



HERA JOB EVALUATION MATCHING QUESTIONNAIRE

GUIDANCE NOTES

(January 2006)

INTRODUCTION

In August 2006, the University will be implementing a new grading scheme which will be negotiated locally with trade unions under the national Framework Agreement. The new arrangements, which will replace the current grading arrangements for all staff below the level of Professor, will be based on a single institution-wide job evaluation system to ensure that all roles are assessed in a consistent and equitable manner.

The University has chosen HERA as its method of job evaluation. HERA (Higher Education Role Analysis) has been designed on behalf of a consortium of Higher Education Institutions to analyse all roles found in Higher Education. Approximately 75% of all HEIs will be using HERA.

To enable your job to be matched into the new grading scheme which is being developed, you are invited to submit written information about your role on the enclosed questionnaire.

This will be verified by managers in your School/Service, who may refer the questionnaire back to you if you have omitted important information. It is important that the information which you provide accurately reflects what is actually required of you by your School/Service.

You should pass the completed questionnaire to your manager no later than **Friday 24 February 2006**. (Your School/Service will advise you who you should pass the questionnaire to.)

It is not necessary to word-process your responses to the questionnaire, but a MS Word copy of the questionnaire can be downloaded from the Personnel & Staff Development website if you prefer to type your responses.

If you would like some support in completing the documentation then you are encouraged to attend one of the informal sessions which Personnel & Staff Development will be arranging during February 2006 (see details on next page). You may also wish to speak to your trade union representative (see list on next page).

In some Schools and Services, Heads/School Managers may take a more active role in initially completing the information about your job and discussing this with you. The purpose and outcome is the same – namely to provide an agreed statement of what is required of your role by your School/Service to enable the post to be matched into the new grading scheme. Your School/Service will notify you if the exercise is to be managed this way.

HERA analyses jobs under 14 'elements' and this questionnaire collects information on each of these areas of work. It is not necessary for you to give exhaustive examples or information – 1 or 2 examples for each 'element' is sufficient, giving brief details about the areas of work which are most important or predominant or which involve the greatest skill or effort.

It is important to note that it is the role and not the person who is being evaluated. HERA does not take account of how well you are undertaking the role. Any duties that are being carried out due to a temporary acting up arrangement should not be included.

To assist you in completing the questionnaire, brief examples are given under some of the headings in this Guidance Booklet. (These examples relate to a variety of different roles within the University.)

You may complete this questionnaire in 'work time' - but you should first consult with your line manager to agree the most appropriate time(s) for you to do this. The questionnaire should take no longer than two hours to complete and it should not be necessary to exceed the space provided or add further pages. Leave blank any parts of the questionnaire which are not relevant to you.

The 14 'elements' are: *Communications, Teamwork & Motivation, Liaison & Networking, Service Delivery, Decision Making Processes & Outcomes, Planning & Organising resources, Initiative & Problem Solving, Analysis & Research, Sensory & Physical Demands, Work Environment, Pastoral Care & Welfare, Team Development, Teaching & Learning Support, Knowledge & Experience.*

The information which you provide will be used to match your role into the new grading scheme using HERA. It is expected that you will be notified of your new grade and salary in June 2006 and any changes will take effect from 1 August 2006.

Further information about the implementation of the Framework Agreement in the University of Exeter can be found on the Personnel & Staff Development website:

www.admin.ex.ac.uk/personnel – follow the link for 'Framework Agreement'.

DO YOU NEED SOME SUPPORT IN COMPLETING THIS QUESTIONNAIRE?

You are invited to 'drop-in' to any one of the following sessions to speak to a role analyst from Personnel & Staff Development. The sessions will be flexible and informal and the analyst will be available for an hour and a half from the times shown. We cannot complete the questionnaire for you, but the sessions will guide you on the information which you should include.

It would be helpful if you emailed hera@exeter.ac.uk in advance of these sessions with any questions you wish to have answered.

Date	Time	Venue	Campus
Monday 6 February	2.30pm	Lecture Room 2	Tremough
Tuesday 7 February	11.30am	Freddie Mercury Room, Cornwall House	Streatham
	3.30pm	Committee Room A, Northcote House	Streatham
Wednesday 8 February	10.30am	Washington Singer, Room 25	Streatham
	3.00pm	Amory, Room 417	Streatham
Thursday 9 February	10.30am	Baring Court, Room 220	St. Luke's
Friday 10 February	10.30am	Harrison, Room 004	Streatham
	3.00pm	Queen's Building, Room LT6	Streatham
Monday 13 February	10.30am	Reed Hall, Veitch Room	Streatham
Tuesday 14 February	10.30am	North Cloisters, Room 145	St. Luke's

