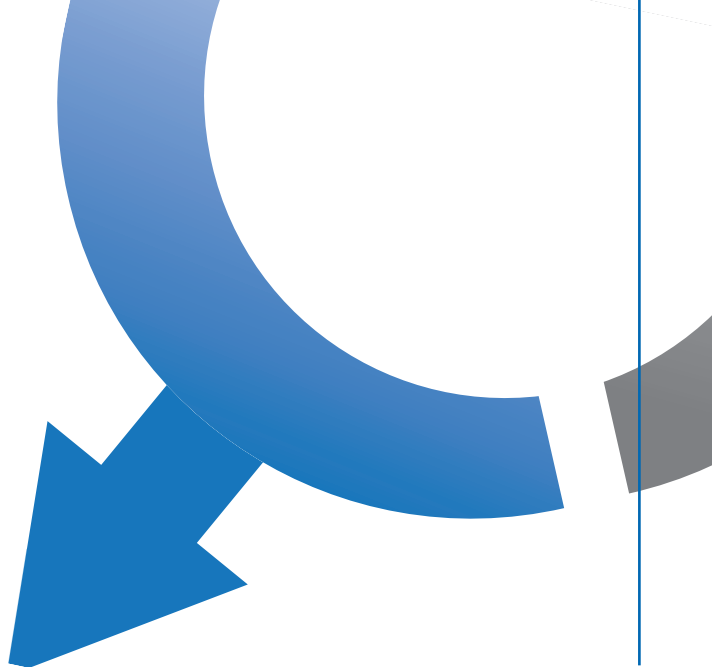





Closing the gender pay gap



**A practical guide
to revalue traditional
women's work**





Public Services International (PSI) is a global trade union federation that represents 20 million women and men working in the public services around the world. It has 639 affiliated unions in 154 countries. PSI is an autonomous body, which works in association with federations covering other sectors of the workforce and with the International Trade Unions Confederation (ITUC). PSI is an officially recognised non-governmental organisation for the public sector within the International Labour Organisation (ILO) and has consultative status with ECOSOC and observer status with other UN bodies such as UNCTAD and UNESCO.

An estimated 65 percent of PSI's members are women. PSI builds on a global network of women activists, which is a democratic structure for women. It also implements large-scale training programmes on equality between men and women.

PSI's priorities include: promotion of quality public services, trade union capacity building, defending and promoting workers' rights and promoting equality, equity and diversity.

Women's education and organising project
in the Andean sub-region

Public Services International
45, avenue Voltaire, BP 9
01211 Ferney-Voltaire, Cedex
France
Phone : +33. 4 50 40 64 64
Fax : +33. 4 50 40 73 20
Web : [Web: www.world-psi.org](http://www.world-psi.org)

Inter-American Regional Office
1100 H St. NW
Suite 650
Washington DC 20004
USA
Phone: +1.-202 -824 08 80
Fax: +1.-202 -824 08 81
Email: psiamericas@verizon.net

PSI Sub-regional Office for the Andean Region
Carrera 20, # 39 A - 10
CO BOGOTA
Phone: +57.1.3382858
Fax: +57.1.3405557
Email: ispandina@etb.net.co
COLOMBIA

Graphic design
Nataly Moreano 328 1460
natmoreano@yahoo.es
Quito-Ecuador

First published in 2005.

Closing the gender pay gap:

Implementation of job evaluation systems to revalue work traditionally carried out by women

A practical guide for trade unions in the
public sector.

This guide was first written for the Public Services International
Women's Education and Organising Project in the Andean
Region by:

Daina Z. Green
Pay Equity Specialist
SEIU-Canada
Service Employees International Union
dzgreen@look.ca
www.web.ca/~dzgreen





CONTENTS

How to Use This Guide.....	5
Definition of concepts.....	7
Understanding the gender pay gap.....	13
Moving forward: Measurement and Revaluation.....	18
Job evaluation.....	19
First steps	19
Developing or modifying an evaluation system.....	21
Aspects of women's work.....	26
Value of factors and subfactors.....	32
Notes.....	35
 Implementation of a new system	39
Principles in the evaluation process.....	39
Evaluation procedures.....	44
Communication within the team	48
Meetings for evaluation purposes.....	50
Analysis of results.....	56
Additional resources.....	61
 Model tool	63
Factor 1: Skill.....	66
Factor 2: Responsibility.....	73
Factor 3: Effort.....	79
Factor 4: Working Conditions.....	81
Weighting factors and subfactors	

How to Use This Guide

This guide was first developed by the Public Services International Women's Education and Organising Project in the Andean Region to provide practical support for its affiliated unions in the Andean countries to progress towards pay equity for women (1). It is generally recognised that there is inequity in the income of men compared to women, still a worldwide phenomenon. This inequity is unacceptable. Pay equity is a basic right, established by the International Labour Organization (ILO) in its Declaration on Fundamental Principles and Rights at Work, and is also reflected in many other international treaties and conventions. However, neither recognition of the problem nor the lofty pronouncements of governments and civil society are enough to put it right. Concrete measures need to be taken to close the pay gap, and here the trade unions have a leading role to play.

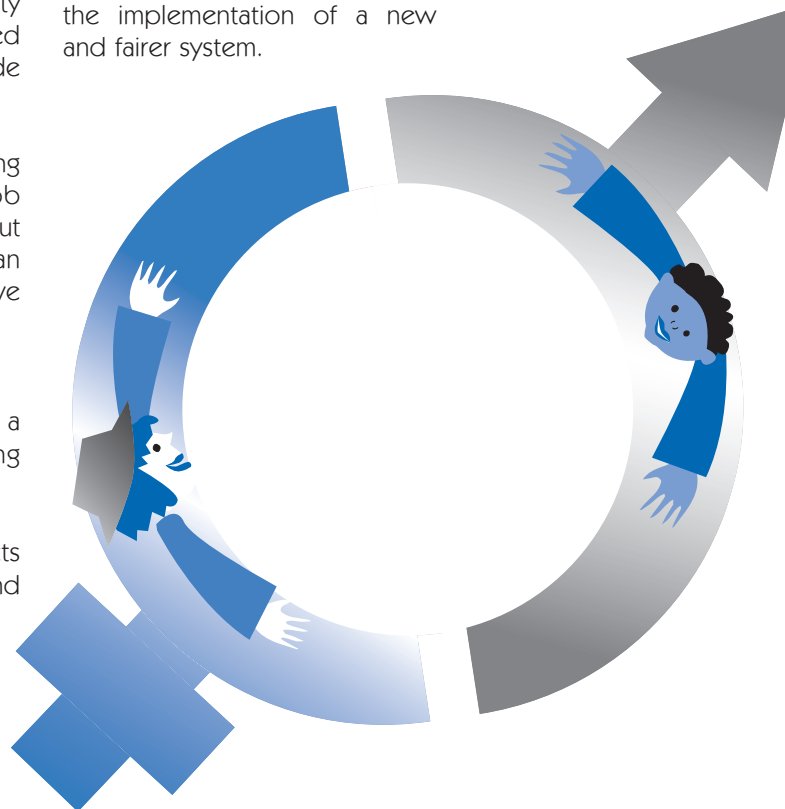
This guide sets out in detail a method for designing and then implementing a programme of job evaluation, with the purpose of revaluing, without gender bias, the work effected within an organisation or company. In order to do this, we need to understand the following:

- a)** The relationship between the VALUE of a particular job and its corresponding COMPENSATION;
- b)** The causes of job segregation, and how it affects the levels of compensation received by men and women.

c) How the current job evaluation systems tend to minimise and render invisible the value of work traditionally carried out by women.

d) The steps to follow in order to select or design a gender-neutral job evaluation system that is appropriate for the place of work where it is to be applied;

e) The role of the trade union in the implementation of a new and fairer system.



The wage gap between men and women has many different roots, among which are the traditional undervaluing of women's work, the lack of access many women experience in educational opportunities, vocational training and promotion; sexist attitudes, rooted in society, which restrict the kind of jobs for which women can apply; and disproportionate levels of responsibility for maintaining the home and caring for family members, which is not equally shared with men.

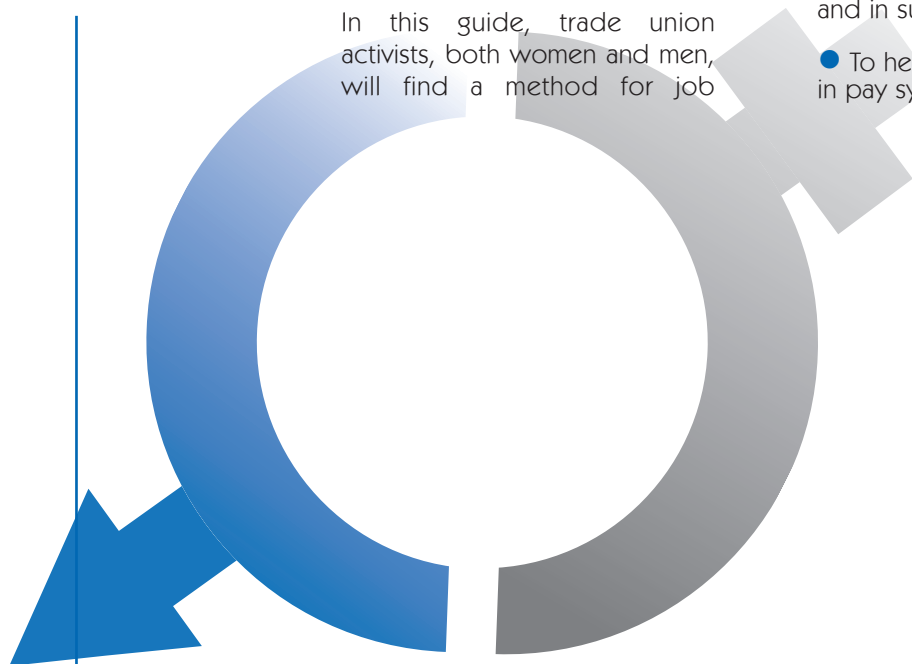
This guide is based on methodology designed to close the part of the wage gap that results from the undervaluing of work traditionally carried out by women.

In this guide, trade union activists, both women and men, will find a method for job

evaluation which corrects the sexist bias encountered in the most commonly used job evaluation systems. Trade unionists will learn to identify the effects of sexist attitudes which until now have not been studied, and which influence the tools of job evaluation, and all stages of the evaluation process.

Public Services International (PSI) has defined the objectives of the international campaign for pay equity in the following terms:

- Equal pay for work that is similar or the same when identical jobs are compared;
- Equal pay for work of equal or comparable value for jobs that are not identical, but are of equal value, for example the work of a nurse and that of a carpenter;
- Strategies to fight low pay for women and in support of a living wage;
- To help to put an end to discrimination in pay systems.



Definition of concepts

The terms used when discussing job evaluation vary according to the country being discussed. We will refer here to the most frequently used terms, starting with the key concept.

What is meant by pay equity?

Pay equity is fair pay for the job done, in other words, conditions of equal pay for both men and women. This concept recognises that there is gender bias in women's pay and conditions. Pay equity recognises that the work carried out by most women is often less well paid.

Pay equity goes beyond equal pay for the same work, and requires equal pay for work of equal value.

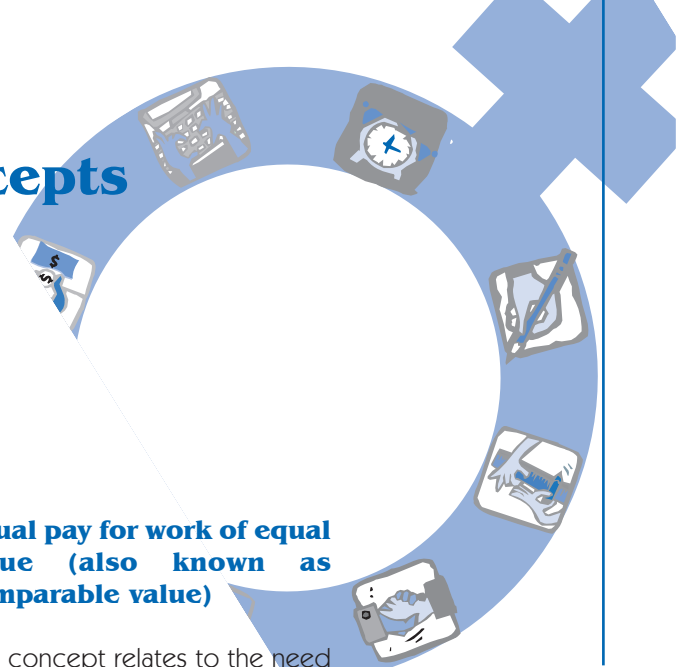
Equal pay for equal work

There should be no difference in the wages received by people who do the same work for a company or organisation. A woman carpenter should earn the same as a male carpenter if they carry out the same tasks and have the same employer. In other words, when comparing two jobs that are equal or identical, the pay should be the same. In many countries, this norm was adopted a long time ago. Historically, this concept precedes policies of equal pay for work of equal value. (See the following definition.)

Equal pay for work of equal value (also known as comparable value)

This concept relates to the need for a process to eliminate sex-based stereotypes in the evaluation of jobs predominantly carried out by male or female workers in a company or organisation. When different jobs require the same level of training and involve the same tasks, they should receive the same wage and conditions of work.

Jobs do not have to be similar to be considered of equal value. Different jobs should be paid at the same rate due to the fact that they require the same level of skill, responsibility and effort.





Compensation

The wage component includes the basic wage, supplementary payments, bonuses and allowances, payments of pensions and benefits, either in cash (for example, payments made by the employer into a pension plan), or otherwise (for example the right to unpaid leave), amounts paid for the basic wage and other emoluments, such as classification, incremental wage scales, payments for unsociable hours and overtime.

In addition to components of wages, the total compensation corresponding to a job covers all elements that directly or indirectly influence pay, including all premiums that have a monetary value, such as the following:

- Travel allowance
- Bonuses
- Stipends for excellence, skill or productivity
- Annual leave
- Sick pay
- Maternity benefit and leave
- Professional training paid as working time
- Trade union work paid as working time
- Expenses
- Housing allowance and funeral expenses
- Health insurance
- Pensions

Pay can be calculated by hour, week or month. Payments may also be made for productivity, performance, piecework or as a bonus.

Description of tasks/ Job description

This is a summary of the core duties involved in a job, including the type of work, a list of the tasks, responsibilities and stipulations that are necessary to the work. It may be applied to several people who carry out the same job.

Employment equity/ Affirmative action

An employment equity programme implies an integrated social, political and cultural process, the purpose of which is to recognise, overcome and amend the traditional discrimination faced at work

by certain sectors of society (such as women, people of colour, indigenous peoples, sexual minorities, and persons with disabilities). It recognises and combats racism, sexism and other forms of workplace discrimination. An employment equity plan attempts to identify and eliminate barriers that produce discriminatory practices, by promoting improvements in the social and economic well-being of the groups affected. In short, nobody should be prevented from taking up an employment opportunity for reasons unrelated to their skill or training. These programmes set out detailed, long-term plans of action. At the level of companies or organisations, plans should be drawn up with the participation of the trade union(s), which should monitor the results obtained.

Affirmative action programmes involve measures implemented for a limited period with the aim of correcting a traditional imbalance, for example by giving preference in promotion or recruitment to qualified people from groups that have been under-represented in particular jobs, or by supporting the training of men or women workers in order to improve their access to particular jobs.

Evaluation of performance

Systematic evaluation of performance and potential development of the person. This is a process to evaluate, stimulate or judge the value, excellence and qualities of a worker. It is the process by which the global performance of a person in a particular post is estimated.

Job evaluation

This is a process which compares different jobs in a systematic and detailed way in order to provide a basis for comparing wages, for the purpose of promotion and salary increases. The job to be done and the components that make up each job are studied, put into a hierarchical structure, and assigned points allowing them to be compared with each other. It is jobs that are evaluated, not people.

Compensable and non-compensable factors

Factors which are considered compensable are those which determine the level of pay for a job based on the duties, responsibilities and effort required to perform the job, and the conditions under which the job is performed.

There are some aspects of jobs which are NOT considered compensable. For example, working faster or increases in the volume of production in the job are not usually reflected in the pay (except when pay is determined by piecework). Increased speed of work could be reflected in a subfactor measuring stress factors, but not in a factor measuring skill or responsibility. In the job evaluation process, it is of interest when different tasks are added, requiring additional skills or responsibilities, but not when more of the same is added.

In the same way, any contribution to the work relating to the person who holds the post, but which is not a minimum requirement for the post itself, is not reflected in the compensation. The qualifications described as preferable in an advertisement for a job vacancy

may be over and above the minimum, but still not for this reason be requirements. Therefore personal qualities do not constitute an item that can be compensated in pay.

