HERA

Guide for Verifiers

To explain HERA and what is expected of those verifying evidence of role requirements

University of Dundee

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1. **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. This score can be used to assign roles to appropriate grades or bands in a salary structure.

It is made up of 14 elements which reflect the values of higher education and the aspects of roles seen as the most important.

HERA was developed by a consortium of universities and colleges of higher education for use in the sector to analyse all roles and occupational groups. Its strength lies in the fact that it is sector-specific and its development was based on field research and well-accepted methods with a high degree of involvement from staff and their representatives.

During its development, the scheme was piloted and then trialled in partnership with the Trade Unions and employers. As a result it was deemed to be an appropriate tool for use in support of allocating roles against pay and grading structures and for ensuring equal pay for work of equal value.

2. **How will HERA be implemented at Dundee?**

Evidence of role requirements is obtained from role holders. This will be recorded on a HERA Role Outline form and this information will be used to match to one of the generic profiles which have been developed in conjunction with the campus unions.

3. **The evidence**

HERA looks for evidence of activities or responsibilities undertaken by role holders. These should be those performed in typical circumstances and situations, not rare or extreme cases. They should be required of the role holder, not those undertaken from personal interest.

Some of the elements make allowance for **occasional** requirements. This provision has been made as it is known that some roles holders are expected to perform certain duties, for example, only at specific times of the year. However, "one offs" carried out some years previously should not be included unless it is certain that the role holder will be required to repeat that activity.
Some role holders may have duties additional to the requirements of the role for which they may or may not receive extra payment, for example being a First Aider. Often these are agreed on a personal basis and are over and above normal role requirements. Activities of this nature should be excluded.

Some staff carry out a number of roles, for example a senior lecturer who is also expected to spend one day a week as a staff development officer. The activities carried out in both roles are part of the overall requirements and are performed on a regular, on-going basis. In cases such as this, the analysis should be based on all aspects of the role.

4. Verification process

The evidence provided by the role holder needs to be verified by someone who knows the role well and is authorised to do so. The verifier is asked to confirm the completeness of coverage, representativeness and accuracy of the evidence given.

The record will not include every single activity or task undertaken. Its purpose is to provide typical and significant examples that represent the role. Quality is more important than quantity.

The verification of a role outline form is important for several reasons and the person asked to verify the evidence should be aware of the significance of their contribution.

Role holders may

- omit a critical aspect of their role
- diminish their involvement or level of responsibility
- fail to understand the significance of a task they perform
- represent the level and extent of their responsibilities weakly
- exaggerate their involvement
- represent responsibilities out of context
- claim responsibility for activities they do not undertake

However, if no evidence is offered in a specific area, the verifier should not feel obliged to find it. Not relevant or not required can be legitimate responses, reflecting the true situation.

5. Bias

There is also the potential for unjustifiable bias. This can be due to the way in which the role holder views their position and status in the institution. Research has shown convincingly that roles most frequently occupied by
women and members of minority ethnic groups are valued less than those typically occupied by white males.

Examples of this can include:

A technician refusing to accept his contribution to students learning even though the activities described clearly fall within the definition of Teaching and Learning Support
A secretary failing to give examples of planning the work of her boss on a longer term basis because "she is only a secretary"
A residencies night porter not recognising the important contribution he makes to students' well being
A manager claiming sole responsibility for the team's decision making

Those acting as verifiers need to be aware of the dangers of gender and racial stereotyping and ensure that the evidence used is accurate and representative of the role requirements.

6. Disability

People with disabilities require special consideration. It should be remembered that it is the role that is being analysed; not the role holder. However, it is possible that agreement may have been reached with an individual to adjust the scope and level of their responsibilities to accommodate their disability. Therefore the evidence used to analyse the role should be taken in the light of any such agreement. The verifier may wish to seek advice from HR in this circumstance.

7. Performance

The analysis is of role requirements; not an individual's performance. It is understood that the profile of the role should be built on the presumption that the role holder is trained and capable to perform the role to the standard required, unless the role is one occupied by a novice or trainee and this is made explicit.

8. Difference of view

If the verifier does not agree with the evidence provided, it is important that differences are reconciled if at all possible before contacting HR. These differences should be matters of fact:

i.e.

- evidence included that should not be included
- evidence omitted that should be included
- evidence placed under the wrong element
The verifier should as far as possible discusses any differences with the role holder and seeks to clarify them. Research shows that if role holders feel that they have been treated fairly and have been given full opportunity to state their view early in the process, the chances of them feeling aggrieved are reduced. To this end, verifiers are encouraged to take the time to deal properly and fully with any disagreement when they are first asked to verify the evidence.

Any changes to the evidence record should clearly show which areas of difference have been agreed and log any areas where it has not been possible to reconcile the view of the role holder and that of the verifier. In these circumstances, the verifier should report the matter to Human Resources.

9. **Appeals**

There is a procedure whereby individuals can appeal. This Appeal process is available on the HERA website.

10. **What do I do now?**

Staff have been asked to complete the form by **14 December 2007** and should be allowed time within their working day to complete it. A sample role outline form together with notes of guidance has been sent to all staff and can also be accessed on the HERA website. **Your role in relation to this form is to read it carefully once completed and decide whether the information recorded in relation to each element is accurate and reflective of the range of duties and responsibilities of the post.**

11. **Contacts**

For advice and assistance on your role as a verifier, you can contact Julie Strachan on ext 84326 (j.m.strachan@dundee.ac.uk).