

Guide to Australian Standard on gender-inclusive job evaluation

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Section 1:

The Guide at a glance – building blocks for gender-inclusive job evaluation and grading

The Guide is presented in three sections to enable you to select the advice you need.

The first section, The Guide at a glance, provides:

- The “building blocks” for gender-inclusive job evaluation and grading;
- An introduction to the Guide;
- A summary of what is in the Guide and how to use it; and
- An overview of the benefits of using the Guide and the Standard.

The second section, *How do I show the Requirements are met?* provides an overview for each clause of the Standard, and advice on documenting how the Standard’s Requirements for the clause can be met. In the “building blocks” diagram below, the text in each box is hyperlinked to the related content in the Guide. The overview of each clause is drawn from the Standard.

The third section of the Guide, Examples of documenting meeting the Standard’s Requirements, provides examples and formats used in real projects to show how each of the Standard’s Requirements could be met. Each part of the second section of the Guide is hyperlinked to the relevant example.



Introduction

The Gender-inclusive Job Evaluation and Grading Standard is a voluntary standard developed by Standards Australia through a Standards Development Committee. The committee comprised job evaluation and grading specialists, equity specialists, the Australian Human Resources Institute, employer groups, and unions. This Guide is to be used in conjunction with the Standard.

The objective of the Standard and the Guide is to set out requirements for and provide advice about how job evaluation and grading can be carried out free of any effects of gender. The Standard includes material explaining how gender bias can affect evaluation and grading. An important factor contributing to gender bias is that judgements are sometimes made on the basis of inadequate or gender-biased job evaluation or job analysis processes. The Standard addresses how those risks can be identified and minimised in each part of the job evaluation and grading process, from planning the project to reviewing the gender outcomes of the project.

How the Standard is met needs to be demonstrated for each job evaluation and grading project, since the Standard deals with both scheme design or selection and how job evaluation and grading processes are carried out.

This Guide has been developed in consultation with the Standard's original Standards Development Committee. The Workplace Gender Equality Agency (WGEA) is responsible for its content and publication, and the members of the committee do not necessarily endorse each aspect of the Guide.

The Guide and the Standard can be used with any analytic job evaluation or grading system. That includes points/factor job evaluation, and other factor based job classification and grading systems. In Australia, analytic factor analysis of jobs is sometimes conducted using position classifications or work level standards, role profiles, or other position or classification and grading definitions and levels. Those job analyses sometimes are incorporated in industrial awards or agreements while in some other awards, descriptors are largely confined to job titles.

The Standard refers to "jobs mainly held by women or men". Those parts of the Standard should be considered both in terms of the gender of current job holders, and the gender of those who usually hold those jobs in the broader workforce. That is because perspectives on the nature and value of particular jobs have sometimes been affected by the gender makeup of the jobs, irrespective of the gender of current job holders, in general or in a particular organisation. Particular steps are needed to ensure that the evaluation and grading of gender-dominated jobs are not affected by gender bias.

Ultimately, employers are responsible for ensuring job evaluation and grading are not affected by gender bias. It will always be the responsibility of the job evaluation and grading project manager, as delegated by the employer, to assess the adequacy, validity and reliability of claims made about how the Standard is or will be met, and the evidence presented for those claims. This is consistent with the voluntary nature of the Standard and with the usual exercise of due diligence in human resources management. It can be expected that the level of practice and performance in relation to the Standard will improve over time.

¹<http://www.abs.gov.au/AUSSTATS/abs@.nsf/DetailsPage/6291.0.55.003Feb%202012?OpenDocument> The most detailed data on gender composition of occupations is provided by the five-yearly Census. The 2006 data is at [http://www.censusdata.abs.gov.au/ABSNavigation/prenav/ViewData?breadcrumb=TLPD&method=Place of Usual Residence&subaction=-1&issue=2006&producttype=Census Tables&documentproductno=0&textversion=false&documenttype=Details&collection=Census&javascript=true&topic=Occupation&action=404&productlabel=Occupation - 2006 ANZSCO \(minor groups\) by Sex&order=1&period=2006&tabname=Details&areacode=0&navmapdisplayed=true&](http://www.censusdata.abs.gov.au/ABSNavigation/prenav/ViewData?breadcrumb=TLPD&method=Place of Usual Residence&subaction=-1&issue=2006&producttype=Census Tables&documentproductno=0&textversion=false&documenttype=Details&collection=Census&javascript=true&topic=Occupation&action=404&productlabel=Occupation - 2006 ANZSCO (minor groups) by Sex&order=1&period=2006&tabname=Details&areacode=0&navmapdisplayed=true&) The 2011 data will be available from late August 2012.