Equal pay for equal work

All aspects of pay, whether in money or in kind, basic wage, special payments, allowances and benefits, are the same for people who are in the same or similar jobs.

Gender Mainstreaming

Systems of evaluation using a gender analysis of policies and practice that takes into account the different experiences of men and women tend to ensure that equality and equity perspectives are applied throughout an organisation and in all its activities.

Point-factor system

For job evaluation purposes, companies or organisations use one particular system to allocate different values to each of a series of factors. These values added together (ranking points) establish the relationship between different jobs, and the position on the salary scale allocated to each post (job title), based on the logic of compensation that applies in that organisation.

There are other methods or systems for determining the relative value of different jobs in a company or organisation. However, when there are more than about twenty different posts, the other methods are not usually appropriate.



Job/ Post/ Classification

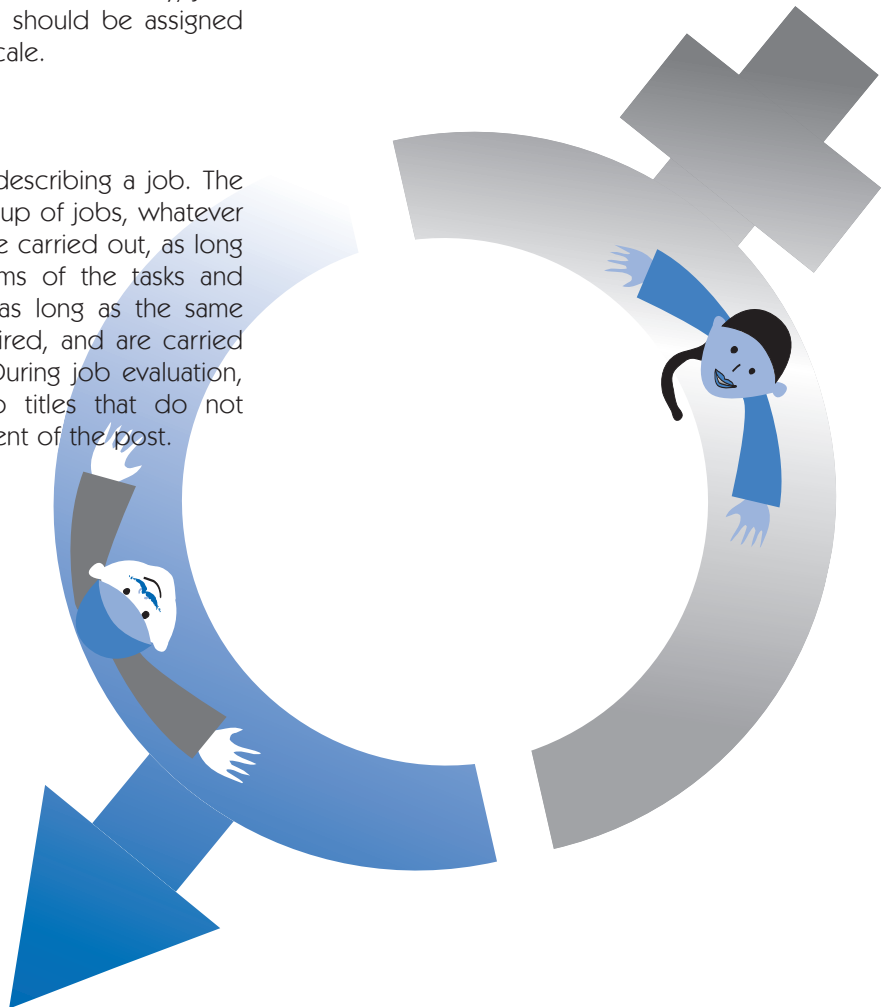
The tasks and responsibilities of one or more workers within or outside the same company or organisation, requiring the same levels of skills and responsibilities.

Salary scale

The range of pay within a company or organisation defines the pay scale. Jobs with the same name should have the same salary. In the same way, jobs with a similar total point value should be assigned the same place on the salary scale.

Job title

This is the label defining and describing a job. The same job title is used for a group of jobs, whatever the organisation where they are carried out, as long as the jobs are similar in terms of the tasks and responsibilities involved, and as long as the same skills and knowledge are required, and are carried out under similar conditions. During job evaluation, one often comes across job titles that do not correspond to the actual content of the post.





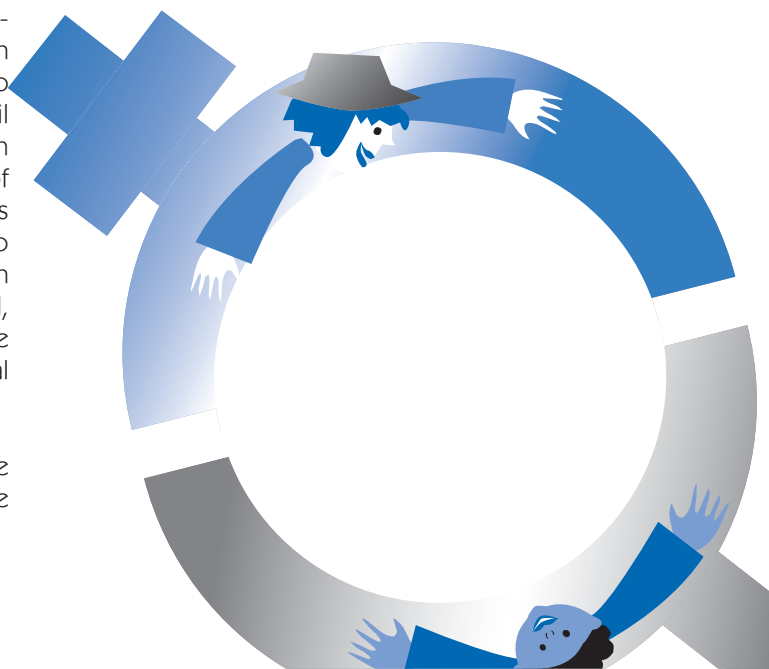
Understanding the gender pay

As mentioned at the beginning of this guide, the pay gap between men and women has several causes. Firstly there are the different experiences of work of men and women (based on different length of time in the workplace: the fact that many women take a career break in order to take care of their children and/or members of their family; lower earnings for many women because they have casual or part-time work).

Another important factor is the feminisation of some jobs, also known as occupational segregation. In almost all countries in the world, most women in the formal labour force are concentrated in only a few jobs. Women's jobs are most usually in education, health and social welfare services, in administration in industry and the public sector, and in the retail of consumer goods. These jobs tend to be less well-paid than jobs considered to be men's work. Even men who work in highly feminised sectors tend to experience discrimination. For example, a civil engineer working for a Ministry of Health could earn less than a civil engineer working for the Ministry of Energy. It is usually difficult for women to access jobs and professions where men predominate, due to obstacles created by social attitudes. Jobs in which women predominate tend to be less well-paid, because the skills required to carry them out are considered to be natural female traits, and not real skills for work.

A third important factor in the pay gap is the discrimination which women face at work. The

characteristics of the labour market for women (their levels of skill, experience, education and professional training) do not in themselves explain the persistent gap between women's and men's salaries. There are also cases of differences in wages where women have similar experience, skills, training and qualifications to men. Women often do not receive as many allowances or benefits as men, as for example bonuses or allowances for housing.



Another important factor to be taken into account is the racial basis of pay inequalities, which existed in its most extreme form in South Africa under apartheid. In both industrialised and developing countries, it is women of colour, migrants and those from ethnic minorities who experience the greatest pay inequality.

How do we know that there is a pay gap between men and women?

At the present time, there is clear proof that women's traditional work (in other words, professions and jobs where women predominate) are underpaid because they are undervalued. In its research on the gender pay gap, PSI found clear evidence of underpayment and undervaluing of women throughout the world. Besides this, in all sectors of the economy, including public services, there is a concentration of women into a small number of low-paid jobs, such as office and service work, including social work, nursing and teaching. In general, the greater the proportion of women in a particular profession, the lower the pay, and, conversely, the more men there are in a profession, the higher the pay.

What are the reasons for this gap?

- Women's work is underpaid because it is undervalued.
- Women's skills are undervalued because they are considered to be natural traits and not acquired skills.
- There is sexist bias in the evaluation of women's work.
- Women are segregated into a few jobs, mostly low paid.

Historically, traditionally female jobs earned a supplementary wage, because, in the mind-set of patriarchal hegemony, it was assumed that it was a man's role to be the head of household and support a family, rather than a woman's role.

Partly because of their unequal share in family responsibilities, many women work fewer hours in their companies, and therefore have less access to opportunities for training and promotion.

Women are discriminated against in recruitment, promotion, professional training and pensions.

They are excluded from many jobs that are considered eminently male.

How can we close or reduce the wage gap?

Two strategies:

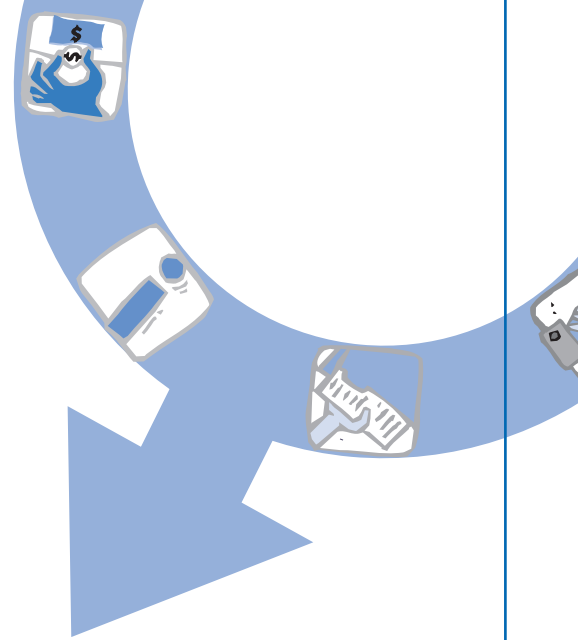
STRATEGY 1: By changing the social value of work traditionally carried out by women

STRATEGY 2: By removing obstacles which prevent more women from accessing a broader range of jobs and being promoted to higher-paid jobs with greater responsibility.

With the first strategy, revaluing jobs that have traditionally been seen as female gives women the option of keeping their jobs without having to make sacrifices in terms of wages (in other words, without having to subsidise their employers). Re-evaluation makes women's wages the same as men's. It is estimated that 25% of the wage gap is due to the undervaluation of women's jobs.

With the second strategy, more options are opened up to women, including the possibility of joining

professions that have traditionally been male, from which women have been excluded, and which are better paid. It is thought that 75% of the present wage gap is due to the exclusion of women from traditionally male jobs. This is evidenced by the fact that women have fewer opportunities for employment in and promotion to higher-paid posts.





STRATEGY 1: **By job evaluation**

By using a job evaluation system free from sexist bias, a fair wage can be allocated to each job. As a result of the re-evaluation, some jobs will be allocated a higher salary. Others will not change. Still others will turn out to be receiving a salary that is higher than its points would warrant. When the new system corrects mistakes in the basis of previous evaluations, revealing important aspects of jobs traditionally carried out by women, it may result in a wage increase for some women's work in the company or organisation. When these increases are put into practice, it reduces the gender wage gap.

A system that is free from bias gets rid of stereotypes as regards the value of men's and

women's jobs, and ensures fair evaluation of everyone's jobs, be they men or women.

The evaluation system is applied to jobs and their content. It is applied to the characteristics or skills of the people carrying out the work. The factors required for each job are identified and a level and number of points assigned to each factor. The points for the different factors are added together, so that a total point value is established for each job, enabling the difference in value between different jobs to be quantified.

STRATEGY 2: **By getting rid of obstacles**

The second strategy aims to procure change of a different type. It starts by identifying the obstacles that limit women's occupational options. . . . Programmes to remedy discrimination by getting rid of obstacles are known as employment equity or affirmative action programmes.

The steps in the process are usually as follows:

- 1)** A committee is set up, made up of representatives of the employer and of the workers, to put the measure into practice.
- 2)** The under-representation of women (or of other groups that have traditionally been the object of discrimination) is identified in the different professions or jobs that exist throughout the company or organisation, from the lowest grade entry level jobs right up to executive level posts. At the same time, calculations are made concerning the availability of female workers who are qualified to do jobs where they are under-represented (for example in technical areas, management and skilled trades).

The difference between the availability of qualified personnel from the under-represented groups and their presence at different levels within the organisation, is an expression of the existence of a gap, in this case a gender gap.

- 3) Following the identification of the gap comes the phase of identification of the barriers or obstacles that are responsible for this under-representation, despite the availability of qualified female personnel to fill these posts. The obstacles may be of different types, for example lack of training opportunities, sexist attitudes of people in charge of recruitment, lack of support services such as childcare or transport, or lack of infrastructure in the workplace, such as women's toilets or changing rooms.
- 4) A detailed plan is drawn up to implement measures to break down these barriers, whether by raising awareness among the personnel in the company or organisation, by creating new infrastructure, or advertising promotion to attract more qualified female applicants. These take the form of short-, medium- and long-term measures.
- 5) The measures are taken and their effect measured, starting with those that are easiest to implement in the short term and which will have the most noticeable and concrete effect.
- 6) The parties involved in the implementation of the system formally evaluate progress.



Moving forward: Measurement and revaluation

This guide focuses on the implementation of job evaluation systems designed to get rid of gender bias and revalue work traditionally carried out by women.

International systems supporting pay equity programmes

The concept of pay equity has come into public debate because the implementation of equal pay for equal work has done very little to close the gap between men's and women's wages. Most jobs are still segregated by gender. Women and men still tend to work in

different jobs. A specific ILO Convention passed in 1951 concerning equal pay for men and women who do work of equal value (Convention 100), signed by almost every Latin American country, but of which, nevertheless, people are generally unaware.

In 2004, the ILO passed a follow-up resolution to Convention 100, entitled Resolution on Gender Equality, Pay Equity and Maternity Protection. This new international agreement gives full recognition to the need to introduce measures to put salaries on the same levels through job evaluation free from gender bias.

Some countries, trade unions and women's groups have lobbied for employers and governments to adopt a policy of equal job opportunities, which covers the conditions of contract, pay, promotion and training. Most governments have set up secretariats or ministries to promote gender equality.

These bodies are supposed to ensure gender perspective in all public policies, but since only meagre resources are allocated to them, this brief may never be put into practice unless the trade unions stay on top of the situation. Some trade unions have drawn up a pay equity policy both as an objective for collective bargaining with employers and in terms of employment of their own union personnel.



An important tool for achieving pay equity: Gender-neutral job evaluation

If we recognise that the jobs most done by women are undervalued, the next step is to measure that undervaluation. If secretaries and other women in the health sector are underpaid, how do we know how much they should be paid? What men's jobs should we compare them with?

The answer lies in a systematic analysis of the content of these jobs that should take into account all aspects of the work process, including those that have previously been overlooked.. Systems used to analyse work must eliminate sexist bias. Applying a gender perspective will then guide the process of drawing up and applying a new job evaluation system that produces fair results for both men and women workers.

So, in a fair system:

- The criteria applied to determine salaries are free from sexist bias (and seek to make visible the work done both by women and men).
- All jobs are evaluated using the same system of measurement.
- Jobs that are comparable in value are identified (on the basis of a total number of points), and the corresponding salary is assigned to them.

First steps Sometimes the company takes the initiative, and sometimes the union

1. Role of the union in joint processes with employers

In recent years, many governments and companies, especially the multinationals, have initiated new job evaluation processes. Their purpose is not usually to achieve gender equity. It is more a question of "modernising" practice in the field of human resources, applying more standardised systems of compensation, and, above all, rationalising resources, which usually implies cuts in staffing.

Nevertheless, job evaluation is an activity that has an important, and internationally recognised





role to play in correcting discrimination that exists. As already mentioned, the ILO's recent resolution (Resolution on Gender Equality, Pay Equity and Maternity Protection) calls on governments and employers to encourage negotiation and adoption of employment equity plans. Specifically, it urges employers to introduce gender-neutral job evaluation schemes.

In this context, it is important for unions to take a proactive position with their employers in drawing up new evaluation systems with a gender perspective.

Even if joint processes do not yet take account of these systems, a gender focus can help motivate the employer to enter into dialogue with the union. It is also likely that the union is better acquainted with aspects of gender equity than the employer.

To develop a coherent job evaluation system without sexist bias within a company or organisation, a good model for shared work is that of the joint committees which unions often set up to manage occupational health and safety in the workplace. The joint committee structure works well for developing and implementing a job evaluation system. In this model, the parties approach the task on the basis of shared objectives rather than in a confrontational way. A joint committee should include representatives of different sections of the company or organisation to ensure the widest possible knowledge of the employer's operations.

