

HERA FORM 2

(May 2019)

**HERA Job Role Assessment Form**

**Please speak to your HR Advisor before completing this form.**

**Please complete this form for any job role which requires a HERA Grading Assessment.**

**Please tick whether this is:**

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| **Tick** | **Type of Assessment** |
|  | **New role**, where the role is not an exact match to any existing role |
|  | **Changed role**, where permanent, significant changes have been made to an existing role.  Or where a role has been changed and the previous evaluation was more than 4 years ago |
|  | **Grading Review,** where an individual’s role has changed significantly and these changes are permanent, and the **Manager** is requesting a review of the grading of the role. |
|  | **Grading Review,** where an individual’s role has changed significantly and these changes are permanent, and the **roleholder** is requesting a review of the grading of their current role |

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| **Proposed Job Title:** |  |
| **Job Title & grade of role this role reports to?** |  |
| **Completed by (your name):** |  |

**Completing this form has 2 key benefits:**

1. **HERA**: It provides the evidence required to support a HERA Grading assessment and to determine whether this is a new role or can be matched to an existing role. This allows us to quickly turn the grading request around, maintaining consistency and fairness of the HERA process.
2. **Job Description**: This form will help you to really think about the role and draw out areas you perhaps hadn’t thought of for the Job Description. This will allow you to refine your Job Description so that it really fits the role.

**Please read the Instructions for Completion on P2 before completing this form.**

**If you have any questions, please contact:**

**Shelley Kelly, Senior HR Advisor, on Ext 3118 or** [**s.a.kelly@exeter.ac.uk**](mailto:s.a.kelly@exeter.ac.uk)

**Thank you**

**Instructions for completion**

* Please complete a Job Role Assessment Form for each individual **role**. If there are a number of the same role in the structure, you only need to complete one form.
* The form is structured on the 14 HERA elements. Please **read the description of each element** and complete all 14 sections as far as possible.
* Please provide **real examples which are specific to the question**– this is what will be used to evidence the HERA grading. If no examples exist as the role is new, please give examples which demonstrate the type of activity you would expect from this role.
* You do not need to provide extensive paragraphs of information – bullets are fine. Don’t feel you need to fill the boxes – the quality of the information is more important than the quantity.

**What we mean by:**

**Example** Something that is typical of the activity, something that has really happened, describing an instance that clearly illustrates the activity, the level of responsibility the individual has and the impact.

**Strategic** Relating to the identification of long-term or overall aims and objectives and the means of achieving them

**Strategic Planning** Strategic planning is an organisation's process of defining its strategy, or direction, and making decisions on allocating its resources to pursue this strategy

**Strategy** A plan of action designed to achieve a long-term or overall aim

**Accountable** Completely responsible for what they do and what is delivered. Obliged to report and justify their actions. Being accountable not only means being responsible for something but also ultimately being answerable for your actions.

**Responsible** Having an obligation to do something as part of one's job or role. Responsibility can be shared while accountability is unlikely to be.

**Analyse** Examine something methodically and in detail in order to explain and interpret it.

**Team Management** Administer and coordinate a group of individuals to perform a task. Involves teamwork, communication, objective setting and performance appraisals.

**Manage** Be in charge of something, dealing with it and taking it forward to completion. Responsible for controlling, organising and delivering something.

**Training** Process of learning the skills you need to do a particular job or activity. Organised activity aimed at imparting information and instruction to improve recipient’s performance or help to attain a qualification.

**Coaching** Support a learner in achieving a specific work related goal, generally over a short period of time.

**Mentoring** A long term process based on mutual trust and respect in which the mentor guides the mentee using their knowledge, skills and experience to progress their career.