What's in the Guide and how to use it

This Guide, like the Standard on Gender-inclusive Job Evaluation and Grading, is for the use of providers of job evaluation and remuneration survey services, human resources (HR) management practitioners, equity experts, employers, employer representatives, employees and employee representatives including unions. The Guide and the Standard relate to evaluation and classification of jobs according to each of their significant elements – in particular, those specified in the Fair Work Act 2009 provisions as relating to work value (s.156(4): skill, responsibility and conditions). Methods of evaluating and classifying jobs include points/factor job evaluation, factor-based job evaluation and grading including work level standards and capability frameworks, and awards and agreements in which job and level descriptors are sufficiently well-developed to enable classification of jobs according to their significant elements of work value. The Standard and the Guide can be applied across a wide range of industries, and to organisations of various sizes.

The main objective of the Guide is to provide advice and examples of how the requirements of the Standard could be met, based on experience in specific job evaluation and grading projects. The examples provided show a possible approach to demonstrating how the Requirements can be met, and they are not definitive or exhaustive. Provision of these examples does not involve recommendation or endorsement of the approach used in the examples. The examples arose from specific activities in particular projects. Use of the example documents will not necessarily be suited to your workplace or ensure compliance with the Standard. The concrete details would always need to reflect the approaches and activities in particular projects. It is therefore strongly recommended that users of the guide develop their own project documents.

For example, Example A outlines the factor weightings of the specific job evaluation scheme used in the particular project. What is said about factors and factor weightings would always need to reflect those of the scheme being used. Example E describes an approach to issues in training on gender bias in job evaluation and grading. This example focuses heavily on outlining some of the content of the training. There are many possible approaches to the provision and content of training, depending on the nature of the project being undertaken, the methods of delivery, and the participants.

The examples include sample plans and reports to the manager responsible for the job evaluation or grading project, an example of an outline of training content on gender and job evaluation and training, sample memos to staff (including template forms), examples of documentation on job evaluation and grading systems, and an example of a competency framework on gender and job evaluation and grading.

The main requirements of the Standard relate to ensuring that:

- The plan for the job evaluation and grading project includes how the gender equity objectives will be met;
- Committee or group members are selected on a fair and clearly stated basis appropriate for the coverage of the project;
- Participants in the project, including internal and external job evaluation and grading practitioners, and members of committees (job evaluation and grading committees, reference panels, steering committees) have appropriate education and training for their roles. The training needs to cover the job evaluation and grading system, its implementation and its gender equity objectives;
- The job evaluation and grading system selected (including its factors or elements, and their weighting) can fully and fairly measure the significant components of all jobs being evaluated, without gender bias;
- The benchmark sample for evaluation and grading is sufficiently representative of the range and distribution of all the jobs being evaluated and graded;
- The job information used in job evaluation and grading is relevant and sufficient for job evaluation and grading free of gender bias;
- The job evaluation and grading process consistently applies the job evaluation and grading system without gender bias;
- The outcomes of evaluation and grading (factor by factor and overall rank order) are checked for consistency, and validated by the organisation;
- Appropriate appeal processes enable testing and redress of any gender bias in evaluation and grading, including processes for checking how the appeals process is working;
- Slotting of jobs not fully evaluated is conducted analytically, systematically and appropriately;
- Job descriptions and evaluations are kept current; and
- Grading structures and systems are soundly based, and consistently applied, free of gender bias.

The Standard's Requirements and Guidance provide detailed specifications of what must be done (Requirements) and what is recommended to be done (Guidance) in applying the Standard.

The Standard also includes Informative Appendices on Roles and Responsibilities in the job valuation Project, Gender as in Job Descriptions, Analysis and Evaluation – Checklists and Examples, Gender Equity in Pay Setting and Other Human Resources Management Processes, and a Bibliography of references to other sources of information.