In some places, negotiations are carried out at a higher level. If there is negotiation for a whole industrial sector, or integrated negotiations on behalf of a group of workers from the public services of a particular country or smaller area of jurisdiction, it is also recommended to apply a balanced union-employer model. A coordinating committee should be established, made up of women and men workers representing their trade unions. On the employers' side, the committee should include people in charge of the administration of wages and benefits as well as managers with supervisory experience. The committee should strive for a balance of men and women.

2. Training in gender perspective as applied to job evaluation processes

Before deciding on a job evaluation system, it is very important that the people who are going to be leading the project go through gender sensitivity training. Traditional biases that people have taken on board may unconsciously have some influence on them at different points in the process, from the selection of the team to the job evaluations themselves.

This sensitivity training should include a study of the principles of job evaluation free from gender bias, as described in this guide, together with an analysis of the characteristics of the workforce in terms of gender in the organisation, company or industrial sector in question (that is, the distribution of women and men throughout). The purpose of the exercise is to reveal gender segregation and some of the stereotypes that help to maintain this division. The basic method is to ask the same question in every situation: What is the impact of this situation? How does this practice affect women? And how does it affect men? For example, if the parties are considering a system of evaluation that puts greater emphasis (greater weight) on responsibility rather than on skills, how must this affect women's jobs? If most of the members of the team representing the management are men, and those representing the unions are mainly women, how must this affect the power relationships within the team?

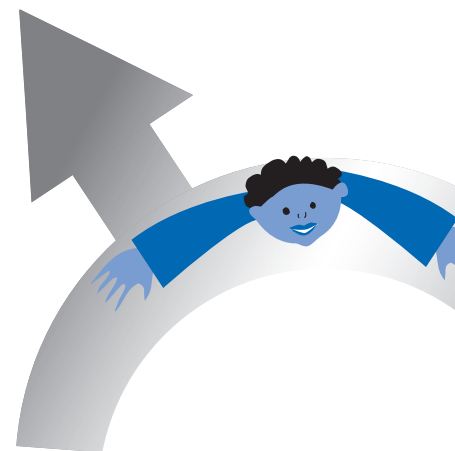
3. Guiding principles for evaluation free from gender bias

The Canadian Human Rights Commission (CHRC) has drawn up a practical and well-documented guide on job evaluation (2). Some practical and theoretical

aspects of this official source published by the Canadian government have been included in this manual: Canada has, for over two decades, been implementing pay equity through job evaluation. Public Services International agrees with the criteria of the Canadian Human Rights Commission, and that is why we have adopted them.

Designing or amending a job evaluation system

For a system to be appropriate for measuring and comparing the value of men's and women's work, it must have a firm structure. According to the CHRC Guide, an appropriate system must have the following characteristics:



a) It should take into account four main criteria or factors:

Summary of the four criteria

The four core factors or criteria in gender-neutral job evaluation are skills, responsibilities, effort and working conditions. Each of the four factors is divided into subfactors according to the context. The characteristics of the four main factors are described below.

1. Skills

The skill factor measures tasks according to level of difficulty and tasks that require training or practice.

- It includes two components, mental abilities and physical abilities, required to perform the job.
- It usually considers such variables as complexity, difficulty and speed.

2. Responsibility

Responsibility measures the effect of the work for the organisation and its services, customers or products, taking into account the varying degrees of impact or importance to the organisation.

- Its main components are: responsibility for human resources/effects on people, material resources, information and finance.
- It usually includes such variables as importance (size), value and accountability (to what extent the employer depends on the person carrying out the job to produce particular results).

3. Effort

Effort measures the mental or physical drain on employees caused by the requirements of a job.

- It refers to the mental or physical demands of a job.
- It takes into account such variables as frequency, duration, and intensity.

4. Working conditions

Working conditions refer to the usual context within which employees perform their jobs. The three main components are:

- Exposure to unpleasant (but not harmful) conditions which are an inherent part of the job.
- The degree of risk of illness or injury which is an inherent part of the job, taking into account the preventive measures available to reduce the risk of harm.
- Stressful elements which are an inherent part of the job (psychological conditions).

Subfactors relating to conditions of work usually take into account variables such as unpleasantness, probability, and type of probable harm (whether slight or serious), the degree of risk, the unpredictable nature of the situations, the degree of exposure or harm, duration and frequency.

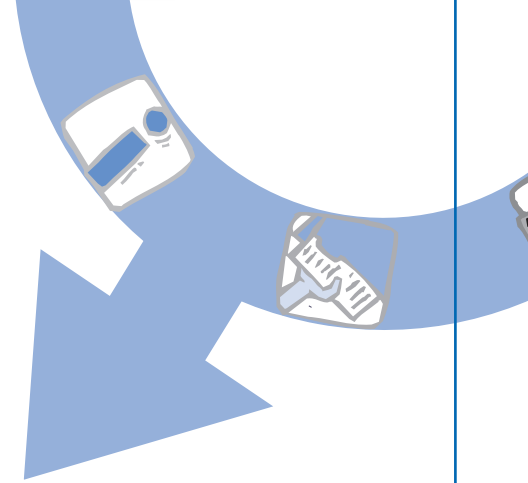
b) It measures jobs relative to one another, and defines the measurements

In point factor job evaluation, jobs are evaluated against a point scale and then compared against each other to determine what each is worth to the organisation. To establish some boundaries and give meaning to the relative terms used in each factor, the organisation or the job evaluation rating committee should discuss beforehand terms such as occasionally, frequently, small, and large. For example, it can be useful to study the jobs in the organisation or company that are expected to score at the highest level on a factor and those that are

expected to score at the lowest level (for example financial responsibility). The examples or points of reference should be set out in writing so that they are used consistently in the future, and are broad enough to include all kinds of work.

c) It makes work visible

Job evaluation is about measuring the value of work. Therefore when choosing which factors to use, it is important not to overlook any important part of a job, in other words, anything that produces value. It is important not to leave out aspects that have traditionally been considered to be women's work, like the ability to care for the sick, sewing or cooking. When going through the sheet where each decision is justified (factor by factor) the





type of work being evaluated should be visible. By taking into account the fact that one can only evaluate visible aspects of a job, and keeping strictly to the process indicated in the documents, the undervaluation of jobs can be corrected, especially work that has traditionally been carried out by women.

d) It makes scales mutually exclusive, exhaustive and progressive

It is important to eliminate gaps between levels (for example, the gap that occurs when a job falls between the end of one level and the beginning of the next). Scales must be exhaustive. For example, if one level lists supervision of two to four people, and the next, ten to one-hundred people, where should one rank jobs involving supervision of five to nine people?

The levels in the scale cannot overlap, but must be mutually exclusive. For example, one scale cannot indicate at the same time that Level 2 is for jobs involving supervision of ten to one hundred people, and Level 3 for those involving supervision of seventy-five to two hundred.

Errors of "omission" occur where no clear rules of use are provided. Confusion may result when a job has a number of different requirements (at different levels), and different responsibilities are described at various different levels under the same factor. Another type of violation of this rule occurs when a factor measures elements that are different but might be required in several jobs at varying levels. For example, if the factor that measures unpleasant conditions establishes occasional exposure to unpleasant substances as a criterion for Level 2 and frequent exposure to loud noise at Level 3, it is difficult to determine how to rank a job that requires occasional exposure to loud noise, but frequent exposure to blood and urine (unpleasant substances). As it stands, the job could correspond to either of the two levels. If it is classified as Level 2, the more serious situations would be left out of the evaluation, and thus become invisible. Very clear rules are necessary about how to evaluate this combination of conditions and responsibilities. The rule may be that the job is automatically given the highest rank: i.e., the most common, the most frequent or the most difficult condition. It is also important to apply such a rule strictly and consistently.

A "progressive factor" is one where higher levels include the lower levels. For example, if Level 1 reflects the requirement to work frequently in very unpleasant conditions, it is likely that the jobs may

also require working occasionally in slightly unpleasant conditions. The job gets credit for the higher level (as regards unpleasantness and frequency) even though the lower level is also true. All progressive factors work on the premise that a job which requires a lot of something also requires a little of it but that the reverse is not true. Progressive factors are the only ones in which levels do not need to be mutually exclusive.

e) Factors must have clear boundaries

A frequent problem for organisations trying to measure jobs is when too many elements of work are included in one factor. Ideally, for example, the same factor would not measure work hazards, dirt, a confined work space, and travel required in the course of work. The organisation should know what it is measuring in each case, and have control over the factors. Combining several issues in the same factor will lead to confusion. Furthermore, the cumulative impact of these elements in a job will not be recognized, meaning that some jobs may not get the points they otherwise would if the elements were measured on separate scales. And lastly, it is easier to measure issues separately.

In practice, it may be difficult to measure each element of a job separately. For instance, the number of factors could be overwhelming. The goal, however, is to be aware of what is being measured and to be as clear as possible. An organisation that chooses to measure several issues at once will need to find ways of ensuring consistency and good discipline.

f) Identifying equivalencies

Measuring more than one variable or element, as in the majority of factors presented in this manual, creates different paths to the same result, or equivalencies. For example, for a factor that measures physical effort, some jobs may require occasional heavy lifting, while others require constant light lifting. In the first case, the effort is required as a result of the weight, without the frequency, and in the second case, it is the frequency and not the weight that causes effort. A job that requires heavy lifting constantly would rank higher than the other two jobs because of the combination of the two elements. Similarly, work that requires constant rapid



movement of the small muscles in the hand and arm (as for example in keyboarding) should appear in a factor measuring physical effort, because it also causes fatigue and requires physical energy, although not on the same level as work which requires the manipulation of heavy equipment, where the large muscles of the arm or back need to be used.

In the same way, work that requires counselling others on complex problems would score higher than a job where the relationship with others is limited to obtaining information, and solving simple problems.

When faced with equivalencies, they must be defined. It is easier to be consistent this way. For example, indicate clearly that "light but continuous physical effort" is equivalent to "occasional heavy physical effort."

Frequently Overlooked Aspects of Women's Work

We have gone over the principles that need to be observed when designing a job evaluation system. In the case of a situation where a system has already been chosen or proposed, it is important to find out to what extent this system is able to recognise and allocate value to men's and women's jobs.

The system must take account of all the relevant requirements for all the jobs that are to be evaluated, including the aspects of the job that have previously often been left out. There are two questions we should ask ourselves when deciding whether the work carried out by women has been recognised: Have the right factors been defined? Has each factor been defined sufficiently broadly?

One problem with factor definition occurs if the factor is too narrow to recognize a complex work demand. For example, for factors that relate to the criteria of effort and working conditions, it is important to bear in mind not just the degree of exertion or the load carried, but one also needs to observe the duration or frequency of the activity requiring that effort.

By paying attention to frequently overlooked aspects of work, it becomes possible to identify those aspects that traditional factors have not recognized. These aspects may require a new factor if existing factors do not relate to the requirements of a job. For example, physical effort can be expanded to include light but continuous work as equivalent to the physical requirement for greater effort, but which only happens for a limited space of time. Physical effort could also be used as a way of recognizing the physical drain caused by lack of movement.



Variety of movement is less fatiguing. In the same way, the evaluation system may not include any factor which values communication skills. In this case, a new factor should be added to measure those types of job requirements.

The following are commonly overlooked aspects of female-dominated jobs. We believe that these aspects should be assigned a value, as part of the logic according to which values, skills and attitudes contribute to the production of goods and the provision of quality services.

Skills

- Communication skills: working with children or adults who have problems that require sensitivity and communication skills, including non-verbal communication; knowing how to set the right atmosphere; counselling people to get over a personal crisis.
- Operating and maintaining various types of equipment: photocopiers, computers, packaging equipment, diagnosis and monitoring equipment.
- Coordination and manual dexterity: coordination of hands, fingers and feet for such things as assembling parts, giving injections, operating equipment and providing therapy.
- Providing a polite and rapid service to the public.
- Keeping records.
- Organizing appointments and scheduling directives.
- Informal training and coordination of other people's work.
- Formatting documents.
- Keyboard skills.
- Attention to detail for people's general welfare.





Responsibilities

- Protecting confidentiality and handling sensitive information.
- Having to respond to emergencies in a boss's absence.
- Administration and logistics management for meetings and conferences.
- Caring for people: moral support, listening, comfort, taking care of bodily needs such as bathing, diet, knowledge of emergency procedures.
- Training and guidance of new personnel.
- Coordination of schedules and work processes.
- Responsibility for tools, equipment and instruments.
- Compiling information or supplying it to people at all levels of the organisation

Effort

- Lifting heavy objects or people who cannot move by themselves because they are fragile or in pain.
- Multiple tasks: carrying out several tasks simultaneously, requiring mental and physical effort.
Many women's jobs, such as nurse, clerical worker, receptionist, social worker, and teacher, are required to coordinate several tasks at the same time.
- Physical effort: restricted movement, awkward working positions, repeated use of a limited number of muscles, constantly lifting light weights.
- Concentration.

Working conditions

- Emotional demands: dealing with illness, pain, death, the dying, and other delicate, demoralizing, and tiring tasks.
- Working without the components, materials and resources in the quantity and of the quality needed.
- Noise from equipment, open plan offices, lack of private space.
- Physical and psychological stress, as when dealing with hostile, abusive, angry, sick or injured people, or stress caused by multiple unforeseen demands.

4. Determining the weighting of different factors

- Exposure to disease.
- Irregular and unpredictable working hours.
- Exposure to corrosive substances or other materials, for example skin irritation caused by detergents, medicines, etc.
- Monotony.

Once the factors in the system have been chosen, the next step is to define the distribution of value points. This is known as factor weighting.

The distribution of points in a system should be in accordance with the values of the organisation or company, and the type of services or products it offers.

Methods for determining the compensation appropriate for each job

Why do some professions pay well in a company or organisation, while people in other jobs are paid less?

In principle, there is a series of factors to be taken into account when determining the compensation for each specific job:

- a) the values of the company or organisation
- b) the going market value for each profession or type of post
- c) where a union exists, the results obtained through collective bargaining

Each organisation and company has its own system for determining the salary of people whom they employ.

Some are formal systems, while in other cases salaries have evolved in such a way that the value of the work for the organisation (its contribution) no longer bears a clear relationship with the salary it commands.

Often the rationale of the compensation structure of an organisation is a reflection of very old-fashioned sexist stereotypes.



The compensation structure of each organisation reflects a set of values relating to that organisation's mandate and the type of service or goods it produces. The original rationale on which compensation is based may have become distorted due to factors such as political or personal favouritism, corruption, or changes in the labour market.

Gender bias forms part of people's culture. It does not necessarily constitute a malicious intention to discriminate against women. Rather it is a reflection of an unquestioning attitude towards women's contribution to the labour market (especially in services, some industries, and as administrative assistants).

When discrimination is intentional, it is considered direct discrimination. When it is the result of a supposedly neutral process, which is applied without any intention for it to be detrimental to women, it is considered to be systemic discrimination. In other words, it is the system itself that produces the discrimination.

For example, the salary scale in force in many state companies and public services was designed a long time ago, when there were a lot fewer women in the paid labour force. In the past (and certainly at least up to the 1970's), traditionally female occupations were not recognised as having the same value as jobs reserved for men as "heads of family". This rationale reflected a social consensus (or premise) that it should be men, and not women, who earn enough to support a family. It was considered that women who worked for a wage only contributed to the family income, and they were therefore assigned "supplementary" salaries that were not intended to support a family.

Nowadays, this discrimination can take on very subtle forms. Most pay scales in public services have salary grades in which there are men's and women's jobs at every level. There are no positions on the pay scale "reserved" for one or the other sex. Jobs grouped together at the same point on the scale need to be looked at very carefully and in great detail to determine if they really are equivalent in value. The female jobs at the lower end of the scale frequently got there because the skills of interaction with customers or patients, the manual dexterity or effort required for precise, continuous typing, and the responsibility for taking instant decisions that are later - often much later - "authorised" by a superior, have not been taken into account. These are aspects of a job that, because they have passed unnoticed, do not receive the salary they should.



Even if the rationale for giving working women a supplementary salary made sense at some time in the past (although in all countries there have always been women who are heads of family and single mothers), this premise cannot be justified today. In a gender equity context, the economic subordination of women is unacceptable. Quite the opposite, measures need to be taken to correct this discrimination of the past.

The governments of many developing countries, reacting to pressure from international financial institutions such as the World Bank and the International Monetary Fund, have declared their intention to "modernise the State". Part of the programme of modernisation is the re-evaluation of jobs in the public services.

Under the logic of neoliberalism, this intention could be read as a pretext for reducing the State by means of cuts in budgets and services. The PSI vigorously opposes this policy.

