

HERA

What is it and how does it work?

What is HERA?

HERA is a tool for analysing roles analytically which was specifically developed for the Higher Education sector. To date Aberystwyth University has used HERA to produce a score for roles in order to assess their relative value in an analytical, transparent, consistent and equitable manner. The information provided by the HERA process has underpinned the development of the new pay and grading structure. HERA can also be used to create role descriptions and profiles to support recruitment and selection, development needs analysis and career planning.

HERA analyses roles using 14 elements:

- Communication, both oral and written
- Teamwork and Motivation
- Liaison and Networking
- Service Delivery
- Decision Making, processes and outcomes
- Planning and Organising Resources
- Initiative and Problem Solving
- Analysis and Research
- Sensory and Physical Demands
- Work Environment
- Pastoral Care and Welfare
- Team Development
- Teaching and Learning Support
- Knowledge and Experience

In order to use the HERA system to analyse a role it is necessary for the role holder and their line manager to provide agreed evidence about what the role involves. This evidence will include actual examples of what the role holder does illustrating the type of tasks and responsibilities that could fit against each of the 14 elements. These examples should be selected from the tasks that the role holder is required to carry out normally and routinely. It is also possible to take into account examples of less usual tasks if details are given of how frequently they are required

When providing details of the role both line managers and role holders should also make a clear distinction between those tasks that are actually required in order to fulfil the duties of the role and those that the role holder may choose to do through personal interest or as a possible aid to their own development.

The sections below detail what each element covers, the scoring options and the kinds of questions that the evidence should seek to answer in order to enable scoring for each of the 14 elements.

The sections are numbered as they appear in the HERA scoring scheme.

1 COMMUNICATIONS

Two types of communication are analysed separately, oral communication and communication using writing, electronic or visual media.

Oral Communication:

This part of the element covers communication in both informal and formal situations. This may include the need to

- convey basic factual information clearly and accurately;
- convey information in the most appropriate format;
- explain complex or detailed specialist information.

“Signing” and hand signals for the hearing and speech impaired are included in this part of the element.

In order to analyse the role we need to know whether the role requires the role holder to communicate at one or more of the three levels below and how frequently there is a need to do this.

1. Communicate straightforward information in a clear and accurate manner.
2. Communicate information which needs careful explanation or interpretation to help others understand, taking into account what to communicate and how best to convey the information to others.
3. Communicate complex conceptual ideas or complex information which may be highly detailed, technical or specialist.

For each of these questions we need to understand whether the role requires the role holder to communicate at this level frequently, occasionally or not at all.

It should be noted that account is taken of the level of understanding of the person being communicated with, so that two people discussing a technical issue when both have a similar understanding of the terminology and issues would not be regarded as a complex communication, however explaining the same technical issue to a person or group that do not have the same level of understanding as the speaker would.

In order to give sufficient information to enable us to make a fair judgement the evidence provided should try and answer those of the following questions that are relevant to the role:

- Who does the role holder talk to as part of the role and how often?
- What type of information is communicated and in what circumstances?
- What is the purpose of the communication?
- How does the role holder decide what to say and when to say it?

Written or electronic communication and visual media:

This part of the element covers communication through written, electronic or visual means in both informal and formal situations. This may include the need to

- convey basic factual information clearly and accurately;
- convey information in the most appropriate format;
- explain complex or detailed specialist information.

In order to analyse the role we need to know whether the role requires the role holder to communicate at one or more of the three levels below and how frequently there is a need to do this

4. Communicate straightforward information in a clear and accurate manner.
5. Communicate information which needs careful explanation or interpretation to help others understand, taking into account what to communicate and how best to convey the information to others.
6. Communicate complex conceptual ideas or complex information which may be highly detailed, technical or specialist.

For each of these questions we need to understand whether the role requires the role holder to communicate at this level frequently, occasionally or not at all.

