# Role Description Guidance

The Role Description Template has been developed to allow the University to collect and hold information about roles in a consistent way. Accurate role information that is clear and unambiguous is essential for the recruitment process.

#### Which part do you complete?

If you are recruiting for a replacement role (which has already been evaluated), part 1 of the form needs to be updated/completed.

If the role has not been evaluated (i.e. a new role) or is significantly different from the original role, parts 1 and 2 of the role description form should be completed/updated to allow for the role to be fully evaluated.

#### Further information about completing the form

The Role Description Form has been designed to be completed electronically. Once completed, it should be approved by the appropriate Dean of School/Director of Service and forwarded to Human Resources for processing. Once approved and evaluated (if required), part 1 of the role description can then be used in the application pack sent to potential candidates.

### Part 1: To be completed for all roles

#### Role Summary

* This section gives a broad overview of the role, including any management responsibilities.
* There should be between 1 and 3 short paragraphs to summarise the role.
* The role title which should be short, meaningful to an outsider, and reflect the broad range of duties.
* The role title of the person to whom the role holder is responsible.
* Information about the School/Service, including location and organisational information such as where the role fits in the School or Service.
* The main purpose of the role.
* Managerial responsibilities for staff.

#### Main duties & responsibilities

* This section should detail the typical activities the role will oversee / do.
* There should ideally be around 6-8 key duties.
* These should specify the highest level duties the role will perform.

#### Person Specification

Must include:

* The essential and desirable skills for the role. It should also detail the knowledge and experience required, including education/qualifications, experience, skills/personal requirements
* The examples and activities must be based on clear, specific and measurable criteria relevant to the role.
* These will be the standards by which applicants are short-listed. Short-listed applicants must meet all the essential criteria.
* The more precise the criteria, the more straightforward the short-listing. A balance must be struck to ensure the candidate can feasibly meet the criteria.
* This also forms an essential tool for interviewing.

### Part 2: To be completed for new roles or existing roles which have changed substantially

These roles need to be evaluated using HERA (Higher Education Role Analysis) and a grade will be allocated following the evaluation process.

To ensure an efficient and accurate allocation of grade, it is vital that managers provide as much information as possible including examples that evidence the required duties, responsibilities or knowledge across the 14 HERA elements.

Definitions for each of the 14 HERA elements; prompt questions and examples of role requirements/activities, are detailed below.

If you have any queries or are not sure whether part 2 is required, please contact your HR Partner or the Head of Reward

# Role Description Overview - EXAMPLE

### ROLE DESCRIPTION

|  |  |  |
| --- | --- | --- |
| GRADE *[Enter Grade - Grade for new or amended posts to be confirmed by HR]* LOCATION *[Enter Campus Location]*  **LINE MANAGER**  [*Line Manager Role Title]* |  | ROLE SUMMARY [1- 3 paragraphs about the role. This should be a brief statement of the primary purpose of the role, its’ purpose at the University, how it fits in the team or wider remit of the team]. Line Management Responsibility for: This role does not have any line management responsibilities currently [OR] This role has line management responsibilities for [insert role titles / no. of line reports here]. |

### MAIN DUTIES AND RESPONSIBILITIES

* These should detail the typical activities the role will oversee / do.
* These should ideally be around 6-8 key duties.
* These should specify the highest-level duties the role will perform.
* X
* X
* X

**Key ones to include for all roles:**

* Role model the [University’s values & behaviours](https://www.napier.ac.uk/about-us/our-strategy);
* Be responsible for ensuring that the information and records processed (received, created, used, stored, destroyed) on behalf of the University are managed in compliance with ALL applicable legislation, codes and policies e.g. [Data Protection](http://staff.napier.ac.uk/services/secretary/governance/DataProtection/Pages/default.aspx), [Information Security](http://staff.napier.ac.uk/services/cit/infosecurity/Pages/InformationSecurity.aspx) and [Records Management](http://staff.napier.ac.uk/services/secretary/governance/records/Pages/default.aspx).

### PERSON SPECIFICATION

In the below sections, the essential and desirable columns are invisible. If you would like to move the tick in to either essential or desirable, please copy and paste in to the correct column, ensuring you tick only one.

