



Human Resources Organizational Development and Design

Job Evaluation: A guide to the UCT system and process



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A. What is Job Evaluation?

Job evaluation is the rating of jobs according to a specifically planned procedure in order to determine the relative size and worth of each job. It examines the contents and requirements of jobs and measures these against a standard scale. This results in job grades, scores, levels or ratings whereby jobs can be compared with other jobs to determine their relative worth.

At UCT, job evaluation is used to evaluate and grade all PASS (Professional, Administrative and Support) jobs.

B. Why do we evaluate jobs?

We evaluate jobs to determine their “intrinsic” worth. We systematically assess the degree of complexity of the job content, discretion and requirements, independent of any pre-conceived standards of remuneration and without regard to the qualities and performance of the job-holder performing the job. This results in a rational rank order of jobs, and job structure based on a system that is readily understood, fair and defensible, for all stakeholders (e.g. management, job-holders and Human Resources).

Job evaluation provides UCT with a rational basis for establishing competitive salary ranges that take internal equity and market forces into account. Job evaluation is just one factor in determining pay, the others including market surveys, skill and performance.

The process and results of job evaluation also provide assistance with:

- Job and organisational design
- Performance management
- Recruitment and selection
- Training and development
- Career planning and pathing
- Succession planning

C. When do we evaluate jobs?

We evaluate jobs when:

- a job is new, before recruitment.
- a job is new, 6 months to 1 year after the job is filled.
- substantive functions are added or removed from a job.
- substantive functions are added or removed from a job during an ERM approved restructuring process.

It is good practice to revisit the grade of a job every four years, if capacity allows.

Job evaluation is never used to promote or reward or people.

A job will not ordinarily be re-evaluated within one year after its last evaluation.

When one job in a unit is re-evaluated, it makes sense to re-evaluate all jobs in the unit together.

It is not necessary to re-evaluate a job before recruitment, if:

- the job has been properly and recently evaluated (in the last two to three years); and
- the requirements of the job have not changed since the evaluation; and
- the post being advertised is the same job as that which was evaluated.

D. Can we evaluate jobs during times of change?

Evaluating or measuring a job is much like taking a photograph. If the subject of the photograph is moving, the photograph will be blurry. If a job is undergoing change, the measurement is likely to be inaccurate.

In order to get an accurate measurement:

- The job needs to have been relatively stable for around 6 months.
- The job needs to be clearly defined and described in a job description.
- The job is measured as it is on the day it is presented for job evaluation. No future changes are taken into account.
- The design and content of job needs to be agreed to by the relevant delegated authorities.

Given the above, it is not advisable to evaluate jobs **during** times of restructure, recalibration, redesign, reorganisation or direction-change. In these cases, job evaluation should only be done once the new structure or new job-design has been agreed/approved, and preferably already implemented.

Additionally, it is not advisable to evaluate jobs **before anticipated** times of restructure, recalibration, redesign, reorganisation or direction-change. Again, in these cases, job evaluation should only be done once the new structure or new job-design has been agreed/approved, and preferably already implemented. Job evaluation is an emotive issue, and a re-evaluation process pre and post such changes would create unnecessary work and distress, and quite possibly differing outcomes.

Where the line manager is unsure on whether to embark on a job evaluation process, s/he should seek advice from his/her HR Practitioner, and if needs be, the Job Evaluation Committee itself.

E. What do we need in order for job evaluation to work?

For a job evaluation system to be successful, UCT needs the following:

- Management and employee support and transparency during the process
- Clear procedure and policy
- Clear definitions
- Written records
- Ownership by line manager
- Clear explanation of the links between the job description, the grade and the applicable remuneration
- Restricting the number of re-evaluations – clear procedures and reasons for doing so
- Following the rules of the system
- Stakeholder involvement

F. What are the 'Ground Rules' or principles of Job Evaluation?

A number of ground rules or principles exist to ensure and protect the integrity, validity and reliability of an evaluation system:

1. Examine the job and not the person in it.
2. Don't grade deputising or acting tasks unless performed regularly.
3. Assume competent and proper performance by the person doing it.
4. Evaluate the job 'as it is' and not how you imagine it could or should be.
5. Look for and examine 'typical incidents' (examples of activities or circumstances that actually occur), activities or circumstances that actually occur.
6. Reject any job description that is:
 - Unclear; or
 - Unlikely (unlikely events in the normal performance of the job must be disregarded); or
 - Unsatisfactory; or
 - Not on HR191; or
 - Not agreed prior to job evaluation (clear agreement must be reached on the content of the job by the job holder(s), immediate supervisor and by Management, prior to job evaluation. The job description must be signed and dated.)
7. Evaluate and grade by consensus of opinion of the job evaluation panel.
8. Have at least one person doing the job (who can fully represent the job) present.

