



Job Overview Form

To be completed for the evaluation of:

- all new roles (and replacement posts that have not been evaluated in the last 5 years or where changes are made to the duties of a replacement post) and
- existing roles being submitted for regrading.

Role Details

| | |
|--------------------|--|
| Role Title: | VMG Code: HR to complete if relevant |
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Please indicate (click on the relevant box) whether the position is:

New Role Existing Vacant Role Existing Post with Existing Role-Holder

| | |
|---|--|
| If Existing Vacant Role, please give date of last evaluation if known: | |
|---|--|

| | |
|----------------------------|------------------------|
| SCHOOL/DIRECTORATE: | DEPT/INSTITUTE: |
|----------------------------|------------------------|

| | |
|-----------------------------------|--|
| CURRENT OR PROPOSED GRADE: | EVALUATED GRADE & DATE: HR to complete |
|-----------------------------------|--|

WHAT IS HERA

HERA is a Job Evaluation tool used to analyse roles found in Higher Education. It is used at Heriot-Watt University to produce a total points score to assess roles and identify which grade they fit within.

It is made up of fourteen elements which reflect the aspects of roles seen as the most important within the Higher Education context. Each element has a series of questions which draw out evidence of what is required by role-holders.

Notes on how this document may be used

The questions are designed to elicit evidence about the role requirements in a straightforward manner, but with sufficient detail to enable the evidence to be scored effectively. Wherever possible, tick boxes have been used. You should work through the questions and tick the appropriate response for each question. Each response requires you to give examples of the skills used, activities engaged in and the responsibilities held. The examples you give should relate to current role requirements; not activities that were undertaken in the past or may be expected in the future. Care should be taken to ensure that evidence is factual, ie reflects essential requirements carried out regardless of who the role-holder may be and does not reflect individual performance in the role. There are other University procedures for rewarding performance.

Examples should not include activities undertaken on a voluntary basis or that form part of a secondary role.

These examples will form the evidence on which the role will be evaluated. The evidence given must be verified by someone authorised to do so in the School or Section and is usually the line manager (who typically will know the role well).

As part of this record of evidence, the purpose and key accountabilities or duties of the role need to be outlined, and a simple diagram showing the position of the role in the immediate structure included.

Wherever possible explain acronyms and avoid the use of individual names, referring to role titles only.

Once verified, the completed record should be returned in both electronic format wherever possible as well as a signed hard copy, to HR. You will be contacted if any additional information is required. Once the role has been fully analysed, HR will inform you of the outcome directly or via your line manager as appropriate.

TOP TIP

Check the "Guidance on HERA & Completing a JOF" to help ensure you are including all the relevant information.

JOB DESCRIPTION

Role Title:

School or Service:

Reports to:

Responsible for: *(any staff that report to this role)*

Organisation Chart: *(Please use job titles only and do not include individual names)*

please attach an organisation chart

Main purpose of role: Describe as concisely as possible in no more than 2 or 3 sentences, the overall purpose of the job. The description should enable the job to be identified as distinct from other jobs.

Key Accountabilities and Duties: List the main duties and responsibilities in a series of brief, numbered phrases in order of importance to the School/Service/University.

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| 1. | |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| 6. | |
| 7. | |
| 8. | |

1. COMMUNICATION

Who does the role-holder need to talk to, and how often?

Who does the role-holder communicate with in writing or electronically, and how often?

What type of information is exchanged verbally or in written form, and why?

How does the role-holder decide what to say or write and when to say or write it?

2. TEAMWORK AND MOTIVATION

What is the role-holder's main team?

What is the role-holder's function in that team? Please check:

Leader of several different teams

Manager of one team

First line supervisor

Team member

TOP TIP

Sometimes teams are identified by individuals here that are really networks as defined by HERA - check the 'Guidance to completing a JOF' for more information.

If you have indicated that you are a manager or a supervisor, please check the box if you fulfil the role of line manager which would include, for example: approving annual leave and sickness absence and conducting return to work meetings, conducting regular PDR meetings (list not exhaustive).