To add a new line in to any of the sections, please right click in an existing line and select “insert” then “insert below”. This will create a new line below the existing one. Repeat as many times as necessary.

|  | ESSENTIAL | DESIRABLE |
| --- | --- | --- |
| Education / Qualifications Consider what level of education is essential or desirable for the role E.g., if an G6 Lecturer role a PhD sits here as an essential qualification. It is worth considering when to be prescriptive and when not to be here and consider when equivalent experience might come in to play. | | |
| * EXAMPLE – CIPD Level 3 qualification or equivalent experience | ✔ |  |
| * EXAMPLE – [insert degree or relevant equivalent experience] |  | ✔ |
| Skills / Experience |  |  |
| * X | ✔ |  |
| * X | ✔ |  |
| * X | ✔ |  |
| * X | ✔ |  |
| * X | ✔ |  |
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| * X |  | ✔ |

|  |
| --- |
| HERA GUIDANCE for Part 2 of the Role Description |
| Communication: |
| This element covers communication of all kinds including verbal, written and electronic. It also considers the type of information being communicated for example complexity, subject specialist and if this is operational or strategic.  **Areas to consider:**   * Outline who the role holder will communicate with; the frequency of the communication; the content and purpose. This should include verbal and written communications. * Audience - e.g., senior managers or students? * Reason – why is the communication required and the impact of this? * Frequency? * Content - is this operational, complex, responses to queries or involving presentations? * Will the role use standard templates to communicate? * Are they writing reports and how complex is the content – is it strategic, reporting on data, contributing to papers for ULT? * Who will the role holder communicate with in writing or electronically, and how often? What will they communicate? Does this information inform strategic decisions?   **Examples may include:**  **Oral**   * Handle routine enquiries from members of staff within the School/Service and across the University, using set policies and procedure, accurately and in a timely manner. * Excellent negotiation and interpersonal skills are required to interact with senior managers across the University to inform them of changes to service. * Communicate effectively on a weekly basis with staff at all levels across the University and negotiate, listen, understand and articulate customer requirements and propose pragmatic solutions. * Occasionally required to explain issues in a sensitive manner that can be easily understood by the recipient.   **Written**   * Provide written reports and committee papers explaining why and how a complex system should be implemented within the University. * Present papers at international conferences. * Convey new legal requirements and their implications to colleagues. * Take minutes at meetings. * Produce policies and procedures. |

