



➔ *Gender Bias in  
Job Evaluation:  
A Resource  
Collection*

**EXTRACTS OF RECOMMENDED  
READINGS AND RESOURCES**



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“There are four component parts to a gender neutral comparison system:

- the accurate collection of job information;
- deciding on the mechanism or tool to determine how the value will attach to the job information;
- applying the mechanism to determine the value of the work performed; and
- making the comparisons (evaluations).

As a starting point, the (parties) are required to ensure that each component which forms part of the comparison (or job evaluation) system is gender neutral. Bias in one means the system as a whole is not gender neutral. Gender bias must be eliminated from all parts of the comparison (or job evaluation) system.”

*Ontario Nurses' Association vs Regional Municipality of Haldimand-Norfolk, Haldimand-Norfolk (No.6) (1991), P.E.R. 105, opening extract*

This resource is a snapshot of gender bias in job evaluation. *Gender Bias in Job Evaluation* is designed to be an easy-to-use collection of resources that encompasses job evaluation projects and processes from the planning stages to monitoring and reviewing the remuneration outcome. The material is extracted from New Zealand and international publications that demonstrate how to eliminate gender bias in job evaluation. As the collection uses exact quotes from original publications, all formatting, style and punctuation have been retained. Referring to particular job evaluation systems is unavoidable: for example the Equitable Job Evaluation System, and the Hay system. The guidance provided in relation to particular systems is likely to be relevant and applicable to others.

The resource uses the same structure as the *New Zealand Gender-inclusive Job Evaluation Standard (NZS 8007:2006)*, and is designed to be used in conjunction with the *Guide to Meeting the Requirements of the Gender-inclusive Job Evaluation Standard NZS 8007:2006*. The numbering in this resource corresponds to the numbering of the sections and clauses in the Standard.

Over time, the resource collection will benefit from finding out which of the checklists, outlines and extracts are the most useful. New material will be included as it comes to light. The collection provides examples of the type of material likely to be relevant to the way particular provisions of the Standard can be met.

“Gender neutrality must thus be assessed in both the design and the implementation of the comparison system to be used for pay equity purposes.”

*Ibid. clause 92*



## READING ONE

**Planning a new job evaluation scheme:** Extract from *Job Evaluation: a guide to achieving equal pay* by Michael Armstrong, Ann Cummins, Sue Hastings and Willie Wood, Kogan Page, 2003. ISBN 0 7494 3966 1. pp 65 – 82<sup>1</sup>

### Overview

This chapter is intended to be a practical guide on how to develop a job evaluation scheme. It focuses on developing an analytical point-factor scheme, as this illustrates the more demanding design issues. However, many of the design considerations apply equally well to the other types of job evaluation. The steps are

1. identifying and defining the scheme factors;
2. analysing jobs;
3. testing the draft factor plan;
4. developing the scoring model;
5. preparing for implementation.

In practice, these steps are not always consecutive and some may need to be repeated in order to test and validate the scheme fully. Also, where a new pay structure is being implemented in conjunction with job evaluation, there are some parallel steps, as shown in Figure 6.1, which illustrates the design stages.

Before embarking on scheme design, there are two preparatory steps that must be completed: 1) choosing the scheme design and 2) project planning. This chapter concentrates on these first two steps, with the next chapter focusing on the more technical aspects of the scheme design.

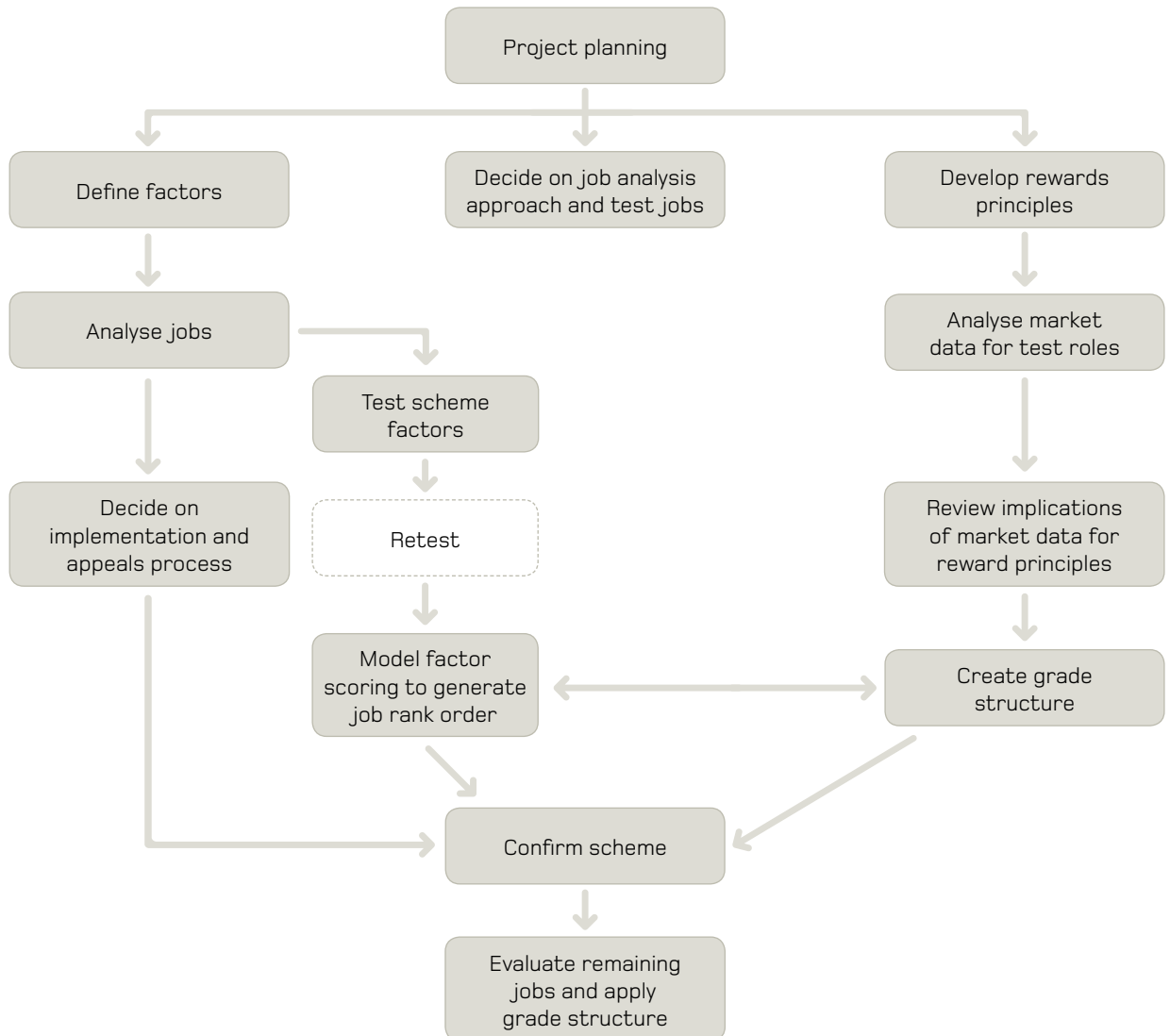
### Choosing a Job Evaluation Scheme

Before embarking on detailed planning, it is necessary to have at least a preliminary view about what type of scheme will meet the organisation's needs. This decision may be made by the project team that will work on the detailed scheme design.

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<sup>1</sup> Material from this book is made available with the kind permission of the publisher on the basis that the resource collection is provided to identified people and may be monitored.

**Figure 6.1** Design stages



However, experience suggests that the decision is often made in advance by the human resources function or a reward strategy steering group in the light of the organisation's broader human resources or reward strategy. If the decision of the type of scheme does not involve all of the relevant stakeholders, it is important to ensure that they are presented with, and are given the opportunity to discuss, the rationale for the type of scheme chosen, early on in the project. Whoever is involved in the decision making will need to evaluate the options against a set of criteria that are deemed important to the organisation, for example:

- Simplicity versus rigour;
- Cost and time constraints;
- Minimising administration;



- The extent to which the organisation is comfortable with, or wants to avoid, ongoing reliance on external support;
- Whether computer support is needed;
- The extent to which a robust defence to potential equal pay claims is sought (around three-quarters of respondents to the E-Reward survey stated that equal value considerations were one of these reasons for having job evaluation);
- How job evaluation will be used to support equal pay reviews;
- What type of scheme is most likely to be supported internally by management and staff;
- The organisation's history of job evaluation: one that has a sophisticated points factor scheme in the past is likely to have a different perspective from the one that has never had a job evaluation scheme;
- How the 'unique' characteristics of the organisation will be taken into account;
- Whether the organisation wants to introduce a new way of describing jobs or recording job information;
- Potential for links to other resource policies.

Assuming that the decision is made to introduce the points factor scheme, the next decision relates to the extent to which the organisation wants to tailor the scheme to meet their own needs. Schemes can be broadly split into three levels of customisation:

1. proprietary schemes developed by consultants, applying standard factors and scoring models that have been tried and tested across a range of organisations or designed specifically for a sector;
2. customised schemes, based on an existing scheme, for example one developed by consultants, but that is capable of being adapted to address the organisation's needs;
3. tailor-made schemes, developed entirely in-house or with the aid of an external advisor.



Based on the views expressed by the respondents to the E-Reward survey, the perceived pros and cons of each approach are summarised in Table 6.1.

**Table 6.1** Pros and cons of different approaches to customisation

DEGREE OF CUSTOMISATION	BENEFITS	RISKS
Proprietary	<ul style="list-style-type: none"><li>• tried and tested, with an established reputation;</li><li>• the consultants can draw on extensive experience of implementing similar schemes;</li><li>• does not require extensive design effort;</li><li>• may link to pay database;</li><li>• computer support may be available as part of the package;</li><li>• consultancy may have international network for implementation.</li></ul>	<ul style="list-style-type: none"><li>• factors may suit some types of organisation more than others;</li><li>• may not lead to high level of internal ownership;</li><li>• may be difficult to explain rationale for scoring and weighting;</li><li>• can lead to ongoing reliance on external provider;</li><li>• may include elements or supporting processes that do not meet organisational requirements, e.g. lengthy job descriptions.</li></ul>
Customised	<ul style="list-style-type: none"><li>• draws on external experience, so saves on design time;</li><li>• gives a starting point to the design process, but gives opportunities to engage employees.</li></ul>	<ul style="list-style-type: none"><li>• needs careful design input and implementation to avoid same risks as for proprietary scheme;</li><li>• need to avoid 'cherry picking' factors or scheme design elements that do not logically hang together.</li></ul>
Tailor-made	<ul style="list-style-type: none"><li>• reflects the values and language of the organisation – focuses on what is important;</li><li>• fits the particular needs at the time;</li><li>• participative design process likely to lead to greater buy-in;</li><li>• no ongoing reliance on external provider;</li><li>• able to align to competency framework.</li></ul>	<ul style="list-style-type: none"><li>• Needs investment of time and resources to develop scheme;</li><li>• Unless expertise is available in-house, needs external support through development process.</li></ul>

Having made this decision, or at least narrowed down the options, the next step is to plan the project in detail. The need for disciplined project planning is emphasized by one respondent to the E-Reward survey, commenting that job evaluation 'should be run like a project with specific success criteria...'

### **Project Planning**

A project plan will include all five technical steps listed at the beginning of this chapter. However, an important aspect of project planning is to agree how stakeholders will be involved in the scheme design, and managing their perceptions. Getting this right is critical because there is overwhelming evidence that successful scheme implementation is determined as much by how it is perceived internally as in the minutiae of technical design details. Project planning should therefore include:

- Who will be covered by the scheme;
- Who will be involved in the scheme development;
- Resources – financial and people;
- How to monitor for equal value issues;
- The communications plan;
- The design table.

### **Who will be covered by the scheme?**

Assuming that one of the main purposes of job evaluation is to help ensure equity of pay decisions, there is a strong argument for including all employees in the scheme. This gives less potential for pay discrimination than where employees are covered by a range of different evaluation or pay systems. But it may require a radical change in outlook by some of the stakeholders where different collective negotiating arrangements of pay structures have traditionally covered different employee groups. However, the E-Reward survey showed that nearly three-quarters of organisations now operate a single scheme.

If there are justifiable and non-discriminatory reasons for not including employees in the scheme, consideration will need to be given to how read-across can be achieved across the employee groups inside and outside the scheme. This is needed in order to conduct equal pay reviews, which should span occupational boundaries.

### **Who will be involved in scheme development?**

As with the introduction of any human resource initiative, evidence shows that broad involvement and consultation during scheme development increases scheme credibility and robustness, by ensuring that different perspectives are taken into account.

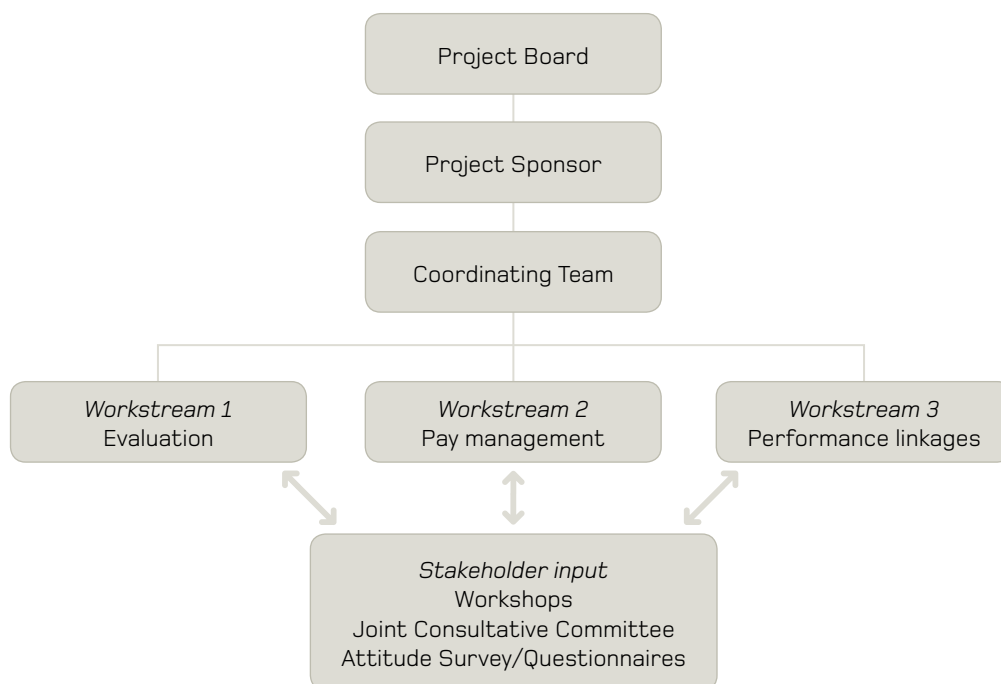
There are several stakeholder groups that will have an interest in the job evaluation design. These include top management, staff and trade unions or other employee representatives.

