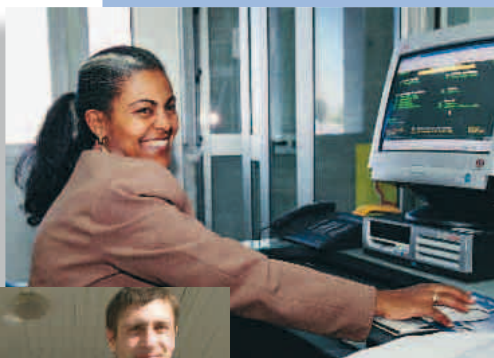


# PROMOTING EQUITY



International  
Labour  
Office



## GENDER-NEUTRAL JOB EVALUATION FOR EQUAL PAY: A STEP-BY-STEP GUIDE

Programme on  
Promoting the  
Declaration on  
Fundamental  
Principles and  
Rights at Work



PROMOTING  
**EQUITY**

**GENDER-NEUTRAL JOB EVALUATION  
FOR EQUAL PAY:**  
A STEP-BY-STEP GUIDE

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ISBN 978-92-2-121538-7 (print)

ISBN 978-92-2-121539-4 (web pdf)

*First published 2008*

This report can be downloaded from the web site of the  
Programme on Promoting the Declaration on Fundamental Principles and Rights at Work ([www.ilo.org/decl](http://www.ilo.org/decl))

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*Promoting equity: Gender-neutral job evaluation for equal pay: A step-by-step guide*

Geneva, International Labour Office, 2008

*ILO Cataloguing in Publication Data*

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# CONTENTS

PREFACE	v
CHAPTER 1 Context and objectives of the guide	1
CHAPTER 2 The Pay Equity Committee	7
CHAPTER 3 Selecting which jobs to compare	17
CHAPTER 4 Job evaluation methods	25
CHAPTER 5 Collecting data on the jobs to be evaluated	43
CHAPTER 6 Analysing the questionnaire results	57
CHAPTER 7 Determining the value of jobs	69
CHAPTER 8 Estimating wage gaps for jobs of equal value and making pay adjustments	83
BIBLIOGRAPHY	92
LIST OF TABLES	95
GLOSSARY	97

# Acknowledgements

I would like to express my deepest appreciation to Manuela Tomei, who conceived this project and has followed and encouraged it throughout. Her always pertinent observations led to significant improvements in this Guide. Thanks are also due to Zafar Shaheed for his support and very valuable suggestions. Lisa Wong's contribution was crucial, as she guided the project in the final and difficult stages leading up to publication.

I would like to thank all those who took part in the various meetings and discussions that took place at the ILO in Geneva, as well as those held following my training sessions at the ILO International Training Centre in Turin. Their queries, criticisms and comments were constructive and thought-provoking. Eric André Charest, an intern at the ILO in 2006, provided very valuable research assistance.

Marie-Thérèse Chicha

# PREFACE

Significant gender disparities in pay are amongst the most resilient features of labour markets everywhere in the world. Even though the gender pay gap has narrowed in some places, women, on average, continue to work for a lower pay than men. This trend continues despite striking advances in women's educational attainments and work experience.

The gender pay gap has many causes and sex discrimination in remuneration is one of them. The Equal Remuneration Convention, 1951, (No.100), one of the eight core international labour standards, seeks to address discrimination in remuneration by ensuring that women and men receive equal remuneration not just for the same or similar work, but also for work of equal value. This principle is fundamental to the achievement of gender equality, as a large proportion of women do different jobs than men. Assessing the value, and corresponding requirements, of different jobs on the basis of common and objective criteria also contributes to more transparent and efficient systems for pay determination, while improving recruitment and selection procedures.

Determining if two jobs that differ in content are equal in value requires some method to compare them. Job evaluation methods are the tools that help to establish the relative value of jobs and thus determine whether their corresponding pay is just. The last major publication of the ILO on this important topic was Job Evaluation (1986), which was designed basically to unravel some of the complexities of this important human resources instrument and to make it more accessible to a broader audience beyond the specialists and consultants who typically deal with job evaluation. At that time, a short treatment of the gender pay equity implications of job evaluation was provided. It is high time to have a thorough treatment of this complex issue. For an objective and fair assessment of jobs, however, job evaluation methods must be free from gender bias; otherwise key dimensions of jobs typically performed by women risk being disregarded or valued lower than those typically performed by men. This results in the perpetuation of the undervaluation of women's jobs and the reinforcement of the gender pay gap.

The process whereby job evaluation methods are developed and applied is at least as important as the technical contents of these methods, as possible and unintended gender biases may arise at any stage in their design and use. The purpose of this publication is to address gender biases more systematically and prevent the occurrence of these problems by providing a step-by-step Guide as to how to develop and apply a job evaluation method free of gender bias.

This Guide has been produced as part of the ILO's Follow-up to the Action Plan on the Elimination of Discrimination (2004-2007), ensuing the first global report on the subject entitled Time for equality at work. It responds to a growing number of requests for technical assistance in this field from governments, workers' organizations and tripartite bodies dealing with gender and labour questions. The Guide is aimed at workers' and employers' organizations, officers of Equal Opportunity Bodies and human resource managers, gender specialists and pay equity practitioners.

The Guide has been written by Prof. Marie-Thérèse Chicha of the School of Industrial Relations of the University of Montreal, Canada. Marie-Thérèse Chicha is a well-known pay equity specialist and practitioner in Canada and abroad. She has consulted and extensively written on issues related to employment and pay equity, and management of ethno-cultural diversity. The publication is based on a comparative review of job evaluation methods, and other materials that have been developed and used in different countries, as well as on case studies and research in gender studies and in human resources management. The Guide has been tested and validated in training activities organized by the International Training Centre of the ILO, Turin, for tripartite constituencies.

This Guide has benefited from the insights of several ILO colleagues, and a special thanks goes to Manuela Tomei who conceived this project and overviewed its preparation. Appreciation also goes to Lisa Wong, in bringing this publication to fruition.

Zafar Shaheed  
*Director*  
*Programme on Promoting the Declaration on*  
*Fundamental Principles and Rights at Work*





## CONTENTS - CHAPTER 1

Objectives	1
Causes of wage discrimination	1
Scope of the principle of pay equity	2
Benefits of pay equity	4
Content of the Guide	5



## CHAPTER

## 1

## Context and objectives of the guide

## OBJECTIVES

This Guide, to be used when implementing the principle of equal remuneration for work of equal value, free from discrimination based on sex, as enshrined in the ILO Equal Remuneration Convention, 1951 (No. 100), is in keeping with the Follow-up to the ILO Declaration on Fundamental Principles and Rights at Work and, in particular, with the 2003 and 2007 Global Reports devoted to equality at work. It is meant as a tool to be used to promote this principle in many different workplace environments.

To date, the ILO Convention No. 100, adopted in 1951, has been ratified by 167 countries. However, despite this broad consensus regarding the principle enshrined in it, the pay gap between women and men remains a persistent and universal fact of the labour market. Recent statistical surveys have revealed that this gap exists in countries with very diverse economic structures and that, although the gap is decreasing in most of these countries, this progress is being achieved very slowly. The gap persists despite the significant gains women have made in terms of education and work experience.

## CAUSES OF WAGE DISCRIMINATION

A great number of studies have examined the causes of this pay gap and have led to the identification of two sets of factors. The first concerns the characteristics of individuals and of the organizations in which they work. The following are among the most important of these factors:

- Educational level and field of study;
- Work experience in the labour market and seniority in the organization or in the job held;
- Number of working hours;
- Size of organization and sector of activity.

Part of the pay gap could thus be abolished through policies aimed directly at these dimensions such as, for example, adopting flexible working hours in the workplace so as to allow parents

to balance work and family responsibilities, making it possible for mothers to continue in their careers without interruption, thus gaining more work experience and seniority.

Even when this first set of factors is taken into account, however, econometric studies have repeatedly found an unexplained residual gap between the average wages of women and men. According to Gunderson (2006), the residual gap generally stands somewhere between 5 and 15 per cent. In other words, the wage discrimination targeted by Convention No. 100 does not correspond to the whole wage gap that is observed, but only to a portion of it.

The residual gap reflects wage discrimination based on sex resulting from a second set of factors which we will come back to in detail throughout the various chapters of this Guide. Let us simply list them here:

- Stereotypes and prejudices with regard to women's work;
- Traditional job evaluation methods designed on the basis of the requirements of male-dominated jobs;
- Weaker bargaining power on the part of female workers who are less often unionized and hold a disproportionate number of precarious jobs.

At the same time, part of this residual gap can be attributed to direct discrimination between a man and a woman performing the same job, for example, a male computer specialist and a female computer specialist or a male nurse and a female nurse. This type of discrimination is also covered by Convention No. 100, but, as it is generally easy to identify, it was not included in this Guide. In order to avoid any ambiguity and to conform to what is becoming common practice, we will use the expression *pay equity* to refer to the principle of equal remuneration for work of equal value, which is the subject of this Guide.

## SCOPE OF THE PRINCIPLE OF PAY EQUITY

One of the reasons why so little progress has been achieved with regard to respecting the fundamental right to pay equity is highlighted by the Committee of Experts on the Application of Conventions and Recommendations (2007):

*...The Committee notes that difficulties in applying the Convention in law and in practice result in particular from a lack of understanding of the scope and implications of the concept of "work of equal value". This concept is a cornerstone of the Convention and lies at the heart of the fundamental right of equal remuneration for men and women for work of equal value, and the promotion of equality.*

Indeed, it must be acknowledged that the principle of pay equity can appear to be very demanding and complex at first sight. It requires adopting a new way of looking at job characteristics, modifying the perception of women's work compared to men's work, re-examining the pay systems in force in organizations and, ultimately, raising the pay for female-dominated jobs. These various steps are often described as long, costly and difficult. This opinion has been greatly influenced by the history of pay equity struggles and the early experiences of those who pioneered this process. This view does not necessarily reflect today's reality in the context of new approaches to the promotion of this principle.

Pay equity was implemented in the United States in the late 1960s and 1970s, in the public service in some states and municipalities. Joint labour-management initiatives were carried out, often under the threat of judicial proceedings. They involved a very wide range of jobs and a great number of employees. The implementation processes were long and costly, in part because of the conflict-ridden climate in which they took place and in part because of the new and unknown nature of the subject. It was in fact at this time that the first gender-neutral job evaluation methods were developed and tested. Later, pay equity was implemented in other countries, also mostly in a litigious context. Because of this past history, the impression that prevailed at the time and that still exists today is that achieving pay equity requires too many resources and unfolds in a context of strained labour relations.

Since the late 1990s, a growing number of initiatives have been taken up by unions with the aim of promoting pay equity. National and international federations of trade unions have adopted various measures to extend the implementation of pay equity in workplaces where they are involved. The Public Services International (PSI), in particular, has developed a strategy covering several dimensions, including awareness programmes and training, as well as implementing job evaluation methods in the public sector in various countries.

Pay equity initiatives have also been developed in the form of partnerships between several actors. In the early years of this millennium, a partnership was created between the European Commission, government institutions and labour associations and experts from many countries in the context of the BETSY project. Evaluation tools were created and implemented in a number of organizations. In Portugal, a partnership between labour associations, employer representatives, the ILO and the European Commission led to the development and implementation of a pay equity programme in the food service industry.

Towards the late 1980s, initiatives having a wider impact were taken up in a number of countries in the form of so-called “proactive” laws. The proactive model makes implementing pay equity in public and private organizations compulsory and has been adopted, in particular, in Sweden, Canada (Ontario and Quebec) and Finland. Generally, it is characterized by the following elements:

- ➔ It applies to all employers meeting certain criteria (size of workforce, for example);
- ➔ It imposes results-based obligations on these employers, within a specified time period;
- ➔ It specifies the main methodological criteria to be used to achieve these results;
- ➔ It is carried out in a joint effort by the employer and employee representatives.

In order to facilitate the implementation of this model, new methodologies have been developed, which are more flexible and easier to interpret and implement. In most cases, public bodies have produced a wide range of information documents and developed training sessions, as well as offering other types of support for the actors in this field. At the same time, implementing pay equity has increasingly emerged as a highly effective way to improve human resource management and increase the efficiency of the pay system within an organization. Thus, it is possible to promote pay equity today in a context that has moved away from the unwieldiness and high cost of the judicial model. This old model can now be replaced by a new model which brings together equality and efficiency and is simpler to develop and implement.

## BENEFITS OF PAY EQUITY

The main benefit of implementing pay equity is the actual sanctioning of female workers' right to equality, whereby their skills are recognized and their job tasks are accorded value, not only symbolically, but in very concrete terms, through pay adjustments. It is therefore a question of dignity and recognition on the part of their superiors and co-workers, the positive impacts of which have been emphasized by many female workers. Pay adjustments can also have a significant impact on these workers' capacity to provide a decent standard of living for their families and increase their financial security in retirement.

Beyond the positive impacts on female workers, pay equity initiatives that have been carried out through partnerships and proactive laws have also resulted in significant positive impacts for employers. These impacts have been in areas as diverse as human resource management, the efficient use of skills, labour relations and the attractiveness of the organization. The following table summarizes the various benefits observed in cases where pay equity has been implemented.<sup>1</sup>

**Table 1.1 Synthesis of benefits of pay equity**

BENEFITS	INDICATORS
<b>Improvement in human resource management practices</b>	
Greater efficiency in staffing practices	Less time devoted by employees to the recruitment process
Greater effectiveness of skills development	Increased productivity and quality of work
Improved retention of new employees at the end of their probationary period	Decreases in recruiting and training costs
Coherent pay policy and harmonized pay structure based on the value of jobs	Improved compensation management: time savings for employees in charge of managing the pay system More efficient distribution of the total payroll among various jobs
<b>Highlighting the undervalued skills of female workers</b>	
Improved quality of products and services	Fewer errors or customer complaints
<b>Better perception of workplace equity and improved labour relations</b>	
Greater job satisfaction and stronger commitment to the organization	Lower employee turnover, absenteeism and related costs
Greater speed in resolving complaints or conflicts	Less time devoted to resolving conflicts
Fewer conflicts	Ibid.
<b>Impacts on the organization's reputation and attractiveness</b>	
Lower costs related to recruiting qualified personnel	Less time devoted to the search for qualified candidates, especially in high demand occupations
Reduction in time that positions remain vacant	Value of stalled production or lost contracts

The benefits are thus manifold and among the conditions favouring their achievement are, in particular, joint action by the parties involved, adequate training of those responsible and transparency in the decisions taken in the various steps along the way.

<sup>1</sup> For further details, see Chicha (2006).

## CONTENT OF THE GUIDE

This Guide is based on several studies from various countries and on the experience of practitioners as well as that gained by the author through her work as a researcher and trainer in Canada and other countries. It analyses the overall process, from selecting which jobs to evaluate, through the various phases of job evaluation, to equalizing pay. The goal of the Guide is to set out the various methodological components of the process and to explain the criteria which should be met in order to avoid discriminatory practices.

The Guide is aimed both at employer and union representatives responsible for implementing a pay equity programme and at practitioners and trainers. Its content can be adapted to different economic and organizational contexts and to large and small organizations. Working together through each of the steps described will allow all those responsible for implementing the programme to gain more detailed knowledge of the workplace, take a critical look at some facets which may have become obsolete or inappropriate due to technological or organizational changes, and, especially, discover aspects of jobs that they were not familiar with, in particular pertaining to jobs held by women.

Methodological flexibility is built into the content of the Guide. In some workplaces, such as small organizations, the steps can be simplified. In others, on the other hand, the steps required will be more detailed and more extensive. Those implementing the programme will therefore have a great deal of leeway in using it, subject to the obligation to avoid gender bias. The Guide will be particularly useful and easier to apply if it is complemented with proper training.

Pay equity must be achieved through a planned and structured process, often called a *pay equity programme*, involving the following steps:

- ➔ Identifying female-dominated jobs and male-dominated jobs to be compared;
- ➔ Choosing a job evaluation method;
- ➔ Developing tools for data collection and gathering data on the jobs;
- ➔ Analysing the questionnaire results;
- ➔ Determining the value of jobs;
- ➔ Estimating wage gaps between jobs of equal value;
- ➔ Making pay adjustments so as to achieve pay equity.

The first six steps represent a diagnosis of the situation, leading to a conclusion about whether or not a pay gap exists between jobs of equal value. If it is determined that there is indeed a gap, users are directed to the seventh step, that is, making pay adjustments. When it is determined that no gap exists, no such adjustments will be required.

Each chapter presents one or two steps in the process of implementing pay equity within an organization. It explains the goals, various operations to be carried out, criteria for gender neutrality and proper practices to follow. Checklists are presented for quick reference for users.<sup>2</sup> Lastly, most chapters end with a brief outline of the benefits that can be gained from the step covered.

<sup>2</sup> This Guide was based on many sources from several countries. These sources, which share many common points, are presented in the Bibliography along with the corresponding web sites where documents may be downloaded. To avoid redundancy and unwieldiness, it was decided not to pepper the text with repeated bibliographical references, especially given the fact that these sources were often enriched and adapted.





## CONTENTS - CHAPTER 2

Objectives	7
Logistics of implementing pay equity in an enterprise	7
The Pay Equity Committee	9
Composition of the Pay Equity Committee	10
Designating Committee members	11
Training	11
Information	12
Operating rules	13
Benefits	13
Checklist	14

# CHAPTER 2 The Pay Equity Committee

## OBJECTIVES

Implementing a pay equity programme involves a set of tasks that must be carried out in a rigorous manner with the aim of identifying and eliminating any discrimination that may exist in the pay system. This chapter sets out the major steps that need to be carried out to accomplish this process, the logistical components that need to be taken into account and the ways in which employees can participate.