The Guide has a section on Documenting how the Requirements are Met for each clause of the Standard. This section provides a check that all the Requirements have been addressed, there is a record of agreement among participants in the project about how the project will be carried out and a record of how the project was carried out and its outcomes. The documentation is a basis for accountability for the project and can be useful for retrieving information about decisions made during the project and the reasons for them.

Some of the issues addressed in the example material (for example, Example A, Example B) can be provided before the project commences while some issues addressed in other material (for example Example F) can only be provided after the evaluation and grading are completed.

The Guide and the Standard can be used for auditing the extent to which the Standard is met, and developing a plan for moving toward full compliance.

A particular project may include only one or a few aspects of the processes covered by the Standard. Appendix A of the Standard is a Functional Guide to Using the Standard, setting out the sections of the Standard that are most likely to be relevant for particular activities – for example, an HR practitioner writing a few job descriptions, or job evaluation practitioners grading/evaluating a small number of jobs into an established job evaluation or grading system. However, meeting the Standard's Requirements still involves checking that the Requirements for the precursor activities (such as selecting the job evaluation or grading system) and the successor activities (such as providing appeal processes and checking outcomes), are met. This is because, irrespective of when the Requirements of the various clauses of the Standard are met, for the Standard to be fully applied all its Requirements must already have been met, or be met, in the current project.

Why would I use the Guide and the Standard?

Research has identified a range of business benefits in having gender-equitable remuneration. Gender equity in job evaluation and grading contributes significantly to gender pay equity.

Business benefits include:

- Improving understanding of jobs and their contributions to organisations supports more focused recruitment, selection, progression and development;
- Positioning the organisation as an employer of choice and contributing to reaping a full return on investment in recruitment and development;
- Ensuring that employees are recognised fairly for their contribution to the organisation by checking that the job evaluation and grading system is transparent, sound and consistently applied;
- Enhancing employee morale, commitment, and productivity through demonstration of sound and equitable job evaluation and grading;
- Promoting better workplace relations through transparent valuing, grouping and ranking of jobs;
- Enhancing effective utilisation of labour through making the most of the internal labour market, including through articulating and supporting career paths;
- Promoting clarity about the bases of job ranking and remuneration;
- Supporting greater corporate accountability for equitable remuneration;
- Enabling assessment of internal equity among jobs, and external relativities (of particular jobs, occupations, organisations, sectors, industries);
- Building an organisation that presents a positive image to and secures its good reputation with customers and the community;
- Reducing exposure to employee complaints about grading, progression, and remuneration;
- Enabling risk assessment and demonstration of compliance with Australian laws on equal remuneration and sex discrimination; and
- Making an effective contribution to avoiding and defending equal remuneration claims.

The Fair Work Act 2009 Part 2-7 requires equal remuneration for work of equal or comparable value <http://www.comlaw.gov.au/ComLaw/Legislation/ActCompilation1.nsf/0/577E89BE7C274EADCA257743001673E5?OpenDocument> . Federal, State and Territory anti-discrimination laws also prohibit direct and indirect discrimination on the basis of sex (among other grounds) in the terms and conditions of employment including remuneration.

The business benefits of gender-inclusive job evaluation and grading vary across organisations, industries and sectors. Some issues affecting the strength and value of these various benefits are: the specific skill requirements of the organisation and industry, supply and demand pressures related to industry economics and growth trends, demographic trends, competitiveness of organisations in the industry, exposure to litigation, industrial history, overall sophistication and transparency of HR systems including job evaluation and grading systems, and the cultures of organisations and industries (particularly in relation to the rationality and evidence base of the remuneration system), among others.

Section 2:

How do I show the Requirements are met?

Planning the job evaluation project

The job evaluation project plan helps to ensure that all the information and resources everyone needs to participate effectively are provided. If the project is not planned or shortcuts are taken, there is a risk of overlooking steps crucial to ensuring the job evaluation process achieves its gender equity objectives.

Documenting how the Requirements are met

The project plan should:

- Include a statement of the gender equity principles and practices for the project;
- Set out who the key participants in the project are and their roles and involvement in the project;
- Document the training on job evaluation and grading and gender bias that will be provided for participants; and
- Outline how communication about the project will be carried out, including advising staff of how they can obtain more information and what outcomes they can expect from the project.