Unless a job evaluation study is being undertaken entirely as a background exercise, for example to support an equal pay review, implementing a job evaluation scheme invariably involves a project team to take the project through from design to implementation. Many organisations have their own project management processes and structures. Where there are none, a typical structure might include:

- **Steering Group:** decisions about the development of the scheme will need to be made at key stages of the project. Depending on the size of the organisation, it is helpful to have a steering group that speaks with the authority of the organisation and that can rectify these key decisions. In a small organisation the steering group may be the senior management team or directors. In comparison, schemes developed for an industry sector are more likely to include a balance of employer representatives and national trade union officials.
- **Project sponsor at senior management level:** their role is to provide a communications link to the management team, to provide a top-management perspective and knowledge, to ensure resources are made available, to be a sounding board and to give a steer on tactics and matters of principle.
- **Project leader:** accountable for the overall project
- **Project Administrator:** to provide administrative support to the project. This is particularly helpful in large job evaluation projects where a lot of coordination is needed, for example in administering and tracking the job analysis process.
- **Project team:** to participate in the design process.

An integrated job evaluation and pay design project structure and roles for a building society, which encompasses job evaluation, pay structure design and the link between pay and performance management, is illustrated in Figure 6.2.

**Figure 6.2:** Building society job evaluation project structure



Careful consideration should be given to the selection of project team members. Selecting members who represent a diagonal slice across the organisation by level and by function works well in offering different perspectives during scheme development. In addition, gender balance should be taken into account. As the EOC Good Practice Guide states, 'It is recognised good practice in job evaluation to include in these groups a representative sample of people from the spread of jobs covered by the scheme. A fair representation of women in all job evaluation groups and discussions is strongly recommended as a means of reducing the probability of sex bias.' Similarly, where an organisation extends its monitoring beyond gender monitoring, consideration should be given to other areas of representation.

As well as ensuring broad representation, it is necessary to think about what kind of expertise will support the project. For example, a project team might include members with:

- Specific organisational responsibility for equality or diversity;
- Internal communications experience;
- Knowledge of the organisation's previous grading or job evaluation history;
- Input from a quality management perspective;
- Personnel knowledge;
- Trade union or other formal employee representation.

If there are recognised trade unions, their representatives should be included in the project team as this is more likely to commit both parties to the outcome of the development process. Full union engagement is encouraged by the ACAS guidelines, which state that 'in the event of an equal value claim, a jointly agreed analytical scheme is more likely to be regarded as fair by an employment tribunal'. Many trade unions are willing to be involved 'without prejudice' in scheme development in a non-negotiating forum, often as full project team or steering group members, but they usually retain the formal right to negotiate on the scheme outcomes at the end of the process. Similarly, it can be helpful to involve members of an existing staff consultative forum where there is no formal trade union recognition.

The project team should have terms of reference that clarify the boundaries of the project and define their role. Typically their role consists of:

- Providing their ideas and input at all stages of the scheme design;
- Being an advocate for the project;
- Communicating with their colleagues;
- Being a sounding board for the detailed design work that takes place outside the project team meetings.

The size of the project team will vary from one organisation to the next. There is a balance between ensuring broad representation and keeping the team to a workable size. Experience suggests that teams of more than 10 people can be less effective in providing the scope for all team members to make an equal contribution. However, more than 10 may be needed to ensure full representation, for example in a unionized environment where several unions are represented and want to be involved. On the other hand, a team of less than six or seven is unlikely to be representative of the organisation.



Finally, it is worth noting that project team members may feel daunted at the beginning of the project. However, many organisations find that as the project progresses their confidence increases, to the extent that by the end of the project individual team members are frequently keen to continue their involvement into full scheme implementation.

## Resources

A decision needs to be made early on about what resources will be required to complete a job evaluation project. It is wise not to underestimate this. The largest financial outgoings are likely to be the cost of buying in external support and software, if needed. However, at least as important as the financial cost is the internal time commitment. It is particularly important for the project team members to be given an indication of the time they may have to spend on the project to ensure that they can commit to the demands of the project. The level of commitment needs to be made clear to all other interested parties, as the scheme design and testing may involve a large number of employees who are not part of the project team.

Account should also be taken of the extent to which there are any other major organisational initiatives underway. The possibility of a clash of priorities at key project stages needs to be identified so that this can be allowed for in the project plan.

## Using external advisors

An early decision is whether to use an external resource. It may well be worth while getting support where in-house expertise is non-existent or limited. Many people are exposed to a new job evaluation scheme only once or twice in their careers, whereas a good external advisor will have experience of applying job evaluation schemes in many different settings, and can provide an in-depth knowledge of both technical design issues and the potential pitfalls around putting in a new scheme.

This will be particularly important if the intention is to use some form of computer-aided process for the continuing evaluation of jobs (see chapter 8). The choice of which type of software (and which supplier) should be made very early on in the design phase. Knowing the input and other requirements of software systems in advance should minimise the work and time required to convert from the paper design to the computer process.

Support can come from a range of sources, including ACAS<sup>2</sup>, associations and consultants. In making a decision about which external advisor to use, consideration needs to be given to what role they will play. This can range from providing a packaged solution, as in a consultant's proprietary scheme, to facilitating the process that will help the organisation develop its own scheme. The level of support can vary from providing hands-on input to acting as a sounding board to the development process.

The following checklist will help the decision about which consultant or advisor to use:

- How closely does the advisor's view of their role match the organisation's own expectations?
- Depending on the degree of customisation required, what is the advisor's experience in proprietary, customised or tailor-made schemes?
- How well does their experience relate to the organisation/sector?

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<sup>2</sup> The United Kingdom's Advisory, Conciliation and Arbitration Service.



- To what extent does the prospective advisor focus on the technical aspects of the scheme design, compared with the non-technical aspects?
- What is their level of familiarity with equal pay for work of equal value issues?
- What tests do they recommend as a matter of course to ensure that the scheme will not be biased?
- To what extent will the organisation want to be independent of the external advisor in the future?
- To what extent will the scheme be badged as the organisation's own, or as the consultants' scheme?
- If the scheme is to be computer-aided, to what extent does the computer support the process? Can the provider guarantee good on-site and off-site support and training? Can they provide reference sites?
- How does the consultant charge for and record their fees? What happens if the scope of the project changes? Are they clear about how they charge for additional expenses, for example is there a standard loading for overheads? Do they charge separately for administrative/secretarial time? What is the licence or purchase fee for any software-related support and to what extent does this vary between stand-alone and network versions?
- Last but not least, what is the fit? Does the consultant's style suit the organisation? Bear in mind that the success of a project is related not only to the technical design of the scheme, but also to the organisational credibility of the scheme, which is obtained through communication, consultation and involvement; an external advisor can have a significant impact on the development and implementation process in this regard.

### **Equal Value considerations**

Testing the robustness of the scheme for equal pay issues is essential throughout the process, from scheme selection to implementation. The project plan needs to incorporate specific tests to ensure that the scheme is unbiased. These are summarised in Appendix 4. However, it is worth highlighting that at an early stage key stakeholders should receive training in equal value issues, including:

- The background to equal pay issues in the UK;
- The legislative framework;
- What tests need to be applied to scheme design and implementation to ensure that equal pay for equal value principles are followed.

The Equal Pay Act focuses solely on gender discrimination; however, in designing the scheme the potential for other types of discrimination, such as race and disability, should also be considered.

### **Planning Communications**

Putting in place a communications plan is an essential part of project planning. The credibility of a new job evaluation scheme rests on how effectively it is communicated. The most widely reported problem with job evaluation reported in the E-Reward survey was the lack of understanding of the scheme by managers and employees.



The most common advice given to those who might be engaged in a job evaluation exercise by respondents to that survey is to communicate as much as possible.

The E-Reward survey respondents also stressed the importance of being specific about the business need for job evaluation. This needs to be started at the beginning of the design process. Employees must understand the rationale and trust the design and implementation process. The same applies to the organisation's leadership. As one HR manager said, 'the business leaders should have been involved more from the outset to ensure their buy-in'.

The project plan should allow for an early communication to cover the following points:

- Setting expectations: what is the intention behind bringing in a new job evaluation scheme? Perceptions about a scheme's introduction will depend on the culture and pay history of the organisation. For example, there might be an expectation that this is an opportunity for everyone's pay to go up. Elsewhere, it may be the opposite. If there has been a recent reorganisation, it may be necessary to address concerns about whether the job evaluation is linked to further restructuring and redundancies. Another common perception that needs addressing early is the misconception that job evaluation is linked to measuring individual performance.
- Design principle – let staff know early decisions about the scheme design.
- Any pay-related principles: for example, no one's pay will be reduced as a result of introducing the scheme.
- Any early decisions or principles on assimilation, for example a commitment to ensure that there will be a mechanism to avoid 'fossilising' existing pay inequalities.
- Who is involved in scheme design, who project team members are and how they can be contacted.

The project team needs to incorporate communications to staff at key points later in the project; for example, if job information needs to be collected from a broad sample of jobs, communication is needed to explain the process and reassure both those who will be involved in the process and those who are not.

There are key stages in a job evaluation project when communication is essential; as the project starts, before employees are involved in job analysis, when the scheme design is complete and when the new pay structure is attached to the scheme. Here are examples of what some organisations have done to make their communications more effective throughout the process:

- provide a telephone help line number, using an answer-phone to collect questions;
- give out contact numbers and e-mail addresses of all project team members;
- create distinctive project communications: for example, special bulletins on coloured paper;
- put information on the intranet;
- brief staff regularly through team meetings, directors' meetings and any other regular communication briefings;
- run informal lunchtime sessions so that staff can ask questions about any aspect of the scheme design and implementation – tie these in to take place shortly after written communications;



- use organisational knowledge in identifying the most effective way to reach all staff; for example, some organisations attach information bulletins to pay slips as the only guaranteed way of reaching all staff;
- use a range of media, to take into account of the fact that different people receive and absorb information in different ways (visual, auditory, written).

The experience of organisations that have gone through this process is that it is best to avoid giving definitive completion dates if there is any chance that the timetable might deviate from the original plan. It is necessary to manage expectations carefully by communicating only those dates that are known to be achievable, and to be clear about what will, and will not, be achieved by then. A date is the one thing that everyone remembers. If a communication states that the scheme will be completed by 1 May, employees will expect that the scheme be implemented and all jobs evaluated by that date, even if implementation is planned to follow on later.

### **The Design Timetable**

Having taken account of all the above factors, it is worth stopping to confirm whether now is the right time to be conducting a job evaluation project. For example, is restructuring likely in the near future? If so, will the job evaluation scheme support the allocation of jobs to the new structure, or will it be better to get the restructuring out of the way, and to evaluate jobs in the new structure once it has settled into place?

With respect to planning the detail of timing, it is usually possible to predict the amount of time required for the technical aspects of the scheme design. Variation in the timetable is more likely to be the result of:

- the level and type of involvement and consultation that is needed to ensure that the scheme will be acceptable and credible;
- the extent to which the scheme is likely to need more than one iteration of testing;
- whether there are plans to pilot the scheme in one part of the organisation prior to full implementation;
- the approach that will be taken to job analysis, including whether good quality information is available about all the jobs to be evaluated or whether it will be necessary to analyse jobs afresh to meet job evaluation needs;
- the decision-making process in the organisation: for example, if key decisions are made by a senior-level committee that meets once a month or quarter, the project plan will need to tie in with this meeting schedule.

For these reasons, project timetables can vary significantly. At the simplest level a project involves three main tasks:

1. Decide on overall scheme design.
2. Agree and test scheme factors and scoring.
3. Evaluate jobs.

However, this process and the amount of work involved vary immensely depending on the size and complexity of the organisation. For a simple scheme the design could be completed in only two to three months. However, a more typical project plan would extend to six to nine months, and in a large organisation or federation of organisations the design may take up to twelve months.

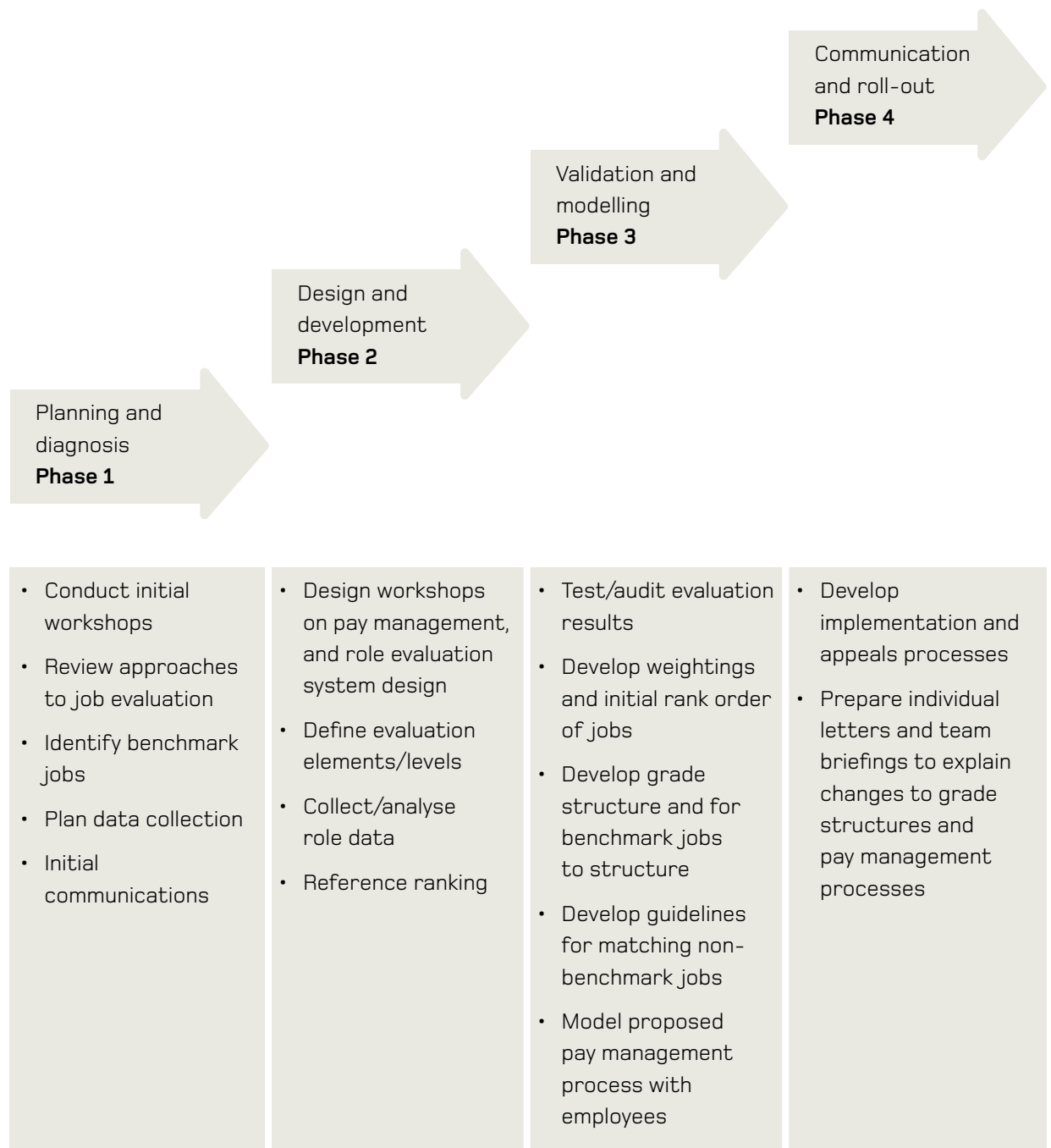
Completion through to full implementation is even more variable and depends on whether to evaluate all the remaining jobs that have not been part of the development process. The alternative is to evaluate a representative group of jobs (benchmarks), with the remaining jobs being matched to grades, based either on their closeness of fit to these benchmark jobs or to a summary description of the grading criteria for that grade based on the jobs that have already been evaluated into each grade (classification).