## LOGISTICS OF IMPLEMENTING PAY EQUITY IN AN ENTERPRISE

The process of setting up and implementing a pay equity programme will run smoothly and efficiently if this process has been well-planned. Based on the experience of those who have implemented such programmes in various countries, the following components should be taken into consideration beforehand:

- Planning for the financial and human **resources** that will be needed. Financial resources mainly refer to the administrative costs involved in the project and the budget that will be devoted to its various activities: questionnaires, consultants, internal communication, etc. They do not include any amounts that will be allocated to pay adjustments, which may certainly need to be provided for, but the amount of which cannot be determined ahead of time. Human resources refer to the number of individuals that will be assigned to the process and the time required by their participation, for example, in number of hours per week or month;
- Determining the procedures for the **training** to be provided. Pay equity depends both on technical knowledge in the areas of job evaluation and remuneration and on knowledge related to discrimination, stereotypes and prejudice with regard to women's work and the causes of inequality based on sex. Pre-programme training will be necessary for those who will be in charge of implementing pay equity. It is thus important to decide who will give this training and how it will be carried out;



- Deciding on whether **consultants** will be hired and establishing the necessary recruitment procedures. If the training received by those in charge of implementing pay equity is sufficient, the role of a consultant becomes less necessary. The trainer can also act as a consultant in working out some of the more complex points;
- Establishing a **communication strategy**. Given that a pay equity programme pertains to a very delicate matter, that is, relative pay within the enterprise, it will be important to make sure that employees' fears are eased as much as possible. It is often recommended that a communication strategy be established right from the beginning of the process in order to prevent rumours from developing. Such a strategy can take various forms, depending on the type of organization and the means at its disposal (Saba 2000);
- Establishing the **work plan schedule**. It will be necessary to decide when each step will be carried out and the date at which the work plan activities will come to an end and wage adjustments will begin to be paid out;
- Deciding which type of **joint employer-employee participation** will be adopted. To date, experience has often shown that setting up a joint employer-employee process has major advantages in terms of equity and effectiveness, as it:
  - Introduces a new way of looking at jobs by comparing diverse opinions expressed by human resource managers and employees;
  - Ensures that the process and results will be seen as legitimate in the eyes of employees;
  - Distributes the workload among many different individuals.

The best way to ensure that these objectives will be achieved is to organize participation in the form of a Committee whose composition and roles, as well as the conditions under which it will operate, are clearly defined.



## THE PAY EQUITY COMMITTEE

In a small organization, joint employer-employee participation can be informal. On the other hand, in a large organization, it can be highly structured and involve clearly defined responsibilities and procedures. In a small organization, joint participation can take the form of a very small Committee composed, for example, of one employer representative and two employee representatives. The work of such a Committee will be made easier if they can resort to expertise and information documents made available by a specialized government body. In Sweden, Great Britain and Canada (in the provinces of Ontario and Quebec) in particular, public bodies have produced simplified documents on implementing pay equity, aimed at small organizations. Models exist which are flexible and well-suited to small and medium-sized enterprises. Moreover, as managers of small and medium-sized enterprises have pointed out, the resulting benefits of pay equity are considerable.<sup>3</sup> In the case of a small enterprise with approximately ten jobs<sup>4</sup> to be evaluated, the programme can be completed in a short space of time – as little as a week – if those in charge of the process have been given pertinent training beforehand (see further below).

In a medium-sized or large enterprise, a larger and more structured Committee can be set up, ensuring that the various parties will be represented, that is, the employer, unionized employees and non-unionized employees. If there are a considerable number of jobs to be evaluated, steps 1 to 5 could take up to two years to complete, especially when those in charge of the process devote only a few hours per week to it. In a very large organization or in the public service where the number of different jobs is very high, that is, 150 or even more, the process could take up to three years to complete, but these cases are exceptional.

### Roles of the Pay Equity Committee

The roles played by the Committee should be quite broadly defined, given that the various steps of a pay equity programme, as described above, are closely interdependent. Identifying the gender predominance of jobs allows participants, right from the start, to become familiar with the various jobs in the enterprise and their main characteristics; the choice or adaptation of a job evaluation method forces participants to understand what constitutes gender bias related to job evaluation and to develop skilled use of this tool, which is so important for the process; data collection is closely tied to the job evaluation method used since the questionnaire is developed based on the factors and sub-factors identified. Consequently, it would appear to be logical and desirable that all the steps in the programme be carried out by the same group of people. A body of knowledge and skills is gradually acquired along the way and it would be unfortunate not to make the best use of this asset throughout the entire exercise. The most suitable option is therefore that a single Pay Equity Committee be responsible for all the steps in the programme, or at least the first five, and that its composition, insofar as is possible, remain stable.<sup>5</sup> This will allow for effective progress and:

- ➔ ensure consistency in the process;
- ➔ lead to the development of solid in-house expertise in the areas of equality and job evaluation;
- ➔ reduce delays caused when Committee members change between steps.

<sup>3</sup> *Comparative analysis of promoting pay equity : models and impacts*, Marie-Thérèse Chicha, 2006 ; International Labour Office, InFocus Programme on Promoting the Declaration on Fundamental Principles and Rights at Work. p. 9.

<sup>4</sup> It should be specified that these are jobs and not employees. There may be 10 jobs but 20 or so employees.

<sup>5</sup> Indeed, the longer the process is stretched out, the higher the risk of having to replace one or more Committee members.

## Composition of the Pay Equity Committee

When deciding on the composition of the Pay Equity Committee, the following points should be taken into account:

- include members who have as direct as possible knowledge of the main jobs to be evaluated;
- include members who are willing to recognize and eliminate any gender bias that might affect the process or the evaluation tools;
- allow female workers to play a significant role in this process which concerns them most directly.

To this end, a number of criteria should be respected:

### ■ PRESENCE OF EMPLOYEES

There should be a significant presence of employees in the Committee in order to ensure that the characteristics of the jobs to be evaluated are more fully taken into account. Their presence also legitimizes the process in the eyes of their co-workers and makes the results easier for the latter to accept. To respond to these concerns, it is recommended that employees make up at least half of the members of the Committee.

### ■ PRESENCE OF WOMEN

Among employee Committee members, women should be well represented in order to:

- help better identify the overlooked requirements of female jobs;
- exert an influence over the decisions.

This representation could exceed 50 per cent, depending on the number of female employees in the enterprise and the number of predominantly female jobs classes to be evaluated.

It is recommended that the female employees chosen to participate in the implementation come from female-dominated jobs (for a definition of these jobs, see Chapter 3). Given the issues involved in the exercise, *female-dominated jobs involving the highest number of employees should have priority.*

*For example, in a bank where tellers represent the most important female-dominated job in terms of numbers in relation to only a small number of female administrative assistants, it is recommended that a female teller be asked to sit on the steering Committee.*

Lastly, if *female workers from ethnic minorities* are concentrated in some jobs, they should also be represented because their jobs are likely to be particularly disadvantaged in terms of pay.

*For example, if in a garment factory, it is observed that seamstresses are mostly women from ethnic minorities, it is recommended that these employees be asked to participate in the Committee.*

In the case of large enterprises, there should be no hesitation in choosing *employees from different hierarchical levels*. Since women are concentrated in subordinate jobs, it is sometimes feared that they will not be able to clearly understand the evaluation process. However, experience has shown that with adequate training and when being part of a group that holds no prejudice, they can be excellent evaluators.



## DESIGNATING COMMITTEE MEMBERS

Participants in the joint process, whether or not conducted by means of a Committee, should be designated by the parties they represent.

- ➔ the employer, for management representatives;
- ➔ the trade union executive, for unionized members.

It is important that union and management representatives clearly distinguish the process of achieving pay equity from the process of negotiating a collective agreement. Pay equity is a fundamental right which must not be subject to concessions or compromises that characterize collective agreement negotiations. Distinguishing between the issues of pay equity and those of collective agreements also helps to limit the potential conflicts between women's and men's interests in trade unions.

**In non-unionized settings, employees should also participate in the implementation of pay equity.** Since, in general, they do not have collective structures, the employer should set aside time for them to elect their representatives.

## TRAINING

It is unanimously recognized that to perform their tasks effectively, Committee members should receive basic training which includes two components: the dynamics of wage discrimination and the methodological aspects related to implementing pay equity.

**The purpose of the first component is to help identify the prejudices and stereotypes** which can appear in different steps of the programme and should deal with the following points:

- ➔ the factors which account for wage discrimination;
- ➔ the influence of prejudices and stereotypes on job perception;
- ➔ the influence of prejudices and stereotypes on evaluation methods;
- ➔ the influence of prejudices and stereotypes on the compensation systems.

**The purpose of the second component is to help the representatives carry out the process in a rigorous manner** and understand the proposals made by internal or external experts. In particular it should cover:

- ➔ the evaluation method;
- ➔ the data collection procedures;
- ➔ the evaluation procedures;
- ➔ the components of total compensation;
- ➔ the values and the mission of the enterprise.

These training sessions could be provided through any of the following approaches:

- ➔ discussion groups;
- ➔ simulation exercises;
- ➔ case studies.

Experience has sometimes shown that it is also useful to provide training in group dynamics in order to facilitate interactions between Committee members.

## INFORMATION

Complete and transparent information is an essential condition in order for the process to run smoothly and so that employees will not be sceptical of the results. Two types of information must be transmitted.

### ■ INFORMATION INTENDED FOR MEMBERS OF COMMITTEES

In order for Committee members to perform their tasks, the employer must provide them with the information they need, in particular that related to staff, their status, the components of their total compensation schemes, any changes that take place in the enterprise once pay equity has been introduced, etc.

Given the sensitive nature of certain information, those in charge of implementing the process must undertake in writing to guarantee its confidentiality. This information should only be used in the context of pay equity processes.

### ■ INFORMATION INTENDED FOR EMPLOYEES

It is essential that employees be periodically informed of the main steps achieved, for example:

- ➔ The establishment and composition of the Committee;
- ➔ The work plan schedule;
- ➔ The jobs to be evaluated;
- ➔ Data collection on the jobs to be evaluated;
- ➔ The results of the evaluation;
- ➔ The pay adjustments.

Whether pertaining to the value assigned to jobs or to pay adjustments, none of this information should be personal: the data should be communicated in terms of jobs and not in terms of employee.

## OPERATING RULES

The Committees' operating rules should be established right at the beginning.

Although **use of consensus rather than voting is time consuming**, especially at the beginning, it has several advantages:

- ➔ It allows for different viewpoints to be heard;
- ➔ It leads to an in-depth consideration of the different facets of an issue;
- ➔ The decisions are more likely to be supported by all of the employees.

For members to be able to fully perform their tasks, different types of guarantees should be provided for:

**PROTECTION FROM REPRISALS:** for Committee members to be able to perform their work freely, they should be protected from reprisals which could result from any position they may have taken or opinions they may have expressed in the Committee;

**MAINTAINING THEIR SALARY:** time spent on Committee work and on training should be considered to be work time and be paid accordingly;

**SCHEDULING OF MEETINGS:** the schedules planned for meetings should not prevent employees with family responsibilities from participating since this would particularly penalize women.

## BENEFITS

Joint participation of employees, in particular in a structured Committee, contributes to:

- Legitimizing the process and the results in the eyes of employees, especially if the Committee members have the reputation of being impartial and upright;
- Ensuring that decisions are based on better knowledge of the jobs and reducing the risk of errors and discrimination, provided that the Committee members have received training covering the two components mentioned (see 'Training' above) and that transparent and complete information has been made available to them;
- Avoiding the extensive use of external consultants and its related costs;
- Improving labour relations when Committee members have learned to work towards achieving a common goal and to proceed by consensus.

In the case of a very large enterprise with numerous establishments and a wide range of very different jobs (one hundred or more), two years can be provided for if those responsible for the process only spend a few hours on it per week.



- ☐ Was a Pay Equity Committee created right at the beginning of the process?
- ☐ Has this Committee clearly defined its mandate?
- ☐ Has the mandate been communicated to all employees?
- ☐ Is there at least 50% employee representation on the Committee?
- ☐ Do women form the majority of employee members?
- ☐ Are female-dominated jobs including the largest number of employees represented?
- ☐ Are female workers from ethnic minorities represented in the Committee?
- ☐ In non-unionized enterprises, are employees well represented within the Committee?
- ☐ In unionized enterprises, are the interests of non-unionized employees equally taken into account?
- ☐ Have Committee members received joint training?
- ☐ Does this training cover both gender bias and methodological aspects?

- ☐ Has the employer made all of the information needed by Committee members to accomplish their tasks available?
- ☐ Have Committee members undertaken to maintain confidentiality of this information?
- ☐ Were the operating rules for the Committee established at the outset?
- ☐ Is decision-making based on consensus to the extent possible?
- ☐ Are members of the Committee protected from all reprisals linked to their participation?
- ☐ Is time spent on Committee activities considered to be work time and paid accordingly?
- ☐ Does the scheduling of meetings take account of the requirements related to balancing work and family responsibilities?

**If you answered “No” to any of these questions, you will need to examine the reasons why. If a satisfactory explanation cannot be found, then you will need to modify your decision.**







## CONTENTS - CHAPTER 3

Objectives and sequence	17
Drawing up a list of the jobs in the enterprise	18
Gender predominance of jobs and wage discrimination	19
Absence of male comparators	21
Benefits	22
Checklist	23

# CHAPTER 3

## Selecting which jobs to compare

### OBJECTIVES

This chapter explains how to select which jobs to compare within the enterprise in order to identify wage gaps due to discrimination. The job comparison criterion is linked to the ground of discrimination being fought. For example, if it is a question of correcting wage gaps due to discrimination on the basis of sex, the pay levels of female-dominated jobs should be compared to those of male-dominated jobs. If it is a question of discrimination based on ethnic origin, jobs performed by people of ethnic or foreign origin should be compared to those performed by people who do not share these characteristics. In this Guide, emphasis will be put on sex as the ground of discrimination.

THE SEQUENCE OF OPERATIONS IS AS FOLLOWS:

Drawing up a list of the jobs in the enterprise

Determining whether these jobs are male- or female-dominated

Ensuring that the criteria used to determine predominance are rigorous

Ensuring that there is no gender bias

If necessary, determining which strategy to use in the absence of male comparators

## DRAWING UP A LIST OF JOBS IN THE ENTERPRISE

In a pay equity programme, it is generally recommended that all jobs in an enterprise be included. Methods have been developed that make it possible simultaneously to evaluate a great variety of jobs, including, for example, those of mechanics, nurses, secretaries or engineers. The same method must be used to evaluate all of these jobs in order to be able to compare them to one another. If one method is used to evaluate blue-collar jobs, which are generally held by men, while another method is used to evaluate office jobs, which are generally held by women, this will automatically mean that the blue-collar jobs are being exclusively compared among themselves, while the same holds true for the office jobs. Part of wage discrimination based on sex will thus be impossible to correct or even to measure.

Often, in enterprises, jobs requiring skills or involving duties or responsibilities that are partially different can be found under the same job title. Listing jobs with different requirements under the same title will lead to many problems later on when it comes to job evaluation.

*For example: In a wholesale company, the title “salesperson” covers both employees who are in charge of sales of state-of-the-art computer equipment to other companies, and employees who sell small basic equipment to retailers. While these two positions share the same job title, they require different types of knowledge, much more detailed and extensive in the first case than in the second. These positions should be distinguished and given different job titles.*

On the other hand, sometimes similar jobs are found under different job titles. Perhaps in the past these jobs actually did involve different responsibilities or qualifications which may have become blurred with changes in technology, while their respective job titles have remained the same. In this case, for reasons of simplicity, it would be better to group them together to avoid weighing down the process unnecessarily.

The questions that must be addressed right from the start in order to properly define the jobs within an enterprise for pay equity purposes are the following:

**Do the jobs being considered involve similar responsibilities or duties?** If this is not the case, even if the jobs share the same job title, it will be necessary to separate them and give them different titles, such as, in the example cited above, firm-to-firm sales representative and retail sales representative.

**Do the jobs being considered require similar qualifications?** For example, in a pay equity programme implemented in the food service industry, the term “chef” might be used in both large and small restaurants. However, when job qualifications are examined closely, it can be observed that a chef in a large restaurant must be able to manage a team of specialized assistants and plan major gastronomic events, etc., whereas these skills would not be required of a chef in a small restaurant. In the case of sectoral job evaluation the Committee should distinguish between these two jobs by assigning them different job titles and, subsequently, evaluating them separately.

## GENDER PREDOMINANCE OF JOBS AND WAGE DISCRIMINATION

Identifying the gender predominance of jobs is a vital step, given that it is known that prejudices and stereotypes about female jobs are a major cause of women's work being undervalued and underpaid.

It is therefore important, right from the start, to identify which jobs within the enterprise are female-dominated, since these jobs are likely to be subject to wage discrimination. It is also important to identify male-dominated jobs against which the former can be compared in order to assess wage gaps.

It is possible, as is done in some countries such as Sweden for example, to compare female-dominated jobs with all other jobs in the organization. In this case, it is not necessary to identify male-dominated jobs, thus simplifying the process. On the other hand, comparators include so-called "neutral" jobs, that is, jobs that cannot be associated with women or with men and which are therefore not affected by the issue of discrimination. This approach, however, carries the risk of resulting in a less accurate measure of discriminatory wage gaps.