Example A shows how these items could be covered. It is an example of a project plan provided to the project manager, setting out how the requirements of the Standard would be met.

The operating guide to the job evaluation system and procedures, including the gender equity objectives and checks, should be provided to project participants.

The UK Equality and Human Rights Commission has a comprehensive range of checklists on gender and job evaluation at <http://www.equalityhumanrights.com/advice-and-guidance/guidance-for-employers/tools-equal-pay/checklists-equal-pay-in-practice> . Number 19 deals with high-risk grading and pay practices from a gender equity perspective. There is also a simple job evaluation tool at <http://www.equalityhumanrights.com/advice-and-guidance/guidance-for-employers/tools-equal-pay/equal-pay-audit-toolkit-for-small-businesses/step-two-estimating-who-is-doing-equal-work/>

Appendix E of the Standard includes a range of references on job evaluation and grading and gender.

The operating guide or manual for some job evaluation systems includes a guide or code of practice on equal pay for work of equal value.

Participants in the job evaluation and grading project

The size and scope of the job evaluation and grading project affect how it is conducted and who is involved. Representative committees and/or reference panels can make a valuable contribution where a wide range of jobs are being evaluated or where a new job evaluation and grading scheme is being introduced. Internal specialist HR staff or external job evaluation and grading practitioners may provide expert advice in projects of any size or scope. Smaller scale job evaluation and grading projects (for example, where a few jobs are being evaluated or re-evaluated or graded) may involve only internal specialist HR staff and/or external job evaluation and grading practitioners.

Committee or groups

A job evaluation and grading project may use committees or groups. Involving a range of people can help participants to understand the jobs and identify any occurrences of gender bias. The size of the group or committee will be determined by the size of the organisation(s) involved, the scope of the project and the range of jobs covered.

Reference panels

A job evaluation project may use a reference panel to monitor and/or review some or all job evaluations. One reason for doing this is that although it is seen as desirable to have a representative group involved in the job evaluation process there may be too many jobs, and/or the complexity and/or timeframe of the job evaluation project are seen as making conduct of all evaluations by a committee or group unworkable. While the reference panel may explicitly consider only some of the job evaluations, for the reference panel to contribute diverse perspectives, transparency and accountability to the evaluation process, it needs to have authority to call for review of the evaluation of any particular position(s).

Job evaluation and grading job evaluation practitioners

Job evaluation specialists are often used to complement or supplement internal job evaluation processes.

Documenting how the Requirements are met

Example B sets out how the Requirements regarding specification of participants and their roles in the project, and the jobs covered by the project, can be met.

Example C sets out how the Requirements could be met regarding establishing job evaluation practitioners' understanding of how gender bias occurs in job evaluation and how it can be avoided or minimised.

Example I provides a framework for skills and knowledge for providing education and training on gender and job evaluation and grading.

The project plan should clarify the membership and roles of any committees, groups, or reference panels involved in the project, including the occupations and gender of members and chairs, and the training provided to them on job evaluation and gender equity. The project plan also should include information about the occupations and gender of the job holders covered by the project.

Information should be provided regarding the gender composition of bodies such as reference panels, committees or groups and of the part of the workforce covered by the project.

Selection of job evaluation and grading schemes

Whether job evaluation and grading schemes fully and fairly capture and analyse different types of jobs can have gender implications, particularly where jobs are mainly held by women or men. Assessment of schemes requires consideration of the comprehensiveness of factors and the effect of weightings (implicit or explicit, preset or tailored) on the rankings of jobs mainly done by women or men.

Documenting how the Requirements are met

Example A shows how the Requirements could be met.

The documentation needs to show how the job evaluation scheme meets each Requirement, including specifying how the scheme's factors capture all the elements of jobs set out in Requirement 2.4.3 (f).

Factor weightings

Factor weightings may be implicit in the number of levels in a factor. There may be explicit weightings applied to scores for factors. Often, they are a pre-set part of a job evaluation system. In considering the possible gender implications of a scheme, it is important to consider the respective weightings of job elements such as skill, responsibility and demands and conditions, and the contribution of the various levels within the factor to the score for each factor and the overall score.