Finally, it is advisable to build some flexibility into the project plan. It should be assumed that the first attempt at scheme design will not be perfect. There may be a need for additional design work or testing, and this should be allowed for.

Whatever the size of the project, the plan should cover the following:

- key stages;
- deliverables from each stage;
- dates and milestones;
- responsibility for delivering each item in the plan.

An outline project plan used by a financial services institution is illustrated in Figure 6.3.

**Figure 6.3** Project phases

## READING TWO

**Job evaluation checklist:** Extract from *Good Practice Guide – Job evaluation schemes free of sex bias*, Equal Opportunities Commission, United Kingdom, Appendix 3, pp 17 – 19

### Formulating a Job Evaluation Scheme

- Is the scheme analytical?
- Is the scheme appropriate to the jobs it will cover?
- If any groups of workers are excluded from the scheme are there clear justifiable reasons for the exclusion?
- Is there a non-gendered use of generic/benchmark jobs?
- Is the steering committee representative of the jobs covered by the scheme and are they trained in job evaluation and avoiding sex bias?
- Is the chair impartial and does he/she have a good knowledge of equality issues?
- Are there any trade union representatives on the steering committee?
- If a proprietary scheme is to be used does the company have equal opportunities guidelines?

### Job Descriptions

- Are the job descriptions written to an agreed format?
  - Are they assessed to a common standard?
  - Are they consistent, realistic and objective?
  - Does the format reflect the factor plan?
  - Are trained job analysts involved?
  - Are the job titles gender neutral?
  - Is the sex of the job holder concealed?
  - Are the job holders involved in writing their own job description?
  - Has guidance been provided on the completion of job descriptions?
- Are guidance notes provided?
  - Do they contain a comprehensive list of elements in the jobs to be assessed?
- Are the people responsible for collating the job descriptions trained in equal opportunities?

### Scheme Awareness

- Are people covered by the scheme aware of its purpose?
- Are staff kept well informed of the progress of the scheme?



## Factors

- Are the factor definitions and levels exact and detailed descriptions provided for each factor?
- Do the factors cover all important job demands?
- Is there any double counting?
- Do the factors operate fairly?
- Are the numbers of factor levels between the factors even and are they realistic?
- Does any variation between the points reflect real increases in demand?

## Weighting

- Is the weighting system suitable for the jobs being covered?
- Does the weighting represent the correct factors for the organisation?
- Is there a rationale for the weightings?
- Does the weighting explicitly or implicitly perpetuate existing hierarchy?
- Do any high or low weights affect predominantly men or women?

## Appeals

- Is there a recognised appeals procedure?
  - Do staff have a clear understanding of how the appeal procedure can be used?
- Is there an appeals panel?
  - Are they representative of the workforce?
  - Are they trained in job evaluation and sex discrimination?
- Is there equal access to the procedure?
- Are appeal results monitored for gender bias?

## Maintaining and Monitoring a Job Evaluation Scheme

- Has future responsibility for the scheme been clearly allocated?
- Are changes in regradings and the grading structure consistent and non-discriminatory?
- Are comprehensive records kept?
- Are the outcomes of the job evaluation checked for sex bias?
- Are existing schemes reviewed to ensure discrimination has not crept in?
- Are statistics recorded on pay broken down by gender?
- Is the collated information checked regularly?



### **Scheme Impact**

- What is the impact of the scheme on women and men?
  - How many women have moved up and down the grades?
  - How many men have moved up and down the grades?

### **Pay and Benefits**

- Have grade boundaries been drawn without bias?
- Do any special payments reward demands already built into the scheme/
- Is any pay protection (red-circling) free of sex bias?
- Are there justifiable reasons for any inconsistency in the relation of pay and benefits to the job evaluation results?



## READING THREE

**Principles:** Extract from HayGroup, *Job Evaluation Manual, Implementation of Job Evaluation, Suggested Code of Practice for Ensuring Equal Pay for Work of Equal Value*<sup>3</sup> p 55

- Regular reviews of remuneration policies and practices should be undertaken to assess major areas of vulnerability and prevent discrimination.
- The membership of project steering groups, job evaluation panels and appeal panels should be consistent with equal opportunity, affirmative action and other like policies adopted within the organisation. This will ensure a broad and proper understanding of the content of work typically undertaken.
- Job description design and preparation should avoid both explicit and implicit reference to gender of the position holder.
- A single integrated approach to job evaluation should be used – providing vertical coverage from the largest to the smallest job in the organisation and horizontal coverage of all occupational groups, and all sites with an organisation.

The job evaluation method should be analytical – i.e. it should break down jobs for consideration under a number of factors – and should be free of gender and ethnic bias, both inherently and in the way in which it is implemented and maintained.

Positioning of grade boundaries, where superimposed on an evaluated hierarchy of jobs, should not be allowed to introduce potential gender or ethnic bias.

Training of individuals involved in any aspect of position description preparation, job evaluation and performance or merit assessment should include, in addition to the thorough grounding in the techniques, a briefing on how to avoid gender and ethnic bias in their application.

Communications to employees concerning the basis of determination of remuneration should be made clearly, concisely and should frequently be reinforced in order to prevent misunderstandings.

### Guidelines for Implementation

The establishment and maintenance of effective and acceptable remuneration arrangements involves a number of key elements. The following guidelines are offered as a basis for ensuring that remuneration policy and practice fulfil both the letter and spirit of legal requirements for equal pay between men and women. They are, in essence, those which we would regard as appropriate in ensuring fairness in treatment across any job or occupational groups, departments, divisions or any two individuals within an organisation. They would apply equally in ensuring equality of treatment between racial, ethnic or disabled groups.

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<sup>3</sup> Material from the Hay Group Job Evaluation Training Manual is made available with the kind permission of the Hay Group.



**Committees** Extract from *Equitable Job Evaluation User's Guide*, Pay and Employment Equity Unit, Department of Labour, New Zealand, 2007, p 22

It is important that there is diverse participation in the job evaluation process, as it contributes a range of perspectives and experiences and that can help to highlight and question gender bias. Ideally, jobs will be evaluated in a structured job evaluation committee process by trained evaluators who are representative of the roles within the scope of the project, and who participate on an equitable basis.

Where jobs cannot be evaluated by a committee, using two trained job evaluators provides a check on the integrity of the evaluations.

The reason for the jobs not being evaluated by a committee should be documented.

Is the valuing tool of the comparison system applied consistently without regard to the gender of the job class?

If a committee is used to evaluate jobs, is it representative, balancing the interests of the parties with duties and obligations under the Act?

If a committee is part of the system, is it sufficiently knowledgeable to enable the parties to meet their obligations?

Is the decision making process accomplished in a manner free of gender bias?

Did the mechanism identify systemic wage discrimination?

*Ontario Nurses' Association vs Regional Municipality of Haldimand-Norfolk, Haldimand-Norfolk (No.6) (1991), P.E.R. 105, cl 84*

The primary function of the job evaluation committee is to interpret the available job information and, by applying the Equitable Job Evaluation Factor Plan, to establish in a fair and consistent manner the relative ranking of jobs within the scope of the job evaluation project. Members must be able to understand the contribution of the roles being evaluated in relation to the objectives of the organisation, and to apply the methodology in a systematic and unbiased manner.

A prime concern of any job evaluation committee is to maintain, as far as possible, both objectivity and consistency when determining evaluation scores for jobs. The committee must appear objective and consistent in the eyes of the employees. Jobholders' perceptions of the committee and the process may be as important as the actual execution of the project.



## READING TWO

**Steering and Review Arrangements:** Extract from *HayGroup, Job Evaluation Manual, Implementation of Job Evaluation, Suggested Code of Practice for Ensuring Equal Pay for Work of Equal Value* pp 55 – 56

Appropriate investment in the responsibility for planning and co-ordinating the implementation of changes to elements of the remuneration system, e.g. the introduction of a new job evaluation method, is vital to success. The allocation of such responsibility may depend on the size and complexity of the organisation. In larger more complex organisations it should reside with a steering panel. Responsibility for regular review of existing arrangements and maintenance of consistent standards should be allocated with equal care. Unbiased operation is vital to ensuring a system of remuneration management free of sex bias.

- Formation of steering and review panels should have regard to the distribution of men and women across the organisation.
- Individuals should be thoroughly trained, but not only in techniques and approaches they are required to assess and monitor, but they should be briefed to avoid sex bias (both direct and unintentional).



## READING THREE

**Roles and Responsibilities:** Extract from *Equitable Job Evaluation User's Guide*, Pay and Employment Equity Unit, Department of Labour, New Zealand, 2007, pp 12 – 16

The use of committee(s) or group(s) is beneficial to the job evaluation process. There may be a steering or project group or individuals who may be allocated specific responsibilities as part of the job evaluation process. This section describes a variety of groups and suggestions on the roles and responsibilities for each. Some of the responsibilities outlined in this guide may be carried out either jointly or in part; each organisation should choose the appropriate mix of committee, group and role that best suits their circumstances.

### The sponsor

The sponsor is typically a senior manager within the organisation. The sponsor is responsible for:

- contacting the union/s about participating in the project
- selecting the members of the steering group and making sure they have the skills necessary to manage the project and are representative of the jobs within the project scope
- providing guidance to the steering group
- championing gender equity principles and practices, the job evaluation system and its gender-inclusive implementation
- formally managing the project's scope
- ensuring a communication plan is developed within the organisation
- approving plans, schedules and budgets
- ensuring that relevant parties are consulted and that sustained buy-in is achieved
- ensuring that all those involved are supported to participate, including undertaking the training on the Equitable Job Evaluation System and on avoiding gender bias
- clearing "roadblocks"
- ensuring timely availability of resources
- reviewing the progress of the implementation and ongoing management
- ensuring that the benefits of implementing the Equitable Job Evaluation System are realised.

### The steering group

Typically, the steering group consists of representative members of the organisation and is usually chaired by a senior member from human resources, with experience in job evaluation. When selecting members of the steering group it is also important to consider union representation, the make-up of the employee population, and the role the steering group is to play. Members of this group should be trained in job evaluation and gender bias issues. Ideally the steering group should consist of no more than six to eight members.



The steering group will typically be responsible for considering and agreeing:

- the training to be provided for all union, employee and management representatives who will be directly involved in gathering information about jobs and evaluating them
- the selection of job evaluators and data gatherers
- the ways in which the system and its implementation will be communicated to employees and union representatives. Progress on implementing the system should be reported on a regular basis, in general, and in relation to individuals' jobs
- how specialist external consultants in job evaluation and/or gender bias might be involved
- the composition of the job evaluation committee(s), including arrangements for chairing, and gender balance
- the basis on which jobs are to be selected for evaluation
- the extent of disclosure to jobholders on the results of the job evaluation
- the terms on which there should be protection against the loss of remuneration (should a job evaluation identify that a job is being paid above the pay range established for a particular size of job)
- the review/appeals procedure
- overall timescales for the evaluation process
- the arrangements for monitoring the work of the evaluation committee(s)
- the process for monitoring the overall evaluation and pay outcomes by gender.

### **Involvement of unions**

The development of the Equitable Job Evaluation System is one of the key products arising from the Government's Plan of Action on Pay and Employment Equity, which involves partnerships of employers and unions representing the Public Service, public health and public education sectors. It is expected that the representative unions will be involved in the decision to implement the Equitable Job Evaluation System, and will participate in its implementation.

### **Data gatherers**

The role of the data gatherer is critical to the success of the entire job evaluation process. The results of any job evaluation can only ever be as good as the job information used in the evaluation.

Data gatherers are responsible for working with jobholders to ensure there is a high-quality, gender-neutral description of the jobs for the evaluation committee, through the use of position descriptions and job questionnaires. Data gatherers also act as representatives of the Equitable Job Evaluation System and will need to be able to correctly and clearly answer any questions the jobholders may have about the system and the process.



Data gatherers will need:

- excellent interpersonal and communication skills, to interview jobholders and assist in compiling clear and consistent job documentation
- understanding of the concepts of under/over-description of work by jobholders
- time to commit to working with jobholders, collecting quality job information
- training in gender-neutral data gathering.

The number of data gatherers required will depend on the size of the organisation, the number of jobs to be evaluated and the timeframe for evaluation. Detailed information on the role of data gatherers is contained in Appendix 4.

### **The job evaluation committee**

The role of the job evaluation committee is, firstly, to gain an understanding of the jobs to be evaluated, by reviewing the position descriptions and job questionnaires; and secondly, to evaluate the jobs in an impartial, gender-neutral and consistent manner, using the *Equitable Job Evaluation Factor Plan* and *User's Guide*.

It is essential that the committee members have sufficient time to undertake the role properly.

Ideally, the job evaluation committee should consist of six to eight job evaluators. However, to ensure there are adequate numbers of people to participate as evaluators, more job evaluators than is necessary should be trained, to cover absences.