It should be noted that account is taken of the level of understanding of the person being communicated with, so that a technical document designed to be read by people who share a similar understand of the terminology and issues would not be regarded as complex communication, however writing about the same technical issue for people that do not have the same level of understanding as the writer would.

In order to give sufficient information to enable us to make a fair judgement the evidence provided should try and answer those of the following questions that are relevant to the role:

- Who does the role holder write to as part of the role and how often?
- What does the role holder write about?
- What is the purpose of the communication?
- How does the role holder decide what to write and when to write it?
- How does the role holder structure the information?

2 TEAMWORK AND MOTIVATION

This element covers team work and team leadership when working in both internal and external teams. This may include the need to

- contribute as an active member of the team;
- motivate others in the team;
- provide leadership and direction for the team.

There are five main levels to this element; these are described in the groups of statements below.

7. Participate in and deliver their contribution to a team.
8. Be supportive and encouraging of others in a team;
help to build co-operation by setting an example and showing a flexible approach to delivering team results;
contribute to building team morale as an active participant in the team.
9. Clarify the requirements;
agree clear task objectives;
organise and delegate work fairly according to individual abilities;
help the team focus their efforts on the task in hand and motivate individual team members.
10. Form and communicate a clear vision of what is to be achieved overall by a team;
encourage individuals to contribute to this common goal to the best of their ability;
create a sense of unity and common purpose.
11. Understand and manage the inter-relationship between different teams and their impact on the overall aims of the institution;
help to break down barriers between teams;
build beneficial working relationships across the teams.

From the evidence provided the role analyst will determine which of the groups of statements provides the best fit to the role; this is described as the main focus. It is also possible to give recognition to work that falls more into one of the higher levels, but which is not the main focus of the role and could be an important or occasional requirement.

For the purpose of this element a team is taken to mean a number of people (i.e. two or more) who work together to achieve a common purpose. Teams can be internal to the institution or external. They can be fixed (the role holder's normal working team) or drawn together for a purpose (a project team). Care will be needed to distinguish between a team and a network, which is defined under Liaison and Networking.

In order to give sufficient information to enable us to make a fair judgement the evidence provided should try and answer those of the following questions that are relevant to the role:

- Which team(s) is the role holder mainly involved with?
- What is the function of the team(s) and what are they working to achieve?
- Is the team ongoing or put together to deliver a specific project?
- Who is in the team and what is the role holder's main role in it?
- Who identified the need for the team and set it up?
- How does the team relate to other teams and is there a need to co-ordinate activities?
- How are the team members encouraged and motivated?

3 LIAISON AND NETWORKING

This element covers liaising with others both within and outside the institution and creating networks of useful contacts. This may include the need to

- pass on information promptly to colleagues;
- ensure mutual exchange of information;
- influence developments through one's contacts;
- build an external reputation.

To analyse this we need to know which of the four statements describe the types of liaison and networking the role holder is involved with as part of their role, and for each one that is applicable to assess which of the four purposes below best fits the reason for the involvement.

12. Carry out standard day to day liaison using existing procedures.
13. Participate in networks within the institution or externally.
14. Initiate, build or lead internal networks;
maintain relationships over time;
establish communication channels for self or others to use.
15. Initiate, develop or lead networks which are external to the institution.

To score the role we need to determine the purpose of the liaison or networking described in each of the levels above that apply to the role. This will be at one of the following levels:

- To pass on information promptly; keep people informed to ensure co-ordination of effort and that work is done effectively
- To ensure dissemination of information in the right format to the right people at the right time; build relationships and contacts to facilitate future exchange of information
- To influence events or decisions; undertake active collaboration to pursue a shared interest
- To build a reputation; market the institution; advance the profession or subject; influence external developments; generate benefits for the institution as a whole

It is important to differentiate between networks that the role requires the role holder to belong to and those he or she may choose to belong to out of personal interest. Only the former will be considered in the analysis and scoring of the role. For the purpose of this element liaison is the making of contacts for work-related reasons and a network is a group of people, possibly a committee, who exchange information and experience on a recurrent basis for professional purposes connected to the role. As stated under Teamwork and Motivation care may be needed to distinguish between a team and a network.

