GUIDANCE NOTES TO ACCOMPANY THE ROLE ANALYSIS QUESTIONNAIRE

HERA (Higher Education Role Analysis)

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Your HR Partner will also be able to advise you.
Introduction

The aim of this document is to guide you through the role analysis questionnaire. It takes you through the different elements that make up a role, with a description of each element and some examples.

Please take time to read through these guidance notes. There are no right or wrong answers within the questionnaire, we are just looking for examples of the typical things you do in your role in relation to each of the different elements. Please do not include examples of rare or one-off activities.

When giving examples and further details, try to avoid the use of words which indicate gender or first names. Try to use job titles or ‘they’ and ‘their’ instead.

HERA is made up of fourteen elements which reflect the values of higher education. Each element has a series of questions to gather evidence of what is required in your role. Although it may seem to be a lengthy questionnaire, we need to ask a lot of questions to gain a sufficient understanding of your role. You may find that not all sections are relevant to your role, but please do not hesitate to get in touch if you have any questions.

If you have any questions or experience any difficulty in completing this document, please do not hesitate to contact me. I can be contacted by telephone on extension 6049, or by e-mail at c.e.eckett@reading.ac.uk.

Overall purpose of the role

Briefly describe in two or three sentences the purpose of your role. This should give a broad summary of your role and enable the Role Analyst to understand the part you play in your team/department. This should not be a detailed list of duties and responsibilities.

Main responsibilities

Please list your main duties and responsibilities. Please ensure that the main duties/key responsibilities listed meet the following criteria:

- That they represent all the key areas of your job
- That each one is distinct from the rest, and describes a specific activity or responsibility
- That they relate specifically to your own job
- That they are in priority order, with the most important first.
**Organisation Chart**

The organisation chart will help the Role Analyst to understand how your role fits into the rest of your department and should include: your line manager, your peers/colleagues and your subordinates as appropriate. Please use job titles rather than individuals’ names.

The organisation chart should be signed off by your manager to confirm that it is an accurate reflection of where your role fits into the rest of the department.

**Communication**

This element covers all types of communication: verbal, written, electronic, visual, or speaking in a foreign language, in both informal and formal situations. Signing, Braille or using other means of communication with people with disabilities is also included. Communication is a two-way process involving listening and understanding and passing information on.

**Oral Communication**

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

Examples might include: giving directions, meeting and greeting people on reception, taking telephone messages, explaining processes and procedures, giving presentations, lecturing, presenting papers at a conference, demonstrating to students or staff how to use a piece of equipment, attending or chairing meetings.

You may find it helpful to consider:

- Who do you talk to as part of your role? (e.g. students, staff, external organisations, members of the public, committees, conference delegates)
- What do you talk about? (e.g. procedures, how to do things, your project or research, demonstrating an experiment or equipment, course options)
- Why do you need to exchange this information? (e.g. answering enquiries either over the telephone or face to face, seeking answers or clarification to progress your own work, presenting progress reports on projects or research, training or teaching.)
- How do you decide what to say and when to say it? (e.g. are you answering routine enquiries with standard answers, or do you have to think carefully about how you present the information? Are you trying to influence and negotiate with someone, or are you trying to explain complex information? Are you chairing a meeting?)
Written Communication

Written Communication looks at communicating in writing or through electronic media such as e-mail, as well as the need to use visual media such as film or PowerPoint.

Examples might include responding in writing to requests for information, taking minutes for meetings, writing e-mails, writing letters, writing a paper for publication, timetabling lectures or exams, writing policies or procedures, issuing contracts or invoices, preparing documentation for courses or the prospectus.

You may find it helpful to consider:

- Who do you write to? (e.g. students, staff, external organisations, funding agencies, management)
- What do you write about? (e.g. standard letters, contracts, invoices, financial reports, research papers, grant applications, minutes of meetings, arrangements for meetings or conferences, timetabling, reports, handbooks, module descriptions, standard forms)
- How do you decide what to write? (e.g. standard letters, draft more complex letters, structuring a management report, a policy or procedure)

Teamwork and Motivation

This section is about team work and team leadership.

A team is defined as a number of people (usually more than 2) who work together to achieve a common purpose.

This could include internal or external teams, teams that are fixed (e.g. a department) or those that change (e.g. project teams). The role you hold in the team may be 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?
Liaison and Networking

Liaison is making one-off contacts for a work-related reason.

A network is an interconnecting group of people, who exchange information, contacts and experience on a recurrent basis for professional purposes connected with the role. A network may be a group within the University spanning different schools or faculties; or external to the University including other universities, schools, colleges, local government, private sector organisations; or a professional group or society that you may belong to e.g. The British Psychological Society, the Royal Institute of Chartered Surveyors, the Institute of Learning and Teaching.

The reasons for liaising and networking may include 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?