The committee must be representative of the diversity in the organisation and:

- include both union and employer representatives
- be balanced in terms of gender
- be women and men drawn from a range of levels within the organisation and across the different areas of the organisation
- be personally committed to and knowledgeable of gender equity objectives
- be available to attend meetings on a regular basis (because the job evaluation skills learnt in training will be lost if they are not regularly used)
- be able to maintain confidentiality
- actively engage in and contribute to the process
- adhere to agreed processes and methodologies
- be seen as credible and objective decision-makers by staff within the organisation
- receive full training on the Equitable Job Evaluation System, their role and responsibilities, including gender equity obligations.

We also find that training of the committee is a key requirement. Where there is a job evaluation committee, it is essential that there be adequate training in bias-free evaluation and that members develop a conscious awareness of the attitudes and biases people bring to point valuing. Value judgements made by a committee untrained in identifying systemic bias, will likely preserve existing wage inequities through the undervaluation of female job classes.

*Ontario Nurses' Association vs Regional Municipality of Haldimand-Norfolk, Haldimand-Norfolk (No.6) (1991), P.E.R. 105, cl 89*

### **The chairperson**

The chairperson is a member of the job evaluation committee who is responsible for managing its meetings.

The chairperson does not direct the outcome of the job evaluations, but ensures that:

- a full discussion of each job takes place
- any questions regarding the job are answered
- all committee members participate in the process
- differences in factor scores that evaluators have come up with are discussed
- the consensus decisions and reasons for job scores are recorded
- gender-neutral principles, practices and behaviour are maintained and modelled.

The chairperson may be appointed from within the group of trained job evaluators, or the role may rotate on an agreed basis. Alternatively the steering group may agree to appoint an independent chairperson, for example an independent consultant.

### **The co-ordinator**

It is helpful to appoint a co-ordinator to administer the Equitable Job Evaluation project within an organisation. Often this role is filled by a member of the human resources team. The co-ordinator will be responsible for:

- setting up the job evaluation committee meetings
- distributing the job information to committee members
- recording the final scores and rationales for the individual job evaluations.

### **The use of consultants**

The sponsor or steering group may decide to use a consultant to assist with implementation of the Equitable Job Evaluation System. This may take the form of guiding the implementation of the job evaluation process, delivering the Equitable Job Evaluation training modules, providing hands-on support in the data gathering and job evaluation committee phases, or providing expertise in gender equity issues.

Whatever the role the consultant is to play, it is critical that they can demonstrate commitment to and knowledge of gender equity objectives and techniques for identifying and addressing gender bias.



## READING FOUR

Skills and knowledge framework, gender bias and job evaluation, produced by the Pay and Employment Equity Unit, Department of Labour, New Zealand.

PAY AND EMPLOYMENT EQUITY FOR WOMEN	
Key areas of skills and knowledge	Comment
Actively supports the identification and elimination of pay and employment inequity.	
Monitors the actions taken to reduce pay and employment inequities.	
Understands processes and practices that may constitute barriers to pay and employment equity.	
Understands the characteristics of undervaluation in female-dominated occupations.	

SKILL AREA: JOB EVALUATION	
Indicators	Examples of relevant evidence
Demonstrates experience with job evaluation systems.	
Competently sizes positions using comprehensive job information.	
Understands the relationships between factors, levels, points and weighting used in job evaluation tools.	
Is aware of international case law and research on aspects of job evaluation design and practice that have resulted in gender-biased outcomes.	
Recognises the impact of job evaluation on job descriptions, remuneration, training and development.	
Appreciates importance of collecting robust job information and training data gatherers, evaluators and other.	





## SKILL AREA: DELIVERS EDUCATION AND TRAINING

### Experience or qualifications in adult education

Indicators	Examples of relevant evidence
Completed relevant unit standards/ qualifications, train the trainer, etc.	
Experience in group facilitation, and education and training.	
Demonstrates active training delivery methods that engage, encourage and challenge to create a positive learning environment.	
Experience in identifying learning barriers and differences in learning styles.	
Experience delivering to diverse people, for example, roles, ethnicity, levels of literacy/ experience and knowledge base.	

## READING ONE

**Checklists for selecting a scheme** Extract from *Guidance Note 4: Job Evaluation Schemes Free of Sex Bias*, Equal Opportunities Commission, United Kingdom, pp 4 – 9

The series of checklists below contain questions that will enable you to check whether the scheme that you are using, or intending to use, is non-discriminatory. The checklists are cross-referenced to the key features set out in other sections of this resource.

Ensuring that a job evaluation scheme does not discriminate on grounds of sex involves examining every aspect of the scheme from design through implementation to monitoring the outcomes. Working through the checklists will help you ensure that any job evaluation scheme you use is free from sex bias. If you use more than one job evaluation scheme you will need to answer the questions in the checklists in respect of each of the schemes.

If you do not know the answers to some of the questions in the checklists then you may need to seek information from people involved at the time that decisions were taken, e.g. earlier generations of job evaluation panel members or long-standing trade union reps. You may also need to contact the consultants who designed and helped to implement the scheme. If you find you have large number of unanswered questions, then it may well be that your scheme would not stand up to scrutiny.

### Checklist A: Background Information

#### 1. Is the scheme 'In house' or 'Off the peg'?

If the scheme was either developed in-house or modified from the framework provided by an external supplier you should be able to use the questions given here to test whether the scheme is non-discriminatory. If it was bought "off the shelf" you will need to assure yourself that the supplier has reviewed the principles and practices of their scheme in accordance with the guidance given here. You will also need to check out the way in which you are implementing the scheme.

#### 2. When was the scheme introduced?

The older a scheme is, the more likely it is to have been developed without reference to the need to avoid gender bias. If your answers to the questions given here suggest that your scheme might not stand up to scrutiny, then you will need to decide whether a major overhaul will put things right, or whether it would be better to introduce a new scheme.

#### 3. When was the scheme last reviewed?

Job evaluation schemes should be periodically reviewed to ensure that they remain free from sex bias.

#### 4. Does the scheme cover all employees?

Excluding groups of jobs from a job evaluation scheme may perpetuate sex bias, especially if the groups excluded are composed predominantly of employees of one sex. Discrimination in the grading and pay of the jobs of female employees often occurs or is perpetuated by their separation into a different grading structure based on a different job evaluation scheme, or no job evaluation scheme at all. Incorporating female jobs within the same non-discriminatory job

evaluation scheme as the male jobs will help you to achieve equal pay for equal work. You should only exclude groups of employees from a scheme if you have justifiable and non-discriminatory reasons for doing so.

Employers and trade unions should appreciate that problems can be created if bargaining units are used as the sole basis for the scope of jobs to be covered, since this can often be discriminatory. Claims for equal pay for work of equal value can be brought where separate schemes or collective bargaining arrangements are used to justify differences in pay between the sexes, or where members of one sex are left out of a job evaluation scheme.

**5. Do your employees understand how the scheme works?**

If your pay system, or any part of it, is characterised by a total lack of transparency, then the burden of proof is on you as the employer to show that the pay practice is not discriminatory. In respect of job evaluation, 'transparent' means that information about the design and implementation of the scheme should be available to employees in a readily understandable form.

**6. Is the scheme computerised?**

Increasingly, the process of job evaluation is being computerised so that, for example, information on jobs is inputted onto computers in the form of answers to pre-formulated questions and a score for the job is then given. Schemes that are computerised are often quicker to implement and they are not inherently discriminatory. However, any computerised system will reflect the nature of the information it analyses. Therefore, it is important to ensure that your computerised scheme gathers comprehensive information about jobs and is based on factors that are non-discriminatory. At the benchmarking stage, you should evaluate the benchmark jobs using both the computerised format and written job descriptions or completed job questionnaires. A comparison of the two exercises should then be undertaken to check for sex bias.

**Checklist B: The Design of the Scheme**

**7. Is the scheme analytical?**

A job evaluation scheme must be analytical for it to be accepted by the courts as an appropriate method for determining whether jobs are, or are not, equivalent. You as the employer (rather than the supplier or consultant) must show that the scheme is analytical.

**8. Does the scheme's factor plan fairly measure all significant features of all the jobs it covers?**

A job evaluation scheme must be based on factors that fairly value all the main demands of the jobs covered by the scheme, irrespective of whether men or women perform them. Factors that tend to favour workers of one sex (e.g. physical effort) can be included, as long as the scheme also includes factors that tend to favour the other sex (e.g. manual dexterity). However, the point here is that the factors should reflect the fair/real value of the job rather than being a balancing act, and therefore only relevant factors should be included.



To check whether a scheme factor plan fairly measures all significant demands of jobs either:

- Check the scheme factors against a list of frequently overlooked factors and a list of factors that favour typically male or female jobs, or,
- Analyse job information (job descriptions, person specifications) from a sample of typically male and female jobs, listing the main job features and compare them with the scheme factors. If there are job features not covered by the factors, you should consider whether these factors are more common in jobs typically carried out by one sex or the other.

If the scheme factors favour predominantly one sex, then this may indicate that factors favouring the other sex have been omitted. (See section 3.5.3 Factors and 3.5.4 Factor Weightings)

**9. Do the factor levels in the job evaluation scheme reflect measurable steps in demand within the jobs covered by the scheme?**

Factor levels should reflect significant and measurable differences in levels of demand, which are appropriately reflected in the scoring/weighting systems. (See section 3.5.3 Factors and 3.5.4 Factor Weightings)

**10. Is the rationale for the scheme's scoring and weighting system documented?**

A weighting and scoring system should not introduce bias towards predominantly male or female jobs. You can check this by comparing the rank order resulting from simply adding up raw scores (1 point per level per factor) with that resulting from applying the scheme's weighting and scoring systems. If the differences in position in the two rank orders affect jobs of predominantly one sex, then this indicates the introduction of bias through the weighting and/or scoring system. Any use of 'felt fair' ranking as a basis for generating weighing should be carefully checked for bias, as it may tend to perpetuate any discriminatory features in the existing hierarchy. (See section 3.5.3 Factors and 3.5.4 Factor Weightings)

### **Checklist C: The Implementation of the Scheme**

**11. When jobs are evaluated or re-evaluated, do you involve jobholders in completing a Job Questionnaire or an equivalent job information document?**

Jobholders know more about the demands of their jobs than anyone else, although they may need help in explaining them. Completion of Job Questionnaires by line managers or human resource staff, without jobholder involvement, can result in job demands being omitted or understated. (See section 3.7 Job Information)

**12. Do you use trained Job Analysts to assist jobholders to complete Job Questionnaires or equivalent job information documents?**

It is good job evaluation practice to use trained Job Analysts to assist jobholders to provide the information required by the scheme and to a consistently high standard, as this helps to prevent inconsistent and potentially biased evaluations.

**13. Have the Job Analysts been trained in equality issues and the avoidance of sex bias?**

Job Analysts should understand how sex bias can occur in the information collection process and be trained to avoid it.

**14. Does the Job Questionnaire or equivalent job information document follow the job evaluation scheme factor plan? That is, does it use all of the same headings?**

Job information documents, which follow the job evaluation scheme factors, are easier to evaluate and help avoid evaluators making assumptions about job demands, which can result in them being omitted or undervalued in the evaluation process. (See section 3.5.3 Factors and 3.5.4 Factor Weightings)

**15. Are jobs evaluated or re-evaluated by a job evaluation panel or committee?**

Evaluation by only 1 or 2 people (e.g. line manager, personnel officer) can result in biased outcomes. This risk is reduced through evaluation by a panel with broad knowledge of jobs across the organisation.

**16. Are job evaluation panel members representative of the main areas of work and gender composition of the workgroups being evaluated?**

The more representative the evaluators are the greater should be their combined understanding of job demands across the workgroup.

**17. Are panel members trained in equality issues and the avoidance of sex bias?**

Training in the avoidance of sex bias in the evaluation process helps to prevent it occurring and to ensure that the exercise is seen as fair.

**18. Are evaluation rationales or records, including the reason for each factor assessment, maintained for each job evaluated or re-evaluated?**

It is good job evaluation practice to maintain detailed evaluation records, for a number of reasons. Records:

- Allow evaluators to check back on their decision making process and thus help ensure consistent evaluations;
- Allow the reasons for evaluations to be explained to jobholders, for example, those considering appealing;
- Provide information to appeal panel members on what information was taken into account in the initial evaluation;
- Provide contemporary evidence for any evaluations that may subsequently be subject to legal challenge.

**19. Has the impact of evaluations, re-evaluations and appeals on male and female dominated jobs been monitored?**

You can monitor the impact by comparing the rank order implicit in the pre-evaluation pay structure with that resulting from the evaluation exercise (and any subsequent re-evaluations and appeals) and identifying the gender dominance, if any, of jobs that have moved up or down the rank order. If the pre-evaluation pay structure was biased against “female” job characteristics, then upward moves would be disproportionately among female dominated jobs. Otherwise, one would expect moves to be roughly proportionate to the gender composition of the workforce.



**20. Have all distinct jobs within the relevant employee group been analysed and evaluated?**

In legal terms, jobs that have not been analysed and evaluated fall outside the scope of the job evaluation study. So a jobholder whose job has not been analysed and evaluated (or whose job has changed to the extent that the original evaluation no longer applies) could take an equal pay claim and the job evaluation scheme would not provide you with a defence.

**Checklist D: For Organisations With More Than One Job Evaluation Scheme**

**21. Are all of your employees covered by one of the job evaluation schemes in use in your organisation?**

Employees outside the scope of a job evaluation scheme can make an equal pay claim comparing their work with that of employees within the scope of the scheme. It is also possible for a jobholder in one scheme to claim equal pay with a jobholder in a different job evaluation scheme. Where claims such as these are made, the job evaluation scheme(s) do not provide you with a defence.

**22. Have you made any comparisons between the demands (and pay) of jobs covered by different job evaluation schemes?**

You can do this in either of two ways:

- i. By evaluating a small number of jobs from scheme A, which are closest in nature to jobs in scheme B, using both schemes; and vice versa; then comparing the results and relative pay levels.
- ii. By undertaking 'equal value' checks (see EOC Equal Pay Kit Guidance Note 5 Assessing Equal Value) on a sample of predominantly male and female jobs from each scheme, to test for vulnerability to equal pay claims.

## READING ONE

**Frequently overlooked job characteristics in work:** Handout from *Equitable Job Evaluation Education and Training Module 3*, Pay and Employment Equity Unit, Department of Labour

The following list describes some of the frequently overlooked job characteristics in women's work<sup>4</sup>.