G. What system do we use?

UCT uses the Peromnes job evaluation and grading system. Peromnes was originally devised in the mid 1960's by prominent South African Human Resources practitioners and has since then been refined and developed to become one of the most widely used evaluation systems in Southern Africa. Peromnes is also the most widely used tool by Tertiary Institutions in South Africa, with more than half of the Institutions using this system.

Peromnes is a registered trade mark belonging to Deloitte (Pty) Ltd and only licensed users may make use of the product and related works and systems. The University of Cape Town is authorised to use the systems and uses this system for all job evaluations, except Academic jobs.

Peromnes is:

- Credible (a large number and variety of organisations use it successfully, where it is acceptable to all stakeholders)
- Applicable (to all types of jobs (excluding academic jobs), all levels of jobs and any kind of organisation)
- Simple (the manual system requires only a rating scale, a score sheet, a pen or pencil, there are no complex calculations and no complicated definitions or complex terminology)
- Consistent (procedures are standardised, terminology is clearly defined and thus different evaluators achieve same/similar results)
- Comparable (grades can be compared with other higher education and other organisations, Peromnes remuneration surveys are published twice yearly (by Deloitte).)
- Flexible (results can be applied to an organisation's specific needs.)

H. How does Peromnes work?

Peromnes grades show the rank order of jobs within an organisation and allow jobs to be compared by grade with other jobs both inside and outside the organisation.

Peromnes evaluates and scores jobs in terms of eight factors. These factors are intrinsic to jobs, do not measure aspects outside the job and are applicable to all jobs in terms of function and level in organisation. The first six evaluate tasks, skills, responsibilities and relationships (job content), and the last two evaluate education and further training and experience (job requirements):

Factor 1: Problem Solving:	Evaluates the nature and complexity of the decisions, judgements and recommendations made in the job.
Factor 2: Consequence of Judgements:	Evaluates the impact or results of accountable decisions, judgements and recommendations on organisational levels, inside and outside the organisation.
Factor 3: Pressure of Work:	Evaluates the amount of pressure in a job in terms of the variety and type of work done and the time available to do it.
Factor 4: Knowledge:	Evaluates the level of knowledge required to perform the job competently.
Factor 5: Job Impact:	Evaluates the influence or impact that the job has on the activities of parts of the organisation or outside the organisation.
Factor 6: Comprehension:	Evaluates the requirement of the job to understand written and spoken communications.
Factor 7: Educational Qualifications:	Evaluates the essential minimum educational qualifications required to do the job.
Factor 8: Further Training/Experience:	Evaluates the typical period of further appropriate training and experience required to become competent in the job after obtaining the essential minimum educational qualifications.

It is important to note that certain aspects of jobs do not necessarily contribute to the intrinsic complexity of jobs, for example:

- The size of applicable budget
- The volume of business/work
- The value of equipment used
- Working (environmental) conditions

Each factor is scored using a standardised rating scale of 35 points. The sum of the scores for each of the factors gives a total score which is converted into a Peromnes grade by using the conversion table. The Peromnes grades are then converted to UCT grades using a UCT grade correlation table.

There are 21 grades in the Peromnes system, 1++ being the highest grade and 19 being the lowest grade. UCT only uses Peromnes Grade 19 – 1 and does not use 1+ and 1++.

I. What do we use to evaluate jobs?

We evaluate jobs from accurate, current, written, signed job descriptions, supplemented by interviews with job-holders and their line managers.

While Peromnes does not require a job description in specific format (it just requires a statement of what is done, how it is done and why it is done), for internal consistency, we require that all jobs are submitted on the Job Description (HR191) HR form, accompanied by the completed Job Evaluation Application (HR192) HR form.

The job description contains:

- Position title (a position title is not an indication of the complexity of a specific job, it is only a basic indication of its functional classification)
- Organogram
- Job purpose
- Job content (the different tasks that are performed in the job or the expectations that the organisation has of the job job-holder regarding the achievement of organisational objectives.)
- Competencies (minimum requirements needed to competently perform the job activities)
- Qualifications and experience
- Agreement by line manager and job holder (where there is one)

A Job Description (HR191) HR form is also used as the basis for recruitment and selection and performance management.

J. How do I apply to have a job evaluated?

A Job Evaluation Application (HR192) HR form is completed and forwarded to the HR Practitioner. This application must be supported by the line manager and the relevant Dean or ED.

The Job Evaluation Application (HR192) HR form is accompanied by:

- An organogram
- The new job description for the job to be graded (or descriptions where more than one job is affected)
- The old job description for the job to be graded (or descriptions where more than one job is affected)
- Any other documentation which assists the Job Analyst (Organisational Design Specialist) in understanding the job

K. How is a job evaluated and graded?

Once a Job Evaluation Application (HR192) HR form is received, the HR Practitioner consults with the applicant and reviews and interrogates the application. If there is good cause for evaluation or re-evaluation, s/he then either benchmarks the job or forwards the job for formal job evaluation to the Job Analyst (Organisational Design Specialist).