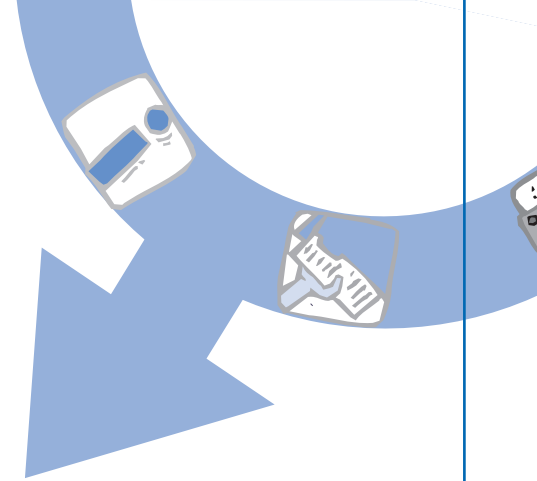
However, at the same time, the process of "modernisation" may bring some positive results. New job evaluation systems attempt to get rid of arbitrary and unfair factors when setting compensation. In order to correct distortion caused by individual arrangements for party political reasons, or plain corruption in the manipulation of salaries, the new systems demand greater transparency and consistency in setting compensation.

Unfortunately, not many governments have paid any attention to the effects of gender on the implementation of these new measures. It should be mentioned that most countries have set up directorates, national offices, or ministries of gender (or women). They have also approved plans at

national level for equal opportunities. These plans usually include a commitment to carry out a gender check on any new policies. It is the gender offices that are in charge of checking national policies for their impact in terms of gender. However, these provisions are not always put properly into effect, and the effect of the new systems in terms of gender is not studied.

In order to eliminate gender bias in compensation systems, it is important to check the relationship between the value of different jobs and the salary allocated to them.

For example, in a healthcare organisation or social services, the quality of the services and attention to service-users has to be important. Therefore, communication skills, in other words the ability to attend to





service-users with sensitivity, offering a professional service of mediation, need to be valued.

This method ensures the rational distribution of points, since it reflects the values of the organisation.

Calculating the point value of factors and subfactors

Firstly, define the total number of possible points in the system. The system we propose has 1,000 points, to simplify calculations.

Secondly, distribute the points among the four factors (skill,

responsibility, effort, and working conditions), taking into account:

- the mandate and values of the organisation,
- the rationale for compensation, and
- the aim of re-evaluating aspects that are underestimated in the system currently in force, especially with regard to work traditionally done by women in the organisation.

Thirdly, define how points are to be distributed between the different subfactors, according to their relative importance. For each subfactor, divide the total number of points among all the levels.

In the following example, the system has one thousand points in all. The Responsibility factor represents 40% of the total (400 points). Within this factor, the subfactor Responsibility for Others is worth 12% of the total (120 points).

WEIGHTING OF FACTORS AND SUBFACTORS			
CRITERIA (FACTORS)	SUBFACTORS	LEVELS	WEIGHTING
SKILL			
(40%)	Education and experience	1-2	120
	Communication skills	3	90
	Reasoning and productivity	6	120
	Knowledge	4	90
EFFORT			
(10%)	Knowledge	3	90
	Mental effort	3	90
RESPONSIBILITY			
(40%)	Responsibility for coordination and supervision	6	90
	Responsibility for other people	6	120
	Responsibility for materials and tools	3	120
	Responsibility for method and programme	4	90
	Responsibility for safety	3	90
WORKING CONDITIONS			
(10%)	Psychological conditions	4	90
	Physical working conditions	4	90
	Articulation of occupational duties	6	90
			1000

The fourth step is to allocate points at each level. The following two methods are recommended:

- 1) Distribute the points for the subfactor evenly between its different levels.

Total points divided by number of levels
 Example: 120 points divided by 6 levels = 20 points per level

	1	2	3	4	5	6	TOTAL
	20	40	60	80	100	120	120

2) Apply a formula based on the total value of the subfactor.

(Total points less the percentage represented by the subfactor)
 divided by the total number of levels minus 1
 $120 - 12 [108] / (6 - 1 = 5) = 21.6$ points between levels

	1	2	3	4	5	6	TOTAL
	12	33.6	55.2	76.8	98.4	120	120

NOTE: The second formula increases the distance between the first two levels and the highest level. It mainly affects the first two levels.

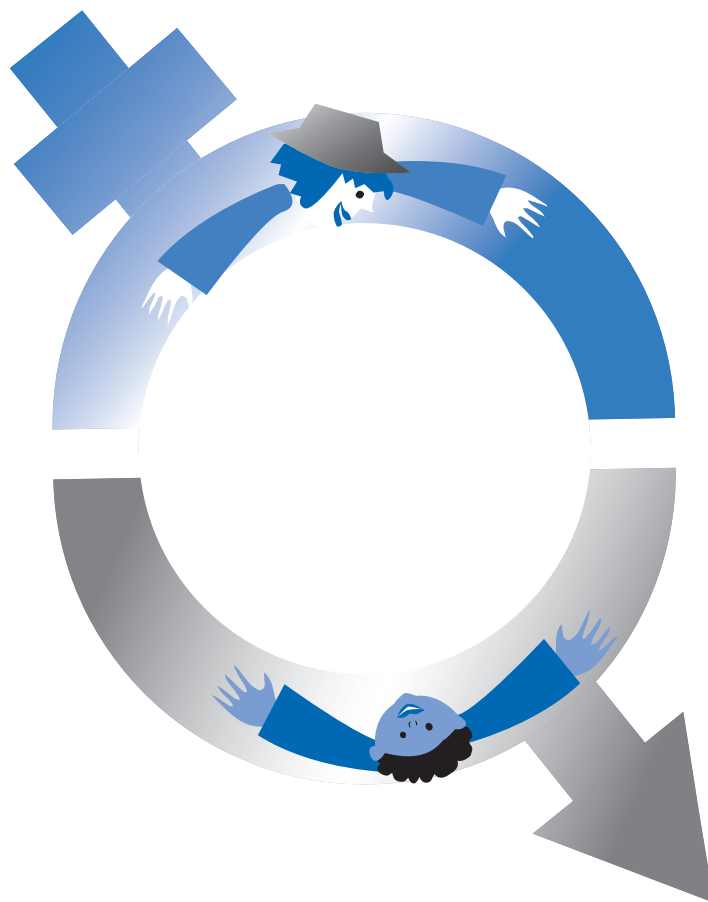


The structure of the gender-neutral job evaluation system that we propose is based on the criteria, listed in the Guide published by the Canadian Human Rights Commission, already mentioned above. However, it should be noted that the system is amenable to multiple variations, and in fact must be modified by the parties involved in the project to make it suited to the nature of the jobs in the workplace where it is to be used, always taking into account the principles of job evaluation free from gender bias.

NOTES

¹ In the term "pay equity" used in this paper, "pay" refers to the total compensation, whether monetary or not, received by a worker in return for her/his work. The salary is one part of this pay.

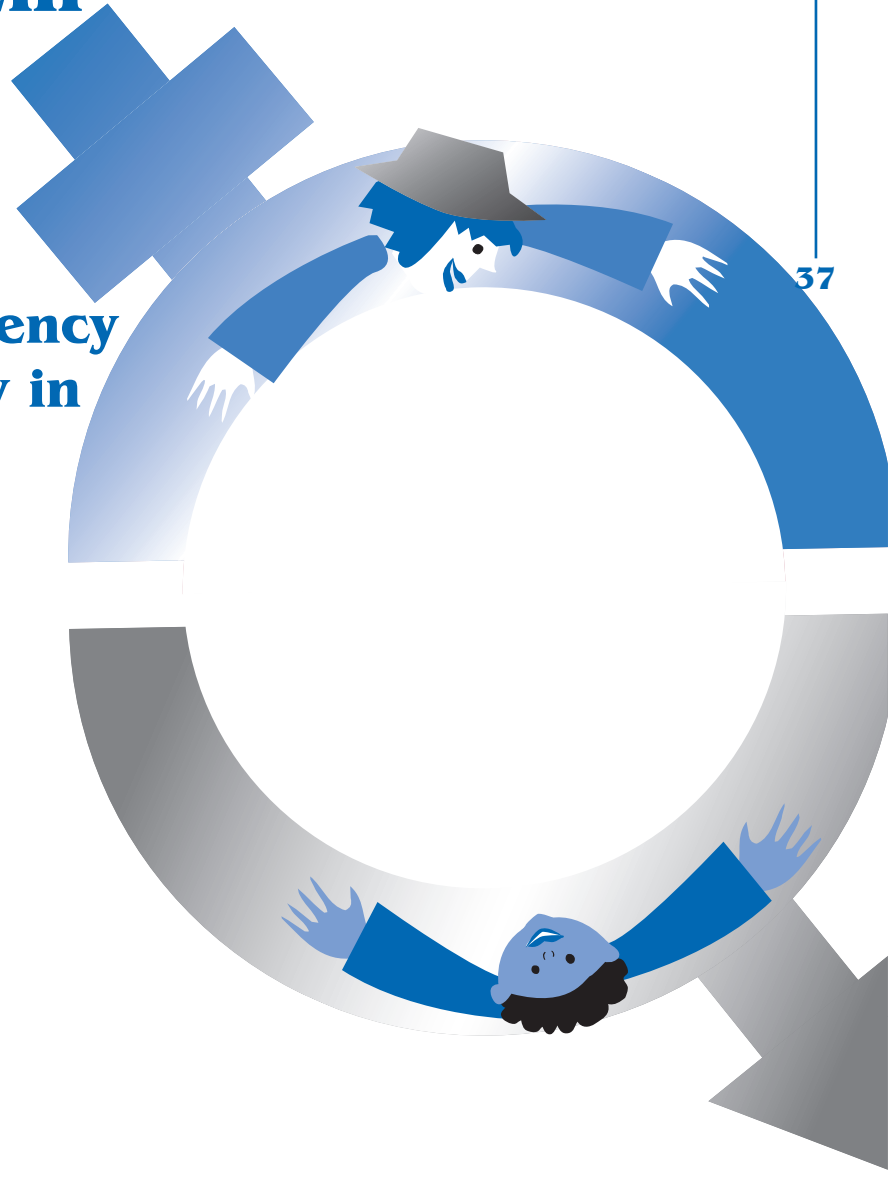
² The guide is available in English and French on the Canadian Human Rights Commission website (<http://www.chrc-ccdp.ca/publications/volume1-en.asp>).





Implementing a new system

**Ensuring consistency
and transparency in
decision-making**





Implementing a new system

Ensuring consistency and transparency in decision-making

Guiding Principles in Evaluating Jobs

The Guide published by the Canadian Human Rights Commission also sets out a series of principles for use in the evaluation process itself. Applying them will help to make the evaluation fair and ensure that it fulfils the objectives of pay equity. These principles will be repeated at each stage in the preparation and implementation of the pay equity process, and some of them are the same as the principles applied to system design.

1. Gender neutrality and fairness:

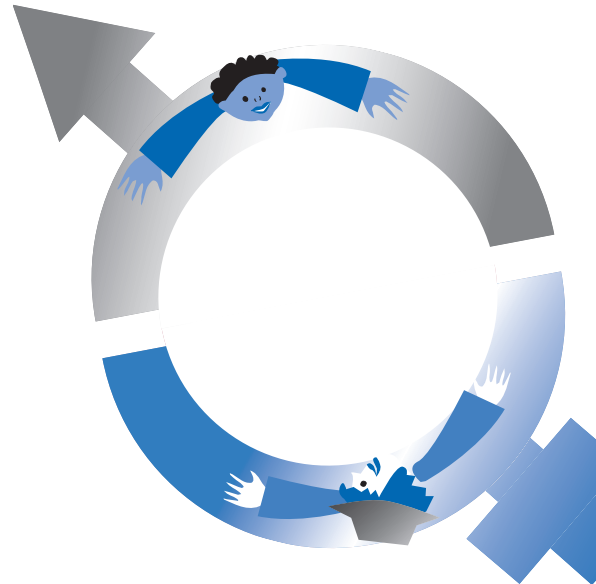
Neutrality must be the goal at all times. Fairness is the equivalent of equity and gender neutrality. It requires that all jobs be judged without biases or assumptions that are based on stereotypes or misunderstanding. An important tool for minimizing bias is a committee whose members have taken sensitivity training and are prepared to challenge bias where they see it. Since stereotypes form part of our culture, concrete steps need to be taken to make them visible, question, and overcome them.

2. Inclusivity:

The job evaluation process must include all aspects of work done by men and women even if the work was not previously valued, understood or even

noticed. Missing or overlooking elements of work has created much of the gender bias problem.

The concept of inclusivity is relevant to the processes of describing jobs and of choosing the factors. It is essential that the job evaluation process capture (i.e. include) all aspects or requirements of each job in the organisation and all working conditions associated with it. Factors, examples and weights must fairly represent jobs and job tasks done by men and women.



3. Clarity and understandability:

Any confusion over the meaning or significance of the wording at any stages of the job evaluation process can compromise the quality and fairness of the results. The job evaluation process is based on information concerning jobs which comes from the people who carry out the work and their supervisors. This input is analysed using a tool for classifying aspects of a job in terms of factors and subfactors. It is important that the language used in all the tools is very clear. It is important to avoid jargon and ambiguous terminology that may lend itself to multiple interpretations. If some members of the team do not interpret the language used in the same way,

or if several different interpretations are possible, the process will probably lead to unfair results.

The rules concerning how to interpret information should also be clear. The job evaluation tool should provide direction regarding how to look at jobs using the information gathered. If the factors or notes do not provide this direction, the committee has little choice but to rate according to assumed value, e.g., "it's a management job so it must be worth a lot."

What we do always want to avoid is any situation where the committee members substitute their own opinion concerning the requirements of a job instead of using verifiable information collected from people who actually do the job. Evaluations should always be made on the basis of the documented information, and not on the personal opinion of raters.

4. Making work visible:

This is a major challenge in the pay equity process. Lack of visibility of aspects of women's work is one of the main reasons that women's work has been undervalued in the past. It is only when jobs are well understood and everything about them has been properly defined and described that effective job evaluation can take place. When some of the information is overlooked, the organisation will not be able to properly value, understand and manage a job. Understanding a job allows the organisation to set appropriate recruiting requirements, define and measure performance standards and determine the appropriate compensation for equity purposes.



Although the employees are the experts about the requirements of their jobs, it is often not they who describe their jobs most effectively for evaluation purposes. They should be offered training so that they can describe their jobs in a way that makes their work visible. It may be useful to collaborate with them directly in order to produce a document that mentions, in clear language, the best examples of the requirements of each job.

5. Representativeness:

The principle of representativeness refers to the people taking part in the evaluation process. Everyone has prejudices. Therefore, it is best for the committees used in job evaluation to have a number of people from different perspectives involved at every stage to bring a balance of views and diversity of knowledge concerning the operations of the company, organisation or sector. The group will counterbalance each member's biases. Diversity is also the best way to gain a better appreciation of the contribution of all the jobs being evaluated. Members of the committee will know more about certain jobs and can explain the value of these jobs to their colleagues, or ask for more information where they see something has been omitted. This knowledge will help increase the chances of a bias-free result.

6. Openness to change:

All participants (including employees, managers, job evaluation committee members, job information

collectors and so on) should be sensitized and trained regarding the job evaluation process and the goals of pay equity, i.e., the elimination of gender bias. People who still favour the previous system may cause problems in the process of evaluating jobs using new criteria. There is no point in involving people in this process who are unwilling to consider necessary changes.

As pay equity is about questioning past assumptions and relationships, all those involved in the pay equity process need to remain open to new ideas and allow new results to emerge. If evaluators are



committed to maintaining the status quo, they will overlook cases where change is warranted. It may be helpful to use some new people who have a vested interest in providing new insights.

While it is true that change is difficult and challenges people on many levels, for the pay equity process to have a chance of succeeding, it is essential that the people taking part in it stay open to change.

7. Context:

The task of identifying and getting rid of gender bias must

be seen in context of the goals of the organisation, the range of work, the working conditions, and so on. All decisions must reflect the specific circumstances of the organisation. The reason for considering the nature and purpose of the organisation is that these provide the most objective means for measuring what is actually required for the jobs. Requirements include both the skill sets that are necessary to perform the tasks required to meet the employer's goals, and the responsibilities which are assigned to jobs to enable companies or organisations to function. Requirements also include the effort required of employees, given the demands placed on them, as well as the organisation-specific working conditions.

By context, we mean the circumstances and the characteristics of the organisation in which jobs will be evaluated. The contribution made by each job needs to be seen within the framework of the values of that organisation, which should be clearly set out. For example, it is important to make plain not only its mandate for quality service, but to explicitly recognize the value of customer contact and dealing with complaints. These organisational values must not only be translated into job evaluation, they must also be consistent with demands on employees. It is not enough, for example, to recognize responsibility for resources and working conditions like dirt and dust, if the system fails to recognize exposure to verbal abuse sustained by employees in service-oriented jobs.