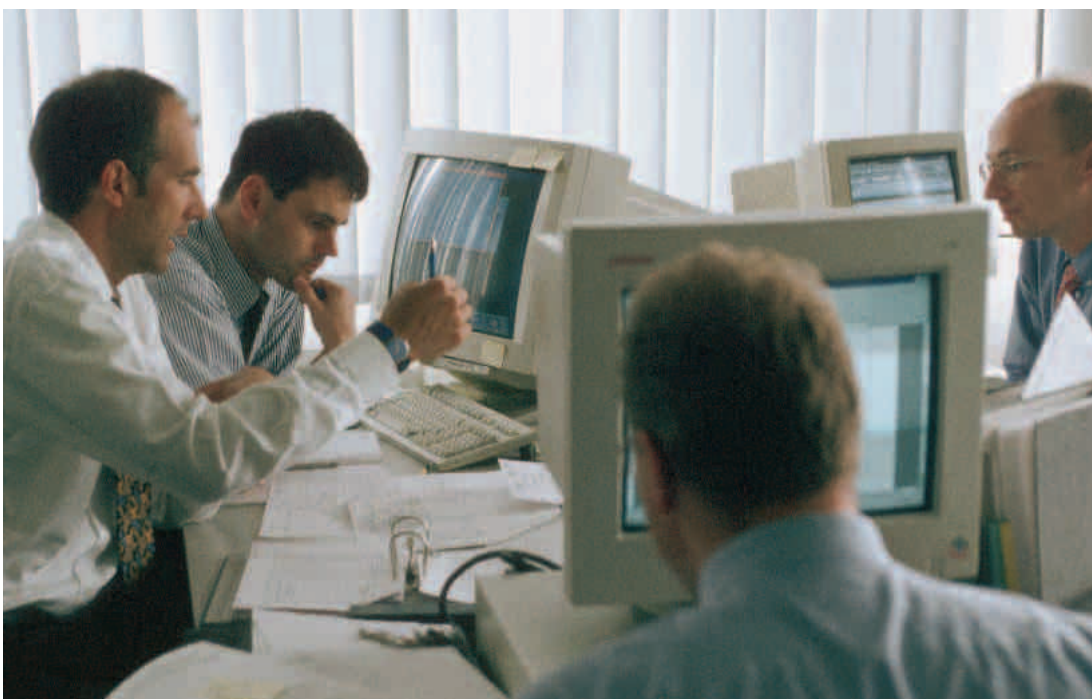
### Criteria for determining predominance

Several of the criteria for determining predominance can be used together or separately. These criteria were chosen because several studies have demonstrated their impact on women's work being undervalued and underpaid. They are therefore good indicators for identifying jobs which are likely to be subject to wage discrimination.

#### Percentage of women or men

**One criterion which makes it possible to decide whether a job is female- or male-dominated is the percentage of women or men performing the job.**

In fact, statistics show that the higher the proportion of women performing a job, the lower the corresponding pay and vice versa. In some countries, a job is considered to be female- or male-dominated if women or men represent at least 60 per cent of those performing the job. In other countries, the threshold is set at 70 per cent. It is important to realize that the





higher the threshold is set, the lower the number of jobs identified as gender-dominated will be. There are no conclusive studies indicating what the optimal threshold should be.

When calculating the percentage, it is important to take into account all employees, regardless of their status, because high rates of precariousness are often found among female jobs. The following example shows that by excluding precarious employees from the count, there is a risk of changing the predominance of the corresponding job and thus unfairly preventing these women workers from benefiting from pay equity.

*For example, 20 employees hold a given job, including:*

*4 men and 1 woman with permanent status and 4 men and 11 women with temporary status;*

*If all temporary jobs are excluded when determining the gender predominance of this job, it will be determined to be male-dominated, at a rate of 80 per cent (4/5). Thus, all of the employees holding this job will be denied the benefits of pay equity;*

*If temporary jobs are included when determining the gender predominance of this job, it will be determined to be female-dominated, at a rate of 60 per cent (12/20). Therefore, all of the employees holding this job, including, in particular, the female workers with temporary status, will potentially benefit from pay equity.*

**It is important to include all of the organization's employees, whether they be full-time or part-time, on indeterminate or fixed-term contracts.**

#### **Recent history of the job**

It can happen, in the case where the number of employees in a given occupation is low, say four or five employees, that the departure of two of these employees will modify the percentage and consequently the determined predominance of the job.

*For example: A company had been employing ten draftspersons since 2000, including just one woman. In 2005, several of these draftspersons retired and were replaced by others, so that in 2006, there were now 7 women and 3 men among the group. It would be absurd to consider that this occupation had become female-dominated and was therefore likely to be subject to wage discrimination because the proportion of women performing the job went from 20 to 70 per cent within the space of one year. This is why, in some Canadian provinces such as Ontario and Quebec,<sup>6</sup> it is suggested that the recent history of a job be taken into consideration. Such a practice would lead the job cited in this example to be considered, in 2006, as a male-dominated job.*

<sup>6</sup> Canadian jurisdictions have passed proactive pay equity laws.



How far back in time should such an analysis go? In principle, **it would be necessary to go back to the time when the wages for the job were set**. If the occupation was male-dominated at that time, there is good reason to maintain this characteristic at the time the pay equity exercise is carried out. This exercise is more straightforward when dealing with unionized employees because, in this case, the analysis can be based on the situation that existed on the date the last collective agreement was signed. Otherwise, a retroactive period of five to six years should suffice. This approach also ensures stability in the results of the exercise. Otherwise, any change in an occupation's gender predominance would throw the results into doubt.

### Stereotypes

Lastly, another relevant indicator to consider is whether the job is stereotypically a female job – nurse, primary school teacher, receptionist or cashier – or male job – senior manager, programmer/analyst, truck driver or electrician. The lone receptionist's position in a company may be held by a man. Nonetheless, this job is stereotypically a woman's job and the pay is likely to be affected by this stereotype. Those responsible for carrying out the pay equity process could classify it among female-dominated jobs.

How can stereotypes be identified? There are several possible indicators:

- Global statistics on the labour market;
- The female or male profile of a job in a given sector (for example, the chefs in expensive restaurants tend to be men while the cooks in ordinary restaurants tend to be women; the same pattern holds true for waiters and waitresses);
- The female or male designation commonly associated with the job (for example, the ongoing spontaneous use of “policeman” and “cleaning woman.”)

**In practice, those responsible for this step will have to decide on the gender predominance of each job, by comparing the results of the three indicators and, if they are not consistent, by choosing the option that appears most relevant to them.**

**When none of the indicators are relevant, the job can be considered to be neutral. In this case, it will not be included in wage comparisons.**

## ABSENCE OF MALE COMPARATORS

In some enterprises in highly female-dominated sectors, there may be no male-dominated jobs, even when all employees are taken into account. Since, traditionally, comparisons are made within an enterprise, it can therefore appear to be impossible to assess and correct wage discrimination. At the same time, female-dominated sectors, such as the clothing industry, often feature low wages, precarious employment and a high concentration of migrant women workers.

One way out of this impasse may be found by looking to industry-level pay equity initiatives or initiatives taken by sector-based Committees. Male-dominated jobs may thus be found in other companies in the same sector, which could be used for comparison.

## BENEFITS

This step, which is often overlooked in pay equity programmes, has several benefits, including, the following:

- It leads to a more coherent listing of job titles and job content, which then facilitates human resources management;
- It familiarizes the members of the Pay Equity Committee with the notion of stereotypes and their impact, which in turn allows them to gain a better understanding of the way these stereotypes influence the various facets of job evaluation;
- It allows for the better identification of occupational segregation existing in the enterprise and thus for the development of equal employment opportunity programmes.



## Checklist

- ☐ Have all the jobs in the enterprise been included in the programme?
- ☐ Has it been determined that jobs involving different duties or qualifications do not come under the same job title?
- ☐ Has it been determined that similar jobs are not found under two different job titles?
- ☐ Have female- and male-dominated jobs been determined?
- ☐ Are the criteria used to determine gender predominance multidimensional?
- ☐ Does the number of employees holding gender-dominated jobs include all employees in the enterprise, whether they be full-time or part-time, on indeterminate or fixed-term contracts?
- ☐ In enterprises where there are no male comparators, have all possible options been explored to implement pay equity?

**If you answered “No” to any of these questions, you will need to examine the reasons why. If a satisfactory explanation cannot be found, then you will need to modify your decision.**



## CONTENTS - CHAPTER 4

Objectives and sequence	25
Selecting the method	26
Evaluation factors	27
Sub-factors	28
Qualifications: sub-factors	29
Effort: sub-factors	31
Responsibility: sub-factors	32
Working conditions: sub-factors	34
Levels of sub-factors	36
Benefits	39
Checklist	40

# CHAPTER 4 Job evaluation methods

## OBJECTIVES

The goal of a job evaluation method is to assess, based on common criteria, the characteristics of the jobs within an enterprise in order to establish their relative value. In terms of pay equity, more specifically, such a method makes it possible to ensure that female-dominated jobs and male-dominated jobs of equal value are subject to the same pay.

In general, the document or Guide presenting the job evaluation method should include two parts:

The first part sets out the selected factors and sub-factors in the method;

The second part explains how these factors and sub-factors should be interpreted and includes concrete illustrations for this purpose pertaining to the enterprise or the sector considered.

THE SEQUENCE OF OPERATIONS IS AS FOLLOWS:

Selecting the method

Selecting or adapting the evaluation sub-factors

Ensuring that the sub-factors adequately cover overlooked aspects of women's work

Ensuring that the sub-factors are rigorous

Determining which dimensions will be used to measure sub-factors

Determining the number of levels per sub-factor and defining them

Ensuring that the levels are rigorous and gender-neutral

Ensuring that the entire method has been recorded clearly and precisely in writing



## SELECTING THE METHOD

### Type of method

There are two types of evaluation methods: global methods and analytical methods. The first, such as the ranking and classification methods, compares jobs and classifies them according to basic job requirements, without carrying out a detailed analysis of their content. A major disadvantage of the global approach is that it does not allow for the identification and elimination of the influence of prejudices and stereotypes which cause predominantly female jobs to be undervalued. This is why this method is often not recommended for pay equity purposes.

Analytical methods make it possible for all the requirements of all jobs in an enterprise to be systematically examined, evaluated and compared, using common, precise and detailed criteria. An analytical method based on points and factors, usually referred to as the point method, is currently recognized as the most appropriate evaluation method for pay equity purposes. This method forms the basis of the methodology presented in this Guide.

### Developing the method

When selecting a gender-neutral evaluation method which is well suited to the specific characteristics of the enterprise, there are several possible options:

- Modifying an evaluation method which is currently being used in the enterprise;
- Developing a new evaluation method based on documents which are available for this purpose;<sup>7</sup>
- Adapting an evaluation method developed for enterprises in the same sector, when sector-based initiatives have been carried out;
- Acquiring a method developed by a consultant. A great variety of such methods are available. However, some of these methods do not take into account, or give very little consideration to the issues related to pay equity. Before selecting a method developed by a consultant, a few questions need to be addressed, in particular whether the method fits the criteria of gender neutrality.



<sup>7</sup> The list of these documents and how they can be obtained is indicated in the Bibliography of this Guide.

### Checklist of elements to verify when selecting a method developed by a consultant:

- ☐ Where does the method come from? When was it developed? What types of jobs or sectors was it developed for? In what work context is it most often used?
- ☐ What changes have been introduced in order to adapt it to pay equity purposes?
- ☐ Can the method be adapted to suit the gender-predominant job classes in your enterprise?
- ☐ Is the consultant willing to allow members of the Committee in charge of the programme, where such a Committee exists, to participate fully in the process?
- ☐ Does the method assess all four evaluation factors: qualifications, effort, responsibility and working conditions? Have other factors which do not fit into these four categories of factors been unduly added?
- ☐ Do the sub-factor definitions contain sexist components? Do they take into account the aspects of women's jobs which are often overlooked?
- ☐ Are the evaluation tools, such as the questionnaire, free of discriminatory bias?
- ☐ Is the implementation process recommended likely to create discriminatory bias?
- ☐ How has the consultant ensured that the method, tools and process are entirely free of sex-based discrimination? Are there reliable means by which to monitor this?

## EVALUATION FACTORS

Most point methods of job evaluation include four basic factors:

- ➔ Qualifications;
- ➔ Effort;
- ➔ Responsibility;
- ➔ The conditions under which the work is performed.

According to evaluation and compensation experts, **these four factors are essential and sufficient** for evaluating all the tasks performed in an organization, regardless of which economic sector the enterprise belongs to.

Each of the four factors must be used to evaluate each job.

*For example: Within a given enterprise, it would not be acceptable to evaluate electricians based on qualifications, responsibility, effort and working conditions, while evaluating secretaries based only on qualifications, effort and responsibility, on the pretext that secretaries have good working conditions. Secretaries also work under difficult conditions, and it is important to evaluate this factor for them as well.*



## SUB-FACTORS

The four basic factors should be broken down into **sub-factors**, which will make it possible to take into account the more detailed and varied characteristics of the different types of jobs in each enterprise.<sup>8</sup> For example, the *qualifications* factor can be broken down into work-related knowledge, manual dexterity and interpersonal skills, while the *effort* factor can be broken down into mental effort and physical effort, and so forth.

Most methods include between **10 and 16 sub-factors** in total, depending on the size of the enterprise and the variety of jobs to be evaluated. While the sub-factors chosen must come under one of the four basic factors, the choice and the way they are interpreted in concrete terms can vary depending on the economic sector. Two conditions must be strictly observed: rigorous methodology and gender neutrality.

### Rigorous methodology

#### Adapting the method to the organization

Selecting which jobs to compare, which was carried out in the previous step, allowed those responsible for pay equity to acquire information on the various work groups and types of jobs and tasks existing in the enterprise. This knowledge will be highly useful now when it comes to adapting the content of the evaluation method to the specific characteristics of the organization.

Small organizations will need a relatively simple method that can include a total of seven to eight sub-factors.

#### Avoiding ambiguity

Disparate elements should not be grouped together under a single sub-factor so that evaluators will have trouble interpreting it. This would be the case, for example, if *handling heavy objects*, *taxing working positions* and *visual attention*, three very different dimensions of physical effort, were grouped together under one sub-factor. The lack of precision in the definition of this sub-factor would likely lead to unreliable results:

- ➔ Assessing this sub-factor would be very complex;
- ➔ Jobs simultaneously involving all three requirements would likely be undervalued.

#### Not counting a sub-factor twice

Sub-factors should not be counted twice. For example, some evaluation methods designed mainly for manufacturing jobs included a *qualifications* sub-factor called *ability to handle heavy equipment* and an *effort* sub-factor called moving heavy objects. If the same factor is counted twice, jobs whose requirements are rated particularly high in this regard will be overvalued compared to other jobs.

### Gender neutrality

Predominantly female jobs often involve different requirements from those of predominantly male jobs, whether in terms of qualifications, effort, responsibility or working conditions. Until recently, female-dominated jobs were evaluated based on methods designed mainly for male-dominated jobs, which partly accounts for wage discrimination. It is important to be vigilant when selecting the method and to **ensure that its content is equally tailored to both female- and male-dominated jobs**.

<sup>8</sup> A small number of methods, such as the ABAKABA method (Katz and Baitsch, 1996), use a different approach to define and categorize the various criteria, but the variables taken into account are comparable.

### Selecting sub-factors

There is room for a great deal of leeway when selecting sub-factors. Those responsible for the pay equity programme must endeavour to match the selected sub-factors as closely as possible with the jobs in the enterprise. As will be seen later, when carrying out this task, it is important to **include the sub-factors associated with women's jobs which are often overlooked in evaluation methods.**

### Example of sub-factors

It is important that the evaluation sub-factors be clearly defined; the explanations contained in the method's companion document should be illustrated with **examples taken from the workplace and corresponding to both female-dominated and male-dominated jobs.** If the examples used to illustrate a sub-factor refer only to predominantly male jobs, the same tendency will be found in data collection tools (including the questionnaire) and in the evaluators' decisions. This will have the effect of maintaining the invisible nature of the overlooked aspects of predominantly female jobs.

In the sections that follow, sub-factors that come under the four main factors will be examined<sup>9</sup> from the perspective of gender neutrality. Prejudices and stereotypes that can distort the evaluation will be pointed out and aspects of some female-dominated jobs which are often overlooked will be brought to light.



## QUALIFICATIONS: SUB-FACTORS

Qualifications refer to knowledge and skills which are required for a job and which may have been acquired in various ways, such as through:

- ➔ Academic or vocational training certified by a diploma;
- ➔ Paid work experience in the labour market;
- ➔ Informal training;
- ➔ Volunteer work.

**What is important is not how the qualifications were acquired but rather that their content corresponds to the requirements of the job being evaluated.**

### Prejudices and stereotypes regarding qualifications

Many prejudices and stereotypes lead to the undervaluing of qualifications required by female-dominated jobs.

- **Believing that skills required by female-dominated jobs**, such as interpersonal skills, communication skills or fine manual dexterity **are innate and constitute personal qualities rather than job qualifications.** It is essential to include all of the qualifications that are required for the jobs being evaluated, regardless of how these qualifications were acquired.

*For example: Nursing requires a great deal of empathy, know-how and patience when it comes to relations with patients and their families. Whether this skill is innate or acquired is not a relevant question for job evaluation. If the skill is needed to accomplish the tasks involved, it must be considered to be a job qualification.*

<sup>9</sup> It should be pointed out that this chapter will not provide an exhaustive examination of all possible sub-factors corresponding to each main factor.

- Automatically considering many female-dominated jobs as requiring few qualifications and disregarding some of the specific skills required by these jobs.

*For example: Secretarial jobs are often considered as requiring few qualifications. However, secretaries must have a good command of working language in order to write texts, write up the minutes of meetings and correct letters. This job qualification is rarely taken into account in traditional evaluation methods, and this has led to secretarial jobs being undervalued.*

#### **Qualification factor: Selecting and providing examples of gender-neutral sub-factors**

Eliminating prejudices and stereotypes, in concrete terms, entails both:


**Taking account of sub-factors which are usually associated with predominantly female jobs, and**

**Ensuring that sub-factors are illustrated with examples which include references to predominantly female jobs**

**Table 4.1 Qualification factor: Selecting and providing examples of gender-neutral sub-factors**

Type of sub-factor (Gender neutrality in selecting sub-factors)	Female-dominated job title	Examples of female-dominated jobs (Gender neutrality in illustrating sub-factors)
<b>Interpersonal skills (female)<sup>10</sup></b>	Social worker, nurse, human resources employee	Counselling, interviewing
	Salesperson	Evaluating customer needs, persuading
	Teacher	Motivating, using teaching skills
<b>Communication skills (female)</b>	Telemarketing employee, customer services agent, public relations officer, salesperson	Knowledge of a foreign language
	Secretary	Correcting texts, writing up the minutes of meetings
<b>Physical skills (male)</b>	Secretary	Fine manual dexterity: using a keyboard
	Nurse	Giving injections
	Seamstress	Hemming garments, sewing together complex garment pieces
	Assembler	Assembling small electronic components, colour-coded electrical wires, according to a specific sequence

<sup>10</sup> Indicating that a sub-factor is female does not mean that it is not found in male-dominated jobs, but simply that it corresponds relatively more often to female- or male-dominated jobs. This column demonstrates the importance, for each factor, of taking into account not only the sub-factors associated with male-dominated jobs, but also the sub-factors associated with female-dominated jobs (which are often overlooked in traditional job evaluation methods). Similar tables will be found illustrating other factors in the following pages.