The job evaluation and grading process happens in two stages:

Stage one: Job evaluation

Formal job evaluation

If a job is submitted for formal evaluation, the Job Analyst (Organisational Design Specialist) from the Organisational Design unit will set up a job evaluation session. A number of people will be invited to join a job evaluation panel including the line manager, the job-holder, the HR Practitioner and any other subject or technical experts that can add value to the process. For particular job families (such as finance or information technology jobs) a member of the relevant department (such as finance or ICTS) will be invited to be a part of the panel. If requested, the Dean or ED may also be present.

The Job Analyst (Organisational Design Specialist) will lead the evaluation session and ask pointed questions. The job evaluation panel will be asked to take note of and adhere to the 'ground rules'. The panel will be asked to focus on the more complex aspects of the job, and be asked to give factual answers, examples and critical incidents in order to evaluate the job. The job will be scored on the 8 factors, according to the grading rules of the Peromnes system.

In the case of a top management job (where the outcome is likely to be PC13(3), PC13(2) or PC13(1), an external consultant from Deloitte will be invited to formally evaluate the job.

Based on the result of the job evaluation, the job will then be placed at the relevant job grade. There are three possible outcomes:

- Upgrade
- Downgrade
- No change

The job evaluation panel will not be informed of the job grade.

An audit trail will be kept.

Borderline scores and anomalies will be re-examined by the Senior Manager: Organisation Development or the Senior Remuneration and HR Policy Specialist. If the grade remains borderline, the relevant Dean or ED will be consulted on which grade they expect the job to operate at and the level at which they will manage the post.

The job grade is then considered and ratified by the Job Evaluation Committee.

Benchmark review

If a job is submitted after benchmarking, then the Job Analyst (Organisational Design Specialist) will evaluate the job and review the benchmark.

Once the benchmarking recommendation is verified by the Job Analyst (Organisational Design Specialist), the job grade is then considered and ratified by the Job Evaluation Committee.

Stage two: Job grade ratification

The job grade is then considered and ratified by the Job Evaluation Committee to ensure accuracy and consistency.

L. When do we use benchmarking?

It is not always necessary to evaluate every job. In the case where other similar jobs exist, that have already been evaluated, the HR Practitioner will benchmark the job against these jobs and forward the job

descriptions, findings and grade recommendations to the Job Analyst (Organisational Design Specialist) for quality assurance and verification.

Jobs can be benchmarked when they are clearly and easily defined and when benchmark jobs exist that:

- are very similar to the job in question; and
- have already been formally and accurately graded within the last 2 to 3 years; and
- are common in the university; and
- are not too specific, narrow in scope, or specialised; and
- have a standard and consistent set of responsibilities; and
- are similar in nature from one organisation to another; and
- would be found in published salary surveys.

Jobs used to benchmark must:

- have clear and accurate job descriptions written in the HR191 format; and
- have been formally graded in the last two to three years.

It is good practice to benchmark a job against more than one other job, preferably three.

The Job Analyst will build a database of benchmark jobs against which the HR Practitioner can benchmark.

M. Who approves the job evaluation grading outcomes?

A Job Evaluation Committee considers and ratifies the grading outcomes of all evaluations and benchmarking to ensure consistency and accuracy.

The Job Evaluation Committee consists of:

- OPSMAG nominee: DVC for Human Resources (Chair)
- The Executive Director: Human Resources
- Senior Manager: Organisational Development
- The Job Analyst (Organisational Design Specialist)
- Senior Manager: HR Client Services and Employee Relations
- Senior Manager: Remuneration and Payroll or Senior Remuneration and HR Policy Specialist
- Two Dean's nominees
- One ED's nominee

The committee will consider re-evaluations quarterly, in March, June, September and December, the deadlines for submission being the middle of February, May, August and November respectively. Grading results will be communicated at the end of March, June, September and December respectively.

Evaluations of new jobs and jobs affected by ERM restructures will be done on a monthly basis so as not to delay the recruitment and restructure processes. The timing of these evaluations will coincide with the OPSMAG meeting calendar.

The committee undergoes Peromnes Evaluation training. The Job Evaluation Committee sets its own terms of reference.

Positions graded at PC13 (4), PC13 (5) (Peromnes 4 and 5), have one further level of approval, being the Vice Chancellor.

Positions graded at PC13 (1), PC13 (2) and PC13 (3), (Peromnes 1++ – 3), have one further level of approval, being Council Remuneration Committee.