In order to give sufficient information to enable us to make a fair judgement the evidence provided should try and answer those of the following questions that are relevant to the role:

- Who does the role holder liaise with and why?
- Why is it important and how often does it happen?
- What information is the role holder typically passing on or receiving?
- What networks (if any) does the role holder belong to and what is the role holder's part in each?
- How would the role be affected if the role holder was not part of this network?
- Has the role holder been involved in setting up any networks and for what purpose?

4 SERVICE DELIVERY

This element covers the provision of help and assistance to a high standard of service to students, visitors, members of staff and other users of the institution. This may include the need to

- react to requests for information or advice;
- actively offer or promote the services of the institution to others;
- set the overall standards of service offered.

There are three main levels to this element; these are described in the groups of statements below.

16. Deal with internal or external contacts, who ask for service or require information; create a positive image of the institution by being responsive and prompt in responding to requests and referring the user to the right person if necessary; contact is usually initiated by the customer and typically involves routine tasks with set standards or procedures.
17. Deal with internal or external contacts where the service is usually initiated by the role holder, working within the institution's overall procedures or policies;
AND/OR
understand and explore customers' needs; adapt the service accordingly to ensure the usefulness or appropriateness and quality of service (content, time, accuracy, level of information, cost)
18. Set the overall standards for service across a function or area of the institution; monitor service levels; pre-empt changes in customers' needs and anticipate future requirements; maintain overall quality balancing different demands; ensure others have the support they need to provide quality service and fulfil their role

From the evidence provided the role analyst will determine which of the groups of statements provides the best fit to the role; this is described as the main focus. It is also possible to give recognition to work that falls more into one of the higher levels, but which is not the main focus of the role and could be an important or occasional requirement.

The term customer is used in its broadest sense to include anyone who uses or benefits from services provided by the role holder and includes other members of staff as well as students, visitors and clients.

In order to give sufficient information to enable us to make a fair judgement the evidence provided should try and answer those of the following questions that are relevant to the role:

- What service does the role holder provide and to whom?
- Does the role holder actively offer the service or does the customer go to them?
- Is there a standard of service which is the same for all customers?
- Does the role holder find out what the customer wants?
- Does the role holder investigate the needs of the customer and then change the service to meet their requirements?
- Who sets the overall standards for service and decides which services will be offered?
- Who monitors the services offered for effectiveness and appropriateness?

5 DECISION MAKING PROCESSES AND OUTCOMES

This element covers the impact of decisions within the institution and externally. This may include the need to take

- decisions which impact on the role holder's own work or team;
- decisions which impact across the institution;
- decisions which could have significant impact in the longer term within or outside the institution.

To analyse this element for each of the three decision-making processes described below we need to know the typical impact of the decisions the role holder is required to take as part of their role.

19. Take independent decisions.
20. Be party to some collaborative decisions; work with others to reach an optimum conclusion.
21. Provide advice or input to contribute to the decision making of others.

The type of decision has:

- a minor impact
- a moderate impact
- a significant impact
- a major impact

As a guide

- a minor impact would be when the decision affects the immediate work team and is made within a framework of guidance or procedure.
- a moderate impact would be when the decision affects the larger work team or a group of smaller teams, there may also be a framework of guidance or procedure available.
- a significant impact would typically be when the decision affects a department.
- a major impact would be when the decision affects the whole University.

These are guides as team and department sizes vary and this would be taken into account.

In order to give sufficient information to enable us to make a fair judgement the evidence provided should try and answer those of the following questions that are relevant to the role:

- How are decisions made and who makes them?
- What authority does the role holder have to make decisions without the agreement of others?
- Are decisions made within a framework of guidance or procedures?
- How does the role holder take typical decisions and what are the results of making them?
- Who else is involved in making the role holder's decisions and how does the role holder contribute?
- What decisions does the role holder contribute to and how is the final decision taken?
- What decisions does the role holder provide advice to the decision maker on?
- How regularly does the role holder make these types of decisions?
- Who or what do the decisions typically impact and over what timescale?

6 PLANNING AND ORGANISING RESOURCES

This element covers organising, prioritising and planning time and resources, be they human, physical or financial. This may include the need to

- plan and organise one's own work;
- plan work for others on day-to-day tasks or on projects;
- carry out operational planning;
- plan for coming years.

There are five main levels to this element; these are described in the groups of statements below.

22. Complete tasks to a given plan, with allocated resources.
23. Plan, prioritise and organise their own work or resources to achieve agreed objectives.
24. Plan, prioritise and organise the work or resources of self and others within own area on a daily, weekly or monthly basis;
plan and manage small projects, ensuring the effective use of resources;
receive information from and provide information to others to complete their planning;
monitor progress against the plan.
25. Take responsibility for the operational planning and organisation of larger projects or an area of work;
co-ordinate a number of teams or projects on a monthly, quarterly or annual basis;
set performance standards and establish monitoring procedures to keep track of progress across these different aspects of work;
provide input to longer term planning.
26. Carry out planning on a long-term or strategic basis that will affect large parts of the institution and possibly national or international activities?
(Planning and organisation at this level would typically cover a period of at least three to five years.)

From the evidence provided the role analyst will determine which of the groups of statements provides the best fit to the role; this is described as the main focus. It is also possible to give recognition to work that falls more into one of the higher levels, but which is not the main focus of the role and could be an important or occasional requirement.

The size or value of the resources will not over-ride the importance of the skills required for planning and organising their effective use.

In order to give sufficient information to enable us to make a fair judgement the evidence provided should try and answer those of the following questions that are relevant to the role:

- What does the role holder plan and organise?
- What resources are involved (e.g. people, equipment, money etc)?
- Who else is involved in creating and working on a plan?
- What is the timescale for planning?
- What is the impact of the planning?
- How does the role holder prioritise?
- What may impact on the plan and what else does the role holder have to take into account?
- How is progress monitored and by whom?

7 INITIATIVE AND PROBLEM SOLVING

This element covers identifying or developing options and selecting solutions to problems which occur in the role. This may include the need to

- use initiative to select from available options;
- resolve problems where an immediate solution may not be apparent;
- deal with complex problems;
- anticipate problems which could have major repercussions.

There are four main levels to this element; these are described in the groups of statements below.

27. Solve standard day to day problems as they arise; choose between a limited number of options which have clear consequences, by following guidelines or referring to what has been done before; recognise when a problem should be referred to others.
28. Use initiative and creativity to resolve problems where the optimum solution may not be immediately apparent but has to be assessed by a process of reasoning, weighing up the pros and cons of different approaches; identify and assess practical options; break the problem down into component parts.
29. resolve problems where there is a mass of information or diverse, partial and conflicting data, with a range of potential options available; apply creativity to devise varied solutions, approaching the problem from different perspectives.
30. Resolve problems where there is a lack of precedent which calls for innovation and creative thought to develop appropriate options; anticipate problems and make projections; initiate solutions which take into account strategic implications for the institution and which do not limit future choices.

From the evidence provided the role analyst will determine which of the groups of statements provides the best fit to the role; this is described as the main focus. It is also possible to give recognition to work that falls more into one of the higher levels, but which is not the main focus of the role and could be an important or occasional requirement.

Activities that are concerned with analytical or theoretical research should not be included here as they fit into element 8.