## Physical and psychological efforts

## EFFORT: SUB-FACTORS

Effort refers to the difficulty related to and the fatigue and tension caused by performing job tasks. It has been noted that most job evaluation methods used in traditional work contexts have put almost exclusive emphasis on physical effort. However, when addressing pay equity, it is important to redefine physical effort and take mental and emotional effort into account as well. Some practitioners prefer to group these two sub-factors under the title *psychological effort*. In fact, the choice will depend on the type of jobs to be evaluated.

### Prejudices and stereotypes regarding effort

As regards effort, traditional methods have focused on physical effort, in particular that which is associated with blue-collar jobs in the manufacturing or construction sectors. This very widespread image of what constitutes physical effort has had the effect of making the effort required by many female jobs invisible. Thus, predominantly female jobs, mainly office jobs or jobs in the service sector, are seen as not being very physically demanding.

■ **A SECRETARY'S JOB** involves the following kinds of physical effort:

- Lifting and moving piles of files or boxes of documents;
- Bending over filing cabinets to file or look for documents;
- Being in a sitting position for long hours doing word processing.

■ **AN EARLY CHILDHOOD EDUCATOR'S JOB** involves lifting young, often boisterous, children; **A NURSE'S JOB** involves lifting weak or frail patients. Both of these jobs involve physically demanding tasks.

■ **A SEAMSTRESS'S JOB** in a mass production plant involves significant and varied physical effort, including, in particular:

- Operating a pedal quickly and repeatedly for long periods of time;
- Bending over the work surface for long periods of time;
- Lifting and moving piles of finished garments.

Another consequence of this stereotyped image of effort is the tendency to disregard other significant aspects of this factor, such as **mental and emotional effort**, the latter being very much a part of several female-dominated jobs.

### Effort sub-factor: Selecting and providing gender-neutral examples

As indicated in table 4.2, eliminating prejudices and stereotypes, in concrete terms, entails both:

- ➔ Taking account of sub-factors which are usually associated with predominantly female jobs, and
- ➔ Ensuring that sub-factors are illustrated with examples which include references to predominantly female jobs.

**Table 4.2 Effort factor: Selecting and providing examples of gender-neutral sub-factors**

Type of sub-factor (Gender neutrality in selecting sub-factors)	Female-dominated job title	Examples of female-dominated jobs (Gender neutrality in illustrating sub-factors)
<b>Emotional effort (female)</b>	Social worker	Contact with battered children
	Special education teacher	Supporting disabled children
	Nurse	Contact with terminally ill patients
	Customer services agent	Negotiating with customers who are dissatisfied or aggressive
<b>Mental effort (neutral)</b>	Secretary, cashier	Data entry, correcting texts or checking figures
	Secretary	Taking notes in meetings
	Nurse, teacher	Multi-skilling
	Translator, interpreter	Intense concentration over long periods of time
<b>Physical effort (male)</b>	Secretary	Quick, repetitive movements on a keyboard
	Secretary	Lifting and moving piles of files and boxes of documents
	Secretary	Bending over filing cabinets to file or look for documents
	Early childhood educator, nurse	Lifting young children or patients
	Waitress	Continually moving around, carrying fairly heavy objects
	Seamstress	Operating a pedal quickly and repeatedly over long periods of time
	Seamstress	Lifting and moving piles of finished garments
	Seamstress	Bending over the work surface for long periods of time
	Nurse	Lifting and pushing patients in wheelchairs

Impact on the enterprise's goals

## RESPONSIBILITY: SUB-FACTORS

This factor includes tasks that have an impact on the enterprise's goals, for example, its profitability, financial soundness, market coverage and the health and safety of its clients.

### Prejudices and stereotypes regarding responsibility

It is important to consider the various types of responsibility associated with the enterprise's goals independently from the hierarchical level of the job or the number of employees it involves supervising. Responsibility tends to be generally associated with **the hierarchical level of jobs**: a job which is high up on the hierarchical ladder is automatically considered as involving significant responsibility. A simple and frequent indicator of the hierarchical level of a job is the number of subordinates involved.

Predominantly female jobs are perceived as involving little responsibility. It is true that, due to the glass ceiling, these jobs tend to be low on the hierarchical ladder, involving the supervision

of only a limited number of employees, and, in financial terms, involving limited discretionary power. However, these jobs do involve many other responsibilities which do not fit into such an unequivocal image related to this factor. **A closer look at the responsibility they involve reveals that female-dominated jobs have a significant and often overlooked impact on the goals of the enterprise:**

- ➔ **Protecting the confidentiality of important information** is a job requirement for employees in the payroll or customer services departments.
- ➔ Managers in the human resources department, this often being the only predominantly female managerial job, have **significant responsibility with regard to the productivity of employees, as well as their health and safety, and these in turn have an effect on the enterprise's profitability.**
- ➔ Primary school teachers are **responsible, in part, for the intellectual development and safety of their pupils.**

The stereotype which holds that women's jobs involve little responsibility prevents people from being aware of these requirements and results in their being disregarded in traditional evaluation methods.

### **Responsibility sub-factor: Selecting and providing gender-neutral examples**

Eliminating prejudices and stereotypes, in concrete terms, entails both:

- ➔ Taking account of sub-factors which are usually associated with predominantly female jobs, and
- ➔ Ensuring that sub-factors are illustrated with examples which include references to predominantly female jobs.

The following table illustrates the diversity of responsibilities that some female-dominated jobs entail but which are often disregarded in evaluation methods:

**Table 4.3 Responsibility factor: Selecting and providing examples of gender-neutral sub-factors**

Type of sub-factor (Gender neutrality in selecting sub-factors)	Female-dominated job title	Examples of female-dominated jobs (Gender neutrality in illustrating sub-factors)
<b>Responsibility for people (female)</b>	Early childhood educator, teacher, nurse	Offering advice and information to students
	Early childhood educator, teacher	Ensuring the safety of children
<b>Responsibility for human resources (female)</b>	Human resources employee	Guiding new employees
	Secretary	Planning meetings
	Human resources employee	Establishing human resource policies
<b>Responsibility for confidentiality (neutral)</b>	Salesperson, customer services agent	Customer profile
	Payroll department employee	Information regarding the payroll
	Order filler	Vendor profile
<b>Financial responsibility (male)</b>	Accounts payable department employee	Paying bills and writing cheques
	Accounting clerk	Bookkeeping
<b>Responsibility for material resources (male)</b>	Secretary	Using, maintaining and fixing office equipment: photocopier, computer, scanner, printer
	Secretary	Planning needs related to and ordering various supplies



## Working conditions and psychological environment

### WORKING CONDITIONS: SUB-FACTORS

This factor refers to the working conditions and psychological environment in which the work is performed.

#### Prejudices and stereotypes regarding working conditions

Unlike predominantly male jobs, female-dominated jobs are perceived as being performed in an environment which is free from dust, noise, potentially harmful chemical products and uncomfortable temperatures. The psychological environment in the workplace is generally considered to be pleasant. The working conditions factor is, in fact, generally disregarded in the evaluation of administrative jobs, while it is taken into consideration in the evaluation of production jobs.

An examination of the working conditions found in female-dominated jobs reveals many physical conditions which are commonly overlooked.

- ➔ Janitorial staff are exposed to **harmful chemical products**;
- ➔ Supermarket cashiers are exposed to **continuous noise and the potentially harmful rays of scanners**;
- ➔ Nurses are exposed to **contagious diseases**.

As for psychological conditions, the following aspects are rarely considered:

- ➔ **Frequent interruptions** to secretaries' work;
- ➔ **Urgent and unexpected requests from their supervisors**;
- ➔ **Constantly changing work schedules** of cashiers or salespeople in certain types of businesses.





**Working conditions sub-factor: Selecting and providing gender-neutral examples**

Eliminating prejudices and stereotypes, in concrete terms, entails both:

- ➔ Taking account of sub-factors which are usually associated with predominantly female jobs, and
- ➔ Ensuring that sub-factors are illustrated with examples which include references to predominantly female jobs.

**Table 4.4 Working conditions factor: Selecting and providing examples of gender-neutral sub-factors**

Type of sub-factor (Gender neutrality in selecting sub-factors)	Female-dominated job title	Examples of female-dominated jobs (Gender neutrality in illustrating sub-factors)
<b>Physical environment (male)</b>	Secretary/ telephone operator	Constant exposure to cathode rays that may lead to muscular pain and eye strain
	Receptionist	Moderate and constant exposure to noise Exposure to cathode rays from computer monitors
	Early childhood educator	Exposure to very high noise levels made by children, toys and various equipment
	Early childhood educator, nurse	Exposure to contagious diseases
	Cashier	Exposure to the risks related to new technologies such as scanners
	Cashier	Constant exposure to noise: cash register, customers, telephones
	Janitorial staff in commercial buildings	Exposure to cleaning products that pose health risks
	Janitorial staff in commercial buildings	Exposure to dirt, dust and garbage
<b>Psychological conditions (female)</b>	Secretary	Frequent interruptions in person and by telephone
	Secretary	Having to respond to immediate and unexpected requests
	Receptionist/ telephone operator	Lack of privacy in the work area Isolation from co-workers
	Early childhood educator	Interactions with sometimes hostile or demanding parents
	Cashier	Interactions with a varied, sometimes difficult or dissatisfied, public
	Cashier	Variable work schedule
	Janitorial staff in commercial buildings	Working outside regular working hours
	Janitorial staff in commercial buildings	Increased risk of sexual harassment due to night work and isolation

## Development of scales

### LEVELS OF SUB-FACTORS

In order to be able to differentiate between various jobs, each sub-factor in the method chosen must be divided up into levels or degrees. For example, some jobs may involve a high level of financial responsibility while others may involve almost none at all. Similarly, some jobs may involve a high degree of manual dexterity while others require very little. These differences in significance or intensity require the development of scales by which they can be measured.

The dimension measured will vary depending on the type of sub-factor, for example:

- ➔ Visual effort will be measured in terms of duration;
- ➔ Concentration will be measured in terms of intensity;
- ➔ Unpleasant physical conditions will be measured in terms of frequency of exposure.

As can be seen in the following table, in some cases, a single sub-factor will need to be measured in terms of two (or more) different dimensions. In small organizations with few jobs, one dimension will suffice.

**Table 4.5 Examples of dimensions of sub-factors**

SUB-FACTORS	DIMENSIONS
Job knowledge	Depth/extent of knowledge
Ability to analyse	Diversity of methods/complexity of information
Financial responsibility	Value of resources
Confidentiality	Extent of access to information/degree of importance of information
Concentration	Intensity/duration
Physical effort	Frequency/duration/working position/intensity
Unpleasant physical environment	Frequency of exposure/intensity
Difficult psychological conditions	Frequency/intensity

In order to avoid confusion, when two dimensions of a sub-factor are combined, they can be measured in terms of levels, as in the following table:

**Table 4.6 Risk sub-factor levels**

FREQUENCY	SERIOUSNESS		
	Risk of minor injury	Risk of serious injury	Risk of very serious injury
<b>Rarely</b>	Level 1	Level 1	Level 1
<b>Sometimes</b>	Level 2	Level 3	Level 4
<b>Regularly</b>	Level 3	Level 4	Level 5

This table illustrates an example where each level represents two combined dimensions. In particular, it should be noted that:

A **LEVEL** can correspond to various combinations, as is the case for Levels 3 and 4 in this example. This is necessary in order to avoid overly long scales which, in the end, do not clearly differentiate between jobs.

## Defining levels

Depending on the quantitative or qualitative nature of the dimension being measured, some dimensions will be more difficult to measure than others. For example, if it is a question of evaluating financial responsibility, the level will be determined by the amounts being managed, measured in terms of figures, that is, the monetary value. On the other hand, if it is a question of evaluating responsibility for people, which is essentially qualitative in nature, defining the levels will be more complex and will require more discussion with the Committee members. The task of those responsible will be made easier if they can base their decisions on concrete examples taken from their workplace.

Once Committee members of the process have come to an agreement on the definition of the various levels of a given sub-factor, they should record this decision clearly in writing in the companion document so that evaluators will be able to follow their instructions.

The following is an example of the definition of a sub-factor and its levels:<sup>11</sup>

### SUB-FACTOR: Physical Skills

This sub-factor measures the physical skills required for the job.

It covers manual and finger dexterity, hand-eye coordination, coordination of limbs, and sensory coordination.

It takes into account the purpose to which the skills are put and demands arising from the need to achieve specified standards of speed and precision.

- LEVEL 1** There are no particular requirements with regard to physical skills.
- LEVEL 2** The work requires dexterity, coordination or sensory skills, where there is some demand for precision in the use of these skills.
- LEVEL 3** The work requires dexterity, coordination or sensory skills, where there is: (a) some demand for both precision and speed or (b) considerable demand for precision, in the use of these skills.
- LEVEL 4** The work requires dexterity, coordination or sensory skills, where there is: (a) considerable demand for both precision and speed: or: (b) high demand for precision, in the use of these skills.
- LEVEL 5** The work requires dexterity, coordination or sensory skills, where there is very high demand for precision in the use of these skills.

Definitions such as these should be illustrated and accompanied by instructions. For example, the sub-factor described above could be illustrated in a companion document with examples that correspond to jobs within the organization, such as the use of a keyboard (female-dominated job) and the operation of a vehicle (male-dominated job).

In defining the levels of sub-factors, two conditions must be strictly observed: rigorous methodology must be used and gender neutrality must be ensured.

<sup>11</sup> Example drawn from a reference document of the National Joint Council: *General Factor Guidance Notes*.

## Rigorous methodology

### ■ NUMBER OF LEVELS

The number of levels generally used to define sub-factors varies from two to seven or eight, depending on the evaluation method used. A small number of levels simplifies the evaluators' task but does not allow for jobs to be clearly differentiated from one another. An overly high number of levels leads to such detailed differentiation that the differences can end up being insignificant. In most cases, four to six levels is the best number to choose. If the sub-factor is considered to be of secondary importance, the scale can be shorter, comprising two or three levels.

The number of levels should allow for the jobs to be clearly differentiated one from the other while not weighing down the evaluation process unnecessarily. In small enterprises, the number of levels per factor will most often vary from 2 to 3 since there is no need to differentiate between a wide range of jobs.

### ■ NO AMBIGUITY

The definition of the levels should not be based on the hierarchical progression of jobs. The levels must measure real differences in the intensity or significance of a given sub-factor.

### ■ NO OVERLAP

Two different levels should not partially cover the same dimension of a sub-factor. For example, if Level 2 corresponds to the responsibility of supervising 10 to 20 employees, while Level 3 corresponds to that of supervising 15 to 30 employees, it will be difficult to decide where on the scale to place a job involving the supervision of 18 employees.

### ■ CONTINUITY

Scales must be continuous. For example, a scale in which Level 1 covers financial responsibility for amounts ranging from \$1000 to \$5000, Level 2 covers financial responsibility for amounts ranging from \$10,000 to \$50,000, and Level 3 covers financial responsibility for amounts ranging from \$100,000 to \$1,000,000, jobs involving responsibility for an amount between these values will be difficult to measure.

## Gender neutrality

### **Avoid assigning lower levels to female-dominated jobs than are assigned to male-dominated jobs**

One important bias that can easily find its way into the defining of levels, and thus have a discriminatory effect, is the tendency to assign lower levels to aspects that are associated with female-dominated jobs compared to those that are associated with male-dominated jobs.

*For example: In one method used by an organization, when it came to evaluating physical skills, the use of a keyboard or sewing machine was assigned a Level 2 while the operation of a vehicle or forklift truck was assigned a Level 4, without this difference in levels being justified.*

*For example: As regards responsibility for errors, errors that could affect the prestige of a municipality (management jobs) were assigned a level which is two levels above those that could pose a threat to the physical integrity of people (nursing jobs), without any explanation for this decision being provided.*

The assurance of gender neutrality can be verified when scales are being worked out or, sometimes, even later in the process.

**Avoid using shorter scales for sub-factors associated with female-dominated jobs than for those associated with male-dominated jobs.**

This would be the case, for example, if scales including two or three levels were used to measure *interpersonal skills* or *emotional effort* while scales including five or six levels were used to measure *responsibility for material resources* or *physical effort*. This would lead to a much better differentiation being made between male jobs, with their specific features being brought to light through comparison. On the other hand, the same would not be possible for the female-dominated jobs measured by these scales.

**As has been seen in this chapter, when striving to treat predominantly female and male jobs equally, the need to ensure gender neutrality comes up again and again, and must be dealt with in a specific way in each step of the evaluation process.**

## BENEFITS

Adapting a job evaluation method to fit the specific context of an organization leads to better knowledge of the characteristics of the jobs within it and can contribute to improving various human resource management practices, such as recruiting, selecting and promoting personnel.

Moreover, selecting a single evaluation method to measure all of the organization's jobs, whether they be administrative, professional or production jobs, can also contribute to simplifying human resource management, including the compensation system.



- ☐ Does the method include only the following four factors: qualifications, effort, responsibility and working conditions?
- ☐ Is the method well-suited to the characteristics of the enterprise?
- ☐ Do the method's sub-factors allow for the evaluation of all the jobs in the enterprise?
- ☐ Are the sub-factors clear and easy to interpret or, on the contrary, do they group together disparate elements?
- ☐ Do the sub-factors overlap, even partially?
- ☐ Do the sub-factors take into account the characteristics of female-dominated jobs in the enterprise which are often overlooked?
- ☐ Do sub-factor definitions refer to female-dominated jobs as well as male-dominated jobs?
- ☐ Have all required qualifications been included, regardless of how they were acquired?
- ☐ Have the different types of effort – mental, emotional and physical – been taken into account?
- ☐ Have responsibilities been defined independently of the hierarchical progression of jobs?