N. How is the grading outcome communicated?

Once ratified the grade is then communicated to the relevant Dean or ED and/or line manager through the HR Practitioner.

Positions graded at PC13(4) and PC13(5) are sent to OPSMAG and the Council Remuneration Committee for noting. Positions graded at PC13(1), PC13(2) and PC13(3) are sent to Council for noting.

At this point, the job evaluation process ends. The HR Practitioner will advise line management on the options regarding the implementation of the outcome.

O. What if I am unhappy about the outcome of the job evaluation?

A review process encourages transparency and provides a mechanism for stakeholders to formally object to a job evaluation.

The following may be grounds for review:

- An inaccurate job description
- A disputed job description (the job-holder has not agreed to the job description presented)
- Procedural irregularity
- Evidence of discrimination and/or bias
- Inconsistent results in comparison with similar positions in the organisation

The following are not grounds for review:

- The job-holder's performance, skills, knowledge or any other personal attribute
- Budget or affordability

A review may be requested by either the Dean/ED, Line Manager or the job holder based on the criteria listed in above. The request for a review must be submitted in writing to the Job Analyst (Organisational Design Specialist) within one month of the communication of the outcome of the grade, clearly outlining the reasons for the request. The request must have the support of the line manager and relevant Dean/ED.

If satisfied with the reasons for the request, the Job Analyst (Organisational Design Specialist) will review the job evaluation audit trail. S/he will communicate the request with supporting documentation and the audit trail to the Chair of the Job Evaluation Committee. The Chair will review the request and supporting documentation and decide whether the full Job Evaluation Committee needs to review the outcome.

Once the review has concluded, the outcome of the review will be communicated to the Dean/ED, line manager and complainant, through the HR Practitioner.

Once the review has concluded, no further appeal is available through the job evaluation process.

Should the complainant be dissatisfied with the outcome of the review, then this should be addressed via the grievance or alternate dispute resolution procedures for PASS Staff.

P. How is the job grade implemented?

Once the grade has been ratified by the Job Evaluation Committee, the grade is then communicated to the relevant Dean or ED and line manager through the HR Practitioner.

At this point, the job evaluation process ends.

The HR Practitioner will advise line management on the options regarding the implementation of the outcome. The outcome could include:

- A commensurate salary adjustment for the job-holder in line with the new job responsibilities and new grade
- The reinstatement of the previous job description at the old grade, with a commensurate adjustment in job responsibilities and performance management indicators for the job-holder
- An adjustment of working hours in order to afford the commensurate salary range for the new job at the new grade

These outcomes are implemented according to UCT policy and the HR Delegated Authorities.

Q. What are the 2015 timelines?

Round	Date for approval by Job Evaluation Committee	Cutoff for submissions	Re-evaluations?
January	23 January 2015	02 January 2015	No
February	13 February 2015	23 January 2015	No
March	20 March 2015	20 February 2015	Yes
April	24 April 2015	01 April 2015	No
May	22 May 2015	30 April 2015	No
June	19 June 2015	22 May 2015	Yes
July	17 July 2015	26 June 2015	No
August	14 August 2015	24 July 2015	No
September	18 September 2015	21 August 2015	Yes
October	30 October 2015	09 October 2015	No
November	20 November 2015	30 October 2015	No
December	11 December 2015	13 November 2015	Yes

R. How long does the process take?

A job can take anywhere from 2 months to 4 months to be graded, depending on the timetable above, committee meeting dates, and additional steps that may be required. If documentation is submitted incomplete or unsigned, this delays the process further. The following is a rough guideline on how long a job evaluation process can take:

Action	Person Responsible	Approximate Time Length	Running Total Length
Job analysis and design	Line management	Weeks	Month 1

Job description writing	Line management	Weeks	
Job description sign off	Line management	Weeks	
HR192 Application for JE completed and signed by ED/Dean	Line management	Weeks	
Submittal of HR191 and HR192 to HR Practitioner	Line management	Days	
Review of documentation, follow up and correction of omissions and errors	HR Practitioner	Days	Month 2
Submittal of HR191 and HR192 to Organisational Design Specialist	HR Practitioner	Days	
Review of documentation, follow up and correction of omissions and errors	Organisational Design	Days	Month 2 - 3
Setting up of grading session and preparation	Organisational Design	Weeks	
Grading session	Organisational Design	Days	
Audit trail and report	Organisational Design	Days	
JEC approval	Organisational Design	Days	
*External evaluation	Organisational Design	Months	Month 4
*JEC request for further information/evaluation	Organisational Design	Months	Month 4
* REMCOM/VC approval	Organisational Design	Months	Month 4
Communication of outcome to HR Practitioner	Organisational Design	Days	Month 2 - 4
Communication of outcome via internal faculty/department processes	HR Practitioner	Days	Month 2 - 4

** If required*