|  |
| --- |
| Teamwork and Motivation: |
| We are seeking here to understand the contribution made to the team and wider business. This element includes teamwork 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.  **Areas to consider:**   * Where does this role sit within the main team and how many people are there in the team? * Does the role holder have formal line manager/supervisor duties, if so, how many staff report to the role holder? * Describe the role holder’s role in the main team with examples, i.e., providing support/guidance to others; motivating and encouraging, being a role model to less experienced members; allocating work of team members; setting goals/objectives for the team; directing/leading the team etc? * Is this role part of more than one team? * Will the role matrix manage other individuals?   **Examples may include:**   * Strategically lead and motivate a team of staff, develop team working to achieve outstanding results through effective performance management. * Monitor delivery of agreed team outcomes. * Ensure colleagues understand what is to be achieved and by when. * Participate and contribute to weekly management meetings. * Act as a senior member of the team and provide support for other team members. * Overall leader of the team, setting goals and directing the team. |
| Liaison and Networking: |
| We are looking to determine the range of contacts the role is required to make with individuals outside of their own team and the frequency of this. This element 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. **Liaison** is making one-off contacts for work related reasons. A **network** in an interconnecting group of people who exchange information, contact and experience on a recurrent basis for professional purposes connect with the role.  **Areas to consider:**   * Who will the role holder liaise with and what is the purpose of the liaison (e.g., to pass on/receive information; to build beneficial relationships; to influence decisions; to build the University’s reputation? Please outline the benefits gained. * Will the role holder be required to participate in networks internally or externally? If so, what are they and what is their purpose and the role holder’s role in these networks? * Will the role holder be required to initiate or lead any networks internally or externally? If so, what are they and what is their purpose?   **Examples may include:**   * Build and maintain external professional relationships relevant to the needs of the University and represent the University as appropriate. * Establish and maintain effective working relationships at all levels both internally and externally. * Utilise effective negotiation and networking skills, in order to build and maintain internal and external networks to benefit the University. * Exchange information with other staff for effective working (e.g., checking availability for meetings, making room bookings). * Participate in Administrator’s network to exchange information on effective ways of working. * Provide expertise as a member on University wide committees/project groups. |
| 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 University. 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.  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.  **Areas to consider:**   * Who are the role holders’ customers and what service does this role provide? * How does the role holder determine what the customer wants/needs? E.g., direct request; feedback questionnaires; meeting with customers. * Does the role holder offer varied services depending on individual customer requirements? * Will they set standards and targets – for their own work, for a service or number of projects? * Is the role holder involved in monitoring feedback for the service and Impact of the service? * Responsibility for identifying new services or anticipating customer needs? * Will the role holder investigate the needs of the customer and then adapt the service to meet their requirements? If so, using an example describe how?   **Examples may include:**   * Provide a responsive and accurate service to staff and external contacts. * Set up and monitor service standards by seeking and acting upon customer feedback. * Provide a responsive service based on staff and student needs. Contact is normally initiated by the customer. * Identify changes to users’ needs by obtaining feedback from staff’ students and external agencies * Discuss feedback obtained with Line manager with a view to modifying the service provided. * Contact potential customers to let them know of new services. * Set and maintain service standards. |
| Decision Making Processes and Outcomes: |
| This section of the assessment looks to explore the decisions made by the role holder and the impact of this.  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.  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.  **Areas to consider:**   * Individual decisions – will the post holder make decisions with no reference to others? * Collaborative decisions – who with, for example a management team or working group? * Advice and recommendations provided that inform the decisions of others – is this specialist, who will utilise this advice? * What do the above decisions relate to – operational, policy, strategic? * Impact of decisions – who is affected, are these long term? * Using examples describe the decisions and whom or what it will typically impact and over what timescale.   **Examples may include:**   * Contribute to University Committee decision making including taking the initiative to put items forward for the agenda and presenting papers/ideas at the meeting. * Encourage own staff to take appropriate decisions through delegation of appropriate responsibility and accountability. * Responsible for day-to-day decisions relating to diary and office management. * Make independent decisions on a daily basis in relation to all aspects of the work of the school/service; purchase low cost items using the company visa card. * Provide information to academic staff to help them make decisions about the purchase of new equipment. * Develop new services or change existing work practices that affect broad areas of the institution. |
| Planning and Organising Resources: |
| We are looking to explore organisation, prioritising and planning resources. This section of the assessment will look to explore the type of planning involved, for example is this operational. It will also explore the scope of this, for example planning own work, work for a team or section.  **Areas to consider:**   * Will the role holder work to a pre-set plan and/or plan and organise their own work and/or plan and delegate work to others? * Responsible for planning teams, sections, projects, pieces of work or activities? * Responsible for resources and if so, what are these, e.g., time or money/ a budget? * Is the planning required operational or strategic or both? * The scope of planning – is this short or long term? * Will the role holder be responsible for planning and monitoring the utilisation of other resources, e.g. finance space? If so, please provide a typical example. * Will the role holder have to organise projects, e.g., conferences, ceremonies or research projects? If so, please provide a typical example. * Will the role holder be involved in strategic planning?   **Examples may include:**   * Ensure the smooth running of the laboratory/office; plan and prioritise own workload in accordance with agreed objectives. * Prioritise workload with minimal supervision/guidance to ensure high standards of application, care and accuracy in self and others. * Manage a specific project, e.g., organising a conference or event. * Project Management: monitor progress and keep to timescales. * Manage staff and resources across a large team or a smaller number of teams. * Contribute to the School/Service annual plan. * Set objectives for team using the University’s PDR/appraisal system. * Setting the budget. * Monitoring progress and keeping to the timescales for a large complex project. * Planning for the future – developing 3–5-year plans. |
| Initiative and Problem Solving: |