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| 1. **Communications**   **This element covers communication of all kinds – verbal, written, electronic, visual, both formal and informal. Communication includes the need to convey basic factual information clearly and accurately, to consider how and when to communicate, and explaining complex or detailed, specialist information. We are seeking examples which demonstrate the breadth of communication required of the roleholder so please provide a range of verbal and written examples which are reflective of the role.** | | | | | |
| **1a**. Please provide **6 real examples** below which demonstrate **TYPICAL** communication within the role. | | | | | |
| **Who is being communicated with**?  e.g staff, students, external partners, visitors, government bodies, suppliers etc | **Method**  e.g. telephone, face to face, presentation, email, report, formal minutes, website, strategy documents, marketing materials etc | **What is communicated & Why?**  e.g. passing on instruction or information, persuading or influencing others, explaining requirements, briefing on a new procedure, legislation, statistics/ data etc | **Verbal or Written** | **Frequency**  e.g. daily, weekly, fortnightly, monthly, annually etc | **Complexity of information & requirement to consider the level of understanding of recipients**  e.g. academic research which may be conceptual, employment law, technical specifications |
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| **Written Communications – Additional questions** | |
| 1b. Are there **standard templates** to use when creating written communications? EG letters, forms |  |
| 1c. Is the **subject matter specialist**, covering legal or contractual matters, or contentious or sensitive?  If yes, can you explain what makes it so? |  |
| 1d. Does the roleholder write **complex strategy documents**, referencing internal and external sources of information?  If so, can you give me some examples of the reports? |  |
| 1e. Does the roleholder write and sign off **formal papers for VCEG or similar** governance groups?  If so, how frequently?  Can you give me a real example of this please? |  |

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| 1. **TEAMWORK AND MOTIVATION**   **A team is a group of people who work together to achieve a common purpose.**  **We are seeking to understand the roleholder’s contribution to their main team and any other teams they are part of.** | | | |
| 2a. **What team is the roleholder’s primary team and what is their role in the team?**  *e.g. Team Member, Team Leader/ Manager, supervisor* | |  | |
| 2b. **Who sets the levels of responsibilities, targets and objectives and allocates work within the roleholder’s team?** | |  | |
| 2c. **Is the roleholder part of any other team?**  Please give brief details. For example Project Team, research team, any matrix management arrangements, dotted line reporting arrangements | |  | |
| 2d. **Does the roleholder directly line manage other staff?**  *Line Management is when the roleholder has a formal management responsibility for other individuals, normally signified as being named as the Line Manager to the individual in Trent.* | |  | |
| 2e. **Does the roleholder have responsibility for managing more than one team or section?**  *i.e. they manage managers who manage other staff* | |  | |
| 2f. If the roleholder does not have direct line management responsibility, do they **supervise and/ or oversee the workflow** for any other team members?  If so, which roles, how often, what work they are supervising? | |  | |
| 2g. Does the roleholder “**matrix manage**”, i.e. manage the activity, motivation and outputs of staff who they do not directly line manage, through a project management role for example?  Can you describe what that looks like? | |  | |
| 1. **Liaison: We are seeking examples which demonstrate the range of contact the roleholder is required to make with people outside their immediate work team. This could be internal or external to the University.** | | | |
| 3a. Please provide **up to 6 REAL examples** below which demonstrate the **TYPICAL** liaison that the roleholder undertakes. Examples should be recent. | | | |
| **Who does the roleholder primarily make contact with?**  E.g. students, professional services staff, academic staff, PVCs, HODs, potential students, Student Guild, press & media, parents, external partners, funding bodies | **Purpose of the liaison.**  E.g. exchanging information, arranging logistics for a meeting/ event, influencing developments, ensuring effective working/ ensuring things go smoothly (operational), longer term relationship building to ensure effective working, strategic relationship management, promoting an area of work to potential customers | | **Frequency**  E.g. daily, weekly, fortnightly, monthly, annually |
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| **Participation**: **We are seeking examples of where the roleholder is required to take part in formal networks and groups outside their immediate team to be able to deliver their role successfully. This could be internal or external.**  Groups may be permanent or ad hoc. They could be virtual. The roleholder’s involvement should be agreed by the University and not just an activity taken on out of personal interest (e.g. consider whether a replacement would be expected to maintain this involvement if the roleholder left) It is important that you provide information about the purpose of the involvement in the network or group and what the outcomes are for the University. | | | | |
| 3b. Please provide **up to 6 REAL examples** which demonstrate **TYPICAL** participation in groups and networks | | | | |
| **Name of Network or Group**  e.g. Management or Senior Management Team, X Working Group or project work stream, Committee, Y Network, Z Staff Group, Executive Group, XYZ steering group, governing body | **Role in group**  e.g. Chair, regular participant, infrequent guest, present papers, organiser & attendee (logistics), minute taker | **Frequency**  e.g. weekly, monthly, annually | **Purpose & Impact**  e.g. to provide expertise, improve a process, deliver a project, provide data, develop new procedures or ways of working, collective decisions about long term strategy | **Internal/ External/ Both** |
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| **3c. Does the roleholder lead any formal internal or external groups or networks?**  For example regional or national groups in their field of expertise, sector wide groups which they have been asked to lead. Please give details, including whether this is a requirement of the role (ie to replace the roleholder this would be an ongoing requirement of the role as opposed to the roleholder) | |  | | |

