known as a Review Process and you should be notified about this separately in one of the information bulletins if not at the briefing stage.

**For further information/advice contact:**

**HERA Project Manager:**

**Trade Union Representatives:**