

HERA



ROLE OUTLINE FORM

NAME:

Unit [School/College]

Role Title	Role Code <small>For Internal Use Only</small>
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Responsible to	Responsible for
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Role purpose

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 or alternatively send to Human Resources, 7th Floor , Tower Building or e-mail to personnel@dundee.ac.uk

Principle duties or Key objectives
1
2
3
4
5
6

Activities	Examples of role requirements
1 Communication	
2 Teamwork and Motivation	
3 Liaison and networking	

4	Service delivery
5	Decision making
6	Planning and organising resources
7	Initiative and problem solving
8	Analysis and research
9	Sensory and physical demands

10	Work environment
11	Pastoral care and welfare
12	Team development
13	Teaching and learning support
14	Knowledge and experience
Any other significant activities not included above or any other information you want to highlight?	

ROLE OUTLINE FORM

COMPLETION GUIDANCE NOTES

Role purpose

This is the reason why the role exists and the statement should summarise the main areas of activity and responsibility.

Principal duties [or accountabilities]

These should be limited in number. The listing should specify only the highest level of duty.

Key objectives [or targets]

These should be limited in number. The listing should outline the major areas of responsibility and activity which will be used to assess achievement and performance.

Activities

Please provide examples of the main activities required for effective performance of the role. Use the guidance notes given below and try to limit the entry for each heading to around roughly 100 words on average.

Activities:	Representative examples may include:
1 Communication:	
covers communication through written, electronic or visual means and oral 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.	Oral: Evidence of giving or receiving information by speaking or listening e.g. giving directions to students to help them find their way around the institution, telephone enquiries, giving presentations, attending or chairing meetings. <ul style="list-style-type: none">▪ Who do you talk to as part of your role and how often?▪ What type of information is exchanged?▪ Why?▪ How do you decide what to say and when to say it?
	Written and Electronic Examples might include responding to requests for information from the public, drafting internal letters or writing a paper for publication <ul style="list-style-type: none">▪ Who do you write to and how often?▪ What do you write about?▪ Why?▪ How do you decide what to write and when to write it?▪ How do you structure the information?

<p>2 Teamwork and Motivation:</p>	
<p>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.</p>	<p>This is about working in a team (i.e. a number of people who work together to achieve a common purpose) and includes both internal and external teams and teams that are fixed or change (e.g. departmental, research, course development or project teams or those involving students or people from outside the institution).</p> <ul style="list-style-type: none"> ▪ In which teams is the role holder mainly involved? ▪ What is the function of these teams and what are they working to achieve? ▪ 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? ▪ Who is responsible for setting the direction of the work of the team? ▪ How are team members encouraged and motivated?
<p>3 Liaison and Networking:</p>	
<p>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.</p>	<p>This describes liaising and networking with others outside the work team. It is essential to focus on the requirements of the role not what the role holder may elect to do. Liaison is making one-off contacts for work related reasons. A network is an interconnecting group of people who exchange information, contact and experience on a recurrent basis for professional purposes connect with the role.</p> <ul style="list-style-type: none"> ▪ 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 why? ▪ What is the purpose of the network and what is the role holder's part in it? ▪ What would happen if the role holder were not part of this network?
<p>4 Service Delivery:</p>	
<p>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.</p>	<p>The term customer is used in its broadest sense to include anyone who consumes or benefits from the services provided by role holders and includes other members of staff as well as students, visitors and clients.</p> <ul style="list-style-type: none"> ▪ 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 service which is the same for all customers? ▪ How does the role holder find out what the customer wants? ▪ Who sets the overall standards for service and decides which services will be offered?

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.	<p>Decisions include those made by the role holder alone, in conjunction with others and the provision of advice to others to aid their decision making.</p> <ul style="list-style-type: none"> ▪ How are decisions made and who makes them? ▪ What authority does the role holder have to make decision without the agreement of others? ▪ 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? ▪ How regularly does the role holder make these types of decisions? ▪ Who or what do they impact and over what timescale?
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.	<p>The size or value of the resources should not over-ride the importance of the skills required for planning and organising their effective use.</p> <ul style="list-style-type: none"> ▪ What does the role holder plan and organise? ▪ What resources are involved (e.g. people, equipment, money, etc)? ▪ Who else is involved in creating or working on the plan? ▪ What is the time scale? ▪ 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?
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.	<p>Activities that are concerned with analytical or theoretical research should not be included here.</p> <ul style="list-style-type: none"> ▪ What are examples of typical problems? ▪ How often does this type 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?
8 Analysis and Research:	
covers investigating issues, analysing information and carrying out research. This applies not only to academic and research staff but will include staff who follow 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.	<p>The activities to be included here are those requiring the application of analytical skills and the use of research methods. Responsibility for identifying areas in need of investigation are also covered.</p> <ul style="list-style-type: none"> ▪ 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? ▪ How does the role holder chose which method or approach to use? ▪ Who decides that the investigation or research is needed or would be beneficial?