8. Consistency:

In order for job evaluation to contribute to fair compensation practices, the process must treat all jobs equally, i.e. according to the same rules and the same level of interest. Words must be carefully chosen to provide a consistent level of information. All assumptions and procedures should apply to all jobs. If assumptions are made for some jobs but not others, or if equipment is considered for some but not others, the results will not be neutral. Consistency is one of the most important elements of any job evaluation process because what has been left out in the past has often caused gender bias.

It is essential to take measures to ensure that the evaluation teams are following an identical process, and that there are no differences between one evaluation and the next, between different members of the team, or at different times during the evaluation process. The evaluations should be monitored, comparing them, and examining the documentation to make sure that all posts are treated in the same way in their description (the same amount of detail and the same subfactor levels allocated for similar tasks).

In many cases, the committee needs to re-evaluate the first jobs it rated at the beginning of the process, due to the fact that the way the team assesses jobs has developed during the process.

Principles for Developing and Implementing Job Evaluation Systems:

- *Gender neutrality
- *Inclusivity
- *Clarity and understandability
- *Representativeness of those implementing it
- *Work made visible (especially women's)
- *Parties are open to change
- *Respect for context
- *Consistency

Procedures in job evaluation: implementation

This part of the guide refers to the job evaluation process itself. Let us assume that the system has already been agreed, with its factors and subfactors. The levels of each subfactor have been defined, and a weighting system agreed.

Now we can proceed to two very important stages:

- Gathering information on job content, and
- Evaluating each job.

- Organizing the process, from choosing the tools to be used to the final allocation of points and pay ranking, while maintaining clear communication with the workers affected by the process.
- Carrying out the evaluations, through a detailed and often lengthy process

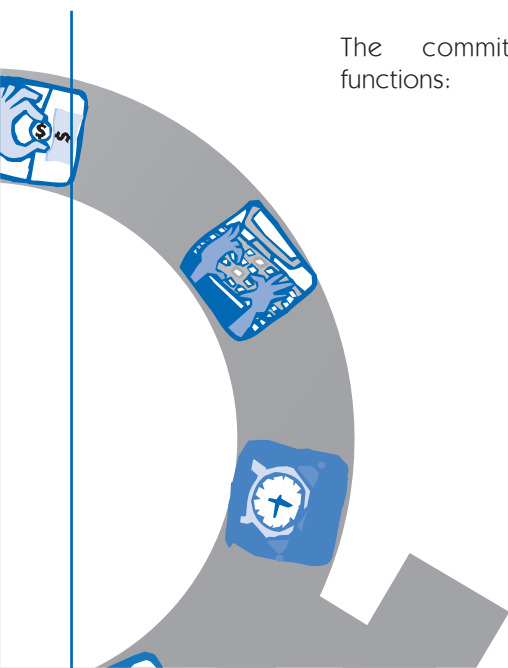
Sometimes these functions are divided between two committees or teams. The people involved in the coordination of the project are usually people empowered to take decisions (Coordinating Committee). The people involved in the evaluation process are more representative of the workplace, and are chosen because they can dedicate the necessary time to the process (Evaluation Committee). In both roles, the participants must go through a training process.

Some functions of the team

Role of the evaluation committee or team

The committee has two functions:

- To communicate the purpose of the exercise to the workers and their supervisors
- To make it possible to gather complete information concerning the content of jobs (Requirements)
- To apply meticulously the job evaluation system
- To analyse the results to ensure gender equity and re-evaluation as appropriate
- To implement changes in salary, if there are any
- To inform the affected people of the results of the exercise



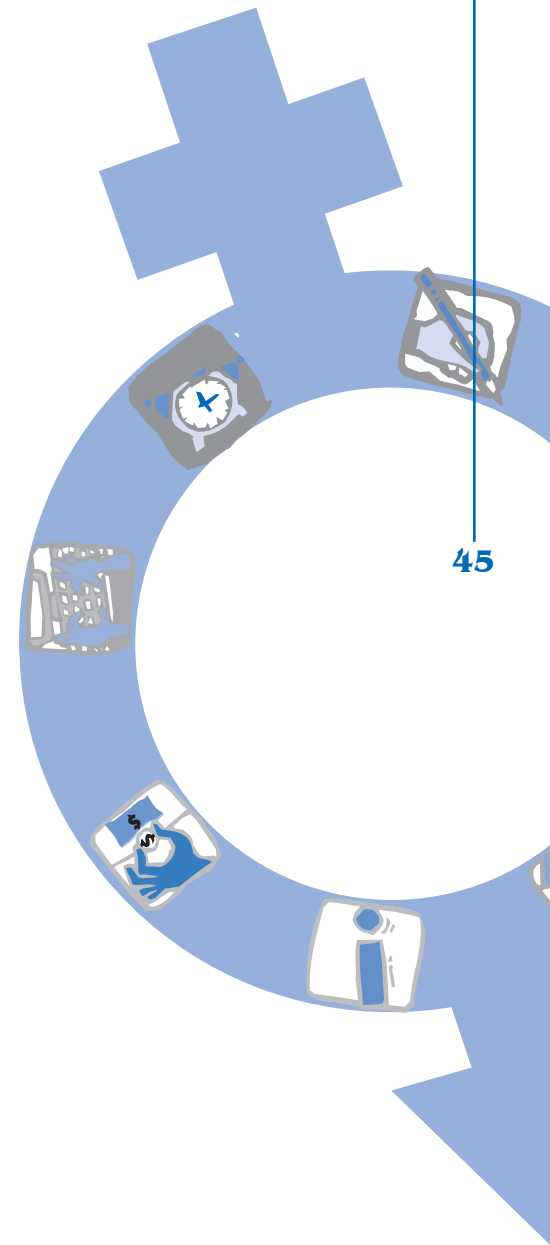
Organizing the information (job descriptions, questionnaires)

The committee has to gather information on the content of all the jobs in the company or organisation. It is important for the information to be up-to-date, complete, and accurate. In order to reduce the possibilities of ambiguity of interpretation, the tool used to gather the information should correspond exactly to the evaluation system used. The level of literacy of the people who will be providing the information should be taken into account. It is important that the quality of the information gathered should not depend on the writing ability of the people concerned. In some cases, it is better to use the tool in interview form, to avoid imposing inappropriate demands on the people who will be describing their tasks and responsibilities.

Rules of use (terms of reference for the job evaluation process)

It is a good idea to establish the terms of reference for the exercise right at the beginning of the project. A document of this kind, signed by the different parties, can constitute a guide for the process and detail clearly the roles of the different parties at each stage of the process.

An example of terms of reference is given below.



Employer X and Union Y

Terms of Reference - Job Evaluation Process and Pay Equity

This document explains in detail the steps that the Employer and the Trade Union will take. The parties agree that they will establish a plan for the evaluation of all the jobs covered by this collective bargaining unit.

1. Committee

A Joint Job Evaluation and Pay Equity Committee will be established, and will be made up of three (3) members representing the Employer and three (3) representing the Trade Union. Both parties may appoint one or more advisers who can take part as non-voting members in the affairs of the Committee.

1. The members of the Committee representing the Employer are:

XXX
XXX
XXX
XXX, alternate

2. The members of the Committee representing the Union are:

XXX
XXX
XXX
XXX, alternate

The alternate members will be designated by the respective parties. Each party will have the right to replace their members/alternates if necessary. All members/alternates must have taken sensitivity training before taking part in job evaluation.

2. Meetings

The committee will have two co-chairs, with the same level of mandate, one named by the Employer, and one by the Union. They will take turns chairing the meetings and preparing the agendas. They will also agree on the time and place of the meetings, and be responsible for producing minutes of the meetings.

Time spent in the joint meetings, including training time, will be counted as working time, and members of the committee will be paid according to their basic salary.

3. Functions of the Joint Job Evaluation and Pay Equity Committee

- A arrange for training on principles of job evaluation in a pay equity context.
- B determine the schedule for committee meetings.
- C agree on a gender-neutral comparison system (GNCS) to include a questionnaire; instructions for completing the questionnaire; a rating tool, including factor and subfactor definitions; a scoring system; a form to record ratings with rationale; and factor weightings.
- D develop a joint communication strategy so that all communications shall be approved by the Joint Committee before release.
- E determine the method of job content collection from incumbents and their supervisors.
- F develop and implement a plan to train the members and alternates who will be rating posts.
- G determine orientation required for incumbents to complete the questionnaires.
- H ensure that the evaluation process adheres to procedures established by the Joint Committee.
- I seek clarification from incumbents and their supervisor where there is insufficient information to agree on the rating of a job using a consistent and fair procedure.
- J determine the factor level ratings for each job based on job content information provided to the Committee.
- K document the rationale for all ratings on the agreed form.
- L make decisions by consensus. Consensus shall be defined as all voting members agreeing that they can support every decision of the Committee. If one or more committee members cannot support a decision, consensus has not been achieved.
- M maintain confidentiality of the Committee's work and decisions within the JRC and JSC.
- N endeavour to resolve any questions, issues or differences that may arise during the evaluations.
- O determine a method for rating jobs held by members who are rating posts.
- P determine gender designation of job classes..
- Q identify male comparator posts within the organization.
- R determine internal reconsideration procedure.
- S determine banding (grouping of job classes considered to be of equivalent value)
- T determine the process for maintaining the plan including evaluating new positions and positions which have changed.

4. Quorum and Alternates

a. The Committee may proceed with a meeting providing quorum is met. Quorum is defined as a minimum of three (3) members present from both the Employer and the Union.

b. Use of Alternates

- (i) In the case of a prolonged absence or the withdrawal of a member, the Employer or the Union will designate its respective replacement within two (2) weeks of the notice of absence/withdrawal.
- (ii) Alternate members of the Joint Rating Committee must have received training in applying the job evaluation system prior to participating in the meetings of the JRC.

5. Use of Advisors

The parties may engage additional advisors to assist their representatives on the Joint Committees. Advisors may attend meetings of either committee and will have voice but no vote. Each party will be responsible for any costs associated with the presence of its advisor(s) at the Committee meetings.

6. Payment for Time

Union Committee members who are employees of the Employer shall be paid their regular straight time hourly rate of pay for time spent attending meetings of the Joint Steering Committee or Joint Rating Committee.

7. Dispute Resolution Process

During the process of rating of jobs, the Committee will attempt to reach consensus on the rating for each sub factor. Should consensus not be reached, the committee will do the following:

- a) request additional information in writing or by way of telephone interview from an incumbent and supervisor; the content of the information provided by telephone will be subsequently documented, signed by the individuals (incumbent and supervisor) who provided the information, and incorporated as addenda to the questionnaire.
- b) set aside ratings which appear to be in need of a consistency check; or
- c) if consensus cannot be reached after completing these steps, refer the matter in question to the Joint Committee.

8. Reconsideration

Upon completion of all job evaluations the Joint Committee shall be responsible for communicating the results to the members of the bargaining units. Any incumbent or their supervisor who disagrees with the evaluation of one or more subfactors will have the right to request reconsideration of the subfactors under question. Requests for reconsideration of any job evaluation will be submitted to the Joint Committee in writing, on the form determined by the parties, setting out reasons for the request for reconsideration. This request must be received within ten calendar days of the results having been communicated. A response will be provided by the Joint Committee as soon as possible following the completion of the reconsideration process.

Signed on the (Date/Place)

For the Employer

For the Union

Communication of the team with the employees affected

Sometimes a new system is designed to correct a system in which the affected employees had little confidence. The process of drawing up and implementing a new system should encourage greater trust through transparency and openness in communication. Therefore it is important for there to be a constant flow of information concerning the progress of the project. It is best for any communications to be written jointly by the employer and the union, so that the incumbents and their supervisors receive exactly the same message.

EXAMPLE OF MEMORANDUM

The XX Health Centre and the Health Workers' Union, in representation of the collective bargaining unit, wish to announce that they are collaborating on a project to draw up and implement a new gender-neutral job evaluation system. This evaluation system will be applied to all the posts in our Health Centre. The Health Centre and the Union have set up a Joint Job Evaluation and Pay Equity Committee in order to carry out the evaluations jointly. The names of the Committee members are listed below.

In the next stage of the process, the Committee will be coordinating the gathering of information from incumbents and their supervisors concerning the requirements of the jobs. Once the information has been collected, it will be analysed by the Committee, and the posts evaluated, using the new job evaluation system.

The purpose of the process is to establish the relative value of all jobs at the Centre, based on an understanding of the minimum requirements for each job. It is not about evaluating the performance of the people who carry out the jobs. There will be no reduction in the salary of any worker due to the introduction of the new system.

The Centre and the Union need to invest a great deal of time and energy for the implementation of the new system. The results will not be given out until all the posts have been evaluated. The incumbents and their supervisors will have the opportunity of reviewing the job evaluations before the final results are incorporated into the Centre's payroll system.

We would like to ask for the support and understanding of all staff and management during this process. We are committed to keeping a constant flow of communication with you as the project progresses.

Yours sincerely,
(Signatures of all members of the Committee)



Job Evaluation Sessions

Training

The first sessions can be thought of as an extension of the training process. When carrying out the first job evaluations, the group will start to consolidate its understanding of the different levels of the factors and how these are applied to the context of the work done in the organisation. The group will learn to cooperate in order to reach a consensus, and to document properly the reasons for decisions taken.

Reading and understanding the information

Before starting to evaluate the jobs, each member of the committee will read his/her copy of the supporting documentation. People often read the documents relating to two or three posts at a time. While always bearing in mind the range of levels in the different subfactors, it is a good idea during the reading stage to underline or take note

of the examples of jobs of greater complexity or responsibility which would justify classification at the highest level of each subfactor. It can be useful to supplement the information from the supporting documentation by reading job descriptions written by the employer, especially if these have been properly updated.

When people notice omissions or lack of clarity in the documents, it is important to ask for clarification, by telephone or in writing, by the member of staff who actually carries out the job and by his/her supervisor. The questions and explanations received should be circulated to all the committee members. It is important to bear in mind the general rule that value cannot be assigned to elements that cannot be seen: we should always strive to make the work visible.

Allocating levels

One procedure often adopted by committees is to evaluate several jobs at the same time, first on one subfactor, and then the next, until all the jobs chosen for that session have been evaluated on all the subfactors. This method (subfactor by subfactor) allows several jobs to be compared at the same time.

In some committees, each committee member carries out the evaluations separately, and they then pool their ideas and discuss their decisions, until they reach a consensus. In others, all the discussion takes place in the group session. After reading the information, the group holds a discussion, citing examples taken from the questionnaire or other document, , and then reaching a consensus. The examples that justify a decision are documented and at the end the committee reviews the rating sheet they have produced for the job in question.

When there is a difference of opinion

The ideal situation is for people to completely agree on the evaluation of every subfactor. Consensus should be the aim. After all, the members of the committee should all have the same objective: to apply the new evaluation system fairly to all jobs. Nobody wants a job to be overvalued, nor for another to be undervalued, because that would undermine the neutrality and validity of the system. The aim is to apply the same rules in the same way to each job, in order to produce a consistent and fair outcome. Every committee member should be able to say of each decision taken "I can accept and uphold this decision".

However, it is not an easy task. It is quite a challenge to reach a common understanding of the meaning of all the terms at the different levels of all the subfactors, especially at the beginning of the process. It may be even more difficult to reach an agreement concerning the contents of the supporting document completed by the workers and their supervisors. Sometimes there are differences of opinion about the meaning of a term in the evaluation system or about its application. On other occasions, the disagreement is about whether or not a particular task is one of the minimum requirements of the post.

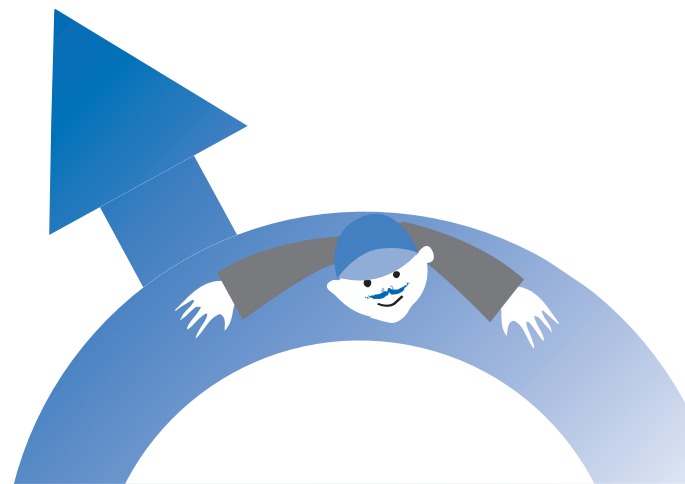
When the Committee is unable to make up its mind concerning whether to apply a term, it is useful to try to sort out its meaning. For example, in our model, level 3 of the subfactor Communication Skills states:

The interaction requires the ability to identify and respond to needs and requests, and to advise, teach or train others.