- ☐ Do the definitions of working conditions adequately reflect the specific nature of this factor in female-dominated jobs?
- ☐ Does the number of levels per sub-factor allow differences between jobs to be properly brought to light?
- ☐ Has it been determined that the scales used to measure sub-factors:
  - are free from ambiguity?
  - do not overlap?
  - are continuous?
- ☐ Has it been determined that the distribution of jobs across the various levels will not have a discriminatory effect on female-dominated jobs?
- ☐ Has it been determined that the number of levels per sub-factor will not have a discriminatory effect on female-dominated jobs?
- ☐ Have all of the characteristics of the method been recorded in writing in a clear and systematic way?

If you answered “No” to any of these questions, you will need to examine the reasons why. If a satisfactory explanation cannot be found, then you will need to modify your decision.



## CONTENTS - CHAPTER 5

Objectives and sequence	43
Job data collection tools	44
Gender neutrality	49
Rigorous design of questionnaires	50
Choice of vocabulary	51
Pre-test	52
Interviews	52
Observation	52
Task description	53
Administering the questionnaire	53
Benefits	54
Checklist	55

# CHAPTER 5 Collecting data on the jobs to be evaluated

## OBJECTIVES

Once the job evaluation method has been determined, the next step involves collecting information on the content of each job based on the factors selected.

*The importance of accurate, complete, up to date and gender-neutral job information cannot be emphasized enough. Job information is used as the basis of job evaluation decision (Canadian Human Rights Commission).*

The quotation above highlights two conditions that must be observed when collecting data: gender neutrality must be ensured, that is, female-dominated jobs and male-dominated jobs must be dealt with on an equal basis, and the tool used must be rigorous, that is, the information collected must be accurate, complete and up to date. These two conditions are closely related.

THE SEQUENCE OF OPERATIONS IS AS FOLLOWS:

Determining which type of data collection tool will be used

Developing the tool: structured or semi-structured questionnaire, interview schedule or observation checklist

Ensuring that the tool is free from discriminatory bias

Ensuring that the tool is rigorous

Choosing which jobs to pre-test

Conducting the pre-test

Analysing the results and reviewing the tool, if necessary

Administering the data collection tool to employees and supervisors

## JOB DATA COLLECTION TOOLS

Many different data collection tools can be used, although some are clearly better for pay equity purposes.

### ■ STRUCTURED QUESTIONNAIRE

Structured questionnaires are made up of questions, each of which is followed by a list of answers or possibilities to be chosen by the respondent. The questionnaires must include three parts:

#### **Explanatory part**

The first, an explanatory part, includes information on the objective and content of the questionnaire as well as instructions for respondents. For example:

**Table 5.1 Explanatory part of the questionnaire**

#### **Objective of questionnaire: To obtain information on your position**

- The questions asked relate to four factors:
  - The qualifications required
  - The responsibility involved
  - The effort required
  - The conditions under which the work is performed.
- Your answers must be objective and precise
- Your answers must relate to the requirements of your position and not to your own characteristics
- You must not overestimate or underestimate the requirements of your position
- You must base your answers on your regular tasks
- You must also include any recent changes made to the requirements of your position

These instructions help to ensure the quality and uniformity of answers.



**Task description**

In the second part, respondents are asked to identify their position and describe their job tasks according to defined categories. This exercise allows analysts and evaluators to better understand the answers relating to the requirements of the position. At the same time, it allows task descriptions to be updated and standardized for subsequent use during recruitment.

**Table 5.2 Simple example for small enterprises<sup>12</sup>**

Job title \_\_\_\_\_  
 Service or Department \_\_\_\_\_  
 Name \_\_\_\_\_ Date \_\_\_\_\_

**Job summary**

Describe your job, its objective and your most important responsibilities.

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**Table 5.3 Detailed examples for large enterprises<sup>13</sup>****1. Identification of position**

Your name \_\_\_\_\_

Designation (title) of position you hold: \_\_\_\_\_

In which service or department do you work? \_\_\_\_\_

How long have you held this position? \_\_\_\_\_

Are you currently working full time? \_\_\_\_\_

If you are working part time, indicate the number of hours \_\_\_\_\_

What machines, instruments or equipment do you use? \_\_\_\_\_

**2. Task description**

Sum up your main duties or responsibilities in one or two sentences maximum.

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List the different tasks you perform as part of your duties.

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Once your list of tasks is completed, please indicate the order of importance (1, 2, 3, ...) of each listed task in the space on the right reserved for this purpose.

<sup>12</sup> Holm and Harriman (2002)

<sup>13</sup> Confédération des syndicats nationaux (CSN)



### Evaluative part

The last and most important part of the questionnaire includes questions relating to the requirements of the job. Some questionnaires are based on closed-ended questions to which examples or comments cannot be added by respondents. Other questionnaires reserve a space after some of the questions in which respondents can write an explanation. These are called semi-structured questionnaires.

**Table 5.4 Example of closed-ended questions tailored for large enterprises<sup>14</sup>**

#### Supervisory responsibility

This question relates to the direct responsibility of supervising other employees. Even if you do not have the title of supervisor, you may have the responsibility of guiding or assisting a new employee. Your supervisor may also have delegated some of his/her duties to you. Please provide information on all these aspects or other similar aspects.

#### Type of responsibility (You can check more than one box)

		No	Shared	Full
A	Giving instructions to or assisting a new employee	1	2	3
B	Allocating work	1	2	3
C	Establishing work schedules	1	2	3
D	Checking work	1	2	3
E	Providing support and encouragement	1	2	3
F	Recruitment	1	2	3
G	Promotions	1	2	3
H	Performance evaluation	1	2	3
I	Dismissals	1	2	3
J	On-the-job training	1	2	3
K	Staff planning	1	2	3
L	Legal issues relating to human resources	1	2	3
M	Leading negotiations, projects or assignments	1	2	3
N	Disciplinary actions	1	2	3
O	Wage determination	1	2	3
P	Occupational safety	1	2	3

#### Number of people under your supervision (Check one only)

- A. None
- B. 1 – 4
- C. 5 – 10
- D. 11 – 30
- E. More than 30

How many different job categories or organizational levels do you supervise?  
(Check one choice only)

- A. None
- B. One
- C. More than one

**Table 5.5 Example of questionnaire developed for small or medium-sized enterprises, based on semi-structured questions<sup>15</sup>**

### **Responsibility in the areas of human resources, policies and practices**

As part of your job requirements, you must perform the following:  
(check all applicable answers):

- a. Provide advice, informal training or instructions to co-workers or volunteers
- b. Organize the work schedule of others.  
Explain \_\_\_\_\_
- c. Coordinate the allocation of tasks.  
Explain \_\_\_\_\_
- d. Participate in recruitment, dismissal and performance evaluation of staff.
- e. Conduct pay reviews and set wages
- f. Directly supervise a work unit
- g. Supervise more than one work unit.  
Describe \_\_\_\_\_
- h. Assume responsibility for other supervisory staff members who report to you.  
How many? \_\_\_\_\_
- i. Develop human resource management policies
- j. Develop special programmes.  
Explain \_\_\_\_\_

Both examples above are extracts from typical questionnaires and can be adapted to a specific enterprise by omitting some questions and/or adding others. The qualitative part of these questions may take a lot of time to process if the number of respondents is high; on the other hand, it will be easier to process in the case of small or medium-sized enterprises with a limited number of employees.

#### **■ STRUCTURED QUESTIONNAIRE**

##### **➔ Advantages of structured questionnaires**

Structured questionnaires restrict the margin of interpretation of analysts and thus help to avoid the influence of gender bias during the evaluation.

Another advantage accounting for their increasing use is that the structured part of the questionnaire lends itself well to the computerization of results. In some methods, the software for presenting and analysing results is supplied by the designers.

<sup>15</sup> Adapted from Pay Equity Commission of Ontario (1993).

Structured questionnaires can also be easily adapted. For example, in cases where the evaluation method was designed for a particular economic sector, a generic questionnaire will have been produced which can be used by adapting a number of questions according to the sub-sector considered.

→ Disadvantage of structured questionnaires

These questionnaires are more complex to design because if a job dimension is omitted, respondents will not have the opportunity to describe it.

■ **OPEN-ENDED QUESTIONNAIRES**

Open-ended questionnaires must also include three parts: instructions for respondents, description of tasks and questions on job requirements. The first two parts are similar to those in structured questionnaires; however, the third part involves the writing skills of respondents since they must describe their job requirements, as shown in the following example:

**Responsibility for work planning, development, results and management**

What responsibilities for planning, development and results are required in your job?  
Is managerial responsibility required in your job? To what extent is the responsibility exercised autonomously? What are the impacts of errors made in exercising these responsibilities?

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→ Advantages of open-ended questionnaires

One advantage is that respondents are given the opportunity to describe all aspects of their jobs in detail and, therefore, more detailed information can be obtained.

Another advantage is that they are easier to design since there is less risk that information will be incomplete; indeed, even if a dimension is omitted by the questionnaire designers, respondents will still be able to indicate it and provide the necessary details.

→ Disadvantages of open-ended questionnaires

A major disadvantage of open-ended questionnaires is that they can reinforce gender bias and lead to unequal results between female-dominated jobs and male-dominated jobs. In fact, they strongly rely on the respondents' writing skills, which vary according to the jobs they perform. In some enterprises, women who are concentrated in jobs which involve carrying out tasks that do not require the use of their writing skills are likely to be disadvantaged.

In addition, women seem to be inclined to use moderate terms to describe the responsibilities or skills required by their jobs. For example, although the responsibilities are identical, they tend to more often use the term *coordinate* than *supervise* or *lead*, terms which are more often used by men.

Both these factors are likely to have a downwards influence on the way evaluators view the value of female-dominated jobs. To minimize these problems, respondents should be well supervised when completing the questionnaire. However, this procedure may be costly in large enterprises.

Another disadvantage of open-ended questionnaires is that the processing of qualitative results is often more complicated and time-consuming, in particular in large enterprises.

## GENDER NEUTRALITY IN THE DESIGN OF QUESTIONNAIRES

For pay equity purposes, a fundamental requirement of questionnaires is that questions be adapted to both female and male jobs. For example, in the case of responsibility for equipment, if the question asked is illustrated with examples referring to forklift trucks or printing presses, female respondents in female-dominated jobs will probably indicate that their responsibilities in this area are minimal. Yet, in clerical jobs, women workers are responsible for numerous pieces of equipment and this is also true for nurses in hospitals. In order for these workers to give an accurate answer to this question, the latter also needs to be illustrated with examples with which they are familiar.

The box below shows elements which could be used to illustrate questions and avoid gender bias.

**Table 5.6 Commonly overlooked elements of female jobs<sup>16</sup>**

### Qualifications

- Interpersonal skills needed to work with children or adults whose problems require a degree of sensitivity and effective communication in various respects
- Ability to operate and maintain various types of machines: photocopiers, computers, manufacturing equipment, packing equipment, diagnostic and monitoring equipment
- Manual dexterity required to give injections, type documents, assemble parts, use sewing machines, give therapeutic massages
- Drafting letters for others, writing up minutes, revising documents written by others
- Developing and maintaining filing systems
- Formatting reports or graphic presentations

### Effort

- Concentrating for long periods of time in front of computer screens
- Working simultaneously for several people or departments with different deadlines
- Providing psychological or emotional support to patients or children
- Dealing with aggressive, troubled or irrational people
- Accomplishing tasks which require the collaboration of others while not having the necessary authority or power over them
- Performing several tasks simultaneously
- Lifting boisterous children or frail individuals, such as patients or seniors
- Working in uncomfortable positions, using a limited number of muscles repeatedly remaining in the same position for long periods of time

<sup>16</sup> This table is found in numerous documents related to job evaluation cited in the Bibliography.

## Responsibility

- Protecting the confidential nature of sensitive information related to, for example, planned layoffs, individual salaries, bonuses, sick leave, turnover
- Organizing logistics for meetings or conferences. Providing care to patients, children or seniors
- Training and providing guidance to newly hired staff
- Coordinating work and taking care of schedules, production processes and equipment, and supplies

## Working conditions

- Stress caused by noise in an open work space or an overcrowded office
- Exposure to illnesses
- Stress due to receiving clients' complaints
- Monotonous nature of tasks
- Irregular or unpredictable work hours
- Stress caused by multiple and often unpredictable work demands
- Exposure to irritants or products which pose health hazards, such as cleaning products

As long as the questionnaire closely follows the chosen evaluation method which itself meets the requirements for gender neutrality presented in the previous chapters, it should also be devoid of gender bias.

Although increasingly less common today, another mistake that should be avoided is the use of gendered job titles, such as cleaning woman, stewardess.

## RIGOROUS DESIGN OF QUESTIONNAIRES

A number of conditions should be met in order to obtain answers which are accurate, complete and up to date, characteristics which show that the questionnaire is rigorous.

■ The first condition is that **the questions must relate to the job requirements rather than the characteristics of the job holder**. Some people may hold higher degrees but perform a job that only requires an undergraduate degree. Similarly, it should be kept in mind that the questionnaire is being used to evaluate the jobs rather than the performance of those holding them. Thus, questions should be clearly formulated so as to avoid this type of ambiguity. For example, instead of asking about the number of years of higher education pursued by the employee or the number of years of experience the employee has, ask about the degrees required by the job and the previous experience needed.

■ Secondly, as regards job evaluation, the aim is, to the extent possible, to obtain objective facts. **Thus, questions relating to the perceptions of respondents should be avoided** since they can vary considerably for the same task. A question such as:

*Do you consider that your work is monotonous?*

should be replaced with:

*Do you have to concentrate on repetitive tasks?*

*How long are these tasks? (Suggest a scale)*



Thus, instead of indicating his or her perception of the monotonous nature of the task which can vary from individual to individual, the respondent will provide objective facts.

- Also, questions should not include **multiple components** because the answers will then be difficult to interpret. For example, if this question is asked:

*Are you responsible for the following: explaining the result of projects, training other employees and coordinating a work team?*

An affirmative answer will not indicate which of these responsibilities the person in question has. It is better to ask separate questions about each of these elements in order to be able to differentiate between the jobs which involve only one of these requirements and those which involve two or three of them.

- Lastly, questions should be formulated so that accurate information can be obtained. Thus, **unclear questions should be avoided**. For example, a question such as:

*Are your tasks physically demanding?*

should be replaced with:

*In performing your duties, do you have to move pieces of equipment, boxes or files?*

*Indicate the weight (scale)*

*Indicate the frequency (scale)*

Evaluators will thus be able to better assess the extent of the effort required and make more precise comparisons between jobs.

## CHOICE OF VOCABULARY

The vocabulary used in formulating questions must be **simple, tailored to the enterprise and easy for respondents to understand**. Complex formulations and technical terms should be avoided as much as possible, unless they are part of the usual vocabulary.

Another aspect which may influence the evaluation is the use of terms which devalue a job, for example:

- *Routine*
- *Basic*
- *Simple*
- *General*
- *Only*

Thus, use of terms which devalue the job requirements should be avoided.

Lastly, **active verbs** should be used in describing tasks (second part of the questionnaire)

**Table 5.7 Examples of active verbs**

Send	Inspect	Plan	Represent
Adjust	Question	Link up	Revise
Clarify	Implement	Recommend	Select
Demonstrate	Motivate	Gather	Care for
Distinguish	Normalize	Settle	Test
Maintain	Organize	Record	Transmit
Establish	Participate	Reread	Transport

On the other hand, more passive types of formulations should be avoided because they are likely to lead to the undervaluing of the importance of a job's contribution. Examples of these are:

- *making sure to send*
- *seeing to the maintenance*
- *thinking about adjusting*
- *remembering to establish, etc.*

## PRE-TEST

Before administering the questionnaire, it must be tested on a few respondents in the main female-dominated and male-dominated jobs. These jobs should be highly representative of the entire enterprise and represent to some extent *benchmark jobs*. Those responsible for this step can also complete the questionnaire. This step helps to test for gender neutrality: that is, if for example, it is observed that the questions chosen tend to yield higher scores for male-dominated jobs than for female-dominated jobs, the questionnaire will then have to be reviewed.

The pre-test may also reveal that some job requirements have been forgotten.

Lastly, this process helps to ensure that the questionnaire is rigorous, in particular that questions are clearly understood by the respondents and that answers are not vague. Once the pre-test results have been analysed, the questionnaire can be finalized.

## INTERVIEWS

It is not recommended to use interviews exclusively, for various reasons. They require a great deal of time, and this inevitably leads to an undesirable reduction in the number of people interviewed. Moreover, if the interviewer is not very well trained, he or she is likely to influence the answers and may introduce gender bias. Lastly, because of the personalized nature of interviews, the extent of detail in the information collected may not be uniform.

However, **interviews can be used as an additional means to collect information**, in particular to clarify certain information in the questionnaires or to complete information lacking. The interviewer must review the information collected through the questionnaire and draw up a list of aspects that need to be clarified. Moreover, he or she will have to thoroughly plan the progress of the interview and prepare the questions in advance.

## OBSERVATION

Observation of workstations can also be used to complete the information obtained through the questionnaire, in particular in cases where a job requirement is difficult to explain in writing or verbally. The analyst must have a precise idea of what he or she is seeking to identify through observation.

## TASK DESCRIPTION

The task descriptions that were being used in an enterprise prior to the job evaluation process are generally not suitable as a source of information on the content of jobs for pay equity purposes. This is due to several reasons:

- ➔ They generally do not contain data corresponding to the factors assessed in evaluation methods, in particular effort and working conditions;
- ➔ They are often old, dating from the time when employees were being recruited for the job described;
- ➔ They are not standardized for all jobs.

However, once the data have been collected and analysed, new job descriptions which are useful and up to date can be drawn up, based on the second part of the questionnaire, as described above.

## ADMINISTERING THE QUESTIONNAIRE

When administering the questionnaire, the same requirements should be met as during its development: gender neutrality must be ensured and the questionnaire must be rigorous, i.e., the data collected should be accurate, precise, complete and up to date.