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| 1. **SERVICE DELIVERY**   **We are seeking to understand the service provided by the roleholder to their customers: the help, assistance and services the role holder is required to give to students, visitors, members of staff and other users of the institution.**  **We are also seeking examples of any formal responsibilities for the ongoing development to ensure a fit for purpose service in the medium and long term and the setting of overall standards of the service.** | | | | | | | | | |
| **4a. What is the primary service(s) that the roleholder provides and who are the key customers?** | | |  | | | | | | |
| **4b. Is the service predominantly initiated by the roleholder (Proactive) or does the customer come generally to them (Reactive)? Please state the % time spent on each.** | | | **Proactive**  **Service initiated by the roleholder** | **%** | | **Reactive**  **Customers comes to them and they respond** | | **%** | |
| **4c. Does the role holder have responsibility for setting standards and performance targets for their own work function, a range of functions or a number of services?**  ***Please describe what these standards are*.** | | |  | | | | | | |
| **4d. How wide an impact across the university does the service and the standards have**?  *e.g. University wide, College or Service wide, team wide, all employees, all students etc* | | |  | | | | | | |
| **4e. To what extent is the service provided pre-determined by internal or external regulation or external requirements such as legislation?**  *e.g. employment law, GDPR, safeguarding, financial regulations, organisational and national teaching standards* | | |  | | | | | | |
| **4f. Beyond the general expectation of contributing to continuous improvement, is the roleholder responsible for identifying and implementing new services or to proactively anticipate the service requirement to meet future needs?** | | |  | | | | | | |
| 1. **DECISION MAKING PROCESSES AND OUTCOMES:**   **We are seeking to understand the decisions made by the roleholder as well as the impact of the decisions on the University. This might be on an individual, team, whole University or outside the University and over both the short and long term. 3 types of decision making are assessed: independent, collaborative and advising on the decisions of others.** | | | | | | | | |
| Please provide **2 REAL examples** below **for each type of decision** which demonstrate decision making which takes place on a **regular basis.** | | | | | | | | |
| **5a. Independent**  The decisions the roleholder will be expected to make independently, **without reference to anyone else** (if another person approves or endorses the roleholder’s decision then it is not made independently). Please note there may be very few, or no, independent decisions for some roles. Please consider how easily the decision can be undone and whether they are committing significant university resources with this independent decision. | | | | | | | | |
| **Type** | **What is the decision?** | **What’s the impact of the decision?** | | | **N/A - Independent** | | **Frequency** | |
| **Independent** |  |  | | |  | |
| **Independent** |  |  | | |  | |
| **5b. Jointly with others**  The decisions the roleholder will be expected to make in **collaboration with others** e.g. with a working group or team, by committee or management team, with their line manager or customers. Please consider whether these are generally about routine work matters or decisions made to start/stop/change a project/policy/procedure, whether they commit the University to areas of business or other significant long term decisions affecting large parts of the university | | | | | | | | |
| **Type** | **What is the decision?** | **What’s the impact of the decision?** | | | **Who do they make it with?** | | **Frequency** | |
| **Joint** |  |  | | |  | |  | |
| **Joint** |  |  | | |  | |  | |
| **5c. Providing advice or recommendations to contribute to the decision making of others**.  Please consider what expert advice is being provided, who they are giving advice to, how wide reaching the impacts of the decision being advised on are, whether it’s strategic or operational advice, what the purpose of the advice is. | | | | | | | | |
| **Type** | **What advice/ recommendation is the roleholder giving?** | **What decision does it help to be made?** | | | **Who are they advising?** | | **Frequency** | |
| **Advice/ recommendation** |  |  | | |  | |  | |
| **Advice/ Recommendation** |  |  | | |  | |  | |

