



## Rules and Procedures regarding Job Evaluation

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## **The core of the rules and procedure**

Determines the intrinsic value of jobs according to a systematic procedure that takes into account the grade and complexity of the content and requirements of a job, and does this independent of any pre-set standards of remuneration and with no reference to the characteristics and performance of the actual person who is the current incumbent.

### **1. Introduction**

Stellenbosch University (SU) uses the PEROMNES job evaluation system by which all PASS (Professional and Administrative Support Staff) jobs at all levels can be evaluated.

Peromnes is a registered trademark belonging to Deloitte (Pty) Ltd, and only licensed users may employ the product and related works and systems. Stellenbosch University (SU) is authorised to make use of the systems and utilises this particular system to perform all job evaluations, except for academic jobs.

Peromnes was originally devised in the mid-1960's by prominent South African Human Resources practitioners. Since then, it has been refined and developed to become one of the most widely used job evaluation systems in Southern Africa. Peromnes is also the job evaluation tool most frequently used by tertiary institutions in South Africa, with more than half of all local institutions using this system.

Job evaluations provide SU with a rational basis for establishing competitive and justifiable base remuneration levels that take internal parity and market forces into account. Job evaluation is just one factor in determining remuneration; the others include market surveys, skills and performance.

***It is therefore important to emphasise that it is an evaluation of the job, and neither an evaluation nor an assessment of the job holder's performance.***

### **2. Application of the rules and procedure**

This applies by default whenever jobs are subjected to evaluation. The Peromnes grades depict the rank order of jobs within an organisation and allow jobs to be compared to other jobs, by grade, both inside and outside the organisation.

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

- Upgrade;
- Downgrade;
- No change.

### **3. Aim of job evaluation**

The aim of job evaluation is to rate jobs according to a specifically planned procedure designed to determine the relative size and worth of each position and to establish its intrinsic value. This is done in accordance with a systematic procedure that takes into account the degree of complexity of the content of the job and its requirements, and to do so independently of any predetermined standards of remuneration and without reference to the characteristics and work performance of actual individuals doing the job. It examines the contents and requirements of positions and measures these against a standard scale. This results in scores, job grades/levels, or ratings whereby jobs can be compared to other jobs to determine their relative worth, resulting in a rational rank order of jobs, and job structure based on a system that is readily understood, fair and defensible for and by all stakeholders (e.g. management, job-holders and Human Resources).

### **4. Objectives of job evaluation**

Ensure that structured procedures are in place for job evaluations. 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 the organisation. The first six factors 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 the 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 SU grades.

There are 19 grades in the Peromnes system, 1 being the highest grade and 19 being the lowest grade.

## 5. The principles

This evaluation system may be used only by persons trained in the Peromnes job evaluation system and authorised to do so by the owners of the system. Evaluate jobs from accurate, current, written, signed job descriptions. A complete list of duties must accompany the request form. No format is prescribed for drafting the job list.

The job description and request form must however contain:

- 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 regarding the achievement of organisational objectives);
- Added responsibilities or enrichment of the job content has to be emphasised clearly in instances where a post is evaluated for the second time;
- Competencies (minimum requirements needed to competently perform the job activities);
- Qualifications and experience;
- Approval of job description by line manager (where there is one) and job holder.

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

- Examine the job and not the person in it.
- Don't grade those tasks performed when standing in for someone else, unless they are regularly performed.
- Evaluate the job 'as it is' and not how you imagine it could or should be in future.
- Look for and examine 'typical incidents' (examples of activities or circumstances that actually occur).
- 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 requested via the correct route and/or without the formal request form; or
  - Not agreed upon 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.)
- Evaluate and grade by consensus of opinion of the job evaluation panel and NOT the Division Head/Departmental Chair, or the Environment Head.
- Where it is not a vacant position, have at least one person doing the job (who can fully represent the position) present.

Jobs are evaluated when:

- A position is new;
- Substantive functions are added or removed from a job;
- Job holders must have been fulfilling the functions of their jobs for at least six months before a job evaluation can take place.

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

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

## 6. Procedure

- 6.1 For all higher management jobs (where the outcome is likely to be on grade 6 or higher), an **external** consultant from Deloitte will be invited to formally evaluate the job. The cost will be covered by Human Resources, unless the job is funded externally, where the specific cost centre has to cover the full cost (except in cases where Human Resources requests an external evaluation of the externally funded job).