### Knowledge and skills

- Knowing emergency procedures when caring for people
- Using a number of computer software and database formats
- Cultural knowledge
- Operating and maintaining different types of office, manufacturing, treatment/diagnosis or monitoring equipment
- Manual dexterity in giving injections, typing or graphic arts
- Managing cross-cultural interactions
- Writing correspondence for others, minute taking, proof reading and editing others' work
- Handling complaints
- Innovating – developing new procedures, solutions or products
- Establishing and maintaining manual and automated filing or records management and disposal
- Dispensing medication to patients
- Deciding the context and format of reports and presentations
- Continuing re-ordering and re-prioritising tasks to meet external demands
- Non-verbal communication
- Counselling someone through a crisis
- Performing complex sequences of hand-eye co-ordination in industrial jobs

### Responsibility

- Representing the organisation through communication with clients and the public
- Supervising staff
- Shouldering the consequences of errors to the organisation
- Managing petty cash
- Training and orientating new staff

<sup>4</sup> This list was collated from the following sources:

1. *EOC Good Practice Guide – Job Evaluation Schemes Free of Sex Bias*, 2003
2. *Technical Note No 108 Identifying Discrimination in Job Evaluation Schemes*, Sue Hastings, Oxford, Trade Union Research Unit, 1989
3. *Pay Equity Now* by Jane Pillinger for PSI
4. Ontario Pay Equity Commission, *Commonly Overlooked Features of Work*
5. Personal communication with John Kervin (Toronto University)
6. Early findings from PEEU skills identification project



- Cleaning offices, stores, machinery or hospital wards
- Keeping public areas such as waiting rooms and offices organised
- Preventing possible damage to equipment
- Co-ordination of schedules for a number of people
- Developing work schedules
- Product quality
- Maintaining manual and automated filing or records management and disposal
- Gathering and providing information for people at all levels in the organisation

### **Demands and working conditions**

- Concentrating for long periods – computers or manufacturing equipment
- Frequent bending or lifting – including people or children
- Regular light lifting
- Managing own response to disgusting situations
- Restricted movement, awkward positions
- Providing caring and emotional support to individuals (e.g. children or those in institutions)
- Dealing with upset, injured, irate, hostile or irrational people
- Dealing with death and dying
- Exposure to corrosive substances or materials e.g. skin irritations from cleaning
- Working in production noise
- Exposure to disease
- Stress from dealing with complaints (such as child abuse)





## READING TWO

**Factors:** Extract from *Good Practice Guide – Job evaluation schemes free of sex bias*, Equal Opportunities Commission, United Kingdom, pp 6 – 9

Factors are clearly identifiable aspects of a job that can be defined and measured which provide the basis for assessing and comparing the relative overall worth of different jobs. Examples of factors are “responsibility for people”, “knowledge”, “communication skills”, “physical demands”, “emotional demands”, “mental skills” and “initiative”. Except in very broad terms, there is no standard set of factors that are applicable to all jobs. Clearly factor choice is crucial since the final rank order of jobs is most heavily affected by the selection of factors.

The exclusion of a factor that is important for a job will result in it being undervalued relative to other jobs. This is particularly important if factors are excluded which occur in predominantly female jobs as this will result in these jobs being placed unfairly at the bottom of a grading structure. “Working conditions” and “physical strength” are often included in schemes covering manual workers; both these factors will appear in jobs performed by men. On the other hand, factors associated with work done by women, for example, “manual dexterity”, “caring skills” and “working with people”, may not be used as factors at all. It is essential therefore that the factors chosen are representative of the whole range of work being evaluated.

The example shows how two different sets of factors, one biased and one unbiased, can produce different rankings for the same two jobs. The first set of factors is blatantly discriminatory.



FACTORS	MAINTENANCE ENGINEER	COMPANY NURSE
<b>Skill</b>		
Experience in job	10	1
Training	5	7
<b>Responsibility</b>		
For money	0	0
Equipment and Machinery	8	8
For safety	3	6
For work done by others	3	0
<b>Effort</b>		
Lifting Equipment	4	2
Strength required	7	2
Sustained physical pressure	5	1
<b>Conditions</b>		
Physical environment	6	0
Working position	6	0
Hazards	7	0
<b>Total</b>	<b>64</b>	<b>27</b>

Note: each factor is scored on a scale from 1 to 10. For simplicity no weights have been applied.

This set of factors is discriminatory because it contains many aspects of the male job and very few characteristics which relate to the female job. Also some of the characteristics which relate to the male job are duplicated, for example “strength required” duplicates to some extent “sustained physical effort” with the result that a high score on one would very frequently be associated with a high score on the other.

The same is true of “lifting requirement” and “strength required”. Note that the difference in scores on the factor “experience in job” completely outweighs the more significant difference in the factor “training”.



FACTORS	MAINTENANCE FITTER	COMPANY NURSE
Basic knowledge	6	8
Complexity of task	6	7
Training	5	7
Responsibility for People	3	8
Responsibility for Materials and Equipment	8	6
Mental Effort	5	6
Visual Attention	6	6
Physical Activity	8	5
Working Conditions	6	1
<b>Total</b>	<b>53</b>	<b>54</b>

Note: each factor is scored on a scale from 1 to 10. For simplicity no weights have been added.

It is important to ensure that the set of job factors used incorporates all the important and relevant differentiating characteristics of all the jobs to which the scheme is going to be applied (See the section 'Commonly overlooked job characteristics in women's work'). It is important to check the factor scores of the jobs performed predominantly by female employees and, if there are a lot of low scores or if the set of factors makes no provision for scoring aspects of the female jobs which reflect their value to the organisation, then the set of factors is discriminatory and should be changed.

### Factor Definition

Where large numbers of jobs are involved, factors are often broadly defined, so it is essential that proper descriptions be provided for the meanings of each factor. The definitions should be closely scrutinised to ensure that unjust sex bias does not occur. For example, a definition of "working conditions" which included shift work could discriminate against women, as could a definition of "experience" which included length of service. For the purposes of job evaluation, it is not important if the jobholder has twenty years' service if the job could be learned in two months. Such matters should be dealt with outside the remit of the job evaluation scheme. If "numeracy" is a factor a proper definition should be provided to avoid subjective judgments, for example, that women are less numerate than men.



## Weighting

Once the important components of the jobs in an organisation have been identified and converted into job factors with scales for measuring those factors, it will be recognised that they are not all equally important to the work of the organisation. It is therefore normal practice to apply weights to the factor scores in an effort to reflect the relative importance of the various factors. A very important sub-factor may be weighted even as high as 10% (whilst an unimportant sub-factor may be only weighted 1%). Deciding what these weights shall be is a highly subjective process, and it is extremely easy for sex discrimination to appear in a job evaluation procedure as a result of discriminatory weightings being applied to the factors. Taking the example of the less biased job factors used in the table above, the following example shows how discriminatory factor weights produce a biased evaluation of the two jobs.

### Example of Biased and Less Biased Factor Weighting

	UNWEIGHTED SCORES		BIASED WEIGHTS	WEIGHTED SCORES		UN-BIASED WEIGHTS	WEIGHTED SCORES	
	Fitter	Nurse	%age	Fitter	Nurse	%age	Fitter	Nurse
Basic knowledge	6	8	7%	0.42	0.56	5%	0.30	0.40
Complexity of task	6	7	8%	0.48	0.56	15%	0.75	1.05
Training	5	7	7%	0.35	0.49	15%	0.75	1.05
Responsibility for People	3	8	15%	0.45	1.2	15%	0.45	1.20
Responsibility for Materials and Equipment	8	6	15%	1.20	0.90	15%	1.20	0.90
Mental Effort	5	6	8%	0.40	0.48	10%	0.50	0.60
Visual Attention	6	6	10%	0.60	0.60	10%	0.60	0.60
Physical Activity	8	5	15%	1.20	0.75	10%	0.80	0.50
Working Conditions	6	1	15%	0.90	0.15	5%	0.30	0.05
<b>Total</b>	<b>53</b>	<b>54</b>	<b>100%</b>	<b>6.00</b>	<b>5.66</b>	<b>100%</b>	<b>5.80</b>	<b>6.35</b>

The first set of weights is biased because most of the factors on which the male job scored highly have high weights and most of the factors on which the female job scored higher than the male have low weights. It is unlikely that this particular set of weights could be justified by reference to the importance of these factors to the organisation as a whole. The second set of weights is less biased because it does not unduly favour the characteristics of male as opposed to female work. This set of weights widens the gap between the two jobs relative to the unweighted scores and shows the company nurse to be a higher-grade job than the fitter. The biased set of weights actually reversed the situation.

To avoid discrimination resulting from the weighting of factors, extreme weights (either very high or very low) should not be given to factors that are exclusively found in jobs performed predominantly by one sex. An analysis showing the percentage of total points (after weighting) attributable to each factor should be compiled. This would assist in highlighting factors with heavy weightings and provide a relative comparison between factors. The factors with the heaviest and the lightest weightings should then be looked at again to ensure these can be justified and are not likely to penalise the jobs of one sex.

### **Numbers of Levels**

Individual factors often have a number of levels within each factor. For example, a factor such as “initiative” could have five levels ranging from the lowest defined as “following detailed instructions under close supervision” to the highest defined as “working within overall policy and having very wide discretion over a broad range of activities with minimal managerial direction”. This is a form of implicit weighting and therefore the considerations identified [above] also apply to levels within factors. Care should be taken to avoid sex bias in the number of levels between factors. It is important to ensure that factors which are characteristics of jobs largely held by one sex do not unjustifiably have greater numbers of levels than those factors which are contained in jobs mainly held by the other sex.

### **Scoring**

Scoring is the method of attaching values to the various levels within each factor so that a total score for each factor and therefore the overall job can be calculated. It is important to ensure that the method of scoring for each factor is reasonably similar, so that the problem does not arise where factors with the same or similar numbers of levels can result in widely differing scores. For example, a factor of “responsibility for financial resources” may have five levels with scores increasing by multiples of five.

Therefore the maximum score for this factor would be 25. However, the factor of “responsibility for caring” could also have five levels but with scores increasing in multiples of 3. Therefore the maximum score for this factor is 15. Clearly the effect of this means that a form of implicit weighting has been applied to the “responsibility for financial resources factor”. In the context of sex discrimination it is particularly important to ensure that factors which are characteristics of male dominated jobs, do not have a wider dispersion of scores than factors which are characteristics of female dominated jobs.

**Selecting jobs to evaluate:** Extract from *Equitable Job Evaluation User's Guide*, Pay and Employment Equity Unit, Department of Labour, 2007, pp 18–19

It may not be possible or necessary to evaluate all jobs in the organisation, either because of the large number of jobs or because resources are limited. Other options can include the selection of jobs from a particular job discipline, or some other specified group of jobs. A rank order of a sample of jobs can be drawn up and the remaining jobs matched and slotted into the order. The jobs selected to form the sample become the benchmarks, the fixed points against which the remaining jobs can be evaluated.

The benchmark sample is particularly useful during the design and initial implementation, but it should not be seen as fixed. The jobs used as benchmarks would be reviewed periodically so that any changes that have taken place either within the organisation or to the job content can be reflected.

The steering group should agree a number of benchmark jobs to evaluate. Benchmark jobs are selected to be representative of particular levels and types of jobs and can be used as a reference point against which other jobs may be assessed. It is therefore important that they are evaluated consistently.

The first step in selecting the jobs to be included in the benchmark sample is to draw up a list of all jobs within the scope of the project. Caution is needed to ensure jobs that have generic titles but are in fact significantly different in job content are not identified as one job. For example, roles that all have the title 'executive assistant' may have substantially different content and different skill levels.

This list of jobs should identify the location of the job by department/team, the number of people who carry out the job and the number of men and women occupying each role.

The jobs within the project scope selected to form the benchmark sample should:

- have a coherent purpose and clear definition
- represent the entire range of jobs found in the organisation, according to level and type of activity, including senior managers, jobs in small units and sole jobholders
- include those jobs most often held by men and those most often held by women and those most commonly found in the organisation. In the latter case, and especially for those jobs spread across the organisation, it may be necessary to have more than one example of the same role
- represent all levels in the current grading or pay structure
- include part-time and full-time jobs
- cover the full range of activities
- include the most frequently occurring and most highly populated jobs, as well as one-off jobs with unique features.

There is no set number or percentage of jobs to be included in the benchmark sample. Many positions are necessary to ensure coverage, but the sample should not be so big as to be unwieldy.

## READING ONE

**Job Analysis and Description:** HayGroup, *Job Evaluation Manual, Implementation of Job Evaluation, Suggested Code of Practice for Ensuring Equal Pay for Work of Equal Value*, p 56

The prime source of information for job evaluation is typically job descriptions. It is as important that the compilation and presentation of descriptions be free sex bias, as it is that the evaluation method and its implementation should be.

- Detailed descriptions of all jobs should be prepared using the uniform format.
- Where job analysts are involved in the preparation of job descriptions, both men and women should be selected with reference to their distribution across the range of jobs.
- All individuals involved in the preparation of the job descriptions should, in addition to receiving appropriate training in the approach to collection and presentation of information, be briefed to avoid sex bias in discussion, interpretation and choice of words used to describe jobs.
- Job descriptions should be agreed as representative of the job by job holders, line management and, where appropriate, the job analyst and union/staff association representative.
- Job titles appearing on job description should avoid any indication of sex of job holder (e.g. not manageress).
- Name and gender of job holder should be avoided on copies of descriptions put forward for panel review.



## READING TWO

**Collecting Job Information – the Data Gathering Process:** Extract from *Equitable Job Evaluation User's Guide*, Pay and Employment Equity Unit, Department of Labour, 2007, pp 20 – 21

Collecting job information is one of the most visible aspects of the whole Equitable Job Evaluation System. It is important that the data gatherers are good ambassadors for the system and collect good quality, gender-neutral job information for evaluation.

If jobs are described incompletely and inaccurately on a systemic basis, existing specifications become nothing more than job-content based justifications for perpetuating undervaluation of female dominated or significantly minority jobs.

*[R. Steinberg and L. Haignere, "Equitable Compensation: Methodological Criteria for Comparable Worth", in C. Bose and G. Spitze Ingredients for Women's Employment Policy, State University of New York, 1987 at p.166] Ontario Nurses' Association vs Regional Municipality of Haldimand-Norfolk, Haldimand-Norfolk (No.6) (1991), P.E.R. 105, cl 28*

### Job Information

The job information on which evaluation decisions will be made will be derived from:

- job descriptions
- questionnaires completed by the jobholder
- a combination of the existing job description and a job evaluation questionnaire
- interviews or discussions with persons knowledgeable about the job.

It is important that there is joint agreement between the jobholder and his/her immediate manager regarding the contents of the job information to be evaluated.

### Job Descriptions and the Equitable Job Evaluation Questionnaire

A standard job evaluation questionnaire has been drawn up to be used as an integral part of the Equitable Job Evaluation System. This may be customised to reflect the environment in which it is being used.

Use of the job questionnaire is recommended because it provides a standard format that, firstly, delivers information needed to cover all the Equitable Job Evaluation factor headings, and secondly, allows a proper comparison of different jobs.

Job descriptions created for recruitment purposes or for employment agreements are unlikely to provide sufficient relevant information for job evaluation. They may distort the functioning of the Equitable Job Evaluation System because they are rarely in a common format and may not be up to date.



What is the range of work performed in the establishment?

Does the system make work, particularly women’s work, visible in this workplace?

Does the information being collected accurately capture the skill, effort and responsibility normally required in the performance of the work and the conditions under which it is normally performed for both the female job classes in the plan and the male job classes to be used for comparison?

Is the job information being collected accurately and consistently, the same way for each job class to be compared?

What is the range of work performed in the establishment?

*Ontario Nurses’ Association vs Regional Municipality of Haldimand-Norfolk, Haldimand-Norfolk (No.6) (1991), P.E.R. 105, opening extract*

Because the jobholder is the “expert” on his/her job, the questionnaire is ideally completed by the jobholder and then reviewed by their supervisor or manager. This also helps to ensure that the process is transparent and that staff feel involved in the job evaluation process. This may not always be possible, for instance if the job is vacant or the jobholder is new to the role. In these circumstances, the manager or supervisor or another knowledgeable person may complete the questionnaire.

Ideally, the questionnaire would be completed at an interview between the jobholder and a data gatherer. Jobholders need to be aware that it could take them up to two hours to complete the questionnaire properly. Time needs to be made available during the work day for this.

Interviews in a standard format, following the questionnaire, help to maintain consistency and ensure that all aspects of the job are captured. This will expedite the evaluation stage of the process. The information given to the data gatherers must be recorded in a clear and concise way on the questionnaire. Data gatherers are responsible for ensuring the completion of the questionnaires in a professional and bias-free manner.

### **Avoiding Bias in Job Information**

It is important that the sex of the jobholder is not identified in the job description or job questionnaire. In particular, personal pronouns (his/her, he/she) should not be used. Instead, the descriptions should simply refer to the jobholder.

Gender bias can creep into the use of language to describe jobs. For example, there may be a tendency to describe jobs typically done by men in a more technical or complex way. This tendency needs to be avoided in completing the job questionnaire. Care should be taken to ensure that aspects of jobs typically done by women are not omitted or under-described, and that features typically characterising men’s jobs are not over-emphasised. Some job titles have historical connotations of a role being held by one gender. For example, nurse, primary teacher, finance manager, clerical supervisor. This can affect perceptions of the nature of the skills and responsibilities that the job needs.



## **Reviewing the Job Information**

The job information that is to be used for completing the job evaluation must be reviewed by the supervisor/manager or another knowledgeable person, to ensure everything has been included and that the questionnaire and/or job description is an accurate snapshot of the job at that time. Where the supervisor does make changes these should be discussed with the jobholder. All job information documents should be reviewed to ensure completeness, prior to being sent to the job evaluation committee.

## READING THREE

**Gender Bias in Job Evaluation:** Extract from *Equitable Job Evaluation User's Guide*, Appendix 3, Pay and Employment Equity Unit, Department of Labour, 2007, pp 42 – 44

The following biases can occur at several points in the job evaluation and pay setting process. It is important to watch for them at all stages and to be prepared to take action to reduce their impact on the ultimate outcome. These biases are particularly common in the information provided about jobs either through position descriptions or questionnaires and in the evaluation process.

### Interpreting the Job Information

- Language – people express themselves in different ways.
- Order of role description – people do not always put the most important job information first – you may have to look hard. People have their own logic and do not necessarily cluster the pieces of information that may be relevant to specific tasks in the most logical places and could be scattered throughout a questionnaire. Data gatherers need to be prepared to look carefully for relevant examples throughout the questionnaire, rather than being grouped in one place.
- Interpreting what is actually done – be careful you don't think you know what "really" happens.
- Under/over-describing skills or tasks.
- Not recognising skills – confusing them with personal attributes. This is increasingly a focus of research, and our understanding of what constitutes a learned skill is increasing.
- Don't equate 'neatness' or 'good' English with greater job competence than untidiness or less good English.
- Length – don't be over-influenced by how much people write or don't write.

### Discussing the Jobs

Most people have learned to avoid the most obvious examples of gender bias in their language. However, more subtle forms can influence perceptions of the value of work. When the committee is discussing the jobs prior to making evaluation decisions, particularly when discussing differences in scoring within the committee, it is important to avoid:

- using words such as:
  - only, just
  - basic, easy, or routine
  - unskilled
- referring to the gender, performance or education level of the current jobholder.



## READING FOUR

**Collecting Good Information:** Extract from *Equitable Job Evaluation User's Guide*, Pay and Employment Equity Unit, Department of Labour, 2007, Appendix 4, pp 45 – 49

### Data Gatherers

Gathering information from jobholders is one of the most important roles in the whole evaluation exercise. Poor, incomplete or biased job information leads to poor or unfair evaluations.

### Overview of Data Collection Process

1. Data gatherer checks whether the jobholder intends to complete the questionnaire on their own, to be interviewed or to complete the questionnaire with a group of jobholders with the same job.
2. Data gatherer checks availability of an up-to-date job description.
3. Job information is provided by the jobholder.
4. Data gatherer checks back with jobholder if information is missing/not clear.
5. If the jobholder has handwritten the questionnaire, data gatherer arranges for it to be typed (especially if other jobholders have their information in typed form).
6. The questionnaire is completed.
7. The jobholder's manager reviews/validates the questionnaire. It is then an agreed document for an evaluation to proceed.
8. If jobholder and manager differ on either the job description or the completed questionnaire, this needs to be resolved between them before an evaluation can proceed.
9. Completed job information is provided to the EJE evaluation committee.

### Being Prepared

The data gatherer needs to:

- be familiar with the EJE factors (in the Equitable Job Evaluation Factor Plan) and the way job evaluation is carried out. This will help them know if the information is usable by the evaluation committee
- abandon any preconceptions about specific jobs in the organisation (even if they think they know a lot about them). The data gatherer needs to have an open mind and concentrate on the information actually being given
- allocate enough time for each interview or review of a questionnaire. If more information/clarification is needed, the data gatherer should ask the jobholder or the jobholder's manager.

## Preparing for data gathering

Have you undertaken the EJE data gatherer's training?

Are you using the standard EJE questionnaire? If not, will the method you use provide information sufficient for evaluation on all the EJE factors?

Does the jobholder have an up-to-date job description that the organisation recognises as an accurate record of the role?

Have you planned to remove any disadvantages for jobholders? For example, where the jobholder is not used to working on a computer, has a low level of literacy or no experience of talking about their job in this way. Have options been identified that would assist the jobholder participate in the job evaluation process in a manner that they would be more comfortable with? For example, interview and dictating responses, or possible assistance with completing of the questionnaire.

How will the jobholder complete the questionnaire:

- Through interview with data gatherer?
- On their own – with support if necessary/wanted?
- With a group of other jobholders?

## Conducting the interview and/or checking the completed questionnaire

- Have all the questions been answered?
- Do not assume that a question will not be relevant – for example, problem-solving in clerical roles or physical skills in health care assistant roles.
- Does the jobholder understand the question? If not, re-word or explain.

Is there sufficient detail for evaluation?

- Think about the factors and the factor levels – will it be possible to decide on a factor level?
- Are the information requirements for each factor covered? For example, frequency of job demands, highest level of skill required, nature of the responsibility.
- Is the level of detail consistent with information from other jobholders?

Is there 'compression' of information (where the information should have more 'layers' or be teased out more)?

- Compressing information can hide important dimensions of the work – especially the less visible skills. For example, helping a patient maintain their dignity while helping them with toileting.
- Terms such as 'clerical work', 'paperwork', 'cleaning' 'taking care of' often minimise and disguise the actual work involved – ask probing questions such as:
  - Tell me what you clean?
  - How do you clean?
  - Are there different processes for different things?
  - Why do you do this?
  - How often?



Is any jargon or abbreviation explained?

Jargon:

- can open the possibility of evaluators guessing or ignoring
- can mean different things in different contexts
- is more prevalent in male-dominated than female-dominated jobs
- can lead to an assumption of it being 'technical' or 'specialised' – assuming it is more complex than it is

Are clear examples provided?

Examples:

- help the evaluators understand the work and the work context
- assist with counteracting over- or under-describing work, for example, when “analysing information” means putting cards in alphabetical order

Is information ordered by actual importance/relevance?

- Providing the least complex or least important information first can affect how the job is seen
- Jobholder should think about what is most frequent or critical in their role, such as describing entering payroll data before describing collecting the mail; assessing individual learning needs before keeping the classroom tidy and secure

Are there any examples of language that could influence the way the information is analysed?

For example, the use of active and passive language:

- Men's work tends to be described in more active terms. The use of passive or less direct terms in job descriptions can influence how the job is perceived.

<b>PASSIVE</b>	<b>ACTIVE</b>
Assist with	Implement
Recommend	Decide
Co-ordinate	Organise
Facilitate	Lead
Contribute to	Responsible for
Proofread	Edit

The use of complex language in a job description does not mean that the job is complex. There is a tendency to describe men's work in more 'technical' terms than women's work.

Does the jobholder feel confident that they have described the job they do?

- Are there parts of the job they think have not been described?
- Is the right emphasis on the important or vital parts?

Does the jobholder's manager agree that the completed questionnaire reflects the job? If not, then this has to be resolved between the manager and the jobholder – the data gatherer is not a mediator in the process.



## Hints for the Data Gathering Interview

<b>BEGINNING THE INTERVIEW</b>	
<b>Positives</b>	<b>Negatives</b>
Welcome – friendly, eye contact, relaxed body language.	Inappropriate humour.
Introduce self and role.	Inappropriate familiarity.
Explain how the interview will proceed – that is, going through the questionnaire.	Jargon.
Invite them to ask if there is something they do not understand.	

<b>DURING THE INTERVIEW</b>	
<b>Positives</b>	<b>Negatives</b>
Use open, closed and probing questions as appropriate – use what, how much, why, which, how, when-type questions.	Using leading or multiple questions.
Keep the questions short.	Interrupting.
Ask for examples (especially of most complex, challenging, frequent).	Finishing people’s sentences for them Rushing because you think you know the answer.
Listen carefully.	Interpreting the information through your own ‘filter’ or experience.
Recognise that different cultures may require different help to elicit information.	Using inappropriate language, such as ‘only’, ‘just’.
Ask for further explanation if you have not understood.	Registering surprise/disbelief at what the jobholder is saying.
Employ ‘engaged’ body language.	

<b>END OF INTERVIEW</b>	
<b>Positives</b>	<b>Negatives</b>
Check everyone has said all they want/need to.	Not explaining what will happen to the information they have provided.
Ask if there are questions.	Creating unrealistic expectations of what will happen next.
Explain what happens to their information, including any checking by manager.	

## READING ONE

**Gender Bias in the Evaluation Process:** Extract from *Equitable Job Evaluation User's Guide*, Pay and Employment Equity Unit, Department of Labour, 2007, Appendix 3, pp 42 – 44

Job evaluation is based on the exercise of judgement. It is important to check whether evaluation decisions are being made with reference to biases – especially those that have gender implications – that will tend to favour one group of jobs over another.

**Availability bias** – a tendency to assume that aspects of a job that are easily remembered or appear to be the dominant part of the job are the whole job, or the most important part of the job. This may mean other less obvious aspects of the work are not taken into account. For example, the editing or proofreading work of a word processor may not be noticed but the 'typing' is.

**Halo effect bias** – jobholders who are accurately seen as skilled in one area being assumed to have a high skill job in all areas – and vice versa. There may also be a halo affect 'by association'. For example, executive assistant to the chief executive officer may be seen as a bigger job than executive assistant to the human resources director, because of the relative status of their managers.

**Gender expectancy** – reflecting social stereotypes about the worth of work done by men and by women. This can result in assuming that:

- currently low-paying jobs, often female-dominated, are smaller than higher-paying male-dominated jobs
- female-dominated jobs are automatically less skilled than male-dominated jobs.

**Undervaluing of some skills** – being more knowledgeable or confident about the value of some skills (especially those easily observed) than others (especially the "softer" or "people" skills). As mentioned earlier, this is increasingly a focus for research. For example, early findings from New Zealand Department of Labour research indicate that the following skills need to be recognised and measured:

- the skill of managing one's own emotions/reactions in interactions where there is high distress, danger or some element of 'disgusting' circumstances
- the skill of co-ordinating and managing the time and work of others
- developing 'shortcuts' or 'tricks' to create more effective or efficient processes or interactions
- managing information ethically.

**Technical bias** – jobs that are technical, especially those with technical or specialist language, may be unfamiliar to committee members or are in areas in which they are personally not confident (for example, working with information technologies). This can lead to an assumption that they are automatically more complex than more familiar jobs.

**'Enjoyment' bias** – the perception that because a workplace or work type is seen as enjoyable or exciting in some way (for example, working in television or the film industry, working with animals, or being in the countryside) the jobs cannot be very difficult.

**Self-deprecating bias** – a tendency to undervalue the work similar to that done by oneself. "If I can do it, it can't be that hard/complex." Sometimes the opposite occurs, with a person inflating the importance of the skills.

**Influence of status quo** – especially of current job relativities and pay rates.



## READING TWO

**Job Evaluation:** HayGroup, *Job Evaluation Manual, Implementation of Job Evaluation, Suggested Code of Practice for Ensuring Equal Pay for Work of Equal Value* pp 56 – 56

Job Evaluation measures the relative contribution which jobs are required to make to the achievement of organisation objectives. It is not concerned with characteristics or performance of job holders – a distinction which must be clearly preserved.

The approach to implementation of a job evaluation method can be as important as the method itself in influencing the equity of results.

