

## **Guidance on submissions for Grading Review under the HERA Maintenance Procedure**

- 1 The original HERA role outline form should be submitted with the changes that have occurred since the last review clearly highlighted on the form (these should be noted in bold, italics or underlined at the end of each section). Details about the impact such changes have on the rest of the post i.e. duties which should be deleted/substituted should also be included.

### **See example in Appendix 1**

- 2 If an electronic version of the original HERA form can not be accessed, please submit a hard copy of the HERA form and detail the changes on the 'Changes to Role' form [http://www.dundee.ac.uk/hr/hera/\\_lib/docs/Changes\\_to\\_role\\_form.pdf](http://www.dundee.ac.uk/hr/hera/_lib/docs/Changes_to_role_form.pdf)

### **See example in Appendix 2**

- 3 If a HERA role outline form has not been completed previously this should be submitted ([http://www.dundee.ac.uk/hr/hera/\\_lib/docs/forms/role\\_outline.doc](http://www.dundee.ac.uk/hr/hera/_lib/docs/forms/role_outline.doc)) along with a copy of the original job description for the role.
- 4 An organisational chart should be provided in all cases illustrating the working relationships and reporting lines with colleagues within the School/Unit.
- 5 The 'Request for Re-grading' form [http://www.dundee.ac.uk/hr/hera/\\_lib/docs/forms/Request for regrading form.pdf](http://www.dundee.ac.uk/hr/hera/_lib/docs/forms/Request_for_regrading_form.pdf) also needs to be completed and signed by the line manager/verifier and the Dean/Head of Unit.

# HERA

## ROLE OUTLINE FORM (EXAMPLE)

|  |  |
|--|--|
| Department [Division/School]   |  |
| Role Code  | Role Title Departmental Secretary  |
| Responsible to Professor X   | Responsible for – day to day running of dept, coordination of sub units in dept<br><u>Responsible for two clerical members of staff</u>  |
| <b>Role purpose</b><br>To ensure the smooth and efficient running of the department, coordination of sub units in department, recruitment etc of staff <u>and</u> administration of research projects. |  |
| <b>Principal duties or Key objectives</b>  |  |
| 1 Departmental Secretary   |  |
| 2 Personal Assistant to Head of Department   |  |
| 3 Clerical and administrative support to other academic staff in Department  |  |
| 4 Research Facilitator for Department  |  |
| <b>Activities</b>  |  |
| 1 Communication  | <b>Examples of role requirements</b><br>ORAL: dealing with queries from staff, students, patients, outside bodies in person or by telephone.<br>EXAMPLES: May vary in nature from simple student timetable queries to more complex queries regarding research grants or finance, or queries from patients, patient's relatives.<br>WRITTEN: emails, letters, references, reports, minutes of meetings<br>EXAMPLES: replying to a request for Professor to attend meeting/lecture; communication with funding bodies with regard to |

Deleted: , responsible for departmental finance issues

|                                     |   |
|-------------------------------------|---|
|                                     | expenditure of funding; references; minutes of meetings.  |
| 2 Teamwork and motivation           | Work alone but included as part of the Departmental Update Group<br>EXAMPLE: first port of call for technical and clerical staff difficulties.<br><a href="#">Due to significant restructuring in the School I am now responsible for 2 other clerical staff in the Department. I meet with the clerical team on a regular basis to provide advice and guidance. I allocate work to them, identifying what are the priorities for the Department and keep them informed about developments within the Department and School</a> |
| 3 Liaison and networking            | Liaising with staff, students, patients, colleagues<br>EXAMPLES: staff from Royal College outside of immediate team, Trust staff with regard to clinical work of Professor .  |
| 4 Service delivery                  | To provide smooth running of whole department. Ensure travel arrangements and meeting arrangements are in place for Professor.  |
| 5 Decision making                   | On a day to day basis able to make independent decisions regarding department, equipment ordering,.<br>EXAMPLE: make decision on supplier for specific piece of equipment or furniture<br>One of the clerical members of staff I supervise now has direct responsibility for finance within the Department. I will advise on more complex issues but the member of staff will be responsible for routine financial matters eg processing invoices and assisting with the costing of research projects                           |
| 6 Planning and organising resources | esponsible for planning and prioritizing own workload to fit in with needs of Head of Department, Research Director and Department<br><a href="#">I now have to plan and prioritise the day to day work of the other clerical members of staff in the Department.</a>   |
| 7 Initiative and problem solving    | The majority of problem solving occurs on a day to day basis where standard problems require standard solutions. Occasionally initiative is required to determine practical options regarding space, room allocation, staffing problems.<br>EXAMPLE: problems with staffing (personal and departmental), diary and clinical timetable for Professor; research project deadlines.<br><a href="#">Financial problems are now resolved in the main by the Finance Assistant</a>  |
| 8 Analysis and research             | Carries out basic levels of analysis and research.<br>EXAMPLE: dealing with staff/patient concerns or complaints, particularly acting as intermediary for heads of units; reporting on projection of research grant expenditure.  |
| 9 Sensory and physical demands      | Required to carry out tasks that require a good level of keyboard skills and some degree of physical effort.<br>EXAMPLES: keyboard skills, digital transcription equipment, use of telephone, lifting and carrying stationery stores, paper etc.  |
| 10 Work environment                 | Basically working in an office environment with computer equipment and telephone.<br>EXAMPLE: use of computer, digital transcription equipment and telephone  |