How many people are there in this team?

How does the role-holder interact with other team members?

Is the role-holder in any other teams? – YES / NO

If YES, please describe their function within these?

3. LIAISON AND NETWORKING

Who does the role-holder liaise with and why?

Is the role-holder required to participate in any networks, groups, committees or forums within the institution or outside it? If so, please give examples and note the purpose of the group(s) and the role of the role-holder in the group(s).

Is the role-holder required to initiate or lead any networks, groups, committees or forums within the institution or outside it? If so, please give examples and note the purpose of the group(s).

4. SERVICE DELIVERY

What service does the role-holder provide and to whom?

Does the role-holder investigate the needs of the customer and then adapt the service to meet their requirements? If so, use an example to describe how.

Who sets and monitors the overall standards for the service(s) provided, and decides which services are offered?

5. DECISION MAKING PROCESSES AND OUTCOMES

Independent Decisions: What types of decision does the role-holder take independently? Please give an example to describe the decision and whom or what it typically impacts and over what timescale. It can also be helpful to indicate how easy it would be to 'fix' if the wrong decision were made.

Collaborative Decisions: What types of decision does the role-holder take in collaboration with others? Please give an example to describe the decision and whom or what it typically impacts and over what timescale.

Advise the Decisions of Others: Does the role-holder give advice to others to help them to make decisions? Please give an example to describe the decision and whom or what it typically impacts and over what timescale.

6. PLANNING AND ORGANISING RESOURCES

Does the role-holder work to a pre-set plan? – YES / NO

If YES, who sets the work for the role-holder and how often is the work set (eg daily, weekly)?

Does the role-holder plan and organise their own work? – YES / NO

If YES, please give examples. Does the role-holder plan their work, for instance, on a daily basis, weekly, 6 months in advance etc?

Does the role-holder plan and delegate work to others? – YES / NO

If YES, please give examples. Does the role-holder plan and delegate their work, for instance, on a daily basis, weekly, 6 months in advance etc?

Is the role-holder responsible for planning and monitoring the utilisation of other resources, e.g. finance, space? – YES / NO

If YES, please describe a typical example.

Does the role-holder have to organise projects, e.g. conferences, ceremonies or research projects? – YES / NO

If YES, please describe a typical example.

Is the role-holder involved in strategic planning? – YES / NO

If YES, please describe a typical example.

7. INITIATIVE AND PROBLEM SOLVING

What problems does the role-holder typically have to resolve?

How often do these occur?

What procedures, custom and practice exist to help the role-holder in solving problems?

Does the role-holder have to use initiative to solve problems? – YES / NO

If YES, please describe an example.

Does the role-holder have to generate new or creative approaches to resolving problems? – YES / NO

If YES, please describe an example.

8. ANALYSIS AND RESEARCH

Does the role-holder have to gather information for analysis, establishing basic facts? – YES / NO

If YES, please describe what information.

Does the role-holder analyse information? – YES / NO

If YES, what does this involve and how is the method determined?

How are the outcomes used and by whom? Please describe an example.

Is the role-holder required to undertake academic or other similar research? – YES / NO

NB – This is unlikely to apply to non-academic staff.

If YES, please describe the type of research and the role-holder's involvement in both the work and direction.

Does the role-holder define new research questions, or originate new methodologies? – YES / NO

If YES, please describe an example.

9. SENSORY AND PHYSICAL DEMANDS

What equipment and or tools does the role-holder use?

Is the role-holder required to lift, carry or handle large, heavy or fragile objects as a key part of their role? – YES / NO

If YES, please describe an example and indicate frequency (daily, weekly, monthly).

Does the role-holder need to use any skills involving dexterity or use of the other senses (observing, listening, touching, smelling, tasting) as a key part of their role? – YES / NO

If YES, please describe an example.

Is the role-holder required to physically handle people or animals? – YES / NO

If YES, please describe an example.

10. WORK ENVIRONMENT

Where does the role-holder normally or most frequently work? Please describe, e.g. office, lecture theatre, lab, kitchen, outdoors etc.