In order to give sufficient information to enable us to make a fair judgement the evidence provided should try and answer those of the following questions that are relevant to the role:

- What are examples of typical problems?
- How often does these types of problem occur?
- What does the role holder do about them?
- What options does the role holder consider and how does the role holder select the best course of action?
- Does the role holder have to generate new or creative approaches to resolving problems?

8 ANALYSIS AND RESEARCH

This element covers investigating issues, analysing information and carrying out research. This may include the need to

- follow standard procedures to gather and analyse data;
- identify and design appropriate methods of research;
- collate and analyse a range of data from different sources;
- establish new methods or models for research, setting the context for research.

There are five main levels to this element; these are described in the groups of statements below.

31. Establish the basic facts in situations which require further investigation and inform others if necessary.
32. Analyse routine data or information using predetermined procedures and gathering the information from standard sources;
work accurately to complete the task precisely as specified.
33. Identify an appropriate existing method of analysis or investigation according to the data and objectives;
recognise and interpret trends or patterns in data;
identify or source additional information which could potentially help the investigation as the analysis progresses.
34. analyse or research 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.
35. Identify the research question within a specific context;
generate original ideas to build on existing concepts;
generate new concepts and methodologies;
develop new avenues of research.

From the evidence provided the role analyst will determine which of the groups of statements provides the best fit to the role; this is described as the main focus. It is also possible to give recognition to work that falls more into one of the higher levels, but which is not the main focus of the role and could be an important or occasional requirement.

Activities to include are those requiring the application of analytical skills and the use of research or investigative methods and should not be seen as limited to those roles formally involved in research work.

In order to give sufficient information to enable us to make a fair judgement the evidence provided should try and answer those of the following questions that are relevant to the role:

- What analysis and or research is required in the role?
- How complex is the analysis and or research?
- Who else is involved in the analysis and research?
- What data does the role holder have available or need to obtain?
- How does the role holder obtain this data?
- What is the data used for?
- How does the role holder chose which method or approach to use in collecting or analysing data?
- Who decides that the investigation or research is needed and would be beneficial?

9 SENSORY AND PHYSICAL DEMANDS

This element covers the sensory and physical aspects of the role required to complete tasks. This may include the need for

- physical effort, co-ordination and dexterity;
- use of aural evidence to assess next actions;
- application of skilled techniques and co-ordination of sensory information;
- high levels of dexterity where precision or accuracy is essential.

In order to analyse the role we need to know which of the four statements below best describes the level of sensory and physical demands that the role requires. This element is scored through a straightforward choice about which of the groups of statements best fits the role.

36.

- A Carry out highly specialist or very complex tasks requiring either mastery of a wide range of complex sensory or physical techniques or involving unusually intense physical effort?
- B Carry out tasks which require either mastery of a range of sensory or physical techniques, concentration to co-ordinate different senses or precision in applying these sensory skills, or involve considerable physical effort?
- C Carry out tasks at a level which would require either learning certain methods or routines or involve moderate physical effort?
- D Complete basic tasks which either would require either a minimum of instruction or light, if any, physical effort?

Information about the how the skills are gained and the practice of using combinations of senses should be provided.

In order to give sufficient information to enable us to make a fair judgement the evidence provided should try and answer those of the following questions that are relevant to the role:

- Does the role holder use any tools or equipment?
- Is the role holder required to lift, carry or handle large or heavy objects, including details of how often and for how long?
- Is any assistance given by others or in the form of special equipment?
- Does the role holder work in cramped, confined or difficult spaces or awkward positions?
- How long did it take to learn or develop the skills and how were they acquired?
- Does the role holder need to learn any skills involving dexterity or use of other sensory skills, how long did these take to acquire?

10 WORK ENVIRONMENT

This element covers the impact of the work environment on individuals in their work and the safe management of the work environment. This may involve reacting to such things as temperature, noise, fumes, the work position and working in an outdoor environment.

There are three main levels to this element; these are described in the groups of statements below.