- A single analytical job evaluation method should be applied across all jobs within the organisation.
- The factors with the job evaluation method should allow measurement of all aspects of jobs – both intellectual and practical knowledge, managerial, technical, clerical and manual skills.
- Neither the choice of factors within the method, nor the weightings between them, should allow inherent discrimination in favour of typically men's or typically women's work.
- Where a "benchmark" of jobs is fully evaluated and other jobs subsequently positioned within that framework, the benchmark sample should be equally representative of typically female and typically male dominated jobs and where possible include jobs populated by both.
- Evaluation and Appeals panels should comprise a cross-section of individuals representative of the range of job groups/occupations to be evaluated and be reflective of the distribution of men and women.
- Allocation of jobs across more than one evaluation panel should avoid adherence to any traditional occupational/grading or historical difference in the sex of job holders.
- An appointed chairperson should monitor panel operations and encourage active involvement of all panel members in the process.
- Evaluators should possess the qualities of open mindedness and fair judgement and, in addition to being thoroughly trained in the job evaluation method, they should be specifically briefed on guarding against sex bias in their interpretation of job descriptions and subsequent evaluation.
- Evaluation of jobs should be the result of panel consensus based purely on job content without reference to job holders or historical position in the hierarchy.
- Evaluations should be updated to reflect changes in jobs, and results should be regularly audited to ensure sex bias does not creep in over time.

## READING THREE

**Good Practice for Evaluating Jobs:** Extract from *Equitable Job Evaluation User's Guide*, Pay and Employment Equity Unit, Department of Labour, 2007, pp 22 – 30

To ensure consistency and objectivity in the job evaluation process, a number of elements of good practice should be followed:

- Evaluators should avoid making any assumptions about the nature or scope of jobs, as these can lead to under-estimation or over-estimation of the value of different jobs
- All important job demands must be included
- Double counting of job elements should be minimised and made explicit
- Be wary of the “halo effect”, an unconscious assumption that a jobholder should score well on all factors because they scored well on the first factor(s), or because of what the evaluators “think” of the job
- Be wary of the “reverse halo effect”, an unconscious assumption that a jobholder should not score well on any factors because they did not score well on the first factor(s), or because of what the evaluators think of the job
- Be aware that jobs known to have high status will not necessarily score highly on all factors. Similarly, jobs that have low status will not necessarily score poorly on all factors
- Do not allow prior knowledge about present pay or the status of jobholders to influence rating decisions
- Rate the job and not the person. For example, the fact that the jobholder has a degree does not necessarily mean that the job requires a degree. Experience and skills may be obtained from other sources. The job is being evaluated as being carried out in a fully competent manner
- If committee members question the information provided about a job, they should not substitute the information with their own views but should check with a knowledgeable source outside the committee, such as the jobholder or a supervisor
- Participate fully and be honest. If anyone is uncomfortable with an individual evaluation, or with the overall assessment, the committee must be told.

A list of common biases that can occur and need to be avoided in the data gathering and job evaluation process are listed in Appendix 3.

### **Before the Job Evaluation Committee Meets**

A quorum for the evaluation committee should be set and evaluators advised by human resources when their services will be required. In some cases, the union representative groups may provide an agreed number of trained job evaluators for each committee meeting. Every effort should be made to ensure consistent membership and attendance on the committee.



Prior to the job evaluation committee meeting, each committee member should receive copies of the job descriptions and/or completed job questionnaires that are to be evaluated, so they can read and review them before the meeting. They should contact the co-ordinator if they feel that further information is required, or that some of the information provided is misleading.

Once the committee members have had experience in evaluation, they may decide to do an initial (and entirely provisional) evaluation prior to the meeting.

### **Beginning the Process**

Once sufficient questionnaires have been completed, the evaluation phase can begin. The process can begin immediately with the selection of some commonly understood jobs, drawn from different departments and varying levels. These first few jobs should be regarded as a training exercise to enable the committee to become familiar with the evaluation language and the levels available. They should be re-evaluated later, to ensure that the initial judgments are consistent with the evaluations for subsequent positions.

It can be helpful to evaluate all the jobs in a particular area or from a vertical slice of the same occupational group. This allows knowledge and understanding of the area or work type to be reflected in the evaluation of all the jobs.

Committee members should bring to their meetings:

- job information documents that have been reviewed
- the Equitable Job Evaluation Factor Plan
- Equitable Job Evaluation Record Forms to record the job ratings and rationale
- an open, unbiased and fair mind
- a willingness to discuss and represent their own point of view, but also to listen to and consider the views of others.

### **Record Keeping**

Consistent and clear job evaluation records for every job evaluated must be kept, detailing the points given for each factor by the committee and the rationale for the decisions. Committee records should be kept by the project co-ordinator. Records are particularly important for monitoring the quality of evaluations and for use in job evaluation system reviews and appeals.

### **Evaluating the Jobs**

The job evaluation process is a search for the **most appropriate rating** for a job. The job evaluation committee must consider the answer to be correct, appropriate and defensible. The committee must discuss the facts (as provided in the job description and/or questionnaire) until it is comfortable that it has all the information and is able to make decisions it can stand behind. Job evaluations are concluded when the committee members have reached consensus on the most appropriate level rating on the factor.



There are two main methods of evaluating jobs:

- factor-by-factor evaluation
- job-by-job evaluation.

In factor-by-factor evaluation, all jobs are evaluated one factor at a time. For example, all jobs are evaluated on the Knowledge Skills Factor, then on the Problem-solving Skills Factor and then the Interpersonal Skills Factor, and so on, until all factors have been evaluated for each job.

In the job-by-job evaluation method, each job is evaluated on all the factors before the next job is evaluated.

There are advantages and disadvantages to each method and they are discussed in more detail below.

### **Factor-by-factor evaluation**

Using this method, all jobs are first evaluated on Factor 1, then Factor 2, and so on, until the evaluation of all the positions is completed. The advantages of this method are as follows:

- The job evaluation process is a comparative exercise, and results are relative, not absolute. If jobs are rated in isolation, the comparative process may be compromised
- It ensures consistent application of one factor at a time rather than moving back and forth between factors
- It makes it more likely that committee members will be able to examine each element of the job in a gender-neutral context, without being swayed by their view of the job as a whole.
- It helps avoid the problem of the existing job value affecting how committee members see a job if they rate the entire job at once
- If the committee is having difficulty evaluating a job, the factor-by-factor approach allows the committee to use its evaluation of other jobs to help determine how the difficult job fits on the factor scale. This approach allows a job to be put aside and rated after other jobs have been evaluated.

The disadvantages of factor-by-factor evaluation are these:

- Evaluators have to focus on a number of different jobs at once, which may lead to some confusion, especially for an inexperienced committee or evaluator
- It is likely to be more time consuming, as evaluators need to read and re-read jobs for each single factor
- There may not always be enough jobs to warrant using the factor-by-factor job evaluation method, and the job-by-job method of evaluation may be more efficient
- Evaluators may miss information for a factor that has been described in the questionnaire under another factor heading.

## Job-by-job evaluation

In this method, each job is evaluated on all the factors before the next job is evaluated.

The advantages of using the job-by-job evaluation method are as follows:

- Evaluators are able to focus on one job at a time and get an in-depth understanding of the job
- Evaluators are less likely to be influenced by the existing organisational hierarchy of the jobs being evaluated
- It is simple for evaluators to follow
- It does not require several jobs to be evaluated at once
- Information relevant to one factor may have been recorded by the job holder under another factor heading, so it avoids that information being missed.

The disadvantages are these:

- Evaluators may not evaluate each factor independently and may be swayed by the factor level that has been attributed to a factor in a previous job
- Evaluators may have difficulty deciding on which factor levels to attribute to jobs, as they are unable to compare the factor levels across a range of jobs.

## The Evaluation Process

Much of the evaluation process for the two methods described above is similar and both require a structured and consistent approach. The evaluation process based on the whole job evaluation method is described below. Step 9 gives the alternative processes for both methods of evaluation.

### Step 1 – Each committee member reads all the available job information (questionnaire and job description)

Consider:

- Is the information clear?
- Is there enough information to get a good picture of the job?
- Is more information required?

If more job information is required, the committee chair should make arrangements to obtain it from the jobholder or their manager.

### Step 2 – Using the Factor Plan, read the first factor definition levels and factor guidelines

Committee members should familiarise themselves with the factor definition, scale degrees and factor guidelines. It is important to understand the focus of the factor, the variables and the standard scale. The committee should discuss what the factor means.



### **Step 3 – Discuss work requirements for the top and bottom of the factor scale**

The committee may want to discuss the type of work requirements that would fit at the top and bottom of the factor scale. This step is optional but is useful for the first evaluation by the committee in terms of developing a common understanding of the factor. For example, for the working conditions factor, “continuously dealing with extremely loud noises” may rank at the top of the factor and “occasionally dealing with dust” may rank at the bottom.

### **Step 4 – Each committee member reads the job information for the particular factor**

### **Step 5 – Each committee member ranks the job on the factor independently**

Each committee member independently marks a rank for each of their assigned jobs on their own Equitable Job Evaluation Record Form (see Appendix 2). It is important that the rationale for ranking decisions is recorded, as this informs discussions later in the evaluation committee process. There should be no discussion among members at this point.

### **Step 6 – Record independent evaluations**

After each committee member has decided on a factor level for the job, the group then discusses the rankings until it can reach a consensus.

One way to do this is to write the titles or codes for the job on a flip chart or whiteboard. Record the levels of each member for all to see. All committee members should have documented their results before any discussion occurs. This will help avoid scenarios where the first or loudest committee member always sets the tone of the discussion that follows.

Committee members should then be encouraged to discuss their scores. For example, those who scored the job at level 4 could first discuss their reasons and then those who scored the job at level 5. The chairperson or project co-ordinator should check that:

- the same job information is not being interpreted in different ways
- people are not making assumptions or ‘filling in’ information gaps with their own opinions.

These discussions also provide an important opportunity for the committee to probe and to challenge assumptions. Discussion should continue until everyone agrees on a factor level. Decisions are based on consensus.

### **Step 7 – Record the committee decision**

The committee decision should be recorded on a separate Equitable Job Evaluation Record Form, along with the reasons for the decision. This is important for two reasons. Firstly, it allows the committee to reflect on previous decisions as the evaluations proceed. Secondly, if the jobholder appeals the overall decision of the committee, the appeals committee has good information to work from.

### **Step 8 – If consensus is not possible, put the job aside temporarily**

Wherever possible, committees should reach a consensus on the evaluation of individual jobs and every effort should be made to do so. If the committee cannot reach consensus on a particular job, it often helps to put the job aside and return to it after a number of (possibly similar) jobs have been evaluated.



### Step 9 – Move to next factor

If you are using the factor-by-factor method repeat steps 4–7 for the next job.

If you are using the job-by-job evaluation method repeat steps 2–7 for the next factor for the same job.

### Step 10 – Check ratings periodically

Informal checking of ratings can and should be done periodically. Remember that ratings are relative, and those done at the beginning may need to be changed as the relativity scale becomes formalised. For example, a level 4 rating may have appeared to be reasonable for a job until it becomes clear that other jobs subsequently given that rating are indeed more demanding than the original job, and that job should now be rated level 3.

It is important to emphasise consistency in the application of the job evaluation process. As more jobs are evaluated, it will become increasingly important for the committee to look back at how similar jobs were previously evaluated. Once the first thirty or forty jobs have been evaluated, it is often helpful for the committee to review in one session the scores for all jobs to date. This is an opportunity to double check that unsubstantiated assumptions (including gender bias) have not been made in any of the evaluations. The emphasis should be on consistency. For example:

- Do jobs held by women always score lower on some factors?
- Is this explainable in terms of the job information?

Once these scores have been double checked and the committee is confident that their decisions are accurate and unbiased, the remaining jobs can be evaluated.

### Step 11 – Scoring of the Jobs

The final scoring of the jobs (converting the factors into a total job evaluation score) should be completed once all the factor levels for the jobs to be evaluated in the committee have been finished. The weighted scores for the levels in each factor are located on pages 42–43 of the *Equitable Job Evaluation Factor Plan*.

Remember, as committees become more experienced the process will proceed more quickly. Experienced committees may do a provisional independent evaluation before the meeting to speed up discussions. However the evaluations are done the requirement for consistency and alertness to possible bias remains.

### Reviewing the Provisional Evaluations– Final “Sore Thumbing”

After all the jobs have been evaluated, a “sore thumbing” exercise should be performed to check relationships, and any that are questionable should be investigated. “Sore thumbing” is the process of looking for individual factor scores and final scores that “stick out like a sore thumb”. Because job evaluation is about relative values, each job must be evaluated correctly relative to all other jobs. During “sore thumbing”, the committee reviews relationships between jobs and how jobs are grouped, to ensure these are appropriate.



The aim in this phase of the evaluation process is to make whatever changes the committee feels are necessary to test or challenge the provisional evaluations. It is likely there will have been inappropriate judgements, particularly in the earliest evaluations, and it is important that these are corrected. However, it is important that the committee does not make changes to suit a preconception of the order in which the jobs should be ranked. As with earlier committee sessions, the aim is to promote orderly discussion, resulting in consensus decisions. This may not be as straightforward as in the preliminary evaluations, because the decisions reached at this stage are likely to remain final (barring reviews, of course).

“Sore thumbing” is not for undoing evaluations because results are different from the existing ranking. It looks at the results from an overall perspective and analyses the logic to ensure ratings make relative sense. Nor should it become an opportunity to introduce bias into the process. It is an opportunity to question assumptions and note anomalies that will need rationales to support them when questioned in the future. Remember that Equitable Job Evaluation may produce job rankings that are somewhat different from those currently in place. It is important to consider whether this difference simply reflects the minimising of gender bias.

It is recommended that the “sore thumbing” process follows a factor-by-factor approach. That is, the committee “sore thumbs” all the jobs on each factor. To assist the “sore thumbing” process, a series of lists can be produced from an evaluation spreadsheet in which all jobs are sorted by the provisional evaluations in each factor. Each of these lists should be examined by the committee, focusing only on the degrees of that factor awarded to each position. The committee must address any proposed changes by reference to the Equitable Job Evaluation Factor Plan.

Committee members should mark any changes on their sorted lists.

At each meeting, the co-ordinator should note the rationale for each committee decision on each job. As the committee discusses each job under a factor, there will be considerations and discussion points that lead to each decision. The rationale for each final decision should be documented. This allows the committee to review their decisions at a later date and also allows for greater consistency when similar jobs come up for evaluation in the future.