Where the weightings are pre-set in the scheme, the provider of the scheme should be able to provide the relevant information about the weightings and rationales for them.

Documenting how the Requirements are met

Example A sets out the weightings used in a particular job evaluation system.

Both the explicit weightings and weightings implicit in the number of levels in the factors should be addressed.

The Standard also advises that the gender impact of the weightings used in the job evaluation process be assessed by testing alternative weightings. Since the weightings used in the scheme reflect organisational values, the exercise of exploring alternatives can focus attention on the current values embedded in the scheme and contribute to considering their current relevance .

Jobs included in job evaluation and grading

The jobs selected for evaluation should be representative of the jobs covered in the project and represent the range of work performed. It is important to include jobs with unique characteristics and jobs predominantly occupied by one gender, even if the overall numbers are small.

² <http://www.payequity.gov.on.ca/en/resources/eval/formula.php> has an interactive spreadsheet enabling exploration of alternative weighting scenarios for the factors skill, effort, responsibility and working conditions.

Documenting how the Requirements are met

Example B describes the benchmark sample, how it relates to the jobs covered by the project and how the selection considerations specified in the Requirements are taken into account.

The Requirements direct attention to the need to ensure that jobs with particular features are considered even where the numbers are small, as well as representative samples of larger groups of jobs.

The Standard also deals (at clause 3.4) with how jobs that are not part of the benchmark sample should be “slotted” into the overall job rank order.

Job information and collection and documentation of job information

Gender bias can occur when data is being gathered or analysed (including in questionnaires, interviews, work observation or focus groups). Job holders and/or their managers will be better able to provide quality job information when the information gathering process covers the range and contribution of the job and its purpose, accountabilities and outcomes. Data gathering may involve various people, including designated data gatherers, internal and external job evaluation practitioners, managers and job holders, and various methods, including questionnaires, individual and group interviews, and written documentation including position descriptions and organization charts.

The information gathered is analysed to specifically determine if it contains descriptors that either over-emphasise or under-describe features of jobs mainly held by men or mainly held by women.

Documenting how the Requirements are met

Example A sets out how job information will be collected, covering the instruments, sources, participants, principles and process in relation to the Requirements.

The Standard also includes Guidance on ensuring that data gatherers and job holders are able to participate effectively in collecting job information.

The Standard’s Requirements for quality assurance and removal of information on names and current pay of job holders also need to be addressed.

The Standard’s Appendix C Gender Bias in Job Descriptions, Analysis and Evaluation – Checklists and Examples illustrates and explains how gender bias can affect job information and ways of checking for and avoiding the gender bias.

Role profiles

Role profiles may be used instead of detailed job descriptions for groups of jobs that are identical or vary only slightly. They can facilitate consistent, equitable and high quality evaluations while making the job evaluation process more manageable. Jobs may be grouped for profiling on the basis of similarity of duties and responsibilities, or similarity of qualifications, among other characteristics. Role profiles may be based on a representative sample of job questionnaires, job descriptions and other job information and/or group or individual interviews.

Documenting how the Requirements are met

Each Requirement should be addressed. The Requirements relate to ensuring the job information and job matching processes used meet the same standards as apply to job descriptions and slotting. The Requirements specify that role profiles must be based on jobs that currently exist, and that matching is performed analytically. It is also required that the use of role profiles be documented and employees be advised about how the process works.

Job analysis

Job analysis draws on and organises job and role information for use in job evaluation.

Documenting how the Requirements are met

Each Requirement should be addressed, explaining how the job analysis provides the necessary information on job outcomes, freedom to act, knowledge and experience, and decision-making. The Guidance recommends that the job holder provides the job analysis and the jobholder’s manager checks it.

Evaluating the jobs

The evaluation process

Job evaluators necessarily exercise judgment in making their decisions. These judgments are influenced by individual values and personal experiences. Evaluators can reduce the risk of making unfair decisions based

on gender by developing an understanding of how gender bias arises, and using consistent processes for conducting the job evaluation and gradings.

Job evaluation is a process to evaluate the elements required in the ordinary competent performance of the job, not to take account of health and safety problems, stresses arising from workplace or management cultures or pressures, or individual performance or characteristics.

Documenting how the Requirements are met

Example F includes a description of how an evaluation process met the Requirements.