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.	<p>Information about the learning required to attain skills and uses the senses should be considered.</p> <ul style="list-style-type: none"> ▪ Does the role holder use any tools or equipment? ▪ Is the role holder required to lift, carry or handle large or heavy objects? ▪ 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?
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.	<p>Working in difficult or dangerous conditions is secondary to the requirement to take action to assess risk and manage hazards.</p> <ul style="list-style-type: none"> ▪ 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 the risk or control the environment before or while working there? ▪ Does the role holder make use of any safety equipment, special clothing? ▪ Who is responsible for controlling the environment and making sure that others working there are not at risk? ▪ Who is responsible for the health and safety of people working there and decides that it is safe to work? ▪ How are these assessments made?
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.	<p>The role holder should be required to provide pastoral care and welfare. These activities are not those undertaken or avoided by choice.</p> <ul style="list-style-type: none"> ▪ 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 other person to anyone else for help? ▪ Did the role holder have any training in this aspect of the role? ▪ Is there any guidance material to help?

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.	<p>These activities are required to be carried out by the role holder within the team identified above.</p> <ul style="list-style-type: none"> ▪ What does the role holder instruct, coach or guide others to do? ▪ How does the role holder do this? ▪ Are there any materials 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:	
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.	<p>Any activity aimed at supporting the learning of others outside the team identified above is included here.</p> <ul style="list-style-type: none"> ▪ What is the role holder's subject area or specialism? ▪ Who does the role holder teach, develop or provide with academic support? ▪ Who decides on the content of the activity? ▪ Is anyone else involved in providing teaching, development or learning support in this subject area? ▪ Who designs and develops the course 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	
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.	<p>For guidance, consider the minimum level of knowledge and experience required of a new person in the role.</p> <ul style="list-style-type: none"> ▪ 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/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 routinely? ▪ What level of knowledge and experience would be required of the replacement, were the role holder to leave their role?

Some Examples of evidence relating to HERA factors in Role Outline Forms

The following notes are examples of the types of responses received in relation to a number of different posts. The list is not exhaustive and is designed to give you some idea of the types of information that can be provided on the role outline form. Some of these headings could be amplified with detailed examples and frequencies to further clarify your role. For example "Giving directions, handling routine phone enquiries or passing on messages" might be expanded by adding – "e.g. first point of contact for students in person or by phone on a daily basis. Information provided on basis of standard departmental procedures and non-routine enquiries forwarded to appropriate manager".

1 Communication

- Giving directions, handling routine phone enquiries or passing on messages.
- Dealing with queries from staff, students and teachers from local schools in person or by telephone to on a day-to-day basis
- Explaining course entry requirements
- Showing colleagues how to operate equipment, or persuading others to adopt a particular viewpoint.
- Conveying new legal requirements to colleagues or explaining a report on budget or cost implications.
- Informal discussions with colleagues in the subject area and admin staff re programme matters (schedules, collaboration in teaching, individual problems with students etc.)
- Routine telephone calls and informal meetings with students answering queries, providing information on courses and other work related issues
- Frequent e-mails (or memos) to students and other staff – requesting and providing information, organising meetings/ activities etc.
- Communicating regularly with staff in ICS and Estates and Buildings via phone or email

2 Teamwork and Motivation

- Part of team of secretarial and clerical staff who provide support to all members of divisional staff and students
- Part of team to organise SSC teaching – liaising with tutors and school staff to produce timetables, discussing provision of projects with tutors as well as room and equipment requirements
- Part of team to organise seminars and symposiums – working with academic staff and support staff to organise all aspects of organisation
- Work alone but included as part of a team known as Academic Support Services, have little day to day contact with other members of the team.
- Have 3 Academic Support Services team meetings a year with other team members to share general information about overall services.
- Take part in regular team meetings around every 2 weeks

3 Liaison and networking

- Liaise with Finance Office to resolve queries relating to CODA transactions on grants
- Liaise with Press Office to notify of divisional events and awards
- Liaise daily with staff and students at all levels to organise technical assistance
- Part of the University network of web administrators exchanging information and views relating to web development
- Internal liaison includes: members of academic staff regarding student intake numbers for records; Accounts office regarding invoices; Student Records Office regarding student contact details
- External liaison includes contact with teachers from local schools
- Membership of cross-University groups
- Membership of working parties required as part of the role.
- Membership of professional bodies, national or international groups or regional university groups or industry associations or bodies e.g. a member of the Technicians UK-wide email user group