TRADE UNION CONTACTS

Name of Union	Recognised for	Name of Contact
Amicus	Technical staff, craft staff in Buildings & Estates	Margaret Grapes M.A.Grapes@exeter.ac.uk Internal Telephone: 4678
Association of University Teachers	Academic staff, research staff, Teaching Fellows, academic-related staff	Neil Brooks N.F.Brooks@exeter.ac.uk Internal Telephone: 3923
Transport & General Workers Union	Manual staff, Hospitality Services Management	Terry Tancock T.L.Tancock@exeter.ac.uk Internal Telephone: 3933
Unison	Clerical staff	Charmain Hebbard m.c.hebbard@exeter.ac.uk Internal Telephone: 4835

JOB DESCRIPTION

If you have a job description which is up-to-date, then you or your manager should append this to the questionnaire.

If you do not have an up-to-date job description, you should give brief details in the 'Job Description' section of the form.

The example below is from a Personnel Administration Assistant.

Job Purpose:	To support the centralised services team by providing an efficient administrative support service for the whole process of recruitment, contracts and payroll.
Responsible to:	Personnel Administration Manager
Responsible for:	None

Key Responsibilities

(Enter the most important responsibilities of your job, up to a maximum of seven.)

1. To administer the recruitment process, including placement of adverts, preparation of further particulars; dealing with responses to advertisements and associated queries, interview invitations and arrangements, references, preparation and circulation of papers for the panel, record-keeping and associated filing.
2. To prepare contracts of employment (ensuring pre-employment checks have taken place eg medical, reference and work permit), including preparation of work permit applications/extensions, and associated filing.
3. To input details of new members of staff onto the HR system and to undertake ad-hoc data entry in the HR system and other personnel records, ensuring that staff are paid correctly and on time.
4. To prepare standard changes to contracts of employment to include increase/reduction in hours, non-renewal notices, acknowledgement of resignations, extensions of contract, acting up allowances, first aid allowances etc and undertake the associated payroll as detailed in (2);
5. To process invoices for recruitment purposes using Aptos.
6. To prepare probation reports for the signature of the relevant Personnel Manager
7. To provide clerical support to activities of the Service, as allocated.

COMMUNICATIONS

This covers verbal, written, electronic or visual communication, both formal and informal, including signing or other means of communication.

Who do you communicate with	Type (eg email, letter, report, telephone)	Frequency	Content and purpose
<i>Examples</i>			
<i>Hospitality Services</i>	<i>Email, telephone</i>	<i>Several times a month</i>	<i>Booking refreshments for meetings.</i>
<i>Students</i>	<i>In person</i>	<i>Several times a day</i>	<i>Answering queries about timetable, examinations etc.</i>
<i>Senior staff in Schools and Professional Services</i>	<i>Email, telephone</i>	<i>One or twice a term</i>	<i>I organise meetings attended by management representatives from Schools/Professional Services. I use email or telephone to notify participants, book rooms, request agenda items, and distribute papers. I attend the meetings and it is my responsibility to prepare draft agendas and minutes and circulate in accordance with deadlines</i>
<i>External contractors</i>	<i>Tender documentation, contracts</i>	<i>Several times a year</i>	<i>I draft tender documentation on behalf of the University and review tenders submitted by contractors. I prepare contracts for the successful contractor.</i>

TEAMWORK AND MOTIVATION

A team is a group of people who work together to achieve a common purpose. In most cases, this will be the team you work closely and regularly with in your School or Service, but it may also include ad hoc project teams.

Are you a team leader?	<i>NO. I do not directly manage staff, but work in a different building to my line manager.</i>
If so, how many staff report directly to you?	<i>I am responsible for a Department of 50 staff. This is organised into 5 individual sections, each managed on a day to day basis by a team leader. I establish the overall direction for the team leaders and departmental strategy. I also have an active part to play in establishing good working relationships between other Services/Schools across the University as a member of the Senior Management Group.</i>
Do you direct or guide casual staff or temps? (If YES, give details of frequency etc)	<i>NO.</i>
What is your main team?	<i>I work in a team of three other Assistants.</i>
Are you part of any other teams (eg project work across Schools/Services)? Give details.	<i>I work on projects and will be responsible for co-ordinating the work of 3 - 6 individuals from different sections of the department at anyone time. This involves meeting regularly to set and review objectives, including timescales.</i>
Who sets the levels of responsibilities, targets and objectives and allocates work within your team?	<i>The Office Manager who allocates work to me and I meet her regularly to review my workload.</i>

LIAISON AND NETWORKING

Liaison is making pro-active one-off contacts for a work-related reason. Some of the examples you have given above under *Communications* will be relevant here, but you may wish to include other examples of standard day liaison.

