

HERA INTERVIEW RECORD



Higher Education Role Analysis
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What is HERA?

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

It is made up of 14 elements which reflect the values of higher education and the aspects of roles seen as the most important. Each element has a series of questions which draw out evidence of what is required by role holders.

Guidance for Completion

This document should be used by trained role analysts. A separate guide is available for role holders to help them prepare for the interview. On this, they are asked to provide examples of the responsibilities they hold and the activities they are required to carry out normally and routinely in their roles. The purpose of this document is to create a record of these responsibilities and activities. Different examples should be used for each element.

The main requirements of the role will be analysed, not activities or responsibilities the role holder has taken on for personal interest. Activities and responsibilities typical of the role should be used, not just the most recent, or rare or extreme ones. Different examples should be used for each element. If the role holder cannot think of another example, their manager may be able to help. The questionnaire contains 50 questions grouped under the 14 elements. These questions have been carefully prepared to ensure that all aspects of roles found in Higher Education are covered.

Space is provided at the end of each group of questions for the evidence. If further space is needed, additional sheets may be used but try to be concise.

If the role holder feels they are required to hold other responsibilities or carry out additional activities not covered under any of the elements, a note of these should be made on the final page of this record.

At the end of the interview, the role holder should be asked to agree that the record is an accurate representation of their role. The evidence should also be agreed by the nominated verifier or manager. Further discussions may be required before everyone is satisfied that the role has been adequately defined.

When the evidence has been agreed, the analyst will be able to score the questions using the response tables given in the Questionnaire and following the local interpretation of the Notes for Guidance.

ROLE DETAILS

Outline the main purpose and five or six key accountabilities or duties required in the role. If possible, they should be listed in order of priority. This may be according to the level of importance as well as the time and effort needed.

Ref:

Role Title:

Department:

Date completed:

Main purpose of role:

Key accountabilities or duties:

1 COMMUNICATIONS

Oral Communication:

Covers communication in both informal and formal situations. This may include the need to convey basic factual information clearly and accurately; conveying information in the most appropriate format; and explaining complex or detailed specialist information.

Does the role holder receive, understand and convey:

- 1 -straightforward information in a clear and accurate manner?**
- 2 -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 -complex conceptual ideas or complex information which may be highly detailed, technical or specialist?**

Evidence:

Written or electronic communication and visual media:

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; conveying information in the most appropriate format; and explaining complex or detailed specialist information.

Does the role holder receive, understand and convey:

- 4 -straightforward information in a clear and accurate manner?**
- 5 -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 -complex conceptual ideas or complex information which may be highly detailed, technical or specialist?**

Evidence:

2 TEAMWORK AND MOTIVATION

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; motivating others in the team; and providing leadership and direction for the team.

Is the role holder required to:

- 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?**

Evidence:

3 LIAISON AND NETWORKING

Covers liaising with others both within and outside the institution and creating networks of useful contacts. This may include passing on information promptly to colleagues; ensuring mutual exchange of information; influencing developments through one's contacts; and building an external reputation.

Is the role holder required to:

- 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?

Is the purpose of liaison and networking to:

- o pass on information promptly; keep people informed to ensure co-ordination of effort and that work is done effectively?
- o 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?
- o influence events or decisions; undertake active collaboration to pursue a shared interest?
- o build a reputation; market the institution; advance the profession or subject; influence external developments; generate benefits for the institution as a whole?

Evidence:

4 SERVICE DELIVERY

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 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.

Is the role holder required to:

- 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?
-Is contact usually initiated by the customer and does it typically involve 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?

Evidence:

5 DECISION MAKING PROCESSES AND OUTCOMES

Covers the impact of decisions within the institution and externally. This may include decisions which impact on one's own work or team; decisions which impact across the institution; and decisions which could have significant impact in the longer term within or outside the institution.

Is the role holder required to:

- 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?
-Does the type of decision have:
 - o a minor impact?**
 - o a moderate impact?**
 - o a significant impact?**
 - o a major impact?****

Evidence:

6 PLANNING AND ORGANISING RESOURCES

Covers organising, prioritising and planning time and resources, be they human, physical or financial. This may include planning and organising one's own work; planning work for others on day to day tasks or on projects; carrying out operational planning; and planning for coming years.

Is the role holder required to:

- 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.)**

Evidence:

7 INITIATIVE AND PROBLEM SOLVING

Covers identifying or developing options and selecting solutions to problems which occur in the role. This may include using 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.

Is the role holder required to:

- 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?

Evidence:

8 ANALYSIS AND RESEARCH

Covers investigating issues, analysing information and carrying out research. This may include following standard procedures to gather and analyse data; identifying and designing appropriate methods of research; collating and analysing a range of data from different sources; and establishing new methods or models for research, setting the context for research.

Is the role holder required to:

- 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?**

Evidence:

9 *SENSORY AND PHYSICAL DEMANDS*

Covers the sensory and physical aspects of the role required to complete tasks. This may include physical effort, co-ordination and dexterity; using aural evidence to assess next actions; applying skilled techniques and co-ordinating sensory information; and high levels of dexterity where precision or accuracy is essential.

36 *Is the role holder required to:*

- 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?**

Evidence:

10 WORK ENVIRONMENT

Covers the impact the working environment has on the individual and their ability to respond to and control that environment safely. This may include such things as the temperature, noise or fumes, the work position and working in an outdoor environment.

Is the role holder required to:

- 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?**

Evidence:

11 PASTORAL CARE AND WELFARE

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; giving supportive advice and guidance; and counselling others on specific issues.

Is the role holder required to:

- 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?**

Evidence:

12 TEAM DEVELOPMENT

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; and giving guidance or advice to one's peers or supervisor on specific aspects of work.

Is the role holder required to:

- 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?**

Evidence:

13 TEACHING AND LEARNING SUPPORT

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; and the assessment and teaching of students.

Is the role holder required to:

- 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?

Does the role holder:

- o -provide standard information or deliver teaching or training.
- o -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).
- o -develop innovative approaches to the learning experience and the curriculum; originate content and methodology.

Evidence:

14 KNOWLEDGE AND EXPERIENCE

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; the need for a breadth or depth of experience to act as a point of reference for others; and the need to act as a leading authority in one's field or discipline.

Is the role holder required to:

- 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?

Evidence: