

REGRADING GUIDANCE NOTES

(GRADES 7-9)

INTRODUCTION

These Guidance Notes are intended to supplement the information within the [Regrading Procedure](#) and the generic Role Descriptors.

For further information, please contact your Line Manager, Head of Section, HR Partner/Advisor or Trade Union representative.

HERA

All posts grades 7-9 within Professional Services are evaluated through an objective assessment (scoring) using the HERA (Higher Education Role Analysis) job evaluation scheme.

HERA is a tool used to analyse roles found in Higher Education institutions. It was developed by a consortium of higher education institutions to cover the vast range of jobs which can be found within the higher education sector. The scheme has been rigorously tested at a national level to ensure that it is fit for purpose. Go to [HERA](#) for further information.

HERA analyses roles against 14 key elements which reflect the values of higher education, and the aspects of the roles identified as being the most important. All roles are analysed against the same elements, these being:

- Communication
- Teamwork and motivation
- Liaison and networking
- Service delivery
- Decision making processes and outcomes
- Planning and organising resources
- Initiative and problem solving
- Analysis and research
- Sensory and physical demands
- Work environment
- Pastoral care and welfare
- Team development
- Teaching and learning support
- Knowledge and experience

COMPLETION AND SUBMISSION OF THE APPLICATION FORM

An application for regrading of post can be made through either a joint submission prepared by a member of staff and their line manager or by the member of staff themselves, regardless of whether the case is supported by the line manager or not. If the member of staff initiates the process, they should advise their line manager of their intention to submit a regrading application.

When completing the application form, you may outline the evidence within each Element as you wish, using whatever headings you feel are most appropriate to your circumstances. The HERA Elements guidance notes below suggest a number of areas you might wish to consider.

Please ensure that the appropriate application form is completed for the grade you are seeking regrading to. If you are unsure which application is applicable in your case please seek advice from your Line Manager or HR Partner/Advisor in advance of completion.

The line manager and the member of staff will be advised of the date when the regrading panel will meet to consider the regrading application. Applicants will be notified of the outcome of their regrading application within 15 working days of the Regrading Panel meeting.

HERA ELEMENTS

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.

When completing this section you may wish to consider the following:

Oral Communication

Who do you talk to as part of the job?

What type of information is exchanged?

How do you decide what to say and when to say it?

Written Communication

Who do you write to?

What do you write about?

How do you decide what to write and when to write it?

How do you structure the information?

2 TEAMWORK AND MOTIVATION

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.

When completing this section you may wish to consider the following:

In which teams are you mainly involved?

What is the function of these teams?

What are they working to achieve?

Who is in the team and what is your main function 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?

3 LIAISON AND NETWORKING

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; participating in public engagement activities; ensuring mutual exchange of information; influencing developments through one's contacts; and building an external reputation.

When completing this section you may wish to consider the following:

Who do you liaise with and why?

Why is it important and how often does it happen?

What information do you typically pass on or receive?

What networks (if any) do you belong to and why?

What is the purpose of the network and what is your role in it?

What would happen if you were not part of this network?

4 SERVICE DELIVERY

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.

When completing this section you may wish to consider the following:

What service do you provide and to whom?

Do you actively offer the service or does the customer come to you?

Is there a standard service, which is the same for all customers?

How do you 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.

When completing this section you may wish to consider the following:

*How are decisions made and who makes them?
What authority do you have to make decision without the agreement of others?
Explain how you make typical decisions and what are the results?
Who else is involved in making your decisions and how do you contribute?
How regularly do you make these types of decisions?
Who or what do they impact on 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. It also covers the level of delegated budgetary authority, and the monitoring of quality of outputs.

When completing this section you may wish to consider the following:

*What do you 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 do you prioritise?
What may impact on the plan and what else do you 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 job. 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.

When completing this section you may wish to consider the following:

*Give examples of typical problems?
How often does this type of problem occur?
What do you do about them?
What options do you consider and how do you select the best course of action?
Is it part of your role to generate new or creative approaches?*

8 ANALYSIS AND RESEARCH

Covers investigating issues, analysing information and carrying out research. This 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, setting the context for research. It also covers participation in job evaluation processes as a trained Role Analyst.

When completing this section you may wish to consider the following:

*Who else is involved in the analysis and research?
What data do you have available or need to obtain?
How do you obtain this data?
How do you choose which method or approach to use?
Who decides that the investigation or research is needed or would be beneficial?
Do you undertake duties as a Role Analyst?*

9 SENSORY AND PHYSICAL DEMANDS

Covers the sensory and physical aspects of the job 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.

When completing this section you may wish to consider the following:

- Do you use any tools or equipment?*
- Are you required to lift, carry or handle large or heavy objects?*
- Is any assistance given by others or in the form of special equipment?*
- Do you work in cramped, confined or difficult spaces or in 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, exposure to hazardous substances, health and safety responsibilities (including Radiation Protection Supervisors, Laser Protection Supervisors and General Safety Advisors), the work position and working in an outdoor environment.

When completing this section you may wish to consider the following:

- Where do you work?*
- What is the environment like?*
- Do you take any special measures to reduce the risk or control the environment before or while working there?*
- Do you make use of any safety equipment or 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 & safety of people working there and decides that it is a safe environment in which to work?*
- Do you undertake any additional duties as part of your role for which you do not receive additional remuneration as a Radiation Protection Supervisor, Laser Protection Supervisor or General Safety Adviser?*

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.

When completing this section you may wish to consider the following:

- Are you approached by others for help?*
- What are the typical issues or problems?*
- What do you do and how do you decide to do it?*
- Are you able to refer the other person to anyone else for help?*
- Did you have any training in this aspect of the job?*
- 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 post holder; and giving guidance or advice to one's peers or supervisor on specific aspects of work.

When completing this section you may wish to consider the following:

- What do you instruct, coach or guide others to do?*
- How do you do this?*
- Are there any materials to help?*
- Have you been trained in this aspect of the job?*
- Who identifies the learning needs of the team members and decides whether any one individual should receive training or development?*
- How do you 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.

When completing this section you may wish to consider the following:

What is your subject area or specialism?

Who do you 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 job, 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.

When completing this section you may wish to consider the following:

What knowledge and experience, however gained, do you need to carry out your basic day to day responsibilities?

How do you apply the knowledge and experience?

How long did it take to obtain the required knowledge and experience?

How did you develop that knowledge and experience?

How often do you need to update that knowledge and experience?

Who routinely goes to you for advice or guidance?

What level of knowledge and experience would be required of the replacement, were you to leave your job?