Who do you contact	Frequency?	What is the purpose of the liaison? (Give examples)
<i>Hospitality Services</i>	<i>Frequently</i>	<i>To book meeting rooms and tea/coffee.</i>
<i>Personnel & Staff Development</i>	<i>Occasional</i>	<i>Recruitment arrangements (ie agree advertising text and media, agree interview and presentation arrangements)</i>

A Network is an interconnecting group of people, possible from different work teams or organisations, who exchange information, contacts and experience on a recurrent basis for professional purposes connected with the role. A network may be internal or external to the University. It may be a permanent group or committee or an ad hoc project team. Your involvement should be agreed by the University and not just an activity taken on out of personal interest (eg would a replacement be expected to maintain this involvement in the event that you left?) It is important that you provide information about the purpose of your involvement in the network and what the outcomes are for the University.

Which networks do you belong to? (State whether internal or external?)	Frequency of meetings?	What contribution are you expected to make? (Give examples)
<i>Secretarial and Clerical Group Internal</i>	<i>Termly</i>	<i>Share ideas and experiences</i>
<i>Computer User Group Internal</i>	<i>Termly</i>	<i>At the meeting we have the opportunity to contribute to the direction of IT within the University and also as a forum to highlight problems and concerns and work towards reaching solutions. An example of a recent issue I raised at the meeting was the speed of the network in building X.</i>
<i>Business Forum</i>	<i>Quarterly</i>	<i>Arrange agenda for quarterly meeting with local members of the business community. Invite key speakers and leading members of the business community, particularly from key University partners. Take minutes of meetings.</i>

SERVICE DELIVERY

This covers the help, assistance and services you are required to give to students, visitors, members of staff and other users of the University. This may include reacting to requests for information or advice, actively offering or promoting the services of the University to others and setting the overall standards of service offered.

Who are your customers?	<i>My customers are lecturers running undergrad. lab based modules and postgrad. students</i>
What service do you provide?	<i>I usually follow an annual timetable to prepare laboratories for a number of first year undergraduate modules</i>

How do you determine what the customer wants/needs? Do you offer varied services depending on the individual customer requirements? (Give details)	<i>The individual lecturers outline the overall aims of the experiments.</i>
Who determines the standards for quality and timescales?	<i>Working to the Lecturers' brief, it is down to me to establish exact equipment needs, what the best raw materials will be. If additional materials or equipment are required, I check with the Head of Technical Services what budget I should work to chief and I decide how to source the items.</i>
Are you involved in monitoring feedback to the service and making improvements? (Give details)	<i>I meet academics on a monthly basis to gain feedback and adjust my services accordingly.</i>

DECISION MAKING PROCESSES AND OUTCOMES

This set of questions covers the impact of your decisions on your work or team, those which impact across the University or those which may have significant impact in the longer term within or outside the University.

Type of decision-making	Frequency	Details
What decisions do you make independently (ie without reference to others)?	<i>Monthly</i>	<i>I order stationary/consumables for the department monthly. I have to be aware of the levels of stock for most consumables and make decisions when to order replacements. We are given the preferred suppliers, and within this I can select the quality of items. I have authority to spend up to £300 in any order and sign off the invoice. I am responsible for an overall budget of £x per annum.</i>
What decisions do you make collaboratively (eg as an equal member of a team, committee or working group)?	<i>Termly</i>	<i>I make joint decisions on what library journals to purchase within my subject area. These decisions are reached following meetings I set up with members of the subject team within the school and library colleagues. Factors to take into account are the content and nature of courses to be taken in the next academic year, previous usage statistics and budgetary constraints. Our current budget is £x,000 per annum.</i>
What decisions do you contribute to by providing specialist advice or input to the decision making of others? For example, making recommendations to a committee or your line manager?.	<i>Regularly</i>	<i>I make recommendations on personnel policy and procedures. For example, new policy formed following a change in legislation will often be developed through a working group. My role will be to take into account views of interested parties and pull together the draft. This is usually then approved at HR Committee, where the decision is made based on my recommendation taking into account my professional expertise</i>

PLANNING AND ORGANISING RESOURCES

This covers organising, prioritising and planning time and resources - personnel, physical or financial. It includes planning and organising your own work; planning work for others (particularly if you are a manager of a team) or planning and managing projects.