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| 1. **PLANNING & ORGANISING RESOURCES**   **This covers organising, prioritising and planning resources – be they time, people, physical or financial resources. This may include the roleholder planning and organising their own work or that of others, on day to day tasks or in longer term projects. These questions explore operational and strategic planning. The planning may impact on the roleholder, a team, a Department or Section, a College or Service or the University as a whole. It could be short, medium and long term planning.** | | | | |
| **6a. What % of the roleholder’s planning is operational & how much is strategic?** | **Operational** | % | **Strategic** | % |
| **6b. What activities, projects, pieces of work, areas of activity, events, systems etc is the roleholder responsible for planning?** |  | | | |
| **6b. What does the roleholder plan on a short term basis (daily, weekly, monthly)?** |  | | | |
| **6c. What does the roleholder plan on an annual basis or longer?**  ***Please describe what they are planning how they go about it?***  ***What strategies does this feed into (if any)?*** |  | | | |
| **6d. Is the roleholder responsible for a project or defined area of work which would be considered to be a “resource”? E.g. a specific IT system, a database, a particular event or series of events, a building, a process such as the international admissions process, budget?** |  | | | |
| **6e. Does the roleholder manage a budget?**  **Please detail the size of the budget and what level of accountability they have for it - ie ultimately accountable, managing on a day to day basis/ monitoring on behalf of budget holder etc** |  | | | |

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| 1. **INITATIVE AND PROBLEM SOLVING**   **We are seeking to understand what the roleholder does in terms of:**   1. **Identifying problems** 2. **Developing options** 3. **Selecting solutions to problems or issues**   **The scope for the roleholder to use their initiative and be creative in their response to problems is also important. Problem solving is not always reactive; it can also be proactive. A “problem” might be to increase income from a certain area or activity. The roleholder may be required to come up with options, using creativity to devise varied solutions, approaching the problem from different perspectives.**  **Problems may:**   * **Be routine and resolved by predictable, repeatable actions or interventions, where the possible solutions may be limited** * **Be unique and require the roleholder to use their judgement, as well as knowledge and experience to resolve the problem using the most appropriate solution. They may be also be resolved with guidance from others** * **Be complex and involve multiple stakeholders, impacting significant and multiple parts of the University or have a significant reputational impact, They might involve conflicting and sensitive information** * **Be the primary purpose of the role or an infrequent requirement** | | | | |
| **7a. Please provide 4 REAL EXAMPLES which demonstrate the TYPICAL problems the roleholder has to deal with (not the most unusual or unique ones).** | | | | |
| **Describe the problem or scenario** | **What does the roleholder do?** | **Reactive or Proactive problem solving?** | **Who/ What does the problem and solution impact?** | **Frequency** |
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| **7b. Now describe the most complex problem the roleholder has to deal with. What does the roleholder have to do? How regularly would they have to deal with this?** | | | | |
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| **7c. How much scope is there for creativity and initiative in the role? If appropriate, describe what this looks like?** | | | | |
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| **8 ANALYSIS AND RESEARCH**  **We are seeking to understand where the roleholder is required to investigate issues, analyse information and carry out research. This could be quantitative or qualitative, or both.**  **Analysis may involve recognising and interpreting trends or patterns in data, or identifying or sourcing additional information. The roleholder may be required to identify an appropriate method of analysis. The analysis may be used in decision making by the individual or others. Sometimes research is required to inform problem solving, please ensure that you have used different examples in Section 7 Initiative and Problem Solving to avoid double counting.** | |
| **8a. Describe what data or information the roleholder collates or gathers?**  **How do they go about it?** |  |
| **8b. Describe what data the roleholder analyses and how they go about it?**  **How are the outcomes used and by whom?** |  |
| **8c. How much of the role is about data and analysis? How much time does the roleholder spend on this?** | **%** |
| **8d. Is the role holder required to undertake academic or other similar research?**  **If yes, please give brief details** |  |
| **8e. Is the role holder required to define new research questions, or originate new methodologies?** |  |
| **8f. How regular are the occasions when the investigation and analysis is especially complex e.g. complex ideas, concepts or extensive data from different perspectives; work out how best to apply existing methodologies according to the overall context, objectives and expectations; identify the relationship between complex, interdependent factors.**  **Please give brief details.** |  |
| **9 SENSORY AND PHYSICAL DEMANDS**  **If the only equipment the roleholder uses is a computer and other standard office equipment, you do not need to complete this section**.  **We are seeking to understand areas of physical effort, coordination and dexterity which are required for the role.** | | |
| **9a. What, tools or equipment, if any, are used as an essential part of the role?** |  | |
| **9b. What are the physical demands or specialist physical techniques or sensory skills, if any, required for the role?** |  | |
| **9c. How long would it take for a new roleholder to gain any specialist, physical or sensory skills?** |  | |