37. Work in an environment which is relatively stable and has little impact on the role holder or the way in which work is completed.
38. Understand how the work environment could impact on their own work or that of colleagues;
take standard actions, within health and safety guidelines where applicable, to adapt to the environment.
39. Understand variability in their working environment and its potential negative impact on the work process or health and safety of the individual or colleagues;
determine the level of risk and appropriate response.

From the evidence provided the role analyst will determine which of the groups of statements provides the best fit to the role; this is described as the main focus. It is also possible to give recognition to work that falls more into one of the higher levels, but which is not the main focus of the role and could be an important or occasional requirement.

In the assessment of this element working in difficult or dangerous conditions is considered a secondary to the requirement to take action to assess and manage hazards.

In order to give sufficient information to enable us to make a fair judgement the evidence provided should try and answer those of the following questions that are relevant to the role:

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

11 PASTORAL CARE AND WELFARE

This element covers the welfare and well being of students and staff within the institution, in both informal and formal situations. This may include the need to

- be aware of the support services available;
- give supportive advice and guidance;
- counsel others on specific issues.

In order to analyse the role we need to know whether or not the role requires the role holder to provide any pastoral care or welfare assistance. There are three levels indicated by the groups of statements below. For each question assessment will be used to determine whether this requirement is frequent, occasional or does not happen.

40. Show sensitivity to those who may need help or, in extreme cases, are showing signs of obvious distress;
initiate appropriate action by involving relevant people.
41. Give advice on commonly occurring welfare issues or queries;
follow standard welfare procedures for the institution;
recognise when an individual should be referred elsewhere for professional help;
respect confidentiality.
42. Give support, guidance or pastoral care where standard procedures do not always exist;
maintain confidentiality and build trust;
judge when to listen, when to give advice or guidance and when to refer the individual for professional help;
be fully aware of support networks for both them self and the individual.

To score at any of the levels in this element it must be a requirement to provide pastoral care and welfare as part of the role rather than something done by personal choice. These are not activities that can be undertaken or avoided by choice.

In order to give sufficient information to enable us to make a fair judgement the evidence provided should try and answer those of the following questions that are relevant to the role:

- Is the role holder approached by others for help?
- What are the typical issues or problems?
- What does the role holder do and how does the role holder decide to do it?
- Is the role holder able to refer the person to anyone else for help?
- What training has the role holder received to help with this aspect of the role?
- Is there any guidance material available to help?

12 TEAM DEVELOPMENT

The element covers the development of the skills and knowledge of others in the work team. This may include the

- induction of new colleagues;
- coaching and appraising any individuals who are supervised, mentored or managed by the role holder;
- giving guidance or advice to one's peers or supervisor on specific aspects of work.

In order to analyse the role we need to know whether or not the role requires the role holder to provide any team development activities. There are three levels indicated by the groups of statements below. For each question assessment will be used to determine whether this requirement is frequent, occasional or does not happen.

43. Advise or guide new starters working in the same role or unit on standard information or procedures.
44. Train or guide others on specific tasks, issues or activities; give advice, guidance and feedback on the basis of their own knowledge or experience; deliver training.
45. Carry out training or development activity according to the needs of the individual or group; identify current capabilities and future needs; define the performance standards required; identify appropriate developmental activity; assess the application of learning; give feedback and guidance on overall performance.

These activities are required to be carried out by the role holder within the team or teams identified in the evidence provided on teamwork and motivation above.

In order to give sufficient information to enable us to make a fair judgement the evidence provided should try and answer those of the following questions that are relevant to the role:

- What does the role holder instruct, coach or guide others to do?
- How does the role holder do this?
- Are there any materials available to help?
- Has the role holder been trained in this aspect of the role?
- Who identifies the learning needs of the team members and decides whether any one individual should receive training or development?
- How does the role holder assess whether learning has occurred?

13 TEACHING AND LEARNING SUPPORT

This element covers the development of the skills and knowledge of students and others who are not part of the work team. This may include

- providing instruction to students or others when they are first using a particular service or working in a particular area;
- carrying out standard training;
- assessing and teaching students.