The Committee might be doubtful about the meaning

of the word "teach". If in this job, the worker has to demonstrate how to use the different function keys for some software that her colleagues are not well acquainted with, helping them at their workstation when they ask her to, is this the kind of teaching that is meant here? What about if she has to prepare material in advance, and get her colleagues together for a training session? Is there any difference between these two kinds of teaching?

Another example: If she explains a procedure to her colleagues, is this advice? Or will it only be considered "advice" if recommendations are offered (otherwise to be considered "informing" or "explaining")? It is important to establish points of reference for the different terms, taking note of clear or exemplary cases.



Sometimes, the examples that appear in the document are not convincing, or seem to be badly chosen. The Committee may consider some examples not to be consistent with tasks performed as part of other jobs, supposedly on the same level or in the same department. In a case like this, the best thing to do is to contact the people concerned (the worker and his/her supervisor) to clarify the nature of the task or who is supposed to carry out the tasks mentioned. It is definitely best not to argue a point for more than five minutes without thinking of asking for further information or putting the decision off until later.

Often a difference of opinion is not resolved straight away. This is fine. It is better to put the decision off until later, taking note of the difference of opinion on the report sheet, until the Committee has more

experience and more points of reference. Often doubts are cleared up by referring later to another post with similar characteristics.

Therefore, if a difference of opinion should arise within the team concerning the evaluation of a job:

- Define what is at the root of the disagreement
- Listen carefully to the reasons put forward by the person (people) who disagrees (disagree)
- Check or clarify the information concerning the job content
- Clarify the use of the terms appearing in the description of the subfactor, and document the new interpretation indicated
- Without reaching a full consensus, make a note of two possible values that could be allocated (e.g. "3 or 4"), and continue with other evaluations
- Put this particular evaluation to one side, and return to it later in the process



Recording evaluations - ensuring transparency

Since one of the main objectives when implementing a job evaluation system is to make visible work that was previously undervalued, the way the results of the evaluation are recorded is of crucial importance.

The members of the evaluation team should be very careful to register enough of the information found on the questionnaire (filled in by the people who carry out the work) to inform the decision regarding levels of each subfactor in the system.

If we take as an example the Job Evaluation Model (see Appendix) we can see how the evaluation of a subfactor can be recorded. In this example, we are looking at an administrative post in a hospital. The subfactor of communication skills has five levels, the first three of which we reproduce below:

LEVEL	COMMUNICATION SKILLS: GUIDELINES AND EXPLANATIONS
1	The interaction requires courtesy and tact, the ability to listen carefully, and to work in cooperation with others.
2	The interaction requires ability to identify and respond to basic needs and requests. Tact and diplomacy are needed to deal with minor conflicts/complaints. In general, the worker may consult his/her superiors to resolve more complicated or difficult situations.
3	The interaction requires the ability to identify and respond to needs and requests, and to advise, teach or train others. Responses may not be well received (e.g. when dealing with people who are angry or upset). The person in this post has to get others to cooperate or coordinate their effort. He/she has to face up to difficult situations before referring them on to another person to resolve

In this example, for this administrative post, the Committee decided on level 2 for this subfactor. We have shown below how this decision was justified and how it was recorded:

SUBFACTOR	LEVEL	JUSTIFICATION
COMMUNICATION SKILLS	2	The interaction requires the ability to identify and respond to basic needs and requests (e.g. communicating with patients and staff to complete documentation with relevant health information). Tact and diplomacy are needed to deal with minor conflicts/complaints (e.g. delay in getting doctor's appointments, complaints of family members concerning deficiencies in patient care). Challenging or tense situations are usually referred to the supervisor to resolve.

The words in bold in the example above were taken from the supporting document for the exercise (in this case, a questionnaire or form filled in by the people who perform this job). The most useful documents contain enough examples of the more demanding or complex tasks and responsibilities that are confronted in this job, and are written by the workers with comments by their supervisors.

At the end of the evaluation process, the people affected by the evaluation must be given an opportunity to review the evaluation of their post by going through the documentation

referring to it. When they go over the justification for each subfactor, they should be able to SEE their work in all its complexity. The evaluation is not a list of tasks. However, the documentation concerning the subfactor levels allocated by the Committee makes it possible to visualise the most important and complex aspects of each job.

It is best to use the same format for documenting all the evaluations.

For each subfactor, the justification should start by quoting a descriptive phrase which appears in the definition of the level selected. Then an example of the work as it appears in the questionnaire or supporting document should be quoted. In so far as it represents a complex or important aspect of the responsibilities attached to the post, the example quoted will reinforce the choice of level.

If the system allows the use of intermediate levels (e.g. 2.5, 3.5), it is important to mention one or more aspects that appear in the next level up in that subfactor, also with a relevant example of the work.

This format is easy to read and understand. It also imposes discipline on the process of defining evaluations. Discussion is around the information that justifies the decisions, and not around the factor level numbers as such. This exercise encourages debate around the functions of the job, rather than encouraging just plain negotiation about levels. In this way, the evaluation team can continue to focus on applying the system consistently.

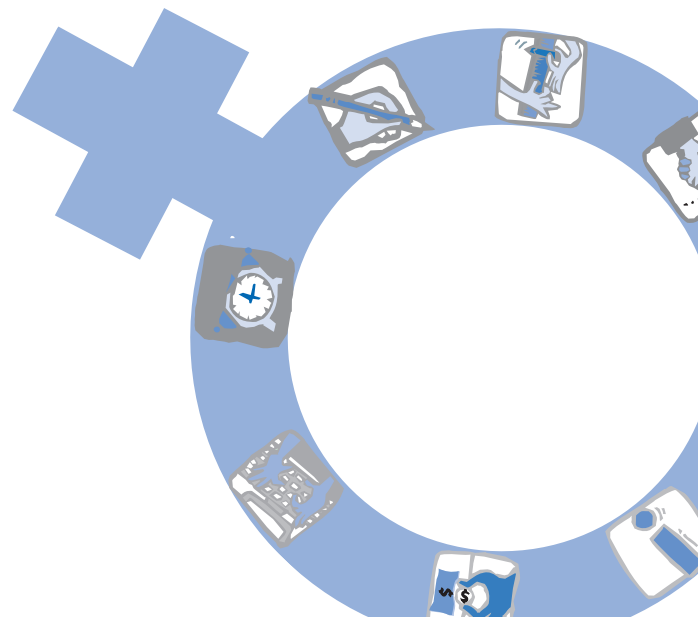
Adding explanatory notes to the set of factors and subfactors

During the evaluations, the evaluation team will reach certain agreements concerning the interpretation of the different levels.

When there are two teams involved in the process, (one in charge of the overall management of the process, and the other for the evaluations), it is the Steering Committee that should ratify the decisions proposed by the Rating Committee as regards interpretation. When taken all together, the explanatory notes could alter the general direction of the system if they are not used carefully and with due regard for the integrity of the set of subfactors. In any case, all the rules concerning interpretation should be properly recorded.

Summary of job evaluation exercise

- Evaluate jobs, not the people who do them
- Record evaluations
- Define men's jobs (at least 70%) and women's jobs (at least 60%)
- Compare posts that give similar results (in terms of total number of points)
- Analyse the effects of the new system on men's and women's jobs
- Make women's pay equal to that of men



Analysis of results

Before making the evaluation of all the posts public, it is extremely important to analyse the results, and especially the gender effects of the implementation of the new system.

The objective of the first stage of the analysis is to ensure uniform, consistent and accurate implementation of the evaluation system.

1. Factor analysis

For this analysis, both quantitative (numbers representing the different levels) and qualitative (text justifying the evaluation of each subfactor) data for each job need to be saved in an electronic spreadsheet.

Distribution of subfactor levels: It is very useful to carry out an analysis of the distribution of the frequency of the levels of all the factors. If it should turn out that no post has been classified at the minimum or maximum level of a particular subfactor, it may be necessary to modify the range of levels, and therefore the points allocated to the subfactor. Trends become more obvious if the results are presented in graphic form.

Correlation of subfactors: It is also useful to analyse how some of the subfactors correlate with each other. Above all, it is important to know if the subfactors measuring management responsibilities correlate too closely with those measuring skill or effort. With traditional systems, one often finds that the higher levels in some skill subfactors have been "reserved" for management posts. This makes it impossible to register a high level of skill in a post that has no management responsibilities, for example work on the organisation's policies or procedures. If the skills subfactor is only measuring the position of the post in the hierarchy, this may be a sign of bias in favour of managerial posts, which in turn may imply gender effects. In other words, if most of the management posts in an organisation tend to be predominantly male, the system may be discriminating against non-management jobs, which tend to be predominantly carried out by women. On the contrary, the system ought to take into account the skills demanded for each job, and not subordinate the evaluation of the post to its position in the hierarchy of the organisation.

Consistency of application: The data for the subfactors need to be checked one by one. For each subfactor, the format and content of the justification written for each post needs to be checked, ensuring that similar texts describing aspects on the same level are equivalent to each

other. The number of the level of the subfactor should also be checked to eliminate any error in the transcription of data. If it is necessary to alter the text or the level number, this should be done. Sometimes it is necessary to go back to the supporting document to check the information.

2. Checking evaluations by function

A check should be carried out on the evaluations of all the jobs together, organised into departments or functions. In this way, one can see how the jobs contributing to the same function relate to each other, and the progression between them, from entry-level posts through to those with a higher level of responsibility within the organisation. It is useful to focus on the subfactors with the greatest weight within the system, which also makes it easier to compare posts at different levels.

3. Analysis of gender effects

In order to carry out an analysis of effects in terms of gender, we need to have determined which jobs can be defined as female, which as male, and which are gender neutral. For example, a job can be considered male if at least 70% of the incumbents are men. In the same way, a post can be considered female if at least 60% of the incumbents are women. However, these figures are not definitive. One should also take into account whether the post has in the past been considered to be a male or female job, regardless of whether women or men have started working in this capacity recently. The point is to determine whether a job was considered male or female when the pay was originally established for it.

A gender analysis needs to identify the effect on jobs in which women predominate. A comparison is made of men's and women's jobs that have approximately the same number of total points. Have the female jobs benefited from the implementation of the new system and from making visible the skills and responsibilities that were previously omitted? Or, on the contrary, has the same relative order been reproduced as before, with female jobs at the bottom?

With a more detailed analysis, a comparison is made of how many men's and women's posts there are at the highest and lowest levels of the skills and effort subfactors. At the same time, it is important to ensure that women's jobs are not clustered together at the lower ranges of these factors.



Deciding the salary range

Once the points in the system have been allocated in accordance with the weighting that has been negotiated between the parties, we can go on to decide how the total number of points corresponds to the salary ranges. Each job has a total number of points. So how do we decide posts are equivalent when the number of points is not identical? All the posts that are to be allocated to

the same banding, or level on the pay scale, should be considered to be of equal value. In this way, jobs with very different content can end up in the same banding. This is what we mean when we say "equal pay for work of equal value". The jobs are different, but are worth the same.

Then we must quantify this equivalence, or, in other words, decide if jobs that are equivalent are to be those with a variation of no more than 25 points, 30 or 40 points. For example, in our system with a maximum total of 1000 points, we can imagine a system of compensation with a progression of 15 different salary levels. Progression between levels can be established by fixed increases of a certain number of points, as can be seen in the following two examples.

Example 1	25 points
Salary grade 4	350 – 374 points
Salary grade 5	375 – 399 points

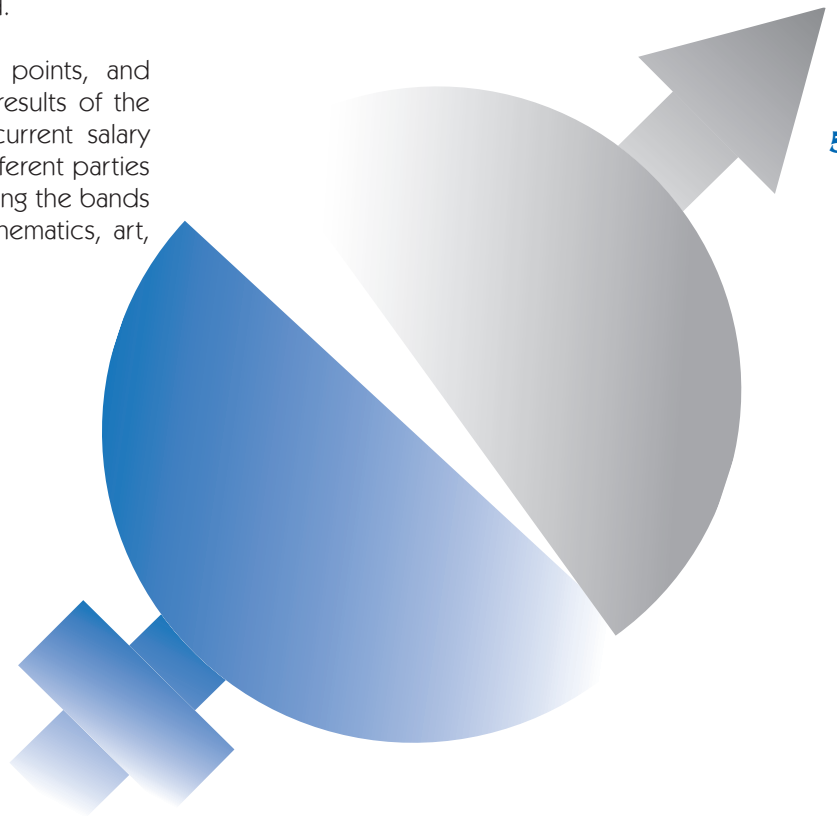
Example 2	40 points
Salary grade 4	350 – 389 points
Salary grade 5	390 – 429 points



It is also possible to implement a system of increments in which the levels, instead of progressing on the basis of a fixed number of points (e.g. 25 points), progress by percentage increments (e.g. by setting at 8% the difference in points and in wages between one level and the next). It should be noted that this method increases the difference in salary between workers in better-paid posts and those who are paid less. In most organisations, this method also tends to increase the gap between men's and women's jobs, since women's jobs are clustered at the lower end of the salary scale. Therefore it is not to be recommended.

To summarise, setting the ranges of points, and hence the banding, depends on the results of the application of the new system, the current salary structure, and the willingness of the different parties to implement a consistent system. Setting the bands appropriately is a combination of mathematics, art, and logic.

Checklist for the process:
(see next page)



PHASE	PROCEDURE	STEPS TO FOLLOW
1	Project planning	<ul style="list-style-type: none"> * Agree terms of reference * Draw up a communication structure * Select committee members
2	Training	<ul style="list-style-type: none"> * Gender sensitivity training * Training on application of principles * Checking all relevant documentation: <ul style="list-style-type: none"> * Job evaluation system * Questionnaire * Forms to document results of evaluations * Format for description of tasks * Work plan and detailed work schedule
3	Gathering information on job content	<ul style="list-style-type: none"> * Define job evaluation process (input) * Workers answer questionnaire and supervisors check it * Committee checks to detect omissions and request corrections
4	Validation of tools/ Job evaluation	<ul style="list-style-type: none"> * Evaluate representative jobs in order to evaluate system (tools) and modify if necessary * Evaluate all jobs and record evaluations * Check evaluations and evaluate results in order to confirm validity of the process * Define the process of reconsideration and communicate provisional results * Study requests for reconsideration
5	Negotiating corresponding salaries	<ul style="list-style-type: none"> * Recommend weighting, ranges of points, salaries for each range, and permanent revision process to evaluate new jobs or any that have been significantly modified.
6	Implementation and Ratification	<ul style="list-style-type: none"> * Negotiate clauses for collective agreement (concerning ongoing revision process) * Calculate cost of increases, and any necessary retroactive increases * Define the timetable for implementation
7	Revision	<ul style="list-style-type: none"> * Maintain the joint committee * Constantly revise changes in jobs.