| This section assesses the role’s involvement in problem solving and how far they identify, develop or select solutions to issues. The type of problem is considered in terms of complexity and the level of creativity required in ascertaining a resolution.  **Areas to consider:**   * What problems will the role holder typically have to resolve and how often do these occur? * What procedures, custom and practice exist to help the role holder in solving problems? * Type of problems encountered – are there routine or complex? * Who is impacted by the problem and solution? * Reactive or proactive problem solving? * Does the role holder have to generate new or creative approached to resolving problems?   **Examples may include:**   * Investigate and resolve student complaints. * Use initiative and creativity where the optimal solution may not be immediately apparent, e.g. handling difficult meetings, complaints, grievances. * Manage and balance the School/Service budget and resources against needs and plans. * Investigate areas of ineffective working or systems failure and develop approaches to improve operational effectiveness by introducing a new system or simplifying practices. * Design new courses or programmes of study to attract students. * Developing new processes, policies or procedures. |
| Analysis and Research: |
| We are looking to see if the role will be required to collate and analyse quantitative or qualitative data in order to investigate as well as resolve issues. 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.  **Areas to consider:**   * Will the role holder be required to gather information for analysis? If so, what information? * Will the role holder analyse information? What will this involve and how is the method determined? * How are the outcomes of any analysis used and by whom? Does it inform any decisions? * Will the role holder be required to undertake academic or other research? * Will the role holder be required to define new research questions or originate new methodologies?   **Examples may include:**   * Monitor the budget and check and report any anomalies. * Collate, monitor and authorise payroll data. * Carry out research on new resources, including software. * Conduct and analyse student satisfaction surveys. * Conduct research in own subject area. * Develop methodologies and design data gathering and analytical techniques. * Analyse potential opportunities or problems in order to recommend ways forward for the University. * Benchmark against other universities in order to assure quality of service. |
| Sensory and Physical Demands: |
| This section explores if a role will require specific physical skills to complete a task.  **Areas to consider:**   * Will the role holder be required to use specialist equipment other than a computer and standard office tools? * Will the role holder be required to lift, carry or handle large, heavy or fragile objects? * Will the role holder need to use any skills involving dexterity or use of the other senses (observing, listening, touching, smelling, tasting)?   **Examples may include:**   * Responsible for moving expensive equipment around the laboratories. * Responsible for setting up and dismantling data projector and audio visual equipment in laboratories. * Required to use a computer for more than 50% of working time. * Responsible for the operation and repair of highly specialised, hazardous or complex tools, equipment or instruments. |
| Work Environment: |
| We are looking to confirm the environment in which the role will be required to work and the risks or hazards involved. 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.  **Areas to consider:**   * Will the role be primarily office based? * Stability of environment? Are there any hazards? * Will the role holder be required to take any special measures to reduce the risk or control any aspects of the environment before or while working there? * Will the role holder be required to make any assessment of the level of risk in the work or in the environment in accordance with the legislation and institutional guidelines? * Will the role holder make use of any safety equipment, special clothing? * Will the role holder be responsible for the overall control of the work environment, in terms of health and safety, and making sure that others working there are not at risk?   **Examples may include:**   * Required to understand Health and safety issues and to take management responsibility for staff. * Required to provide advice to staff and students on safe working practices within own area of responsibility. * Required to follow safety procedures using machinery or electrical equipment. |
| Pastoral Care and Welfare: |
| We are seeking to understand the role holder’s responsibility for the welfare and wellbeing of staff and students. Line managers will hold responsibility for the welfare of direct reports for example, however some roles may hold formal responsibility for managing welfare issues.  **Areas to consider:**   * Will the role offer specialist welfare support? If so, what is the nature of this support and frequency? Has the role holder received training for this role or follow guidance or procedures? * How frequently will the role holder come into contact with those who may need help? Who will the role holder refer them to? * Will the role holder be required to give advice or guidance on welfare issues? What are the typical issues or problems? * Are other people referred to the role holder for specialist advice? If so, for what purpose, please describe an example.   **Examples may include:**   * Required to deal with students who are experiencing difficulties that affect their studies. At times these difficulties are complex and involve relationships, finance and housing as well as academic issues. Guidelines and training are provided but must be able to assess the situation and to refer elsewhere when required. * Required to provide supportive advice and guidance to team on HR procedures and practices including dealing with requests for special leave and absence management. * Required to manage disciplinary procedures within the team and occasionally to deal with complex personal problems. * Required to be sensitive to colleagues in the work area. * Expected to respond with sensitivity and tact where necessary to staff and students and to pass the individual on to a recognised contact, where required. |
| 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.  **Areas to consider?**   * Will the role holder be required to advise or guide other members of the team on standard information and practices? If so, please describe an example and how frequently this occurs? * Will the role holder be required to train others in the team to undertake specific tasks or activities? If so, what are these, and how often would training sessions be undertaken? * Will the role holder undertake performance and development reviews (my contribution), formulate development plans and provide feedback for other team members? If so, please describe an example and indicate how often this occurs.   **Examples may include:**   * Required to co-ordinate the induction and training of new staff. * Responsible for acting as a mentor for new colleagues. * Formally training others in the work team. * Required to conduct regular staff appraisals, one-to-one meetings, quarterly reviews and to identify learning and development needs. |
| 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.  Aside from including academic staff, this may also include professional service staff delivering training on university wide matters such as GDRP or creating courses required for career progression of staff.  **Areas to consider:**   * Will the role holder be required to undertake teaching and or learning support outside their work team? Will the role holder be required to deliver presentations, demonstrations, and/or lectures? * Does the role holder design or amend content for delivery? * Does the role holder provide assessment and/or feedback? * Are they delivering a curriculum or course module?   **Examples may include:**   * Required to design and run staff training courses. * Demonstrates the use of models and kits to students as required and to groups of students in supervised sessions. * Delivers and assesses a course, module or part of an undergraduate degree scheme. * Acts as academic supervisor. |
| Knowledge and Experience |
| The final section of the framework assesses the required knowledge and qualifications needed to successfully complete the role including the required minimum professional qualifications, and essential knowledge and skills.  **Areas to consider:**   * What knowledge and/or previous experience will the role holder need to have to undertake the day to day responsibilities of the role? * Is a professional or vocational qualification required? * How does the role holder update their knowledge and experience? |