- Holders of the jobs to be evaluated are the most reliable source of information since they are the ones who perform the various tasks daily and are therefore most likely to provide accurate, complete and up to date information.
- Supervisors cannot be considered to be the principle source of information but are an important additional source and should be asked to complete the questionnaires along with their employees and comment on them, if necessary. If the employees' answers diverge from those of the supervisor, the Committee members will have to decide which answers to go by.

To the extent possible, the information on the jobs to be evaluated should be collected from all employees who perform these jobs rather than from only a sample of employees. The more representative the respondents, the more reliable the results. In the case of a structured questionnaire, administering it to all employees does not increase the costs, whereas in the case of open-ended questionnaires and especially of interviews, for reasons of feasibility, it may be necessary to question only a sample of employees.

Information sessions on the questionnaire should be provided for employees. Employees should receive precise information on the following:

- ➔ the objectives of the questionnaire;
- ➔ the procedure to follow in answering it;
- ➔ the subjects it covers.

Although this process can be conducted in writing, it is better to hold group information sessions orally so that employees can ask questions or make comments. Similarly, in order to speed up the procedure and obtain a high response rate, the questionnaires can be completed during these group sessions.



## BENEFITS

Having all employees participate enhances their trust in the evaluation process and in the reliability of its results, which is an undeniable advantage in the medium and long terms. This, in turn, will help avoid, or at least reduce, requests for results to be reviewed and will contribute to maintaining a more harmonious work climate.



- ☐ Is the data collection method standardized for all jobs?
- ☐ Has a pre-test been conducted?
- ☐ Do the examples used to illustrate the questions refer to both female-dominated and male-dominated jobs?
- ☐ Have the elements which are often overlooked in female jobs been taken into account?
- ☐ Is the vocabulary used in the questions easy for all employees to understand?
- ☐ Do the questions relate to the jobs rather than to their holders?
- ☐ Are the questions clear and precise?
- ☐ Was an effort made to avoid including several elements in a single question?
- ☐ Have the employees received the information needed on how to complete the questionnaire?
- ☐ Is the confidentiality of answers guaranteed?

If you answered “No” to any of these questions, you will need to examine the reasons why. If a satisfactory explanation cannot be found, then you will need to modify your decision.





## CONTENTS - CHAPTER 6

Objectives and sequence	57
Establishing an identification record for each job	58
Drawing up task descriptions	59
Job profiles	60
Reviewing evaluations	63
Benefits	66
Checklist	67

# CHAPTER 6

## Analysing the questionnaire results

### OBJECTIVES

The goal of analysing the results of the questionnaire is to establish for each job:

- an identification record
- a description of tasks
- a profile indicating the level assigned to this job for each evaluation sub-factor.

This third element is most important because once the job profile has been established, the level assigned for each of the sub-factors will be converted into points using the weighting grid (Chapter 7). The total number of points for each job will thus represent its value. This decisive step contains a high risk of subjectivity, which accounts for the process suggested in this section.

THE SEQUENCE OF OPERATIONS IS AS FOLLOWS:

Establishing an identification record for each job

Drawing up task descriptions

Establishing job profiles

Ensuring gender neutrality

Ensuring consistency

## ESTABLISHING AN IDENTIFICATION RECORD FOR EACH JOB

The first task to be accomplished is data input and analysis which, in the case of a closed-ended questionnaire, can be computerized relatively quickly. On the other hand, the semi-structured questionnaire, involving a limited number of open-ended questions that are often clearly framed, requires a little more time.

After all the answers provided by employees holding the same job have been grouped together, the Committee members must compare and summarize them in order to establish one identification record per job; this record contains purely factual data that are used to better situate the job to be evaluated.

Table 6.1 Identification record

Job title	Department or service
Place of work	
Name of supervisor	Title of supervisor

To avoid gender bias, **job titles should not be associated with one or the other gender**. Most practitioners recommend that **the job salary not be indicated** on the record; some even suggest replacing the job title with a code so as not to influence the evaluators. The hierarchical rank is another aspect which it is recommended to leave out since it might also influence evaluators.





Use the four factors

## DRAWING UP TASK DESCRIPTIONS

The description of each job's tasks is also established based on the answers obtained from the job holders. After all the answers obtained for a particular job have been examined, the elements which appear to be most conclusive should be retained in order to develop a standard description. These descriptions should be drawn up methodically and include the main duties and responsibilities involved, the qualifications required and the working conditions under which the job is performed.

Table 6.2 Description of tasks

### Job summary

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### *Tasks and main responsibilities*

List, in order of importance, the main responsibilities of the position and indicate the content, means used and goal for each of them

### *Supervision/management exercised*

Type of supervision or management involved in the job

### *Consequences of errors*

Indicate whether the work is subject to verification and by whom.

Indicate the impact of errors

### *Contacts*

Reasons for and level of contacts

### *Requisite knowledge/experience*

Requirements related to education, specialized training, and skills

Type of work experience required

### *Equipment used*

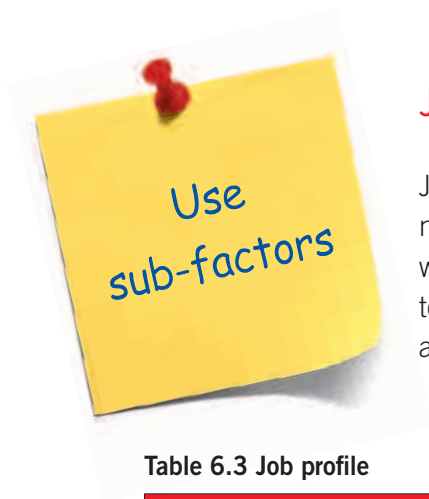
Main tools and equipment used and per centage of work time during which they are used

### *Working conditions*

Workplace, type of work space, environment, potential hazards.

To avoid gender bias, the following conditions should be met:

- **the comparative degree of detail and precision of female-dominated jobs and male-dominated jobs should be the same.** Traditionally, it is observed in workplaces that the task descriptions of female-dominated jobs are brief and include 3 or 4 elements whereas those of male-dominated jobs are detailed and include 6 to 8 elements. Some authors maintain that they should all include a minimum of 6 and a maximum of 10 tasks;
- **the use of active verbs should be favoured over the use of passive verbs;** the latter are often used to describe the tasks involved in female-dominated jobs; and
- in order to better meet these two conditions and to ensure that the descriptions are consistent, **a standardized format should be followed for both types of jobs.**



## JOB PROFILES

Job profiles are drawn up based on the answers to the third part of the questionnaire and cover all of the sub-factors selected in the method. The Committee's work mainly involves determining and validating the level of each of the sub-factors for each job. This process must adhere to the condition of gender neutrality and be rigorous.

Table 6.3 Job profile

SUB-FACTORS	PRESENTATION OF JOB REQUIREMENTS	LEVEL OF SUB-FACTOR	JUSTIFICATION
Knowledge			
Experience/training			
Complexity			
Physical effort			
Mental effort			
Communication			
Consequences of errors			
Human and material resources			
Physical environment			
Risks			

### Gender bias in analysis of results

#### Sources of gender bias

Perceptions related to the various jobs to be evaluated can easily influence the decisions of evaluators, who must pay particular attention to the following effects:

- **The halo effect** can be seen when a job obtains a high level for a sub-factor which is considered to be prestigious, such as the diploma required, and from which it is inferred that the job must also receive a high score for other factors. On the contrary, *the reverse halo* effect can also be seen and can cause a drop in the levels assigned to jobs whose requirements, in terms of a diploma, for example, are low.
- **The influence of the hierarchical rank** can also be a source of gender bias insofar as women's jobs are mainly found in intermediate or lower ranks. Evaluators may correlate higher hierarchical rank with high levels for several factors, which is not necessarily accurate. The reverse can also happen for junior-level jobs.



- **The influence of salary** can be seen to have a similar effect, that is, a highly-paid professional job may be assumed to involve demanding requirements pertaining to various sub-factors, which might not actually be the case
- **The availability effect** relates to the most visible aspects of an occupation: for example, the most visible and well-known part of secretaries' jobs, that is, word processing, can conceal other task requirements, such as filing or writing and revising texts. The less familiar factors may retain less attention on the part of evaluators and thus be assigned lower levels.
- **Emotional bias** relates to jobs which are represented within the Committee and towards which there might be a degree of leniency which could alter the evaluators' objectivity.

#### **Good practices to avoid gender bias**

**Levels should be assigned for one sub-factor at a time for all jobs, that is, the evaluation should proceed on a sub-factor-by-sub-factor rather than a job-by-job basis.** Thus, all jobs will be assigned a level for the *concentration* sub-factor, then all jobs will be assigned a level for the *confidentiality of information* sub-factor, and then the same process will be carried out for the *psychological environment* sub-factor, and so on. This way of proceeding has several advantages, as indicated below.

- If each job is evaluated separately, the comparative approach which is the very basis of the process, will be compromised.
- Evaluation on a factor-by-factor basis guarantees that a standardized process will be applied to all jobs.
- The Committee members will not be influenced by their opinion on the job as a whole, and the halo effect can thus be avoided.

**Evaluating in a random and variable order.** For each of the sub-factors, the order in which the jobs are evaluated should not be based on occupational group or job class so as to avoid the influence of gender-based prejudices. The order should instead be established randomly, as illustrated in the following example.

For the *knowledge* sub-factor, jobs are evaluated in the following order: Job A, Job C, E, F, B, D

For the *mental effort* sub-factor, the order followed is: F, D, A, E, C, B

For the *complexity* sub-factor, it is: E, B, F, D, C, A.

This practice will make it more difficult for evaluators to remember the levels assigned to each job in the previous step.



## Problems encountered during evaluation

The following are examples of some problems that may arise during the evaluation process, along with suggested solutions.

**PROBLEM 1** The description of a job's requirements may seem vague or ambiguous and the Committee members may have difficulty evaluating it. This sometimes occurs in the case of jobs with which the Committee members are not very familiar.

**SOLUTION** It is recommended that clarifications be requested from the job holders and supervisors; in such cases, interviews can also be useful.

**PROBLEM 2** The information collected on a job is incomplete.

**SOLUTION** A number of job holders and supervisors should be met in order to complete it. As in the previous case, it is important here to avoid a solution that is based on the impressions of Committee members or on non-tested hypotheses.

**PROBLEM 3** Despite in-depth discussions, the Committee members cannot agree on a level.

**SOLUTION** In this case, the job which is posing difficulties should be put aside and returned to later, once similar jobs have been evaluated.

**PROBLEM 4** Some Committee members are inclined to always assign an average level regardless of which job or factor is being considered. This attitude is due to the fact that they are not sure of their judgement or have not clearly understood the goal of the exercise.

**SOLUTION** A reminder of the procedure to follow and the goal of the exercise would be useful.

## REVIEWING EVALUATIONS

Once all the jobs have been evaluated, it is important to review them in order to ensure that they are gender-neutral and that the results are consistent.

### Ensuring gender neutrality

This involves ensuring that levels are distributed equally among female- and male-dominated jobs. If, for example, it is found that female-dominated jobs tend to have been assigned average or low levels for most of the sub-factors while the opposite is true for male-dominated jobs, this means that the procedure may have been discriminatory. More specifically, the following test can be applied (the results of which are illustrated, in simplified form, in Table 6.4).

The level assigned for each sub-factor for each job being evaluated can be noted. For example, for the *job knowledge* sub-factor, the foreman's job was assigned a level 3, the programmer-analyst's job was assigned a level 4, and so on.

In order to determine whether or not gender bias exists, the average of the levels assigned for each sub-factor can be calculated for male-dominated jobs and female-dominated jobs respectively. For example, for the *job knowledge* sub-factor, the male-dominated jobs were respectively assigned the following levels:

$$3+4+2+1 \text{ yielding an average score of } 10/4 = 2.5.$$

For this same sub-factor, the female-dominated jobs were assigned the following levels:

$$4+4+3+5 = 16/4 = 4.0.$$

The average score for female-dominated jobs is 1.5 points higher than the average score for male-dominated jobs. Thus, it can be concluded that, in this organization and for the jobs evaluated in this organization, the *job knowledge* sub-factor is female.

Once all the averages have been calculated, it can be observed that for the *physical effort* and *working conditions* sub-factors, the average score for male-dominated jobs is higher than that for female-dominated jobs. This leads to the conclusion that, in the example examined here, these sub-factors are male.<sup>17</sup> The opposite is true for the *job knowledge*, *communication* and *responsibility for people* sub-factors, which would be considered to be female sub-factors in this example. In order to identify the gender predominance of a sub-factor, there has to be a difference of at least 1 between the average scores. In the following table, it can be observed that for the *mental effort* sub-factor, the difference is less than 1, which leads us to consider that this sub-factor is gender-neutral.

<sup>17</sup> In other examples, this could be different.

**Table 6.4 Ensuring gender neutrality in assigning levels**

Gender-predominant jobs	Levels of sub-factors per job					
	Job knowledge	Communication	Mental effort	Physical effort	Responsibility for people	Working conditions
Foreman	3	3	3	3	3	4
Programmer-analyst	4	3	5	2	1	2
Welder	2	1	2	4	1	5
Warehouse employee	1	1	2	4	1	3
<b>Average of levels of male-dominated jobs</b>	<b>2.5</b>	<b>2.0</b>	<b>3.0</b>	<b>3.3</b>	<b>1.5</b>	<b>3.5</b>
Accountant	4	3	4	1	1	2
Computer graphics technician	4	3	3	2	1	2
Customer service supervisor	3	3	3	2	3	3
Human resource manager (woman)	5	5	5	1	5	3
<b>Average of levels of female-dominated jobs</b>	<b>4</b>	<b>3.5</b>	<b>3.8</b>	<b>1.5</b>	<b>2.5</b>	<b>2.5</b>
<b>Gender predominance of sub-factor</b>	<b>Female</b>	<b>Female</b>	<b>Neutral</b>	<b>Male</b>	<b>Female</b>	<b>Male</b>

Thus, it can be observed that, out of six sub-factors, two are male, three are female and one is gender-neutral, which leads to the conclusion that the distribution of levels is quite balanced and that there has not been gender bias in assigning them. If, on the other hand, out of six sub-factors, four had been male, one had been female and one had been gender-neutral, or five had been male and one had been female, it would have been necessary to verify the causes of such a result and correct them if necessary. To sum up, this test makes it possible to determine whether there is a marked imbalance in the distribution of levels and, if so, to look for and correct the causes of such an imbalance.<sup>18</sup>

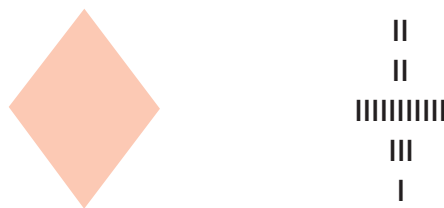
### **Consistency<sup>19</sup>**

This essentially involves examining the distribution of levels assigned for each of the sub-factors and determining whether **they tend to be concentrated around one level in particular**. The cases which need to be re-examined are represented below in the form of a graph. It is assumed that the levels assigned for the sub-factor considered range from 1 to 5.

<sup>18</sup> For the sake of simplicity, this exercise was carried out for a sample of jobs and for some factors only. In reality, it should be carried out for all sub-factors and for all the jobs being evaluated.

<sup>19</sup> Adapted from Canadian Human Rights Commission.

**CASE 1:** The distribution of levels is **diamond-shaped**, that is, most of the jobs, represented by vertical lines, have been assigned a Level 3 for this sub-factor, while a very small number of jobs have been assigned a high or low level.



**CASE 2:** The distribution of levels is shaped like a triangle, that is, most of the jobs have been assigned a Level 1 for this sub-factor while a few of them have been assigned higher levels.



**CASE 3:** The distribution of levels is shaped like a reversed triangle, that is, most of the jobs have been assigned a Level 5 for this sub-factor while a few of them have been assigned lower levels.



If the great majority of jobs are found at only one level for a given sub-factor, this means that there is almost no differentiation among them regarding this aspect. In this case, the Committee will have to decide whether the principle underlying each of these distributions is acceptable. Thus, it will have to check its interpretation of the sub-factor in question, review the justifications recorded and, if necessary, meet the technical advisers, job holders or supervisors concerned.

Once the sore thumbing has been completed, it will be possible to move on to the next step in which the job profile will be used to assign points based on the weighting grid.

## BENEFITS

Job analysis, as described above, yields a number of benefits for employers, in particular in terms of staffing, i.e. recruiting, selecting and promoting employees. In fact, it allows employers to gain more knowledge about the real demands of jobs and thus to better match applicants' qualities with the requirements of the positions to be filled through internal or external recruiting. It can thus reduce the rate of employee turnover which seems to result from inappropriate choices made at hiring, and the high costs associated with it.



- ☐ Have the Committee members written down the justification for all their decisions related to the evaluation?
- ☐ Have the Committee members agreed on the way to proceed if a problem arises?
- ☐ Has all the information which might arouse or maintain prejudice towards certain jobs to be evaluated been eliminated?
- ☐ Do the task descriptions follow the same standard format for both female- and male-dominated jobs?
- ☐ Do the task descriptions contain the same degree of detail for both female- and male-dominated jobs?
- ☐ Do task descriptions use the same number of active verbs for female-dominated jobs as for male-dominated jobs?
- ☐ Is the job evaluation carried out on a sub-factor-by-sub-factor basis?

- ☐ Are jobs evaluated in a random and variable order for each sub-factor?
- ☐ Has effort been made to avoid assigning average or low levels to female-dominated jobs for most of the sub-factors and vice-versa for male-dominated jobs?
- ☐ Has the gender predominance of sub-factors been determined?
- ☐ Is the distribution of levels assigned for any given sub-factor concentrated around one level?  
If yes, can this result be justified?

If you answered “No” to any of these questions, you will need to examine the reasons why. If a satisfactory explanation cannot be found, then you will need to modify your decision.