At the end of the process:

Women's work is revalued so that their pay is on a level with that of work of the same value carried out by men

The contribution of women to services and the production of goods is made visible

This has a positive impact on quality services
It has a positive impact on family incomes



Additional resources

There are many resources available, most on the Internet, to help trade union groups to implement a new system of evaluation free from gender bias. The corresponding web pages are shown below:

ILO (International Labour Organization): <http://www.ilo.org/public/english/gender.htm>

Text and explanation of Conventions 100 and 111:

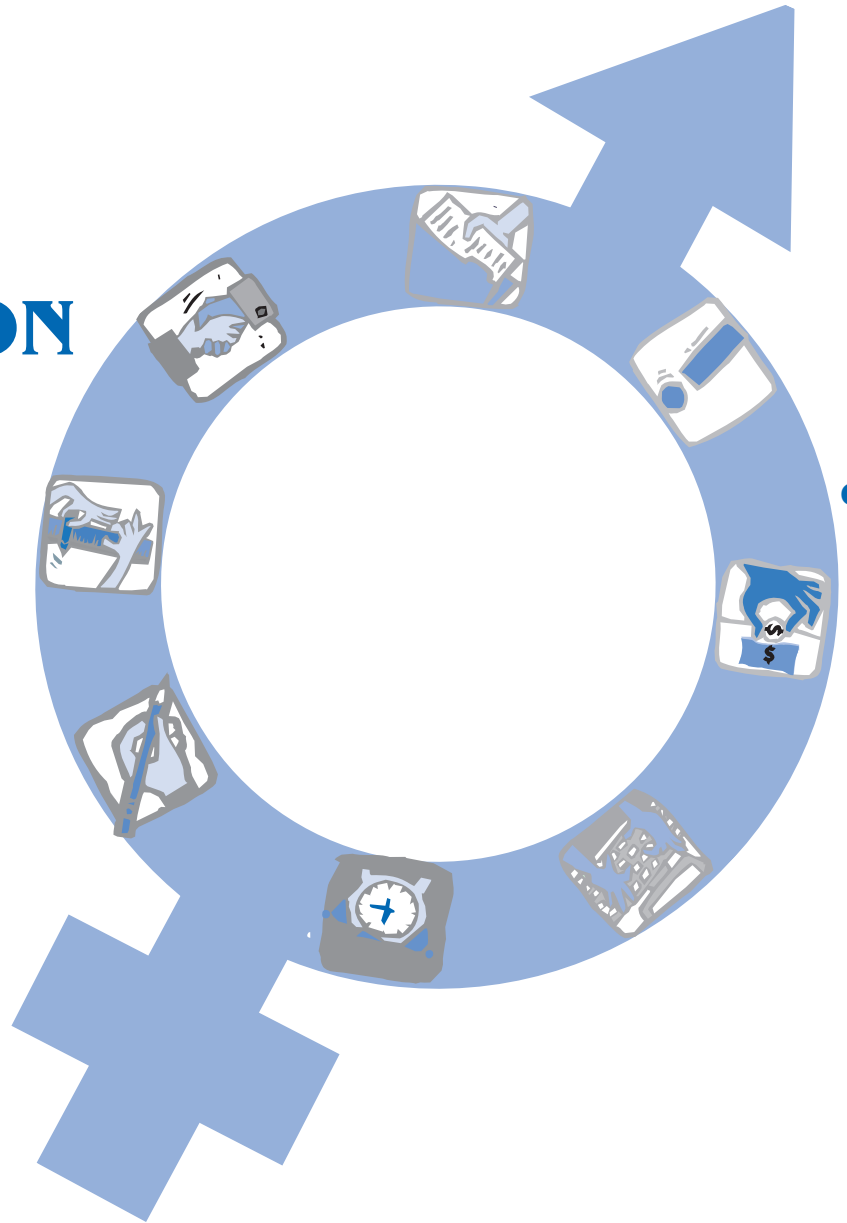
<http://www.ilo.org/public/englishstandards/norm/whatare/fundam/discrim.htm>

PSI (Public Services International): <http://www.world-psi.org>

Canadian Human Rights Commission (in English and French only): <http://www.chrc-ccdp.ca/publications/volume1-en.asp>



JOB EVALUATION MODEL





This job evaluation model is intended to help in the production of a tool which is specifically applicable to each context and set of circumstances. The structure of the job evaluation system free from gender bias which we propose is based on the criteria set out in the Guide published by the Canadian Human Rights Commission. However, it is important to remember that the system can be varied in many ways, and, in fact, should be modified by the parties involved in the project, to adapt it to the characteristics of the jobs in the workplace where it is to be implemented, while always taking into account the principles of job evaluation free from gender bias.

Factor 1: Skill

- 1.1 Education and Experience
- 1.2 Communication Skills
- 1.3 Reasoning and Analytical Skills
- 1.4 Physical Skill

Factor 2: Responsibility

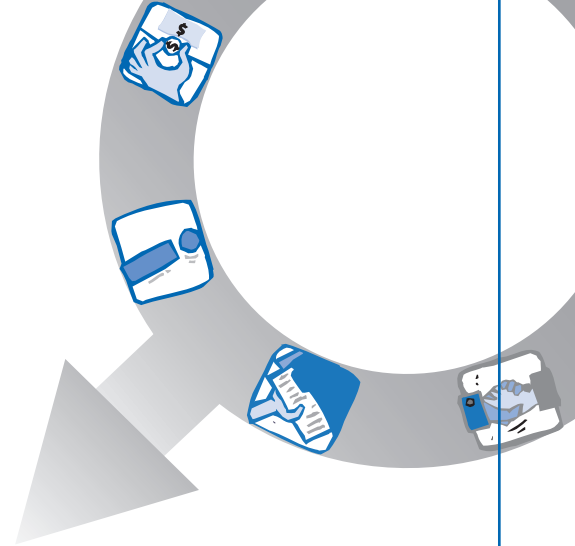
- 2.1 Responsibility for Coordination and Planning
- 2.2 Responsibility for Others
- 2.3 Responsibility for Information and Finance
- 2.4 Responsibility for Material and Programme Resources

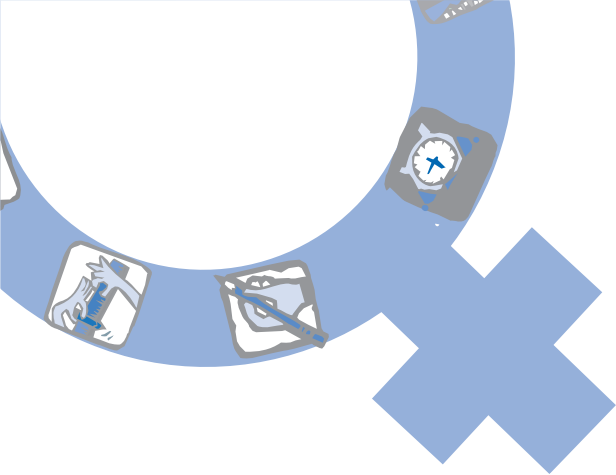
Factor 3: Effort

- 3.1 Physical Effort
- 3.2 Mental Effort

Factor 4: Working Conditions

- 4.1 Psychological Conditions
- 4.2 Unpleasant Physical Conditions
- 4.3 Risk of Injury or Occupational Disease





1. SKILLS FACTOR

1.1 SUBFACTOR: EDUCATION AND EXPERIENCE

This subfactor measures the combination of education and job-related experience required for the job.

By education we mean the minimum level of formal education that is currently required for someone to be hired to start work in the job in question. It is recognised that some people who currently carry out the job will not satisfy this criterion, but will have developed the necessary skills through experience.

Job-related experience is made up of two elements:

- The amount of job-related experience required for a person to be employed in the post. It is assumed that the candidate will have completed the level of formal education indicated above. On-the-job experience is the length of time calculated to be necessary for a person just starting the job to become able to carry out competently all the activities and responsibilities pertaining to it.

To determine the combination of education and experience required, refer to the chart on the next page, and complete the steps described below.

Step 1 Under the column marked MINIMUM LEVEL OF FORMAL EDUCATION, indicate the minimum level of education required for the post.

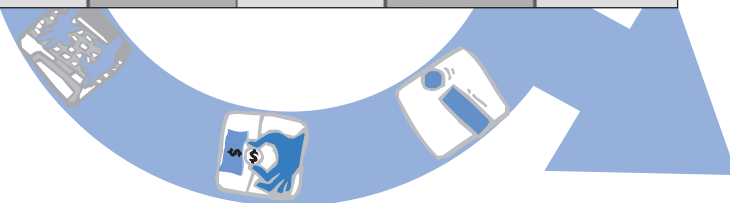
Step 2 Determine the total number of months/years required for a person to be employed in the post. Use the low end of the range, if a range is indicated (e.g. if it states 2 to 3 years, select 2). Take into account time working in jobs lower down the scale that would be a pre-requisite for this post.

Step 3 Determine the total number of months/years required for a person, once in the job, to reach the level of skill required to carry out the activities and responsibilities of the post.

Step 4 Add together the times selected in Steps 2 and 3.

Step 5 In the chart on the next page, select the row that represents the level of education selected in Step 1, and, moving horizontally across the same row, select the box under the heading TOTAL JOB-RELATED EXPERIENCE which corresponds to the total time calculated at Step 4 (from 1 to 10).

MINIMUM JOB-RELATED EXPERIENCE	TOTAL JOB-RELATED EXPERIENCE				
MINIMUM LEVEL OF FORMAL EDUCATION	Less than 6 months	Between 6 months and 2 years	Between 2 and 4 years	Between 4 and 6 years	More than 6 years
Primary school	1	1	1	2	2
Some secondary education	2	2	2	3	3
Secondary education completed	3	3	3	4	4
Secondary education completed, plus up to 1 year of technical or vocational training	4	4	4	5	5
Secondary education completed, plus diploma for 2 or 3 years of technical training	5	5	5	6	6
Secondary education completed, plus diploma for over 3 years of technical training	6	6	6	6	7
University degree	7	7	7	8	8
Postgraduate degree (e.g. M.A., M.Sc.)	8	8	8	9	9
PhD	10	10	10	11	12



1.2 SUBFACTOR: COMMUNICATION SKILLS

This subfactor measures the degree of skill in the field of human interaction (with people both within and outside the organisation) required for the job. This takes into account the type of contact and the level of complexity of the interaction required for the worker to fulfil the job objectives. Some of the skills taken into account under this subfactor are:

- Advising (providing information and making recommendations)
- Communicating in difficult situations (e.g. dealing with customers who are angry or upset or who have communication difficulties)
- Communication between different cultures, requiring sensitivity to cultural differences
- Counselling (e.g. therapeutic intervention)
- Empathy
- Teaching or training others
- Identifying and/or responding to the needs of others
- Investigating to find out information. Exchanging information, simple or complex.
- Getting others to cooperate
- Mediation or negotiation
- Resolving complaints or disagreements, simple or complex
- Making presentations
- Extending common courtesy



In the chart below, select the level of communication skill that best fits the requirements of the post.

LEVEL	COMMUNICATION SKILLS: GUIDELINES AND EXPLANATIONS
1	The interaction requires courtesy and tact, the ability to listen carefully, and to work in cooperation with others.
2	The interaction requires ability to identify and respond to basic needs and requests. Tact and diplomacy are needed to deal with minor conflicts/complaints. In general, the worker may consult his/her superiors to resolve more complicated or challenging situations.
3	The interaction requires the ability to identify and respond to needs and requests, and to advise, teach or train others. Responses may not be well received (e.g. when dealing with people who are angry or upset). The person in this post has to get others to cooperate or coordinate their efforts. He/she has to face up to difficult situations before referring them on to another person to resolve.
4	The interaction requires the ability to identify and respond to needs and requests that are difficult to determine. The worker has to motivate, persuade or influence the behaviour of other people. He/she has to communicate with people both outside his/her department and outside the organisation/company.
5	The interaction requires highly developed skills in the areas of therapeutic counselling, mediation, persuasion and/or formal negotiation, in situations where the interaction is complex, communication difficult, and the outcome contentious.



1.3. SUBFACTOR: REASONING AND ANALYTICAL SKILLS

70

In most jobs, employees have to understand, collect, interpret and analyse different kinds of information, and also solve problems. This subfactor measures the range and complexity of the skills that a job requires in applying information to solve problems that are encountered in the course of the work.

This subfactor measures the requirements of the job with relation to six critical skills:

- **Analysis** (level of complexity of written, graphic and mechanical information to be interpreted and applied to assess a problem or process)
- **Problem solving** (level of skill in reasoning required, choosing a method from already existing procedures or developing new ways or tools to solve problems)
- **Ability to gather/classify/arrange in order of importance/catalogue information** (using standard or specialised systems to locate, classify, store and compile information)
- **Reading** (level of complexity of material to read and understand, including graphic material)
- **Writing** (level of complexity and participation in the content of written material, such as correspondence, notes, reports, plans, scientific or technical manuals, and software programming code)
- **Calculations** (level of skill in managing numbers for calculation, formulae, equations, and specialised mathematical operations, such as accounting).

This subfactor does not measure mechanical or physical skills, which are covered under other subfactors.

In the selection of the level descriptors that best reflect the more complex skills required in the job in question, the contribution made by these elements when carrying out the work, and the general description of the post as regards the six key components, we can be guided by the following chart:

LEVEL	REASONING AND ANALYTICAL SKILLS: GUIDELINES AND EXPLANATIONS
1	The work requires the application of known solutions to straightforward problems: compiling general information from accessible sources; understanding basic written material; and writing to fill in simple forms (where accuracy of spelling is unimportant). Only a minimum level of mathematical ability is required.
2	The work requires the identification of problems and analysis of situations using established procedures; solving simple problems by choosing from among a set of solutions provided; compiling information and/or retrieving files from a particular number of known sources; writing to fill in forms and keep records. Basic mathematical skills are required (addition, subtraction, multiplication, division).
3	The work requires the identification of problems and analysis of situations using standard criteria; solving problems by choosing from a wider range of available options; compiling information using common systems; understanding of general and specialised material; writing formal notes, documents and records. Application of mathematical skills required (calculations, formulae, and/or equations).
4	The work requires the identification of problems and analysis of situations and/or information using a wider range of criteria and guidelines; working out solutions to complex problems, which may be recurring; gathering information and material using complex multiple systems; understanding complex specialised or technical written material. The job also requires some of the following skills: editing documents/graphic material where knowledge of the subject is required; applying knowledge to data processing or production of reports; writing specialised or technical documents/graphic material that require content summary; application of statistical formulae or procedures; book-keeping..
5	The job requires the identification of complex problems by applying sophisticated analytical methods or procedures; working out solutions to problems that have no immediate precedent; gathering complex information using a range of sources and/or working out or generating new data; understanding complex, specialised and/or technical material. The job also requires some of the following skills: organising and developing the content of specialised reports or policy documents; writing oral presentations to convey complex information; writing and designing conceptual material for teaching/research (including systems architecture); applying tools of analysis and financial planning.
6	Besides the skills mentioned for Level 5, the job requires some of the following skills: conceptualisation of unique hypotheses; applying the reasoning process to produce unique solutions; developing new methodologies to gather/generate new data; write material to contribute to the development of knowledge of a subject.

1. 4. SUBFACTOR: PHYSICAL SKILL

The heading of physical dexterity includes physical coordination (hand-eye, hand-ear) and the

dexterity required to carry out quick, accurate movements, including repetitive actions. This subfactor also measures the level of skill in operating, repairing and building equipment and machinery. Since different jobs require different degrees of accuracy, speed of movement and mechanical knowledge, select from the following chart the level which best reflects the requirements of the job.

LEVEL	PHYSICAL SKILL: GUIDELINES AND EXPLANATIONS
1	The work requires simple movements; accuracy and speed are not necessary. The job may require the use or operation of standard office equipment or other computerised equipment to manipulate or retrieve data, requiring only limited mechanical knowledge and/or limited use of a keyboard.
2	The work requires a degree of coordination and dexterity in the use of equipment and machinery, and speed or accuracy in their use. Tools, machinery or equipment are used (such as power tools, or specialised measuring or drawing instruments); also the use of a keyboard is an integral part of the work (speed is not essential).
3	The work requires a combination of coordinated and skilful movements, effected with accuracy and/or speed. The work involves minor maintenance or repair of equipment, and installation or reconfiguration of complex equipment (e.g. hardware or software); constant accurate and fast keyboarding.
4	The work requires a high degree of coordination and dexterity (which implies accuracy and speed); coordination of complicated, accurate and fast movements; full mechanical knowledge of the equipment used and to troubleshoot specialised equipment; carrying out repairs; improvising tools and/or building equipment or structures.

2. RESPONSIBILITY FACTOR

2.1 SUBFACTOR: COORDINATION AND PLANNING

This subfactor measures the responsibilities of coordination and planning corresponding to this post. Coordinating/planning also covers responsibility for establishing priorities and scheduling tasks, events and staff; planning and/or putting into effect programmes, events and conferences. In some cases, the task of coordination falls to one's own position, while in other cases coordination is carried out by a team, department, or by the company/organisation as a whole.



Choose the levels from the chart that best describe the responsibilities the position has for coordination/planning.