What activities do you plan or organise?	<i>I plan an annual maintenance cycle for equipment and liaise with contractors for the maintenance to take place during 'quiet' periods.</i>
What resources and timescales are included in the plan - eg people, money, equipment? (Give details.)	<i>As part of the Senior Management Team for the Service, I work with the Director and other Section Heads to develop a 5 year strategic plan.</i>
Over what period do you plan - daily, weekly or monthly?	<i>My supervisor allocates a daily work schedule to me each morning;</i>
What impact does your planning have on others?	<i>I meet with my team monthly to plan and review priorities for the section.</i>
How do you prioritise what activity needs to be done before another?	<i>There is a schedule of tasks which need to be undertaken every day; I determine which order these tasks are carried out.</i>
What sort of things outside your control can necessitate a change of plan?	<i>Breakdowns and emergencies.</i>
How is your plan monitored? Who monitors it?	<i>I report to a Project Steering Group on a quarterly basis.</i>

INITIATIVE AND PROBLEM SOLVING

This covers identifying or developing options and selecting solutions to problems that typically occur in your role. This may include using your initiative to select from available options, resolving problems where an immediate solution may not be apparent, dealing with complex problems and anticipating problems which could have major repercussions.

What sort of problems do you have to deal with frequently? (State whether daily, weekly, monthly)	<i>I have to make arrangements to cover workloads in the event of sickness absences to ensure buildings are prepared to agreed standards. For example, last week, staff covering an external booking in the Great Hall both called in sick before their evening shift. I had to find someone at short notice to come in by redirecting staff from another area.</i>
Give examples of the most complex problems you have to deal with?	<i>Meeting students who are considering withdrawing from their studies because of debt or other financial issues.</i>
How frequently do you have to deal with the most complex problems?	<i>Monthly.</i>
When dealing with these problems are there guidelines or precedents to follow?	<i>Yes, through my own experience and advice from colleagues in most cases there are precedents to follow.</i>
How do you solve a problem where no previous examples exist?	<i>I will take advice from more senior colleagues.</i>

ANALYSIS AND RESEARCH

This covers occasions when you are required to investigate issues, analyse information and carry out research. These 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, or setting the context for research. It is important to note that this 'element' will apply to a wide variety of roles, not just those engaged in academic research.

Give examples of circumstances or activities when you have to establish the basic facts in situations that require further investigation and inform others if necessary.	<i>For example, balancing money in the cash till and reporting any discrepancies, routine maintenance checks and reports, checking statistics and reporting anomalies, checking stock levels against an inventory.</i>
Give examples of circumstances or activities when you have to gather and analyse routine data or information	<i>For example, database/literature searches, monitoring expenditure against a budget, providing statistics using standard techniques (eg on spreadsheets) or providing data for payroll purposes.</i>
Give examples of circumstances or activities where the investigation and analysis is more complex – eg where you have to recognise and interpret trends or patterns in data, or identify or source additional information or you are required to identify an appropriate method of analysis.	<i>For example, analysing student destination returns and compiling and presenting a report.</i>
Give examples of circumstances or activities when you have to 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.	<i>For example, developing experimental methodology to test a hypothesis – including reviewing current research, developing experiments around variable parameters and conducting experiments. Following the experiments, measuring and analysing results.</i>

TEAM DEVELOPMENT

This covers the development of the skills and knowledge of others in your work team. (A team is a group of people who work together to achieve a common purpose. In most cases, this will be the team you work closely and regularly with in your School or Service, but it may also include ad hoc project teams.) This may include the induction of new colleagues (eg as an induction facilitator), coaching and appraising other team members you supervise, mentor or manage and giving guidance or advice to your peers or supervisor on specific aspects of work.

Are you responsible for appraising the performance and development needs for staff (eg through the Performance & Development Review scheme (PDR))? How do you assess whether the person you have trained has achieved the necessary level of knowledge or skill? Give Details	<i>I carry out PDRs for 3 team leaders in my School. As part of this process I identify training needs and work with individuals to plan how these might be achieved. I organise regular meetings to review progress against the plan.</i>
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Are you required to carry out induction training or mentoring for new members of your team? Give Details	<i>I organise induction for all new joiners in our School (usually about 6 a year). I complete the induction form, and show them around the School and campus, explaining things like health and safety, first aid, refreshments, car parking, leave etc</i>
Do you carry out training on new policies/procedures or demonstrate how to operate specific equipment within your team? Do you carry out any other training for members of your School/Service? Give Details.	<i>I am the expert within the team on the new computer system and carry out training for all new members of the team. I also attend any training offered by the software company and train existing users on this. Eg Following a new version released last month, I modified documentation provided by the supplier to include examples more relevant to our work. I prepared training exercises and ran the courses. I worked alongside individuals to support them in the office to ensure learning had taken place.</i>

TEACHING AND LEARNING SUPPORT

This covers teaching or providing learning support to students and others who are not part of the work team. This may include providing instruction to those outside your immediate team who are new to a service or an area.