## CONTENTS - CHAPTER 7

Objectives and sequence	69
Weighting evaluation factors	70
Distribution of points by level	75
Assigning points to jobs and identifying jobs of the same value	76
Benefits	79
Checklist	80

## CHAPTER

## 7

# Determining the value of jobs

## OBJECTIVES

Two important operations must be conducted one after the other in this step: constructing a weighting grid and assigning points to the jobs. This is the final phase of the evaluation after which compensation for jobs of equal value can be compared.

THE SEQUENCE OF OPERATIONS IS AS FOLLOWS:

Developing the weighting grid

Ensuring consistency and absence of discriminatory bias

Distributing points based on levels of sub-factors

Calculating the total points for each gender-predominant job

Establishing point intervals

Grouping jobs by interval

Ensuring absence of discriminatory bias

## WEIGHTING EVALUATION FACTORS

The weighting of evaluation factors involves determining their relative importance and assigning a numerical value to each of them. It has an extremely important impact on the value of jobs. Even when extreme caution has been exercised during the preceding steps, inconsistencies and bias can nevertheless be introduced at this point, thus cancelling all previous efforts.

It is recommended that **the weighting grid be developed only after the job profiles have been established** (Chapter 6). Indeed, if those in charge of weighting knew in advance that a given skill or responsibility would be assigned a high weight, they could be tempted to assign a high level to it for a job that they wanted to favour.



One grid  
for  
all jobs

### Developing the weighting grid

A weighting grid indicates the relative importance of each factor and sub-factor for the organization. It is essential to use the same weighting grid for all the jobs covered by the pay equity programme. Indeed, in order to compare jobs, it is necessary to use the same measuring instrument. Moreover, the weighting grid is one of the most important elements in the measuring instrument in an evaluation method.

**Table 7.1 Example of a weighting grid**

Factors	Weighting	Number of points
<b>Qualifications</b>	32%	320
Job knowledge	12%	120
Communication	10%	100
Physical skills	10%	100
<b>Effort</b>	19%	190
Emotional effort	5%	50
Mental effort	8%	80
Physical effort	6%	60
<b>Responsibility</b>	39%	390
For people	12%	120
For products	12%	120
Financial	15%	150
<b>Working conditions</b>	10%	100
Physical environment	5%	50
Psychological climate	5%	50
<b>TOTAL</b>	<b>100%</b>	<b>1000 POINTS</b>

The number of points can vary, but unless there is a great diversity of jobs, it is recommended that a total of 1,000 points be used. It should be noted that the weighting grid presented above is for illustrative purposes only and does not constitute a recommended model. In general, most experts agree on the following per centage ranges as approximate guidelines with regard to the relative importance of factors:

20% to 35% for qualifications

25% to 40% for responsibility

15% to 25% for effort

5% to 15% for working conditions.

In order to construct the weighting grid, it is necessary first to rank the factors and then assign them a relative weight in terms of per centage, as illustrated in the steps below.

### **STEP 1**      **Ranking the four major factors by order of importance<sup>20</sup>** **Ranking factors**

Qualifications  
 Responsibility  
 Effort  
 Working conditions

### **STEP 2**      **Determining the per centage assigned to each factor** **Weighting factors**

Qualifications	32%
Responsibility	39%
Effort	19%
Working conditions	10%

### **STEP 3**      **Ranking sub-factors by order of importance** **Ranking *qualifications* sub-factors**

Qualifications  
 Job knowledge  
 Communication  
 Physical skills

### **STEP 4**      **Determining the per centage assigned to each sub-factor** **Weighting *qualifications* sub-factors**

Qualifications	32%
Job knowledge	12%
Communication	10%
Physical skills	10%

This way of proceeding makes it easier to establish the full weighting grid.

<sup>20</sup> This grid is presented for illustration purposes only.





Work!  
Goals!  
Values!

### Consistency of the weighting grid

Given that weighting has a direct effect on wages, it is essential that it be closely linked with the goals of the organization and the type of work characterizing it.

*For example: In a company which develops software programs, a high weight will be assigned to the analytical skills criterion; in a day-care centre, the responsibility for people criterion will be of utmost importance; in a public works enterprise, responsibility for equipment will be one of the key factors.*

Thus, to meet this requirement, it will be necessary to determine accurately, based on documentation, the type of work carried out by the enterprise, its priority goals and its values. Everybody has their own idea of the enterprise's mission. Therefore, to avoid long debates and to be as objective as possible, the information needed should be sought from documents and interviews with technical advisers.

Consistency can be ensured by examining the weight assigned to each factor being assessed in light of the goals and values of the enterprise. An element which has great importance for the enterprise should not be given a low weight and vice versa.

*For example: If an enterprise operating in the service sector indicates in its mandate that quality of service is an absolute priority but nevertheless assigns only a 4% weight to the sub-factor related to customer service, then this weighting will probably need to be changed.*

Consistent weighting is essential to detect discriminatory bias.

*For example: If in Enterprise X a high weight is assigned to responsibility for material resources (male-dominated jobs) at the expense of responsibility for people (female-dominated jobs), this may seem to be discriminatory at first glance. But if it has been clearly established that, in this enterprise, responsibility for material resources is particularly important for achieving the objectives of the enterprise, whereas responsibility for people is only secondary, then there is no discrimination.*

Understanding the essential nature of this link between objectives of the enterprise and weighting brings to light the importance of avoiding pre-established weightings.

### Eliminating gender bias in weighting

The same stereotypes which were identified when the factors were being selected and defined can also influence the establishment of the weighting grid. For example, those in charge of weighting might be inclined to assign a high weight to some factors, simply because they are representative of high-level jobs in the hierarchy; in such a case, the discrimination causing unequal pay may be reproduced.

*For example: Managing a large number of employees (generally male jobs) should not be assigned a high weight simply because the criterion is associated with high-level jobs. On the other hand, the risk of aggression or verbal abuse should not be assigned a low weight simply because it is associated with low-level service jobs (generally female.)*

Thus, the hierarchical structure of the enterprise should not influence the weighting of factors.

Some caution is also necessary regarding the pay structure. Committee members should avoid referring to the current wages of the various positions.

Another case of gender bias may appear if there is a tendency to assign extreme weights unequally to certain sub-factors, based on whether they are associated with female- or male-dominated jobs.

### Ensuring absence of discriminatory bias in the weighting grid

Once a level has been assigned to the various jobs for each sub-factor (see Chapter 4), it is generally observed that female-dominated jobs are assigned a high level for some sub-factors while male-dominated jobs are assigned a high level for other sub-factors. Thus, the former can be referred to as *female sub-factors* and the latter as *male sub-factors*. To ensure that the weighting grid does not have any discriminatory impact, a simple test can be conducted which involves comparing the weight assigned to the sub-factors based on their gender.

The following two tables show how such a test can be conducted.<sup>21</sup>

**Table 7.2 Example of discriminatory weighting**

Sub-factors	Gender predominance of sub-factor	Weight of sub-factor (%)
Job knowledge	F	10
Communication	F	7
Physical skills	M	12
Emotional effort	F	5
Mental effort	N	8
Physical effort	M	10
Responsibility for people	F	8
Responsibility for products	M	15
Financial responsibility	M	15
Working conditions	M	10
<b>Total</b>		<b>100</b>

The table above shows that four sub-factors are female (F) and five sub-factors are male (M). The following calculation reveals that there is an imbalance in the weighting:

The total weights for the 5 male sub-factors are: 12% + 10% + 15% + 15% + 10% = 62% which yields **an average of 12.4% for each male sub-factor**.

<sup>21</sup> Example adapted from *Equal Opportunities Commission Good Practice Guide – Job Evaluation Schemes Free of Sex Bias*.



The total weights for the 4 female sub-factors are:  $10\% + 7\% + 5\% + 8\% = 30\%$  which yields **an average of 7.5% for each female sub-factor**.

The gap between the weights assigned to female and male sub-factors is thus highly significant. However, this does not imply that it is discriminatory but it does imply that the weighting grid should be re-examined and justified in light of the enterprise's mission and the type of work performed therein.

In this fictitious example, those responsible for this step therefore carefully reviewed their first analysis and found that certain female sub-factors had been assigned too low a weight compared to certain male sub-factors. For example, given the enterprise's mission, job knowledge was the most important qualification (and should therefore have been given the most weight, that is, 12 per cent), while the other two *qualifications* sub-factors were both of equal value and should have been assigned the same weight, that is 10 per cent. A re-examination of the types of jobs and their contribution to the enterprise's mission also led the Committee members to assign a higher weight to responsibility for people and a lower weight to physical effort. Once this delicate exercise had been carried out, a new weighting grid was adopted, as illustrated in Table 7.3.

**Table 7.3 Example of non-discriminatory weighting**

Sub-factors	Gender predominance of sub-factor	Weight (%)
Job knowledge	F	12
Communication	F	10
Physical skills	M	10
Emotional effort	F	5
Mental effort	N	8
Physical effort	M	6
Responsibility for people	F	12
Responsibility for products	M	12
Financial responsibility	M	15
Working conditions	M	10
<b>Total</b>		<b>100</b>

The data in Table 7.3 show that the new weighting is more balanced.

The total weights for the 5 male sub-factors are:  $10\% + 6\% + 12\% + 15\% + 10\% = 53\%$  which yield **an average of 10.6% for each male sub-factor**.

The total weights for the 4 female sub-factors are:  $12\% + 10\% + 5\% + 12\% = 39\%$  which yield **an average of 9.75% for each female sub-factor**.

While the gap between the two averages did not disappear altogether, it was reduced. The Committee adjusted the weighting grid based on the criteria of consistency and non-discrimination in order, ultimately, to choose a weighting grid that seemed best suited to the enterprise. This example illustrates the fact that often the weighting is gradually established through a trial and error process.

## DISTRIBUTION OF POINTS BY LEVEL

Once the grid has been established, the total number of points for each sub-factor must be distributed among its different levels. Let us assume that the *job knowledge* sub-factor has been given a maximum of 140 points and that the levels assigned for this sub-factor range from 1 to 5.

How many points should be added each time in moving from one level to the next?

Two decisions must be made in this regard:

### ■ WHAT TYPE OF PROGRESSION SHOULD BE CHOSEN: ARITHMETIC OR GEOMETRIC?

Arithmetic progressions maintain the same gap between each of the various levels and are clearly in line with the goal of pay equity. Geometric progressions, on the other hand, tend to increase the gaps between the levels as the level rises on the scale, thus unjustifiably intensifying the inequality between entry-level jobs (often predominantly female) and high-level jobs (generally predominantly male). This approach is not recommended for pay equity purposes.

### ■ HOW MANY POINTS SHOULD BE ASSIGNED TO THE LOWEST LEVEL?

If a job does not involve a given sub-factor among its requirements, it should not receive any points for this sub-factor. Such cases are limited given that the sub-factors are chosen and defined in such a way as to represent the whole range of jobs within an enterprise. Generally speaking, the first level is thus assigned a certain number of points. For example, in the case of the *job knowledge* sub-factor, for which there are five levels, the 120 points would be distributed according to an arithmetic progression, as follows:

**Table 7.4 Example of arithmetic progression – Job knowledge sub-factor**

Level	L1	L2	L3	L4	L5
Number of points	24 points	48 points	72 points	96 points	120 points

In the case where the first level is defined as corresponding to the absence or low presence of a sub-factor, the number of points assigned to it could be much lower. Take, for example, the *emotional effort* sub-factor: if some jobs do not involve this sub-factor among their requirements, the grid could be constructed as follows:

Level	L1	L2	L3	L4	L5
Number of points	5 points	16.25 points	27.5 points	38.75 points	50 points

In this example, Level L1, which corresponds to little or no emotional effort, was assigned 10% of the total for this sub-factor and the rest of the total was divided by 4, yielding an arithmetic progression of 11.25. Although some experts prefer to always assign an equal number of points per level, others prefer, as in this example, to start with a lower number of points. Some experts even assign 0 points to the first level when it corresponds to the absence of a sub-factor but, as mentioned earlier, this situation rarely presents itself. It must be kept in mind that each of these options will have a different effect on the relative value of jobs.

The same process is conducted for all of the sub-factors included in the method, so that the number of points for each level and each sub-factor can be worked out. The figure in bold indicates the maximum number of points assigned to each sub-factor and corresponds to the highest level assigned to each sub-factor. Also, all of the figures in bold (i.e. the maximum number of points for all sub-factors) should add up to 1,000 points.

**Table 7.5 Point grid for all sub-factors and levels<sup>22</sup>**

	Qualifications			Effort			Responsibility			Working conditions	
	Job	Phys. skills	Comm.	Emot.	Mental	Phys.	For people	For prod.	Finan.	Phys.	Psych.
L1	24	20	20	12.5	16	15	24	24	16	12,5	12,5
L2	48	40	40	25	32	30	48	48	32	25	25
L3	72	60	60	37.5	48	45	72	72	48	37.5	37.5
L4	96	80	80	<b>50</b>	64	<b>60</b>	96	96	64	<b>50</b>	<b>50</b>
<b>L5</b>	<b>120</b>	<b>100</b>	<b>100</b>		<b>80</b>		<b>120</b>	<b>120</b>	<b>150</b>		

## ASSIGNING POINTS TO JOBS AND IDENTIFYING JOBS OF THE SAME VALUE

Once weighting has been established and the number of points per sub-factor and level has been worked out, it will be possible to assign a value to each job. This operation involves two steps:

- **FIRST, POINTS ARE ASSIGNED TO EACH SUB-FACTOR BASED ON THE JOB PROFILE (SEE CHAPTER 6)**
- **SECOND, THE JOBS ARE GROUPED INTO CLASSES IN WHICH ALL JOBS ARE CONSIDERED TO HAVE THE SAME VALUE.**



<sup>22</sup> In this grid, given the job characteristics to be evaluated, the Pay Equity Committee has assigned 4 levels to some sub-factors and 5 to other sub-factors.

### Calculating the total points assigned to each job

The total points assigned to a job will depend on its profile and more specifically on the level which was assigned to it for each of the sub-factors. Let us assume that based on the analysis of the questionnaire results (see Chapter 6), the Committee assigned the following levels to the various sub-factors that characterize a secretary's job:

**Table 7.6 Summary of profile of a secretary's job**

Factors and sub-factors	Levels assigned by the Committee
<i>Qualifications</i>	
Job knowledge	Level 2
Physical skills	Level 2
Communication	Level 2
<i>Effort</i>	
Emotional effort	Level 1
Mental effort	Level 2
Physical effort	Level 2
<i>Responsibility</i>	
For people	Level 1
For products	Level 2
Financial	Level 1
<i>Working conditions</i>	
Physical environment	Level 2
Psychological climate	Level 2

Based on the point grid presented above (Table 7.5), levels can be matched with points. Thus, a secretary's job in the organization examined would obtain a total of 342 points.

**Table 7.7 Determining the total points assigned to a secretary's job**

	Qualifications			Effort			Responsibility			Working conditions	
	Job	Phys. skills	Comm.	Emot.	Mental	Phys.	For people	For prod.	Finan.	Phys.	Psych.
L1	24	20	20	<i>12.5</i>	16	15	<i>24</i>	24	<i>16</i>	12.5	12.5
L2	<i>48</i>	<i>40</i>	<i>40</i>	25	<i>32</i>	<i>30</i>	48	<i>48</i>	32	<i>25</i>	<i>25</i>
L3	72	60	60	37.5	48	45	72	72	48	37.5	37.5
L4	96	80	80	<b>50</b>	64	<b>60</b>	96	96	64	<b>50</b>	<b>50</b>
<b>L5</b>	<b>120</b>	<b>100</b>	<b>100</b>		<b>80</b>		<b>120</b>	<b>120</b>	<b>150</b>		

*Underlined figures in italics indicate the points assigned to a secretary's job.*

By proceeding in the same way for each of the jobs, their respective values can be determined.

Once this step has been completed, the jobs can be ranked based on the total number of points assigned to them, and female-dominated jobs and male-dominated jobs of equal value can be determined.

## Grouping jobs into point intervals

To determine equivalencies between jobs, it is necessary to group them according to point intervals. There are two reasons for this:

- It is highly likely that, most of the time, there will be differences of a few points between a female-dominated job and the closest male-dominated job. Since job evaluation is not an exact science, a difference of a few points, within certain limits, does not mean that the jobs are not equivalent;
- Establishing intervals within which jobs with a relatively similar total number of points can be grouped together, helps to create wage classes and thus simplifies the compensation system.

### Range of intervals

Determining the range covered by the intervals is an issue that the Committee must analyse, taking into account the advantages and disadvantages of different possible scenarios. A decision can be made to assign 30, 50 or 70 points per interval, depending on the total number of points in the method and the number of wage classes that is desirable in the final result:

- A narrow point range is likely to lead to wage differences between jobs that will be difficult to justify.
- A wide point range simplifies the compensation system and makes it more flexible. However, ultimately, it is likely to take away all meaning from the notion of equal value.

In some cases, certain “natural boundaries” may appear by grouping together a number of jobs, and these may guide the Committee in terms of choosing the range of each class of intervals.

Let us assume that, in a method with a maximum of 1,000 points, the decision is made to have 15 classes which correspond approximately to intervals of 65 points each. The following would thus be obtained:

**Table 7.8 Example of interval progression**

Group 1	Group 2	Group 3	Group 4	Group 5	Group 6	Group 7	Group 8
200–299	300–399	400–499	500–599	600–699	700–799	800–899	900–1,000

The example above shows that, if one female-dominated job has been assigned 200 points, another female-dominated job has been assigned 255 points and a male-dominated job has been assigned 240 points, these three jobs will be considered to be equivalent. If there is a wage gap between one or the other of the female-dominated jobs and the male comparator, favouring the latter, this gap should be corrected.

### Absence of discriminatory bias in determining intervals

A number of rules should be observed in order to prevent the grouping by intervals from having a discriminatory impact.