4	Service delivery
	<ul style="list-style-type: none"> • Provision of a customer focussed resources service. • Respond to queries, provide information and carry out basic reviews of customer needs to adapt service to make it both reactive and proactive. • Discuss policy issues with and make recommendations to the Academic Support Services Administrator who takes these forward to Faculty Board. • Carries out an annual survey to find out customer satisfaction; respond to issues raised by staff/student committee about service level • Provide financial information and guidance to heads of departments • Support lecturers by advising on the use of equipment
5	Decision making P and O
	<ul style="list-style-type: none"> • On a day-to-day basis able to make independent decisions regarding all aspects of the service, longer term or far reaching decisions would be made after consultation with the Academic Support Services Administrator. • Make collaborative decisions where necessary with academic staff and teachers • Choosing stock from a preferred supplier's list • authorising money from a previously agreed budget. • Advising on how legislation affects institutional practice and helping to determine the actions needed to implement changes • Uses Purchasing Office information to help make recommendations on which supplier to use for purchase of new equipment.
6	Planning and organising resources
	<ul style="list-style-type: none"> • Responsible for planning and prioritising own workload • Each year provide an annual report and account and discuss budgets and costs and agree scale of membership fees with line manager • Making decisions on what resources need replacing and when • Managing a specific project, e.g. organising a conference or event such as a graduation ceremony or open day, or managing the staff in your department. • Authorised to order office stationery and equipment • Authorised to transfer income between grants
7	Initiative and problem solving
	<ul style="list-style-type: none"> • 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. • Identifying items missing from resource packs and how to locate missing items or what to do if they cannot be found • Solving problems with computer cataloguing software and bar code scanner and knowing when to ask for help
8	Analysis and research
	<ul style="list-style-type: none"> • Carrying out basic levels of analysis and research occasionally or routinely • Dealing with staff/student concerns or complaints, particularly those passed on from staff student committee requiring feedback for the next meeting • Individual and collaborative investigations involving the collection of data from appropriate sources • Literature or database searches, internet searches, • Examination of data using statistical or other analytical methods • Checking stock levels or carrying out routine maintenance checks
9	Sensory and physical demands
	<ul style="list-style-type: none"> • Carrying out tasks that require a good level of keyboard skills and some degree of physical effort • Keyboard skills for use of software for 50% of working day • Using standard office equipment or maintenance tools to conduct experiments that have high risks and use high cost equipment • Driving a University vehicle • Touch typing or using sophisticated computer programmes that demand training and experience. • Carrying heavy equipment on a daily basis • Regular working in confined or cramped spaces

10	Work environment
	<ul style="list-style-type: none"> • The need to understand health and safety issues is required. • Safety equipment (hats, boots, safety goggles etc) need to be worn occasionally • Conducting risk assessments routinely • Dealing with dangerous equipment or chemicals • Routinely dealing with people who are angry, emotional or distressed.
11	Pastoral care and welfare
	<ul style="list-style-type: none"> • Very minor pastoral care element other than showing sensitivity to those who may need help and would involve referral on to somebody more suited to dealing with the issue. • Advising students who to contact if they need help. • Providing support on grant problems • Dealing with disciplinary or performance issues • Providing a program of support for employees who are suffering from work related stress
12	Team development
	<ul style="list-style-type: none"> • Do not get involved with the induction or training of new or existing staff • Showing a new member of staff the ropes • Providing advice and support to new or junior colleagues in carrying out delegated tasks • Showing a colleague how to use a computer-based application, providing feedback and helping to make improvements to level of use • Conducting regular staff appraisals and performance reviews
13	Teaching and learning support
	<ul style="list-style-type: none"> • Demonstrating how to operate simple equipment (such as a photocopier) while following basic safety procedures • Overseeing work experience placements • Delivering and assessing a course, module or part of an undergraduate degree scheme • Planning the content of a course or module of an undergraduate degree.
14	Knowledge and experience
	<ul style="list-style-type: none"> • Need to have sufficient knowledge to be able to work with computer systems and deal with staff/students without frequent reference to others. 2-3 years experience of working within HE environment required • Ability to set up basic laboratory equipment and follow simple analytical procedures. • Need to have a food hygiene certificate and previous practical experience in a canteen environment • Broad experience of University procedures and contacts with other departments required to deal with wide variety of daily enquiries and requests from staff/students at all levels • High degree of discretion and confidentiality required