Do you carry out standard training or instruction which introduces students, staff or other visitors who are new to the area to standard information or procedures? Give details (including audience, frequency, numbers, length).	<i>I run a monthly introductory tour of the library for new staff and students...</i>
Do you teach or train students or staff or others on more complex specific tasks, issues or activities and assess their performance and provide feedback during the event? Give details (including audience, frequency, numbers, length).	<i>I run an annual half-day training event for new academic staff on how to apply for grants...</i>
What is your specialism and who do you teach or develop?	<i>I train new induction facilitators in their role.</i>
Does anyone else provide teaching or developmental activities in this area?	<i>These training activities are prepared and run jointly with other staff from the Professional Services.</i>
Who decides what should be included and delivered?	<i>The purpose of the programme is to apprise staff of HEFCE requirements.</i>
How do you assess the effectiveness of what you are teaching?	<i>The TDU collect questionnaires from participants at the end of the session.</i>
Do you prepare and regularly review and modify the teaching programme and learning materials? Give details.	<i>Not applicable.</i>

SENSORY AND PHYSICAL DEMANDS

This covers the sensory and physical aspects of your role. These may include physical effort, co-ordination and dexterity, applying skilled techniques and co-ordinating sensory information and using high levels of dexterity where precision or accuracy is essential.

Is your role predominantly office-based? (If you are using office IT equipment, how much of your time do you spend copying typing.)	<i>Yes. I frequently work at a PC using email, Word etc</i>
Do you use any specialist equipment? (eg spectrometer, welding equipment) Give details.	<i>I frequently use CAD software to design projects.</i>
Are you required to lift heavy equipment? Give details.	<i>Not applicable.</i>
Do you work in small, cramped or awkward environments? Give details.	<i>Maintenance and repair work frequently involves working in cramped conditions....</i>
How long would it take for a new person to gain any specialist, physical skills?	<i>3 to 6 months.</i>

WORK ENVIRONMENT

This covers the impact the working environment has on you in your role and your 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.

What are the hazards, if any, in your working environment?	<i>My work is office based.</i>
Are you required to take any special measures to reduce risks, wear specialist safety clothing or control the environment? Give details.	<i>I am required to wear gloves when handling and using cleaning materials.</i>
Are you responsible for the health and safety of others working in a hazardous environment, eg carrying out risk/safety assessments? Give details.	<i>I am required to undertake risk assessments for members of my section when they are required to work at heights and on roofs.</i>

PASTORAL CARE AND WELFARE

This covers responsibility for the welfare and well-being of students and staff within the University, in both informal and formal situations. You may need to be aware of the support services available, give supportive advice and guidance, refer others to someone better able to help them or counsel individuals on specific issues.

Do you have contact with students or staff who are distressed or emotional? Give details, eg What sort of problems, what frequency and what actions do you take to help the individual directly or refer them?	<i>As a careers advisor, I frequently meet with students who are emotional about their career choices. Using my professional skills, I help the student explore their options and make decisions about their future. Occasionally it is necessary to encourage them to see the Student Health Service or Student Counselling Service.</i>
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Do people come directly to you or are they referred by someone else?	<i>Occasionally members of my section come to me to talk about personal circumstances at home, usually when compassionate leave is required.</i>
Have you received any training for this role or is there any guidance material available for reference?	<i>My role requires me to be a professionally qualified counsellor.</i>

KNOWLEDGE AND EXPERIENCE

You should include details of any specific knowledge and experience someone needs to have to carry out your role. For example, a working knowledge of Microsoft Office, a broad IT competence, a professional qualification, acquired technical competence. (You should not simply list the qualifications/experience which you have as the current member of the role, but should include any qualifications which are *essential* to the role.)

What knowledge and skills are required for your role, including technical, professional and any specialist knowledge gained through formal qualifications or experience?	<i>Need to be able to manage people and resources. Need to understand budgets and spreadsheets.</i>
How long does it take to gain the relevant amount of knowledge to be able to carry out all aspects of your job?	<i>3 to 6 months.</i>
How do you maintain a current level of knowledge for your job?	<i>I attend regular meetings of my professional association and keep up-to-date by reading my professional journal.</i>
Do people routinely come to you for advice? Give details.	<i>Not applicable.</i>
Who do you go to for advice? Give details.	<i>My Line Manager.</i>