The documentation needs to set out who is doing the evaluations and how, and to cover record-keeping. The Standard includes extensive guidance about the roles of various participants, and about documenting scores for each factor, and decisions made during the job evaluation process and the reasons for them. The Guidance includes the advice that where a committee or group is not conducting evaluations, the job documentation and evaluations should be peer-reviewed by another evaluator.

Monitoring and checking evaluation outcomes

The evaluation results including rank order of jobs should be reviewed after the evaluation process to identify any possible gender bias, as part of the validation process. If the application of gender-inclusive job evaluation results in some previously unrecognised or undervalued aspects of work dominated by one gender being measured, this will most likely alter the relative size of some jobs mainly held by women or men. Organisations should be prepared to respond appropriately.

Validation

Validation is an important part of quality assurance for job evaluation, to ensure consistency in evaluations. Evaluations may vary during the job evaluation process as evaluators gain more experience or knowledge and understanding of the jobs being evaluated. Validating the overall results of the process is critical to ensuring variance in evaluations is minimal.

Documenting how the Requirements are met

The processes by which the evaluation outcomes are tested and checked for consistency and anomalies including factor by factor results, and overall, need to be documented. The basis for identifying anomalies and addressing them also needs to be described.

Checking results

Documenting how the Requirements are met

Example F provides an example of checking and analysing evaluation outcomes in relation to the representation of women and men at each job factor level and in overall rank order, and the job rankings of jobs mainly held by women or men and mixed jobs. The rankings produced by the job evaluation project need to be compared with the previous rankings. The criteria and process for assessing whether changes are justifiable should be documented.

The Standard also recommends advising job holders about the evaluation outcomes. The process for providing the feedback and the level of detail should be documented. Example G provides an example of advice to job holders about the job evaluation project.

Appeals and monitoring and checking the outcomes of the appeals procedure

Having an appeals procedure as part of the overall job evaluation and grading project will help to demonstrate commitment to a fair and open process in general. This includes identifying and addressing gender bias. An appeal may be conducted by a panel/committee or by an individual. Once jobs have been sized, job holders can use the appeals procedure to challenge evaluation scores or job rankings.

Documenting how the Requirements are met

Example A sets out an approach to providing an accessible, fair and open appeals process. Important elements of that include that those hearing the appeal are not the original decision makers, that they have received training on gender bias and job evaluation, and that the appeal process is documented.

One check on the fairness and effectiveness of the appeals process is assessing the outcomes by gender and documenting the process is critical for doing so. The considerations involved in assessing whether gender differences in appeal outcomes are justified should be documented.

Slotting

Once the formal job evaluation and grading of the selected benchmark positions has been completed, any appeals resolved and the final outcomes reviewed by the person responsible for the job evaluation and grading project, the remaining jobs can be slotted into the overall ranking of the evaluated benchmark positions. Where jobs do not match any on the list, they are 'slotted' between positions that are considered larger or smaller than the role and assigned the appropriate job size. Non-matching jobs may need to be compared to evaluated jobs on the list through an analytical process applying relevant factors. Slotting is most effective when the jobs to be slotted are very similar to evaluated jobs.

Documenting how the Requirements are met

Example A provides an example of describing how the Standard's Requirements can be met in relation to slotting jobs. The Standard requires that the level of expertise of those doing slotting, the quality of job information, the thoroughness of the analytic process, the validation of the process, and access to a comparable appeals process be no less than is required for fully evaluated jobs. The Standard advises that valid slotting depends on using the process only where job size or characteristics are similar to the fully evaluated jobs.

Re-evaluating jobs

Changes in technology, organisational structure, business directions, economic conditions and labour market conditions can affect the design and scope of jobs. Devising a systematic process to ensure all job descriptions are updated and evaluations remain relevant will ensure its ongoing currency.

Documenting how the Requirements are met

Example A sets out an approach to maintaining the currency of the job evaluation system. The Standard specifies the elements of a system for maintaining the currency of the system, including criteria for assessing whether re-evaluations are required. Gender considerations that may indicate a need for re-evaluations of jobs include technology changes, improvements in skills recognition where skills identification may have been affected by gender, and changes in the gender composition of the jobs being evaluated. The considerations and process for assessing the need for re-evaluations, and the outcomes by gender of re-evaluations, need to be documented.