To analyse this we need to know which of the four statements describe the types of teaching and learning support the role holder is required to undertake as part of their role, and for each one identified to assess which of the three levels of complexity this teaching and learning support requires.

46. Introduce students or others who are new to the area to standard information or procedures.
47. Teach or train students or others on specific tasks, issues or activities; assess performance and provide feedback during the event.
48. Teach, train or facilitate development activities for individuals or groups on certain aspects or subjects within a particular academic discipline or specialism; monitor performance giving feedback and guidance; act as a catalyst for further development or learning?
49. Deliver a range of teaching or development activity within a particular academic discipline or specialism, teaching across the breadth or depth of the subject; challenge thinking and foster debate; encourage the development of intellectual reasoning and rigour?

Levels of complexity

- provide standard information or deliver teaching or training.
- design content or learning materials within existing frameworks; make appropriate modifications to existing materials on the basis of the knowledge or experience of the learner(s).
- develop innovative approaches to the learning experience and the curriculum; originate content and methodology.

Any activity that is aimed at supporting the learning of others not included in the team or teams identified in evidence supporting teamwork and motivation and team development should be included here.

In order to give sufficient information to enable us to make a fair judgement the evidence provided should try and answer those of the following questions that are relevant to the role:

- What does the role holder teach or train others in?
- Who does the role holder teach, develop or provide with learning support?
- Who decides on the content of the teaching/training activity?
- Is anyone else involved in providing teaching, development or learning support in this subject area?
- Who designs and develops the course or session content?
- Who else within the institution is involved in teaching, training, or learning support in the area?
- Who decides on how the content is to be delivered?
- How is the effectiveness of the teaching, training or support assessed?

14 KNOWLEDGE AND EXPERIENCE

This element covers the relevant knowledge needed to carry out the role, however acquired whether this is technical, professional or specialist. This may include the need

- for sufficient experience to carry out basic, day to day responsibilities;
- for a breadth or depth of experience to act as a point of reference for others;
- to act as a leading authority in one's field or discipline.

In order to analyse the role we need to know which of the six groups of statements below best describes the level of knowledge and experience that the role requires.

50.

- A Be a leading authority in their subject or profession with widespread professional or public recognition.
- B Be recognised as an authority in their field or specialism within the institution or amongst external peers, based on demonstrated expertise; shape and influence developments within the institution through their own contribution to their area of expertise.
- C Apply a breadth or depth of experience showing full working knowledge and proficiency of their own area of expertise; act as a point of reference to others; demonstrate continuous specialist development, acquiring and refining skills and expertise in new or related areas through undertaking and encouraging internal or external development activity.
- D Apply working knowledge of theory and practice, sharing this knowledge with others as appropriate; demonstrate continuous specialist development by acquiring relevant skills and competencies.
- E Have sufficient knowledge or expertise to work on day to day issues in their own area without direct or continuous reference to others.
- F Be aware of basic principles and practices; to have an understanding of the systems and procedures which directly impact on own work and be supervised or work closely with colleagues s/he can turn to for support.

For guidance, the analyst will consider the minimum level of knowledge and experience required to perform the role competently rather than the actual level of knowledge and experience of the role holder.

In order to give sufficient information to enable us to make a fair judgement the evidence provided should try and answer those of the following questions that are relevant to the role:

- What knowledge and experience, however gained, does the role holder need to carry out the role holder's basic day-to-day responsibilities?
- How does the role holder apply the knowledge and experience?
- How long did it take to obtain the required knowledge and experience?
- How did he/she develop that knowledge and experience?
- How often does the role holder need to update that knowledge and experience?
- Who routinely goes to him/her for advice or guidance related to their subject knowledge and experience?
- What level of knowledge and experience would be required of the replacement, were the role holder to leave their role?