LEVEL	COORDINATION AND PLANNING: GUIDELINES AND EXPLANATIONS
1	The post requires a relatively small amount of coordination and planning. The tasks are repetitive, clearly defined, and are carried out in accordance with specific instructions. No interpretation is necessary. Any variation in routine is discussed with the supervisor.
2	The post requires a greater degree of coordination and planning, since each day's activities are self-regulated. The person in this post is expected to plan and prioritise his/her own activities, and carry them out according to established procedures. Occasionally he/she will coordinate tasks, events, or activities carried out by others within one and the same department. There is supervision available to deal with non-routine matters.
3	The post requires the coordination and planning of activities and tasks. The job requires coordination of the activities of other people or resources within a team, department, operation, or for an event. The planning includes a small number of activities and planning tasks, such as the coordination of data, within established deadlines.
4	The post requires the coordination and planning of activities and tasks where there are a large number of elements and tasks, many projects or programmes. The planning affects a broad range of individuals both within and outside the company/organisation, and focuses on assigned priorities of great magnitude (plans, major events, etc.).
5	The post requires coordination and planning at operational level. This worker has to estimate the time and resources needed to complete assigned tasks. He/she has to plan activities and priorities or the use of resources that affect many departments, operations, or organisations.

2.2. SUBFACTOR: RESPONSIBILITY FOR OTHERS

This subfactor measures the job's permanent responsibility for guidance, direction and supervision of staff, service users, customers, students and/or patients. It takes into account the nature of the supervision or guidance, but not supervision that takes place in the temporary absence of the supervisor. Use the chart below to select the levels that best reflect the responsibilities of the post in relation to other people.

LEVEL	RESPONSIBILITY FOR OTHERS: GUIDELINES AND EXPLANATIONS
1	The job does not include ongoing responsibility for supervision or guidance. Occasionally, the worker has to show procedures or offer guidance to others. He/she is responsible for his/her own safety at work (actions which do not directly affect others).
2	The post requires the functional guidance of other workers, customers, patients etc. on an ongoing basis, and/or involves limited supervisory responsibilities, such as assigning work, showing how to do particular tasks, and checking work that others have done. In carrying out this work, the person in this post has to be careful to avoid harm to third parties.
3	The post involves responsibility for the quality and scheduling of the work of one or more assistants, which includes scheduling and organising the work, assigning tasks, overseeing the quality and quantity of work, giving advice, guidance and training; developing detailed work methods, dealing with routine problems, and making recommendations concerning changes in staffing. The person in this post has responsibility for implementing specific measures to protect the health and/or well-being of other people, and shared responsibility for preventing long-term harm to individuals or short-term harm to groups of people. This person can provide expert advice to management.
4	The post involves ongoing responsibility for supervision of a group of employees, which includes introducing, developing and authorising standard practice instructions or procedures for the unit. This worker has direct responsibility for the health and well-being of other people, and for preventing serious harm to individuals (long-term) or short-term harm to groups of people.
5	The post involves responsibility for the supervision of several groups of workers, which includes planning and developing the work targets for the groups supervised, developing general work standards, methods and procedures, dealing with supervisory problems referred by other managers or supervisors, and coordinating and integrating the work done by sub-groups. This worker has direct responsibility for the health and/or well-being of groups of people, and has to take measures to prevent serious harm to any group.
6	The post involves responsibility for supervising other supervisory staff, and for developing work targets for groups of employees, which includes planning staffing levels of several work units. This person is responsible for the health and well-being of large groups of people, and his/her actions have a long-term effect.

2.3 SUBFACTOR: RESPONSIBILITY FOR INFORMATION AND FINANCE

This subfactor measures the degree of responsibility of the post for the use, manipulation, safeguarding and appropriate maintenance of information and data. It includes a level of responsibility for the content of the information handled, and discretion for the release of confidential information.

The subfactor also includes the value and nature of participation in producing financial information, for example in calculating, recording and

interpreting financial information and in monitoring and forecasting spending, and developing budgets.

When studying the impact of errors, the selection of a level should be based on common errors of judgement, not on catastrophic ones. In some jobs, responsibility for information and finance is combined, whereas others have responsibility for one area but not the other. Evaluate the job based on the highest level of responsibility for either finance or information.

Use the chart below to select the levels that best reflect the responsibilities of the post in relation to information and finance.

This subfactor measures the degree of responsibility



LEVEL	RESPONSIBILITY FOR INFORMATION AND FINANCE: GUIDELINES AND EXPLANATIONS
1	This post involves work with straightforward and easily accessible information/data/files (e.g. keeping numerical or alphabetical files). The job does not include any responsibility for the content of files or financial reporting, and the employee in this post does not deal with confidential information.
2	This post involves work with information/data/files that are mostly straightforward and for which there are clear rules for retrieval and storage. The post involves little responsibility for the content of files. The post-holder records and stores information in existing formats (e.g. spreadsheets, computer files). He/she records financial information and carries out standard calculations. He/she receives and records small amounts of money. He/she is responsible for dealing with confidential information, and is required not to divulge it.
3	This post involves work with complex information/data/files. The employee in this job modifies the contents of files (adding, deleting, editing), and selects methods or formats for storing or presenting information. He/she provides information in particular formats as requested, and is responsible for handing over confidential information in accordance with clearly established procedures. He/she carries out calculations and inspections, and records transactions using established methods (e.g. setting up accounts); he/she contributes to the preparation of budgets for the unit, prepares routine financial reports, and applies systems to safeguard the integrity of stored and transmitted data. Mistakes in handling information may produce various problems in customer relations, or relations with the public or the staff, or lost time or resources.
4	The person in this post is responsible for developing the content of complex files. He/she can approve predetermined expenditure to supply the needs of the unit. He/she has limited authority to modify and reallocate budgeted resources. He/she is responsible for collecting and/or recording the unit's revenues (including the production of balance sheets). He/she produces customised financial reports requiring expert judgement. Based on criteria which are often imprecise, he/she makes judgements concerning the handing over of confidential information. She/he ensures that systems are applied to safeguard the integrity of stored and transmitted data. Mistakes in handling information may produce lasting deterioration in customer relations, or relations with the public or the staff, and serious disruption in services, or lost time and resources.
5	The person in this post is responsible for the management of complex information of great importance for the organisation/company. She/he draws up new financial procedures or policy relating to the control of expenses and income. In discharging this responsibility, she/he needs to do research, make evaluations and have profound knowledge of the subject. The person in this post decides whether to hand over confidential information in accordance with general objectives and legal requirements. She/he liaises with the auditors, government officials, solicitors, etc. She/he prepares tenders, and negotiates and prepares justifications for funding applications. She/he is responsible for planning, forecasting and control of budgets and authorisation of important items of expenditure. Mistakes in handling information or finance may lead to lasting deterioration in customer relations, or relations with the public or the staff; and serious disruption in services or significant loss of time and resources which could affect the performance of the organisation/company in the medium and long term.



2.4. SUBFACTOR:
RESPONSIBILITY FOR MATERIAL
AND PROGRAMME RESOURCES

of the post for the operation and maintenance of material resources (equipment, machinery, plant and tools) or aspects of the programme (provision of services and allocation of human resources). Use the chart below to select the levels that best reflect the responsibilities of the post in relation to material and programme resources.

LEVEL	RESPONSIBILITY FOR MATERIAL AND PROGRAMME RESOURCES: GUIDELINES AND EXPLANATIONS
1	This post involves responsibility for the care and appropriate usage of equipment, machinery, supplies and tools with a minimum capital value, or for the allocation of programme material with a minimum capital value controlled by the post-holder.
2	The post involves direct responsibility for the care and appropriate usage of equipment, machinery, supplies and tools of the job (with considerable capital value), or for providing services directly to the customer/public.
3	The post involves direct responsibility for the care, safe operation and maintenance of equipment, machinery, plant and tools of one unit (with significant capital value) or for the allocation of resources for a direct service.
4	The post involves direct responsibility for the care, safe operation, maintenance and repair of equipment, machinery, plant and tools of more than one unit (with great capital value) or responsibility for the allocation of resources for more than one service or programme (of great value to the company/organisation).

3. EFFORT FACTOR

3.1 SUBFACTOR: PHYSICAL EFFORT

This subfactor measures the frequency and intensity of the physical demands of the work, e.g. walking or standing for long periods, lifting, pushing, or carrying objects or people, and the sustained use of the small muscles (e.g. use of keyboard). Intensity of physical effort is measured as low, moderate or high. The following examples make visible some typical activities that correspond to the three levels of intensity of effort:

- Low:** Alternately sitting, standing up and walking, manipulating light objects, intermittent keyboarding or entering data.
- Moderate:** Moving objects of medium weight; brief periods manipulating objects or people;

carrying light weights for long periods; continuous accurate movements (e.g. keyboarding, manual assembly, projecting the voice); working in uncomfortable positions or in confined spaces for short periods; long periods of walking or working standing up.

- High:** Carrying heavy objects, manipulating large and/or irregularly shaped equipment or people, working in confined spaces for long periods, carrying out other activities that continuously require precise large muscle coordination.

Use the chart below to select the levels that best reflect the combination of intensity and duration of the activities in the jobs in question:

LEVEL	PHYSICAL EFFORT: GUIDELINES AND EXPLANATIONS
1	Most of the activities are low intensity, with some of moderate intensity for periods of one to two hours per day. Intermittent keyboarding throughout the day, with no periods of intensive keyboarding.
2	Activities of moderate intensity, for 2 to 4 hours per day in all. Activities during the rest of the day are low intensity. Periods of keyboarding throughout the day, up to 3 hours cumulatively.
3	Activities of moderate intensity for more than 4 hours a day, with high intensity activities for periods of 1 to 2 hours per day.
4	Activities of high intensity for 2 to 4 hours per day in all, with activities of moderate and low intensity for the rest of the day.
5	Activities of high intensity for over 4 hours a day in all, with activities of moderate and low intensity during the rest of the day.

3.2 SUBFACTOR: MENTAL
EFFORT

This subfactor measures the frequency and intensity of the mental and sensory demands of the work. Mental demands are activities that require concentration (e.g. thinking, listening, interpreting, observing) and which cause tiredness or fatigue. Sensory demands refer to the use of the five senses. The intensity of mental effort is defined as low, moderate or high. Below, there are some examples of typical activities that correspond to the three levels of intensity of effort:

- Low:** Collecting routine information, classifying files, attending to telephone calls or routine requests for information
- Moderate:** Word processing or graphic layout, advising customers or staff, conducting interviews, taking part in meetings, providing detailed information, carrying out multiple tasks simultaneously while paying attention to detail.
- High:** Graphic design, careful scrutiny of documents, crisis intervention, counselling, transcribing minutes etc., data entry where no corrections can be made afterwards, moderating groups or meetings; scientific or technical observation; working out solutions to complex problems where interruptions cause disruption of the cognitive process.
- Use the chart below to select the levels that best reflect the combination of intensity and duration of activities:

LEVEL	MENTAL EFFORT: GUIDELINES AND EXPLANATIONS
1	Most activities are low intensity, with some of moderate intensity for periods of one to two hours a day.
2	Activities of moderate intensity for 2 to 4 hours a day. During the rest of the day, the activities are low intensity.
3	Activities of moderate intensity for over 4 hours a day, with high intensity activities for periods of 1 to 2 hours a day.
4	Activities of high intensity for 2 to 4 hours a day, with moderate and low intensity activities during the rest of the day.
5	Activities of high intensity for over 4 hours a day, with moderate and low intensity activities during the rest of the day.

4. WORKING CONDITIONS FACTOR

4.1. SUBFACTOR: PSYCHOLOGICAL CONDITIONS

This subfactor is used to evaluate the psychological conditions that make the job difficult, and which are an inherent part of the work. Take into account the frequency with which the situations mentioned below occur, and the aggravating factor of the sum or accumulation of many different conditions. Three situations occurring occasionally are equivalent to one situation experienced frequently.

- Highly emotional situations that require attention, assistance and/or support
- Difficult situations involving conflict, hostility or violent response
- Place of work lacks the privacy necessary for sensitive transactions
- Situations where the chances of being able to solve the problem are minimal (illness, death, poverty)
- Mental stress caused by monotonous and repetitive work
- Multiple simultaneous tasks
- Simultaneous deadlines; urgent unpredictable assignments
- Exposure to threats to personal safety.

Occasional: Less than 30% of the time (over a year)
Frequent: From 30% to 60% of the time (over a year)
Constant: Over 60% of the time (over a year)

PSYCHOLOGICAL CONDITIONS			
INTENSITY	FREQUENCY		
	Occasional	Frequent	Constant
0, 1 or 2 elements	LEVEL 1	LEVEL 2	LEVEL 3
3 or 4 elements	LEVEL 2	LEVEL 3	LEVEL 4
5 or more elements	LEVEL 3	LEVEL 4	N/A

4.2 UNPLEASANT PHYSICAL CONDITIONS

This subfactor is used to evaluate unpleasant physical conditions that are an inherent part of the job. Take into account the frequency with which the situations mentioned below occur, and the aggravating factor of many different conditions being present. Aspects that may cause physical harm are not included here, as they are covered in the next subfactor. Three situations occurring occasionally are equivalent to one situation experienced frequently.

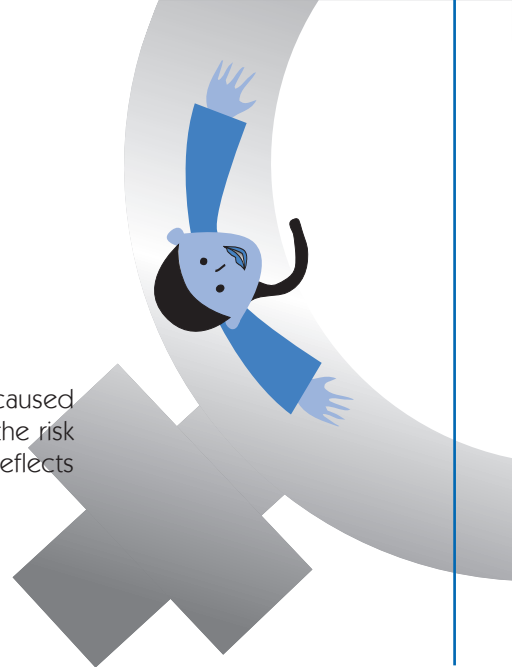
- Working in different climates.
- Working indoors in a very damp, warm, or cold atmosphere.
- Exposure to unpleasant odours.
- Extreme lighting conditions (poor lighting or extreme reflection of sunlight or light from other sources).
- Mechanical vibration.
- Exposure to dust, soil, grease, oil.
- Confined, uncomfortable work space.
- Exposure to irritating noise.
- Exposure to body fluids or substances.
- Use of heavy or uncomfortable personal protection equipment.

Occasional: Less than 30% of the time (over a year)
Frequent: From 30% to 60% of the time (over a year)
Constant: Over 60% of the time (over a year)

UNPLEASANT PHYSICAL CONDITIONS			
INTENSITY	FREQUENCY		
	Occasional	Frequent	Constant
0, 1 or 2 elements	LEVEL 1	LEVEL 2	LEVEL 3
3 or 4 elements	LEVEL 2	LEVEL 3	LEVEL 4
5 or more elements	LEVEL 3	LEVEL 4	N/A

4.3 RISK OF INJURY OR OCCUPATIONAL DISEASE

This subfactor measures the probability of injury or disease that could be caused at work, taking into account the preventive measures in force to mitigate the risk and protect the health and safety of the staff. Select the level that best reflects the probability of job-related injury and/or disease.



LEVEL	RISK OF INJURY OR OCCUPATIONAL DISEASE: GUIDELINES AND EXPLANATIONS
1	In the atmosphere in which the work is carried out there is a limited probability of minor injury due to exposure to elements of risk.
2	In the atmosphere in which the work is carried out there is the possibility of minor injury or a minimal probability of more serious injury due to exposure to elements of risk.
3	In the atmosphere in which the work is carried out, there is a clear probability of minor injury or a limited probability of serious injury due to exposure to elements of risk.
4	In the atmosphere in which the work is carried out, there is a clear probability of serious injury due to exposure to elements of risk.
5	In the atmosphere in which the work is carried out, there is a significant probability of serious injury due to exposure to elements of risk.

WEIGHTING OF FACTORS AND SUBFACTORS

CRITERIA (FACTORS)	SUBFACTORS	LEVELS	WEIGHTING
SKILL			
(40%)	Education and experience	5	120
	Communication skills	5	100
	Reasoning and analytical ability	5	120
	Typical skill	4	80
EFFORT			
(10%)	Typical effort	5	60
	Mental effort	5	40
RESPONSIBILITY			
(40%)	Responsibility for people and equipment	5	80
	Responsibility for other people	5	120
	Responsibility for information and finance	5	120
	Responsibility for material and equipment maintenance	4	80
WORKING CONDITIONS			
(10%)	Responsibility for machine	4	20
	Unpleasant physical conditions	4	20
	Unpleasant psychological conditions	4	20
			1000