The Standard recommends that assessing the currency of job information be built in to performance reviews and reported on every three years by managers.

Grading

Grading jobs once they are evaluated and/or classified provides a way of grouping them in the pay structure. Grades can be defined using job evaluations in rank order, drawing boundaries by clustering scores and/or grouping jobs according to common features as analysed through the job evaluation system.

Another approach is to define grades by, for example, key activities, levels of knowledge and skills or competencies, responsibility for resources, and/or span of decision-making, and developing job profiles and matching jobs to the descriptors. In Australia, classification and gradings used in awards and enterprise agreements, and in enterprise and sector classification standards, work level standards, and competency frameworks used within and outside awards and agreements, are common ways of examining, grouping and grading jobs, and defining the associated pay structures.

These defined structures can be used in ways that meet this Standard to grade jobs that have not been evaluated fully, provided the grade definitions have been developed on the basis of current and consistent job information and factor analysis and job grading is based on analysis of the same job elements. Analytical job evaluation, including points-factor job evaluation, is sometimes used to validate the grade structure and/or particular levels of the grade structures and/or the grading of particular jobs, and to check on internal equity.

Each grading approach provides particular benefits to organisations and presents particular issues and risks in relation to gender bias and equal pay for work of equal value. The requirements and guidance provided apply to grade structures defined using points-factor job evaluation points and to grade structures defined using other analytic methods for describing key activities and the knowledge, skills and responsibilities required for the grades, bands or levels.

It is important to not re-introduce gender bias in human resource processes (including remuneration-setting) after the job evaluation project has been completed. The Standard's Appendix D Gender Equity in Pay

Setting and Other Human Resources Management Processes includes information and checklists relating to gender equity in pay setting, including market rates considerations.

The UK Equality and Human Rights Commission provides some guidance on monitoring outcomes and actions taken to improve pay equity at <http://www.equalityhumanrights.com/advice-and-guidance/guidance-for-employers/tools-equal-pay/toolkit-step-5-developing-an-action-plan/>

Documenting how the Requirements are met

Example H provides an example of a description of the basis and process of a job grading system. The bases of the grade structure and levels, progression requirements, and the grading processes (including appeals) need to be documented. That documentation needs to be accessible to employees and employees need to be advised of the outcome of grading of their job. The Standard requires that job grading be carried out in an analytic way, based on consistent analysis of each of the jobs' significant elements, rather than a whole-job matching process. The process for moderating or peer review of grading needs to be documented. The gender effects of the grading system need to be monitored, including effects on remuneration and opportunities of any career or job family structures associated with it.

The Standard recommends that the gender effects of placement of grade boundaries be assessed.

The UK Equality and Human Rights Commission has a useful checklist on gender issues in grading at <http://www.equalityhumanrights.com/advice-and-guidance/guidance-for-employers/tools-equal-pay/checklists-equal-pay-in-practice/>

Job evaluation and grading, and related human resources management processes

As is noted in the Standard, while remuneration systems are outside the scope of the Standard, it is important to check that the processes following job evaluation and grading have not re-introduced gender bias. Appendix D of the Standard, an Informative Appendix, includes discussion of the issues and principles involved, and provides some questions and guidelines on these issues.

Section 3:

Examples of documenting meeting the Standard's requirements

Examples are provided of:

- A project plan addressing gender equity in a job evaluation and grading project;
- A statement by project leader regarding participants in the project, and jobs included in the benchmark sample in the project;
- A statement by a job evaluation practitioner regarding job evaluation practitioner's understanding of gender bias in job evaluation and grading and how to avoid it;
- A job evaluation practitioner memorandum on gender-inclusiveness of job evaluation and grading system;
- A project plan supplement on gender bias training;
- A project report supplement on monitoring and checking gender outcomes of job evaluation and grading, appeals, and slotting;
- A review process – example of advice to staff about the outcomes of the job evaluation and grading process, the relationship of job evaluation and grading to remuneration, and the review process (including application form);
- The basis and operation of the grading system – example of a rationale; and
- A competency framework for practitioners on gender and job evaluation and grading.

These examples can be freely copied and adapted for your project.