- ➔ Gaps between intervals should be established in terms of absolute numbers (arithmetic progression) rather than in terms of per centages (geometric progression). Basing intervals on a fixed per centage-based progression increases the gaps between jobs at the lowest and highest ends of the value scale and thus may disadvantage women's jobs which are often found in the lower intervals.
- ➔ It should be ensured that women's jobs are not systematically found near the upper limit of the interval, which could reflect a desire to artificially reduce the pay adjustments made as a result of the pay equity process.
- ➔ It should be ensured that female jobs representing a high proportion of the employee population in the enterprise are not found near the upper limit of the interval. Indeed, to reduce the impact of pay equity on total payroll, managers might be tempted to place such jobs just below the upper limit of the interval. This practice is potentially discriminatory and should be avoided.
- ➔ Lastly, for the sake of consistency and non discrimination, the intervals should not overlap. For example:

Group 3 400–499 points

Group 4 480–599 points .

Where will the job which obtains 485 points be placed?

## BENEFITS

Numerous benefits can be derived from this step, in particular:

- Analysing and reflecting on the enterprise's mission and key values can be highly beneficial for updating these dimensions and communicating them with more precision to all employees.
- This reflection will also make it easier to establish the link between the different jobs and the purpose of the enterprise.
- Determining intervals on a consistent and non-discriminatory basis can rationalize human resources management.
- The job hierarchy is established on the basis of a consistent and non-discriminatory principle, thus ensuring a greater sense of equity within the enterprise.
- Future technological or organizational changes can be analysed and integrated based on the same parameters, thus facilitating the task of managers.





- ☐ Has a principle for weighting been defined?
- ☐ Is this principle based on objective and up to date information?
- ☐ Has this principle been clearly recorded in writing?
- ☐ Does the weighting grid represent the enterprise's values?
- ☐ Is the weighting grid tailored to the jobs to be evaluated?
- ☐ Do the factors considered to be most important for the enterprise carry more weight?
- ☐ Has it been determined that the weighting will not implicitly or explicitly perpetuate the existing hierarchy in the enterprise?
- ☐ Has it been determined that the weighting will not implicitly or explicitly perpetuate the existing wage structure in the enterprise?
- ☐ Have the sub-factors considered to be equivalent been assigned the same weight?
- ☐ Has effort been made to avoid systematically assigning a high weight to sub-factors associated with one gender rather than the other?

- ☐ Has an effort been made to avoid systematically assigning a low weight to sub-factors associated with one gender rather than the other?
- ☐ Has it been ensured that, for sub-factors, the progression of points from one level to the next does not result in a marked disadvantage for low-level jobs?
- ☐ Are intervals based on a regular progression in points rather than on a per centage-based progression?
- ☐ Has an effort been made to prevent female-dominated jobs from being disproportionately found just below the upper limit of intervals?
- ☐ Has an effort been made to prevent female-dominated jobs representing a high proportion of the employee population from being found just below the upper limit of intervals?
- ☐ Has it been ensured that the intervals do not overlap?

If you answered “No” to any of these questions, you will need to examine the reasons why. If a satisfactory explanation cannot be found, then you will need to modify your decision.



## CONTENTS - CHAPTER 8

Objectives and sequence	83
Total compensation	84
Pay comparisons and adjustments	87
Non-discriminatory wage gaps	88
Payment of wage adjustments	89
Internal equity	89
Benefits	89
Checklist	90

# CHAPTER 8 Estimating wage gaps for jobs of equal value and making pay adjustments

## OBJECTIVES

The goal of this step is to equalize pay for jobs of equal value. This step is thus the outcome of the entire process undertaken thus far. When an employer finds discriminatory gaps to the detriment of certain female-dominated jobs, it will be necessary to correct them for all employees, whether they work part time or full time, are on indeterminate or fixed-term contracts or are casual workers. Although this step is most essential, it is often not dealt with in detail in manuals and practical policy guidelines related to promoting pay equity.<sup>23</sup>

THE SEQUENCE OF OPERATIONS IS AS FOLLOWS:

Determining the basic salary of jobs to be compared

Determining flexible pay

Ensuring absence of discriminatory bias in flexible pay between jobs of equal value

Determining cash value benefits

Ensuring absence of discriminatory bias in cash value benefits between jobs of equal value

Estimating pay gaps

Harmonizing pay structures for jobs of equal value

Payment of wage adjustments

<sup>23</sup> For further details, see Chicha (2006).



## TOTAL COMPENSATION

Pay equity aims at compensation in its global sense, that is, salary, flexible pay and fringe benefits. Indeed, it aims to equalize all compensation for the work performed and studies have shown that these are the three components which may be affected by discrimination.

### Basic salary

Salary is defined as the basic amount received by an employee before any other amounts are added. This amount can be fixed, as is the case of single pay rates for some jobs; it can also be based on a pay scale, where the transition from one level to the next is determined by seniority or other criteria.

When there is a pay scale, it is better to use the **regular maximum rate** for comparisons between jobs of the same value. In fact, this rate represents the job's contribution to the enterprise. In some cases, beyond the regular maximum rate, some levels are added as **bonuses** to pay employees for their high performance. To ensure that this practice is not discriminatory, three aspects must be verified:

- ➔ Is the **regular maximum rate the same** for female- and male-dominated jobs?
- ➔ Are the **criteria used in awarding these bonuses the same** for female- and male-dominated jobs?
- ➔ When female workers are concentrated in part-time jobs, an additional dimension must be examined: **are these bonuses as accessible** to part-time employees as they are to full-time employees?

For pay comparison purposes, the measurement unit should be standardized: hourly pay, weekly pay or monthly pay.



## Flexible pay

Flexible pay, which is increasingly common, results from the fact that individual, team or corporate performance is taken into account. It can take diverse forms such as:

- Skills-based compensation which involves determining compensation based on employees' skill diversification.
- Team-based compensation which applies to cases in which a group of employees (in a department, branch or store) receives a premium for their higher performance to be shared among themselves.
- Profit-sharing, which means that a part of the profits of the entire enterprise or of one of its units is shared among the employees.

It is essential that each element of flexible pay be examined in order to ensure that it is not allocated in a discriminatory fashion. The following questions must be asked:

- ➔ Is flexible pay as **available** to employees in female-dominated jobs as it is to employees in male-dominated jobs of the same value?
- ➔ **Are the amounts paid equal** for female- and male-dominated jobs of the same value?

If the answer to one of these questions is "No," the gaps must be corrected and their likely causes, such as the following, must be eliminated:

- **Objectives cannot be achieved as easily** for female-dominated jobs as for male-dominated jobs;
- The type of flexible pay examined is **only accessible to regular full-time employees**; it is not accessible to part-time employees, employees on fixed-term contracts or casual;
- **The allocation criteria correspond mainly to qualities associated with men's jobs** (leadership, decision-making skills, self-assertion) and do not take into account the qualities associated with women's jobs (cooperation, consultation, interpersonal skills);

This examination will make the compensation system more consistent and transparent.

For comparison purposes, flexible pay should also be calculated on a standardized basis in order to avoid the variations that are sometimes found in this type of payment scheme. Average compensation can be calculated over a three to five-year period, depending on the evolving economic situation.

If gaps exist in terms of flexible pay between jobs of equal value, the employer should eliminate them either by equalizing the flexible portion of the compensation or by paying a compensatory lump sum to employees in female-dominated jobs.



## Cash value benefits

These involve perquisites or in-kind benefits linked to the job and fully or partially financed by the employer, such as:

- paid time off: vacation leave, public holidays, parental leave, leave for family reasons, sick leave, breaks and mealtimes;<sup>24</sup>
- pension plans and company benefit plans (health, disability);
- fringe benefits (perquisites): company car, parking, payment of professional dues, reimbursement of study expenses, reduced rate loans, cellular telephone, uniforms (except if required by type of tasks).

These elements should be examined in order to ensure that:

- ➔ They are **equally accessible** to employees in female- and male-dominated jobs of the same value;
- ➔ The **amounts received are on average equivalent for jobs of the same value**.  
In the latter case, the calculation will differ, depending on the kind of benefit:
  - Expenses for a company car, professional dues, uniforms or a cellular telephone can be easily measured, based on the immediate cost incurred by the employer.
  - Holidays, vacation leave and other time-based benefits will be calculated in terms of number of days.
  - Pension plans or company benefit plans pose the problem of knowing whether to take into account the benefits received by the employees or the contributions paid by the employer. Despite its limitations, the latter solution is preferable for reasons of feasibility and because it considerably simplifies the evaluation.

If a gap exists in terms of social benefits, the employer should correct it by using the most appropriate means, that is, by paying an equivalent amount in cash or through equal allocation of benefits to employees in female- and male-dominated jobs.

<sup>24</sup> Maternity leave is not included in these benefits because it meets the non-discrimination requirement.

## PAY COMPARISONS AND ADJUSTMENTS

### Methods of pay adjustment

Once the total compensation has been determined for female- and male-dominated jobs, the gaps between jobs of the same value can be calculated. This can be done:

- by comparing individually the pay for a female-dominated job to the pay of a male-dominated job of equal value; this method is easiest to apply when the number of jobs being compared is small and it is therefore best suited to small organizations;
- by comparing globally the pay for female-dominated jobs to the wage/value regression line for male-dominated jobs.

A very important point must be emphasized here, that is, **pay equity is obtained by increasing the pay for female-dominated jobs to the level of pay for male-dominated jobs of the same value** and not the other way around, i.e. decreasing the wages of the latter.

### Pay structures

Once the pay gaps have been calculated, the issue of pay structures arises, in particular in cases where pay scales exist. It has been observed that the scales of female-dominated jobs often include a greater number of levels than those of male-dominated jobs of the same value; it follows that much more time is needed for holders of female-dominated jobs to achieve the same maximum rate of pay. Thus, for a great number of women who are below the maximum level, pay equity is only obtained in theory. This situation of inequality is exacerbated in the case where a single rate is set for men's jobs while numerous levels are set for women's jobs.

**Therefore, when establishing pay equity, the pay structures for women's jobs and men's jobs of the same value should be standardized.** This must be considered to be an integral part of pay equity.



## NON-DISCRIMINATORY WAGE GAPS

The observed wage gaps may be fully or partly caused by factors which are not discriminatory but which reflect management or market constraints.

### Shortages of skilled labour

There may at times be a labour shortage for some jobs. Enterprises must therefore substantially increase their wages in order to attract workers who are employed by competitors or even to recruit workers from abroad. If this involves male-dominated jobs, this “additional premium” due to a labour shortage should not be considered to be discriminatory. A possible solution would be not to include the job subject to a labour shortage in pay comparisons.

However, it should be noted that labour shortages rarely last a long time. If the premium was allocated five years ago and the labour shortage has ended by the time the equal pay exercise is undertaken, then there is no reason to exclude this job from the comparisons.

### Pay freeze

This refers to cases affected by what is sometimes called *red circling*. As a result of a work reorganization or technological change, the maximum rate of pay for some jobs is lowered. Employees whose rate of pay has reached the maximum are not subject to a decrease in pay, but their pay is temporarily frozen. For pay equity purposes, comparisons are made using the new rate.

It is important that this pay freeze be limited to a small number of jobs and be decided well before the pay equity process is undertaken. Otherwise, this practice might be considered to have been dictated implicitly by the desire to limit pay adjustments and could be considered discriminatory.

### Isolated post or cost-of-living allowance

In some cases, employees who are sent abroad or to remote regions are granted an isolated post allowance or an allowance to cover the difference in cost of living or both. These allowances are not included in pay comparisons, provided that they were not allocated in a discriminatory fashion.





Gradual  
adjustments  
possible

## PAYMENT OF WAGE ADJUSTMENTS

Discriminatory pay gaps observed between jobs of equal value should be **completely eliminated**. It is not enough to increase the pay for female-dominated jobs by a certain arbitrary percentage in order to bring them closer to the pay for male-dominated jobs. As long as a gap continues to exist, it cannot be said that wage discrimination has been eliminated. On the other hand, if the amounts to be paid out are considerable, the wages can be raised gradually to achieve equity within three or four years. The aim of this measure is simply to allow the employer to lessen the impact of increasing the payroll.

### INTERNAL EQUITY

The pay equity process leads to an in-depth review of compensation practices and pay structures, and to the resulting adjustments to the pay for female-dominated jobs. The process may also reveal that some male-dominated jobs are underpaid or, on the contrary, overpaid in relation to their value. In order to harmonize the entire compensation system, some employers adjust the pay for male-dominated jobs and jobs of mixed-gender predominance. Once the pay for all these jobs has been adjusted according to their value, it is considered that internal equity has been achieved in the enterprise.

This process can be spread over time by modulating differently the annual pay increases based on whether the job is overpaid or underpaid; the rate of annual pay increases will be lower than the average rate for the former and higher for the latter, until all the jobs are found in the pay category that corresponds to their value.

### BENEFITS

- A major benefit that the enterprise can derive from this process is that it will obtain a compensation system that is consistent and tailored to its needs. This benefit has been unanimously underlined by employers who have implemented pay equity in their enterprises.
- Another positive impact for the employer is the enhanced attractiveness of the enterprise, which will give it a comparative advantage in terms of recruiting.
- Lastly, the employer who carries out this process in a rigorous manner, avoiding gender bias, will in general not have to worry about being sued for wage discrimination, which could be very costly.



- ☐ Is the regular maximum rate of pay scales the same for female- and male-dominated jobs?
- ☐ Are the criteria used in awarding performance bonuses the same for female- and male-dominated jobs?
- ☐ Are bonuses as accessible to employees in part-time jobs as they are to those in full-time jobs?
- ☐ Is flexible pay as accessible to employees in female-dominated jobs as it is to those in male-dominated jobs of the same value?
- ☐ Are the amounts paid out through flexible pay equal for female- and male-dominated jobs of the same value?
- ☐ Can the objectives based on which flexible pay is determined be as easily achieved for female-dominated jobs as for male-dominated jobs?
- ☐ Is the type of flexible pay examined accessible to both full-time and part-time employees and to both permanent and temporary employees?
- ☐ Has it been ensured that the allocation criteria do not correspond mainly to the qualities associated with men's jobs?

- ☐ Are cash value benefits as accessible to employees in female-dominated jobs as they are to those in male-dominated jobs of the same value?
- ☐ Are the amounts received equivalent on average for jobs of the same value?
- ☐ Has effort been made to avoid decreasing the wages of male-dominated jobs in order to achieve pay equity?
- ☐ Have the pay structures been standardized for female- and male-dominated jobs of the same value?
- ☐ Have discriminatory pay gaps observed between jobs of the same value been completely eliminated?

If you answered “No” to any of these questions, you will need to examine the reasons why. If a satisfactory explanation cannot be found, then you will need to modify your decision.



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# LIST OF TABLES

## CHAPTER 1 Context and objectives of the guide

Table 1.1 Synthesis of benefits of pay equity	4
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## CHAPTER 4 Job evaluation methods

Table 4.1 Qualification factor: Selecting and providing examples of gender-neutral sub-factors	30
Table 4.2 Effort factor: Selecting and providing examples of gender-neutral sub-factors	32
Table 4.3 Responsibility factor: Selecting and providing examples of gender-neutral sub-factors	33
Table 4.4 Working conditions factor: Selecting and providing examples of gender-neutral sub-factors	35
Table 4.5 Examples of dimensions of sub-factors	36
Table 4.6 Risk sub-factors levels	36

## CHAPTER 5 Collecting data on the jobs to be evaluated

Table 5.1 Explanatory part of the questionnaire	44
Table 5.2 Simple example for small enterprises	45
Table 5.3 Detailed examples for large enterprises	45
Table 5.4 Example of closed-ended questions tailored for large enterprises	46
Table 5.5 Example of questionnaire developed for small or medium-sized enterprises, based on semi-structured questions	47
Table 5.6 Commonly overlooked elements of female jobs	49
Table 5.7 Examples of active verbs	51

## CHAPTER 6 Analysing the questionnaire results

Table 6.1 Identification record	58
Table 6.2 Description of tasks	59
Table 6.3 Job profile	60
Table 6.4 Ensuring gender neutrality in assigning levels	64

## CHAPTER 7: Determining the value of jobs

Table 7.1 Example of weighting grid	70
Table 7.2 Example of discriminatory weighting	73
Table 7.3 Example of non-discriminatory weighting	74
Table 7.4 Example of arithmetic progression – Job knowledge sub-factor	75
Table 7.5 Point grid for all sub-factors and levels	76
Table 7.6 Summary of profile of a secretary's job	77
Table 7.7 Determining the total points assigned to a secretary's job	77
Table 7.8 Example of interval progression	78

# GLOSSARY

<b>Gender bias</b>	Gender bias refers to the ways some jobs are made to be advantageous or disadvantageous based on sex. This type of bias can show up at any step along the way in a pay equity programme.
<b>Gender predominant jobs</b>	Jobs which are associated with one sex or the other, based on quantitative or qualitative criteria.
<b>Pay equity</b>	Implementing the principle of equal remuneration for work of equal value, free from discrimination based on sex.
<b>Factors</b>	Criteria which make it possible to take into account the requirements of various jobs within an enterprise. In pay equity programmes, the following four factors are considered to be necessary and sufficient in order to properly evaluate jobs: qualifications, effort, responsibility and working conditions.
<b>Weighting grid</b>	Assigning weight to evaluation factors consists in determining their relative importance and attributing a numerical value to each. The weighting grid, which indicates the weight assigned to each factor and sub-factor, is one of the most important elements in the measuring instrument in an evaluation method.
<b>Job evaluation method</b>	A method used to measure, based on four different factors, the characteristics of the jobs within an enterprise, with the aim of establishing their relative value.
<b>Levels</b>	The intensity, frequency, duration or other dimensions of a sub-factor are measured using a scale composed of levels. These levels make it possible to distinguish between different jobs.
<b>Pay equity programme</b>	A planned and structured process whose goal is to achieve pay equity.
<b>Sub-factors</b>	Each factor in a job evaluation method is usually broken down into sub-factors in order to make it possible to evaluate all facets of the various jobs within an enterprise.



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# PROGRAMME ON PROMOTING THE DECLARATION ON FUNDAMENTAL PRINCIPLES AND RIGHTS AT WORK

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Price 35 Swiss francs

ISBN 978-92-2-121538-7



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