**Reading four Pay and Employment Equity Unit, Department of Labour, New Zealand.**





# JOB EVALUATION RECORD

Job Number: \_\_\_\_\_

<b>Position</b>	
<b>Team/Department</b>	
<b>Organisation</b>	

Factors	Rationales	Evaluation Scores			
		Level	Points	Increments/ Unit size adjustments	Final points
<b>SKILLS FACTOR FAMILY</b>					
1. Knowledge					
2. Problem Solving					
3. Interpersonal Skills				Multi-Cultural	
4. Physical Skills					
<b>Skills points</b>					



Factors	Rationales	Evaluation Scores			
		Level	Points	Increments/ Unit size adjustments	Final points
<b>RESPONSIBILITY FACTOR FAMILY</b>					
5. People Leadership				Direct Reports	
6 .Resources				Size	
7. Organisational Outcomes				Size	
8. Services to People					
<b>Responsibility points</b>					



Factors	Rationales	Evaluation Scores			
		Level	Points	Increments/ Unit size adjustments	Final points
<b>DEMANDS FACTOR FAMILY</b>					
9. Emotional Demands					
10. Sensory Demands					
11. Physical Demands					
12. Working Conditions				Frequency	
<b>Demands/Working Conditions points</b>					
<b>TOTAL POINTS</b>					
Evaluator			Date		



### READING ONE

**Monitoring Equitable Job Evaluation Outcomes:** Extract from *Equitable Job Evaluation User's Guide*, Pay and Employment Equity Unit, Department of Labour, 2007, p 34

If the application of Equitable Job Evaluation results in some previously undervalued or invisible aspects of female-dominated work being measured, it is likely to result in changes to the relative job sizes of some jobs held mainly by women or mainly by men. The Equitable Job Evaluation process may also measure some previously undervalued or invisible aspects of female-dominated work. Monitoring should occur throughout the life of the job evaluation system in the organisation. Gender bias can easily re-assert itself over time.

The person responsible for the project should consider the following elements:

- Examine whether the job evaluation outcomes have resulted in a disproportionate representation of jobs held mainly by women or mainly by men at each level, particularly at the upper or lower levels. Consider whether these are justified
- Examine whether any differences in the ranking of mixed jobs or jobs held mainly by women or mainly by men before and after the job evaluation process are justified
- Ensure that any differences that are not justified are addressed.

#### **Re-evaluations**

Jobs and the organisations they are in are constantly changing, and, as a result, job evaluations may need to be re-visited and jobs re-evaluated to reflect change. Organisations that adopt the Equitable Job Evaluation System should put in place a system for capturing jobs that change significantly either over time or as a result of organisational change. This may be incorporated into the annual pay review process.



## 4.4 APPEALS

### READING ONE

**Managing Appeals:** Extract from *Equitable Job Evaluation User's Guide*, Pay and Employment Equity Unit, Department of Labour, 2007, p 33

As part of implementing the Equitable Job Evaluation System, each organisation should establish an appeal process. This will help to demonstrate commitment to a fair and open process that identifies and addresses gender bias. The size of the organisation and of the job evaluation project and of the range of jobs covered will affect whether an appeal is conducted by a panel/committee or at least two individuals. The appeal procedure can be used by jobholders who wish to challenge evaluation scores or job rankings.

The person responsible for the job evaluation project should ensure that:

- all staff receive clear information about the appeals procedure and how to use it
- jobholders appealing their job's evaluation can request help in presenting their appeal
- criteria for appealing the evaluation outcome include the perception of gender bias in the design or implementation of the system
- people hearing appeals have been trained in gender bias issues in job evaluation design and implementation
- people hearing appeals fully document the process, including any discussions about gender bias in the job evaluation outcomes
- the committee/panel that is hearing the appeal includes both women and men as appropriate
- the union(s) are included in the appeal process.



### READING THREE

**Monitoring and Checking the Outcomes of Appeals Procedure:** Extract from *Equitable Job Evaluation User's Guide*, Pay and Employment Equity Unit, Department of Labour, 2007, p 33

The person responsible for the job evaluation project should also establish a systematic process to:

- monitor the outcomes of the appeals procedure for gender differences
- ensure that any gender differences in outcomes are justified
- document the decisions made as part of monitoring the appeals procedure.



### READING ONE

**Slotting the Remaining Jobs against Benchmarks:** Extract from *Equitable Job Evaluation User's Guide*, Pay and Employment Equity Unit, Department of Labour, 2007, p 31

The evaluation of the benchmark jobs provides a consistent framework against which the remaining jobs in the organisation can be allocated. Where no appropriate benchmark job profile exists, a job should be fully evaluated.

'Slotting' or 'matching' is a process used to compare all non-benchmark jobs on an analytical basis. Slotting or matching is not done on the basis of job titles but on careful analysis of the job requirements using the job description and/or questionnaire. To avoid introducing gender bias, sufficient job information needs to be available.

Slotting or matching decisions should not be undertaken by one person alone. At the very least, two trained evaluators familiar with the benchmark jobs should be involved or a panel of job evaluators. As with a full job evaluation, the rationale for the decision should be recorded and a note made that it was a job matching or slotting process rather than a full evaluation.

## READING ONE

**Maintaining and monitoring a job evaluation scheme:** Extract from *Good Practice Guide – Job evaluation schemes free of sex bias*, Equal Opportunities Commission, United Kingdom, Appendix 3, pp 11 – 15

The regular maintenance of a scheme is mainly concerned with claims for regrading, reassessments due to changes in job content and the grading of new jobs. Care should be taken to ensure that when jobs are regraded the jobs mostly done by men are not regraded in such a way as to restore biased differentials which placed those jobs higher than jobs mostly done by women.

### Monitoring the Results of a Scheme

The outcome of a new job evaluation scheme should be monitored to check for sex bias, and periodic reviews of existing schemes should also take place to ensure that discrimination does not creep in. The monitoring of a scheme is best done by incorporating statistics on pay, broken down by sex, into the existing management information package, so that the necessary information can be checked regularly.

Unless the previous grading structure genuinely represents equal pay for work of equal value, a job evaluation exercise carried out according to equal opportunities and equal value principles is unlikely to reproduce the previous rank order of jobs. Such an exercise will almost certainly result in changes to the rank order of jobs within the population covered by the exercise. Other things being equal, jobs undertaken predominantly by women are likely to move up the rank order relative to jobs undertaken predominantly by men.

This does not mean that jobs undertaken mainly by women should not move down the relative rank order or that those undertaken predominantly by men cannot move up the relative rank order, but that where this happens it should be justified by reference to changes in the demands of the relevant jobs, as measured by the job evaluation scheme, by comparison with the previous organisational hierarchy.

### Data Required

In order to assess the results of the job evaluation scheme basic data will be required. This should include the number of employees by gender, job-title, grade and salary for both the new structure and the old. If a review of this data indicates that there are gender imbalances then more detailed information will be needed on the scheme's design and application.

### The Rank Order

The rank order resulting from the job evaluation exercise should be compared with that implied by the previous grading structure, with analyses of the two rank orders by gender. This should be a rank order of individual employees, as job titles can disguise disparate impact. Also the order should be based on all employees, not just the benchmark jobs.



Where the previous grading structure was also based on an analytical job evaluation exercise, this is a straightforward comparison of rank positions of jobs. Where the previous grading structure was not based on such an exercise then it will be necessary to compare the new rank order with the grouped rank order implied by the old grades, that is, by assuming that all jobs from each old grade shared an equal position in the old overall rank order. In either situation, relevant monitoring questions include:

- How many jobs have changed their relative position in the rank order? How many of these are predominantly male jobs? How many are predominantly female jobs? How many are of mixed gender?
- Where the number and proportion of jobs which have changed their relative position in the rank order is very small, implying a very similar rank order to the previous one, then every aspect of the design and implementation of the job evaluation scheme should be checked to ensure that the exercise does meet equal opportunities and equal value principles.
- How many jobs have moved up the relative rank order? How many of these are predominantly male jobs? How many are predominantly female jobs? How many are of mixed gender?
- Where predominantly male jobs have moved up the relative rank order, can this be demonstrably justified by an increase in overall demand since jobs were last reviewed, for instance, through an increase in responsibilities resulting from a re-organisation or re-distribution of work? If not, review the scheme design (including any hidden weighting) and application process.
- How many jobs have moved down the relative rank order? How many of these are predominantly male jobs? How many are predominantly female jobs? How many are of mixed gender?
- Where predominantly female jobs have moved down the relative rank order, can this be shown to have decreased in overall demand since jobs were last reviewed, for instance, through a decision in responsibilities resulting from a re-organisation or re-distribution of work? If not review the scheme design (including any hidden weighting) and application process.



### READING ONE

**The Grade Boundaries:** Extract from *Good Practice Guide – Job evaluation schemes free of sex bias*, Equal Opportunities Commission, United Kingdom, Appendix 3, p 15

The main determinant of the relationship between the rank order of jobs resulting from a job evaluation exercise and the new wage/salary structure is the positioning of the evaluation scheme grade boundaries. In order to ensure that the positioning of the grade boundaries has not contributed to discrimination against female employees, the following monitoring questions are relevant:

- Which jobs were used to determine grade boundaries – was it all jobs, benchmark jobs, or average result for clusters of similar jobs?
- Do the grade boundaries occur at natural breaks in the scores? If not, why not and can it be justified without reference to either the gender of the jobholders or to the previous grading/ pay structures?
- If there are no natural breaks in the job scores, can the points chosen for the grade boundaries be demonstrably justified, for example, by the even size of grades or some other systematic and non-discriminatory principle?
- What, if any, is the gender dominance of the jobs falling immediately below and immediately above each grade boundary? If jobs immediately above a grade boundary are carried out predominantly by men and/or those immediately below the grade boundary are carried out predominantly by women, can the positioning of the boundary be justified without reference to either the gender of the relevant jobholders or to the previous pay/grading structure?
- Are these grades that are comprised only of jobholders of one gender, either male or female? If so, can this be demonstrably justified by reference to the demands of the relevant jobs and how they were assessed under the job evaluation scheme?



## READING TWO

**Operation of Grade Boundaries:** HayGroup, *Job Evaluation Manual, Implementation of Job Evaluation, Suggested Code of Practice for Ensuring Equal Pay for Work of Equal Value*, p 57

It is not uncommon – particularly below management level – for grade boundaries to be superimposed upon a hierarchy of evaluation results. Most typically the reason is to simplify pay administration. There are principles of good grading, but there is also danger that sex bias can be introduced by virtue of the positioning of grades and the consequent effect on remuneration. Where grades are superimposed on a hierarchy of evaluations the risk of discrimination must be minimised:

- The approach used for allocation of points levels to grades should be consistent across the hierarchy of jobs.
- Positioning of boundaries between jobs evaluated as virtually indistinguishable should be avoided.
- Boundaries between traditionally male and traditionally female dominated jobs should be avoided.
- The potential for claims challenging the structuring is likely to be least where each grade covers a narrow range of job sizes and particularly where there is also some pay overlap.



## READING THREE

**The Pay Structure:** Extract from *Good Practice Guide – Job evaluation schemes free of sex bias*, Equal Opportunities Commission, United Kingdom, Appendix 3, pp 11 – 15

Most pay structures are complex usually consisting of basic pay and a number of other elements. Changes in grading as a result of a job evaluation exercise should reflect all elements of the remuneration package. Relevant questions here are:

- How many women have moved to a higher grade but not a higher salary?
- How many women have moved to a higher grade but receive less in terms of bonus and monetary and non-monetary benefits than men on the same grade?
- Have steps been agreed to eliminate the pay differential for equivalently rated jobs? If not, can the differences be clearly justified by non-sex based reasons?

Not all pay structures are based on grades. Where pay is directly linked to the evaluation result then it is important to check there is a perceptible difference in job size.

### Red-Circling

Questions here are:

- How many jobholders have had their wages/salaries red-circled or personally protected?
- How many of these are men and how many are women?
- If the proportions are significantly different can this be demonstrably justified in terms of the features of the job evaluation scheme and job demands?
- In particular, if the numbers and proportions of men whose wages/salaries are red-circled or personally protected in the new salary structure is significantly greater than the numbers and proportions of women, is it demonstrable that the red-circling is not a means of evading paying the higher rates to women?

### Revisions to Job Scores

It is sometimes necessary to revise evaluations of jobs after the initial evaluation phase, in order to rectify an inconsistency which crept into the evaluations, or, more probably, on account of new job information. Where this occurs, it should obviously not be used as an opportunity to re-evaluate jobs to a position in the relative rank order closer to their original position, unless this can be justified in terms of the demands of the job and the features of the job evaluation scheme.

Where revisions to evaluation take place after the initial phase, the following monitoring questions may apply:

- How many jobs have the original assessments revised?
- How many of these are jobs carried out mainly by women?
- How many of these are jobs carried out mainly by men?
- How many are carried out by both men and women?



- Where there is a significant difference in the numbers and proportions, can this be demonstrably justified?
- How many of these are jobs carried out mainly by women?
- How many of these are jobs carried out mainly by men?
- How many are carried out by both men and women?
- If more men's than women's jobs are involved in these upward revisions can this be demonstrably justified without reference to either the gender of the jobholders or the previous grading/pay structures?
- How many of these are jobs carried out mainly by women?
- How many of these are jobs carried out mainly by men?

If more women's than men's jobs are involved in these downward revisions can this be demonstrably justified without reference to either the gender of the jobholders or the previous grading/pay structures?



## APPENDIX A: RESOURCES CITED

Ontario Nurses' Association vs Regional Municipality of Haldimand-Norfolk, Haldimand-Norfolk (No.6) (1991), P.E.R. 105,

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*Good Practice Guide – Job evaluation schemes free of sex bias*, Equal Opportunities Commission, United Kingdom, Appendix 3, pp 17 – 19 section 3.3.3

HayGroup, *Job Evaluation Manual, Implementation of Job Evaluation, Suggested Code of Practice for Ensuring Equal Pay for Work of Equal Value*, pp 55 section 3.3.3, section 3.4, section 3.7, section 4.2, section 4.7

*Equitable Job Evaluation User's Guide*, **Pay and Employment Equity Unit, Department of Labour, 2007**, pp 22 section 3.4, section 3.6, section 3.7, section 4.2, section 4.3, section 4.4, section 4.2.2, section 4.5,

*Equitable Job Evaluation Education and Training Module 3*, **Pay and Employment Equity Unit, Department of Labour**, section 3.5.3 and 3.5.4

*Guidance Note 4: Job Evaluation Schemes Free of Sex Bias*, Equal Opportunities Commission, United Kingdom, pp 4 – 9, section 3.5.2, section 3.5.3 and 3.5.4, section 4.6, section 4.7

*Guidance Note 5: Assessing Equal Value*, Equal Opportunities Commission, United Kingdom.