|                                  |   |
|----------------------------------|---|
| 11 Pastoral care and welfare     | Responsible for pastoral care and welfare of clerical staff, other staff do come to me on a regular basis should they require help and advice.<br><br>EXAMPLE: advising on work load, stress management   |
| 12 Team development              | Involved in induction of new staff to department and following up after they have been in department for a number of months. Advising on staff development for clerical staff. <a href="#">Meet with the clerical members of staff in the Department on a regular basis to identify any training needs. Would recommend any training required to the Head of Department</a> |
| 13 Teaching and learning support | Provide advice and instruction to students, postgraduate and undergraduate regarding enquiries about research projects. Examples: 4 <sup>th</sup> year student projects – advising them what projects are ongoing and who to contact within the department, postgraduate students – making sure guidelines are followed.  |
| 14 Knowledge and experience      | Need to have sufficient knowledge and experience of university procedures, general clerical procedures. 3-5 years experience of working in clerical role. <a href="#">Experience of supervising other staff would be an advantage</a>   |

**Role Holder - Please confirm:**

The details in my role outline form represents a true and accurate picture of the current requirements of my role.

Signed..... Date .....

**Verifier (line manager/Head of School):**

To the best of my knowledge, I verify that the information given in the role profile represents a true and accurate picture of the current requirements of this role.

Signed..... Date.....

Name..... Role Title.....

**When completed please return to your College/SASS HR Office**

**HERA – MAINTENANCE PROCEDURE / GRADING REVIEW (EXAMPLE)**

(Form to be used if original HERA form not in electronic format – to be attached to hard copy of original HERA form)

|                                       |
|---------------------------------------|
| <b>Name :</b>                         |
| <b>Department [Division/School] :</b> |
| <b>Role Title :</b>                   |

**DETAILS OF CHANGES IN DUTIES**

(Please note changes in duties **only** )

|   |
|---|
| <b>Responsible to :</b>   |
| <b>Responsible for :</b> now also responsible for two clerical members of staff |
| <b>Role purpose :</b> no longer responsible for departmental finance issues     |

|  |
|--|
| <b>Changes to Principal duties or Key objectives</b> |
| 1. Now have supervisory responsibility for staff     |
| 2.   |
| 3.   |

| <b>Activities</b>         | <b>Changes in role requirements</b>   |
|---------------------------|---|
| 1 Communication           |   |
| 2 Teamwork and motivation | Due to significant restructuring in the School I am now responsible for 2 other clerical staff in the Department. I meet with the clerical team on a regular basis to provide advice and guidance. I allocate work to them, identifying what are the priorities for the Department and keep them informed about |

|                                     |   |
|-------------------------------------|---|
|                                     | developments within the Department and School   |
| 3 Liaison and networking            |   |
| 4 Service delivery                  |   |
| 5 Decision making                   | One of the clerical members of staff I supervise now has direct responsibility for finance within the Department. I will advise on more complex issues but the member of staff will be responsible for routine financial matters eg processing invoices and assisting with the costing of research projects |
| 6 Planning and organising resources | I now have to plan and prioritise the day to day work of the other clerical members of staff in the Department.   |
| 7 Initiative and problem solving    | Financial problems are now resolved in the main by the Finance Assistant  |
| 8 Analysis and research             |   |
| 9 Sensory and physical demands      |   |
| 10 Work environment                 |   |
| 11 Pastoral care and welfare        |   |
| 12 Team development                 | Meet with the clerical members of staff in the Department on a regular basis to identify any training needs. Would recommend any training required to the Head of Department  |
| 13 Teaching and learning support    |   |
| 14 Knowledge and experience         | Experience of supervising other staff would be an advantage   |

**Role Holder - Please confirm:**

I confirm that the above represents additional requirements of my role.

Signed.....Date .....

**Verifier (line manager/Head of School)**

I confirm that the above represents additional requirements of the role

Signed.....Date.....

Name.....Role Title.....

**When completed, please return to your College/SASS HR Office along with a copy of your original HERA role outline form.**