Is the role-holder required to take any special measures to reduce the risk or control any aspects of the environment before or while working there? – YES / NO

If YES, please describe an example.

Is the role-holder required to make any assessment of the level of risk in the work or in the environment in accordance with the legislation and institutional guidelines? – YES / NO

If YES, please describe an example.

Does the role-holder make use of any safety equipment, special clothing? – YES / NO

If YES, please describe an example of the situation and protective equipment required.

Is the role-holder responsible for the overall control of the work environment, in terms of health and safety, and making sure that others working there are not at risk? – YES / NO

If YES, please describe an example.

11. PASTORAL CARE AND WELFARE

How frequently does the role-holder come into contact with those who may need help with a welfare or well being issue as part of their core role? This can be for either staff and / or students. Please provide an example.

Is the role-holder required to give advice or guidance on welfare issues to staff and/or students? – YES / NO

If YES, what are the typical issues or problems and how frequently do these occur?

Are other people referred to the role-holder for specialist advice? – YES / NO

If YES, for what purpose? Please describe an example.

12. TEAM DEVELOPMENT

Does the role-holder advise or guide other members of the team (as defined in 'Teamwork & Motivation') on standard information and practices? – YES / NO

If YES, please describe an example and how frequently this occurs?

Does the role-holder train others in the team to undertake specific tasks or activities? – YES / NO

If YES, what are these tasks/activities, and how often would training sessions be undertaken?

Does the role-holder undertake PDRs, formulate development plans and provide feedback for other team-members? – YES / NO

If YES, please describe an example and indicate how often this occurs and for how many staff.

13. TEACHING AND LEARNING SUPPORT

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

1. providing instruction to students or others when they are first using a particular service or working in a particular area (eg explaining the use of specific facilities or equipment or outlining procedures),
2. carrying out standard training,
3. the assessment and teaching of students.

Is the role-holder required to undertake teaching and or learning support outside their work team?
 – YES / NO

If YES, please complete the table below:

| Does the role-holder deliver: | Demonstrations or Explanations | One-off Training Sessions/Lectures including assessment of effectiveness of training | A series of lectures/workshops/ongoing coaching or mentoring as part of a scheme | A range of teaching or development activities across a range of subject areas |
|-------------------------------|--------------------------------|--|--|---|
| | YES / NO | YES / NO | YES / NO | YES / NO |

- If YES is noted for any of the above, please describe examples of each relevant activity:
- eg deliver demonstration/teaching/training; design training content or learning materials; assess effectiveness of the teaching, training or support; develop innovative approaches to teaching/training.

14. KNOWLEDGE AND EXPERIENCE

What knowledge and or previous experience does the role-holder need to have to undertake the day to day responsibilities of the role? (NB ensure you differentiate from what an existing role-holder may have – it must be the requirements to do the role)

Is a professional or vocational qualification required? – YES / NO

If YES, which qualifications?

Is the role-holder required to have sufficient knowledge and experience to work without direct supervision? – YES / NO

If YES, please describe an example.

Is the role-holder required to update their knowledge and experience? – YES / NO

If YES, please describe an example and how they keep their knowledge and experience up to date.

Is the role-holder regarded as an expert in their area:

- within the institution YES / NO
- nationally YES / NO
- internationally YES / NO

OTHER ROLE REQUIREMENTS

Please list any other requirements of the role, not included above.

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ROLE-HOLDER

The above represents a true and accurate picture of the current requirements of the role.

| | |
|--------------------|--|
| Name: | |
| Role Title: | |
| | |
| Signed: | |
| Date: | |

VERIFIER – Please refer to the Verifiers Guidance before signing.

To the best of my knowledge, the information given above represents a true and accurate picture of the current requirements of the role and how it fits into the team and department structure.*

| | |
|--------------------|--|
| Name: | |
| Role Title: | |
| | |
| Signed: | |
| Date: | |

*I enclose a current organisation chart reflecting the position of the post to be regraded. (Please enclose a proposed organisation chart as well if the request is due to a restructure.)