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| **10** **WORK ENVIRONMENT**  **If the roleholder is primarily office based and the environment is relatively stable and has little impact on the roleholder, presenting a low level of risk, then you only need to complete 10a and 10b** | | |
| **10a. What is the roleholder’s primary work location?**  **e.g. office, lecture theatre, workshop, vehicle, studio, etc** |  | |
| **10b. What are the hazards, if any, in the working environment?** |  |
| **10c. Is the roleholder required to take any special measures to reduce risks, wear specialist safety clothing or control the environment?**  **Please give details.** |  |
| **10d. Is the roleholder formally responsible for the health and safety of others working in a hazardous environment, e.g. carrying out risk/safety assessments?**  **Please give details** |  |

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| 1. **PASTORAL CARE & WELFARE**   **We are seeking to understand the roleholder’s responsibility for the welfare and wellbeing of staff and students. All employees are expected to show basic concern for the welfare and sensitivity of others. Line managers typically have responsibility for the welfare of their direct reports and the questions below do not refer to standard line management responsibilities which are scored elsewhere.**  **However there are some roles which have a more formal responsibility for this where the role deals with complex, severe and serious welfare issues, where individuals may be distressed, unwell or in need of immediate personal help. Roleholders would typically require specialist or professional qualifications to undertake these roles. Other roleholders may need to know how to signpost others to this specialist support.** | | | |
| **11a. Is roleholder approached by others for specialist welfare support (other than as a line manager)?**  **If No, please move on to 12. Team Development** |  | **Are these predominantly staff or students?** |  |
| **11b. What are the typical issues that the roleholder may be asked to support?** |  | | |
| **11c. What is the nature of the support the role holder would be expected to provide?** |  | | |
| **11d. How frequent is this?** |  | | |
| **11e. Is pastoral care, counselling, staff or student welfare or similar a significant part of the role which requires training to be able to deliver this effectively?**  **Please give details.** |  | | |
| **11f. What is the escalation point for this roleholder?** |  | | |

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| **12 TEAM DEVELOPMENT**  **We are seeking to understand the roleholder’s responsibility for the development of the skills and knowledge of other staff within their work area. This may be in the team the roleholder works closely and regularly with or ad hoc project teams. This could be coaching others, or giving guidance and feedback based on their knowledge and experience.** | | |
| **12a. Will the role holder be formally registered as the Induction Facilitator for the area, taking responsibility for IT set up, introduction to University policies and procedures through our standard induction process?**  **If yes, how frequently will there be new starters to induct?** | |  |
| **12b. Is the roleholder expected to provide coaching and mentoring of less experienced team members on a regular basis?**  **Please give brief details.** |  | |
| **12c. Is there a formal responsibility for the roleholder to deliver regular training or instruction and pass on specific work related skills and knowledge?**  **If yes, please provide details using the following:**   * **What is the training?** * **Is this in a formal or informal training setting?** * **Are they required to create the training materials?** * **Are they required to assess the learners’ progress?** * **How frequently does this take place?** |  | |
| **12d. Does the role holder undertake PDRs, formulate development plans and provide feedback on performance?**  **If yes, please indicate for how many staff.** | |  |

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| **13 TEACHING AND LEARNING SUPPORT**  **We are seeking to understand roleholder’s responsibility for providing teaching and learning support predominantly to students (who may also be staff), outside of the immediate work team, if any.**   * **They may be Professional Services staff who have a formal responsibility for delivering training on University wide matters such as H&S, risk management, GDPR for example.** * **The roleholder may be delivering in a formal setting to those who are working towards an accredited qualification.** * **The roleholder may also be creating and delivering courses through Learning & Development which are required for the development of career progression of staff e.g. Academic Development courses, ILM courses,** * **They may be academic staff who prepare and deliver lectures, seminars and tutorial to undergraduates, post graduates, summer school, distance learning students. There is likely to be an element of assessment of progression and feedback. They may also be involved in the development of the curriculum and the introduction of novel modes of delivery for example.** * **It may be delivered through a lecture, online course, through demonstrations or practical sessions.** * **This may be the core purpose of a role or it made be a small, infrequent part.** * **The roleholder may also be involved in creating online training courses and ensuring the content is current** | | | | | | |
| **13a. Please give up to 4 examples below** | | | | | | |
| **What is the training or learning support delivered?** | **Audience** | **Delivery method** | | **Frequency** | **Part of a formal qualification?**  **If yes, please give details** | **Roleholder designs, develops & reviews content?** |
|  |  |  | |  | YES/NO | YES/NO |
|  |  |  | |  | YES/NO | YES/NO |
|  |  |  | |  | YES/NO | YES/NO |
|  |  |  | |  | YES/NO | YES/NO |
| **Teaching and Learning Support Additional questions:** | | | | | | |
| **13b. How does the role holder assess the effectiveness of their teaching, training or support?**  **Please provide brief details.** | | |  | | | |
| **13c. Does the role holder have overall responsibility for an area of curriculum?**  **If yes, please give details.** | | |  | | | |
| **13d. How does the roleholder inform future teaching and learning support thinking and rigour? Are they accountable for the quality of the curriculum?**  **If so, please give details.** | | |  | | | |

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| **14 KNOWLEDGE AND EXPERIENCE**  **We are seeking to determine what specific knowledge and experience the roleholder must have in order to effectively undertake the role. We also consider how common these skills are within the organisation and how any specialist knowledge and skills are maintained.** | |
| **14a. Please state what minimum professional qualifications the person specification requires.** |  |
| **14b. What essential knowledge and skills are required for the role, including technical, professional and any specialist knowledge gained through or experience?** |  |
| **14c. How is a knowledge for the role maintained? E.g what CPD activity is undertaken?** |  |
| **14d. Is the roleholder expected to be an expert in their field? And explain why?**  **Is this within their team, Service, University, nationally for example?**  **Do other peers have similar levels of expertise or is the role unique in the University.** |  |
| **14e. Who/Where does the roleholder go to for advice?** |  |

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| **Please use the space below to highlight any other information which will help us to understand the role.** |

##### VERIFICATION to be completed if this is a request for a Grading Review on an individual’s role

**Role Holder (where this is a request for a Grading Review)**

I can confirm that the examples given above are an accurate reflection of my job at the University.

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| Signed |  |
| Date |  |

**Line Manager**

I can confirm that I have read the examples covered in this document and that these are an accurate reflection of the requirements for the role holder (as amended below) I can also confirm that the job description provided is current and accurate.

Line manager’s comments/amendments (if applicable):

|  |  |
| --- | --- |
| Name |  |
| Job Title |  |
| Signed |  |
| Date |  |

**Thank you for completing this form – the information provided will support the effective grading of the role.**

**What to do next**

1. Revisit the **Job Description** that you had written for this role in light of your comments in the form. Does it still accurately reflect the job that is required?
2. Revisit the **Person Specification** you had proposed for this role. Does it describe someone who could fulfil the requirements of the role as you have described it here and in the Job Description?
3. **Email: (1) Request for HERA Grading Assessment (HERA FORM 1)**

**(2) This form (HERA FORM 2)**

**(3) The final proposed JD for the role**

**(4) A structure chart showing this role in relation to others in the team**

**to Shelley Kelly, Senior HR Advisor (Reward and Strategic Projects) at** [**s.a.kelly@exeter.ac.uk**](mailto:s.a.kelly@exeter.ac.uk)

**What happens next:**

1. **The submission of the role for grading assessment will be acknowledged, with an indicative timescale for the assessment.**
2. **The information provided in the documents detailed above will be reviewed and assessed, based on established and rigorous protocols.**
3. **Additional information may need to be gathered from the Submitting Manager, or where appropriate the individual, to complete the assessment.**
4. **The assessment will allocate the role a grade which will then be verified by trained HR Colleagues.**
5. **The Submitting Manager, and where appropriate the individual, will be notified of the confirmed grade.**

**If you have any questions prior to sending, please contact Shelley Kelly on 01392 72(3118).**