- 6.2 All applications for **job evaluations** must be supported by the line manager and the relevant Environmental Head and **handled via Human Resources**.
- 6.3 The Divisional or Environmental Head must submit a completed request form for the evaluation or re-evaluation of a job (obtainable from <http://www0.sun.ac.za/hr/documents/hr-forms/>) to the Chief Director: Human Resources.
- 6.4 Personnel Provisioning and Planning will schedule a job evaluation session and appoint a committee consisting of at least two (2) evaluators. 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 division, will be invited to form a part of the panel. If requested, the Environmental Head can also be present.
- 6.5 The HR Practitioner or external 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' (see paragraph 5). 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. During the evaluation process, the job holder and Division Head / Departmental Chair, or Environment Head, will describe the position and answer the system-related questions posed by the panel. **At the start of the actual electronic system evaluation, the job holder will be excused from the evaluation, while the Divisional Head / Departmental Chair, or Environment Head will remain to help clarify any uncertainty.**
- 6.6 **The outcome of the job evaluation must be handled confidentially until the Human Resource Division will communicate the result to the relevant Environmental Head.**
- 6.7 Human Resources will compare the outcome of the job evaluation with other similar positions within SU's organisational structure for the purpose of mutual comparison.
- 6.8 The result of the job evaluation is conveyed in writing to the Environment Head.
- 6.9 If the job evaluation indicates a higher job level and the environment has sufficient funds available to fund such an upgrade, and if the relevant staff plan provides for upgrading the position concerned, the Divisional Head must request in writing that the incumbent concerned should be promoted; provided that the necessary approval by the Environmental Head has been obtained. **No promotion can be made retroactively.**
- 6.10 If the job evaluation indicates a lower job level, the position concerned must be

downgraded. However, current incumbents must be retained at their current job level and remuneration in the downgraded position until the post becomes vacant. Thereafter the position must be filled at the correct (downgraded) job level.

- 6.11 When a job is re-evaluated, the panel must compare the new list of duties with the previous one to determine whether substantial changes have occurred that will influence the post level. If justified by the changes to the job content, another job evaluation – conducted in a manner similar to the procedure described above – must occur.
- 6.12 Borderline scores and anomalies will be re-examined by Human Resources via the HR Practitioner involved. If the grade remains borderline, the relevant Environmental Head will be consulted on which grade they expect the job to operate at and the level at which they will manage the position. The job grade is then considered and ratified by the Job Evaluation Committee involved in this particular evaluation.
- 6.13 The Head: Personnel Provisioning and Planning will approve the job evaluation on behalf of the Chief Director: Human Resources.
- 6.14 The outcome is then communicated to the relevant Environmental Head and/or line manager by Human Resources.
- 6.15 At this point, the job evaluation process ends. The HR Practitioner will advise line management about the options regarding the implementation of the outcome and assure that promotions take place in accordance with an approved personnel plan.
- 6.16 An audit trail will be kept.

## **7. Dispute about the outcome of the job evaluation**

A review process encourages transparency and provides a mechanism for line managers of incumbent to formally object to the outcomes of a job evaluation.

The following may be grounds for review:

- Procedural irregularity;
- Evidence of discrimination and/or bias;
- Inconsistent results compared to similar positions in the organisation.

The following are not grounds for review:

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

A review may be requested by either the Environmental Head, line manager or the job holder based on the criteria listed above. The request for a review must be submitted in writing to the HR Practitioner 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 Environmental Head.

If satisfied with the reasons for the request, the committee will review the job evaluation audit trail. They will communicate the request with supporting documentation and the audit trail to the Head: Personnel Provisioning and Planning who will then review the request and decide whether the full Job Evaluation Committee needs to review the outcome.

Once the review has been concluded, no further appeal is available through the job evaluation process. Should the complainant still be dissatisfied with the outcome of the review, then this should be addressed via the grievance procedures for PASS Staff. Once this grade has been ratified by the Job Evaluation Committee, the grade is then communicated to the relevant Environmental Head and line manager via the HR Practitioner.

At this point, the job evaluation process ends.

## 8. Time frame

Job evaluations will take place on a continuous basis. If documentation is submitted incomplete or unsigned, the process will be delayed.

## 9. Supporting documents

<b>Item no.</b>	<b>Name of document</b>	<b>Status</b> <i>(e.g. identified, in process or approved)</i>
	None	

## 10. Related documents

<b>Item no.</b>	<b>Name of document</b>	<b>Status</b> <i>(e.g. identified, in process or approved)</i>
	None	