Service Delivery

This section looks at the help, assistance and services you provide to others: students, staff or visitors to the University. 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.

The service you provide may be reactive responding to requests; or proactively offering or promoting the services of your department or the University; or your role might be more forward-looking anticipating services that may be required in the future, or 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?
Decision Making

This section looks at the judgements or decisions you are allowed, or expected to take in your job. You should give examples of decisions:

- You take independently
- You make jointly with your manager

For example:
- Deciding when to hold meetings
- Staff matters e.g. agreeing annual leave, deciding whether to instigate the disciplinary procedure, being a member of a recruitment panel and deciding whether to appoint a candidate
- Decisions on undergraduate applications such as eligibility to study a particular course
- Curriculum or strategy decisions
- Purchasing decisions e.g. stationery order for the office or department, authorised purchase card holder, buying non-routine items following Procurement guidelines, buying larger, expensive items, capital expenditure, going out to tender.
- If you are responsible for a budget, please indicate the size of the budget and what this is for e.g. conference budget, research budget, School/Department budget.

Please indicate whether your decisions have a minor, moderate or major impact.

There may also be occasions when you do not make the decision yourself, but provide information and advice to the person or group that will be responsible for making the 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?

Planning and Organising Resources

This section is about organising, prioritising and planning time and resources, be they human, physical or financial. This may include planning and organising your own work, that of others on day-to-day tasks or project planning. You might be involved in organising a research project or an event, you might be involved in strategic planning, planning a training course or a degree module or planning the budget.
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?

**Initiative and Problem Solving**

Within this section you are asked to give a feel for the problems you typically face in your role and an indication of how these problems are solved.

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.

Please give a couple of examples of problems that you typically encounter in your role, not the most dramatic or unusual problems. For example:

- Balancing departmental budget
- Dealing with student attendance problems or failure to submit coursework
- Instigating initial performance management or disciplinary procedures
- Devising new courses or programmes of study to attract students
- Identifying new sources of income and funding
- Handling customer complaints

*(Note: If the problems relate to the analytical or theoretical investigation of issues, your examples should be entered under the Analytical and Research Skills section.)*

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?
Analysis and Research

This section covers the occasions when you are required to investigate issues, analyse information and carry out research.

For example:

- conducting a stock check
- cashing up a till and making sure it balances
- gathering and compiling students’ exam marks, or financial information for budgets
- analysing trends in data
- developing questionnaires and survey methods
- internet, literature or database searches
- conducting experiments
- gathering information from different sources
- determining the direction of a research project.

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?

Sensory and Physical Demands

This element looks at the use of skills and physical effort e.g. technical drawing, operating machinery, concentration when monitoring experiments, handling animals. Coordination and dexterity will be important where precision and accuracy are required.

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 job if they did not have any experience?
Work Environment

This section looks at your working environment and whether you are required to take responsibility for your working conditions e.g. carrying out risk assessments, ensuring Health and Safety or COSHH regulations are adhered to.

Please do not include additional duties such as being a First Aider, or a Fire Warden if you have taken on these duties on a voluntary basis, rather than as a requirement of the role.

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?

Pastoral Care and Welfare

This set of questions is about your role responsibilities for the welfare and well being of students and staff within the institution, in both informal and formal situations. These may require you to:
- be aware of the support services available and refer others to them as appropriate
- give supportive advice and guidance
- counsel others on specific issues.

For example: you may have to show sensitivity to a colleague’s problems, provide advice and support to students with financial problems, counsel students or staff if they are suffering from stress or have emotional problems that are affecting their work or study, respect the confidentiality of those who have asked you for help.

There may be policies or procedures to help you e.g. Personnel policies on compassionate leave, harassment policy.

When considering what you are required to do, you may find it helpful to think about:
- Are you the first point of contact for welfare issues?
- 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?

Team Development

This section covers the development of the skills and knowledge of others in your work team. This may include the induction of new colleagues (at a local/departmental level NOT the induction run by CSTD), showing them the ropes, coaching and appraising other team members you supervise, mentor or manage, and giving guidance or advice to your peers on specific aspects of work.

Note: If you provide training for anyone outside your work team, this should be included under the following section (Teaching and Learning Support).

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?

Teaching and Learning Support

The previous section looked at providing coaching, training and development to others in your work team. In comparison, this section looks at providing teaching and learning support to people outside your work team such as, students, staff from other departments or faculties, external people.

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?
• 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?
Knowledge and Experience

This final section 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.

Please remember that this should describe the qualifications and experience required in order to perform the job at a satisfactory level, rather than a list of the qualifications you personally hold.

It may be helpful to think of the qualifications and experience you would look for if you were recruiting a new person to do the job.

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?

Any Additional Information

Please use this space if there is any other information you feel we need to have in order to understand your role.