Example A:

Example of a project plan addressing gender equity in a job evaluation and grading project

This example sets out how the requirements of the Standard are met in this particular project, specifically articulating the gender equity principles and approaches. It covers:

- The overall objectives of the project;
- Its gender equity principles;
- Reference to other documentation on gender issues in relation to the scheme design, weightings, training, and job evaluation practitioner capability;
- Collection of job information;
- Use of committee in evaluation review;
- The evaluation review process;
- Checking results of job evaluation and grading;
- Review or appeals;
- Monitoring review or appeal;
- Ongoing job sizing process; and
- Ongoing maintenance of the job evaluation and grading process.

Objectives of project

1. To conduct a job evaluation and grading audit review of approximately 48 positions.
2. To determine the suitability of the selected positions as benchmarks for derivation of market data appropriate to the broader employee population.
3. To provide access to suitable market remuneration data for comparison of job evaluated positions as part of the remuneration setting process.
4. (If required) To assist with the development of an effective, comprehensive remuneration structure applicable to those positions covered by individual employment contracts.

Gender equity principles

In all stages, the project undertakes to adhere to the following principles of gender-inclusive job evaluation and grading as based on the Haldimand-Norfolk case (1991) as follows:

- The job evaluation and grading system must consider the particular establishment (workplace) and the range of work of women in the establishment;

- The language must be understandable to employees so incumbents can properly recognise and report the skill, effort, responsibility and working conditions required in their work and as applicable to the project;
- Incumbents should be educated about the job evaluation and grading process and about pay equity before completing job information questionnaires;
- Skills should not be defined to cover only managerial jobs; communications skills should include not only non-verbal communications but also the need to quickly alter the level or sophistication of communication;
- Assignment of value should not be restricted to 'normally' or 'frequently' required skills, responsibilities, effort or conditions because the infrequent may be critical to the work;
- Consistency is a necessary but not sufficient requirement of gender neutrality; and
- Attaching a value to various factors is not just a technical action, but a manifestation of value judgements made between female and male job characteristics.

Compliance with these principles will be documented throughout the project.

Gender neutrality of the job evaluation and grading scheme

A letter attesting to the gender neutrality of the job evaluation and grading scheme chosen for this project is attached to this Project plan (see Example B). Documentation on the review of the scheme for this purpose is available for inspection.

Gender bias training

Training materials on the avoidance of gender bias will be provided to all participants in the job evaluation and grading process. These materials are attached as a supplement to this plan. (see Example E).

The job evaluation and grading process

(Insert details here) propose application of our system for the job evaluation and grading of these positions. A supplementary letter is attached to this plan (see Example D) attesting to the gender-inclusiveness of the job evaluation and grading system and the manual for that system.

Job evaluation practitioner capability in gender-inclusive issues

A supplementary letter is attached (see Example C) attesting to the qualifications of the job evaluation practitioner with regard to gender-inclusive issues.

The job evaluation practitioner will actively monitor and review the project and document the processes in relation to gender bias as provided in the Standard.

Presentations will be made to management and staff in the course of this process. This will provide them with an overview of the job evaluation and grading system, survey capability and remuneration philosophy, while reassuring them of the ongoing continuity of the consulting assistance offered.

The presentation will include an outline of the job evaluation and grading scheme, its factors and how they differentiate among jobs.

³ Haldimand-Norfolk (No.6) *Pay Equity Report 02—Pay Equity Hearing*. This is a leading Canadian case on gender bias in job evaluation. It is referred to at: <http://canlii.ca/eliisa/highlight.do?text=Haldimand-Norfolk+No.6&language=en&searchTitle=Ontario+-+Ontario+Pay+Equity+Hearings+Tribunal&path=/en/on/onpeht/doc/1992/1992canlii4706/1992canlii4706.html>

The job evaluation and grading system

The factor rating charts that comprise the job sizing system evolved from our work with clients in customising job evaluation and grading factor plans to suit their business needs and values systems. In working with those clients to benchmark their points to market salary surveys, it became clear that certain elements bear the most weight in assigning job size and determining market value. The job sizing system is a tool for assessing the content and relative size of jobs using a total of five factors or job sizing criteria.

The lengthy and extensive experience of (insert details here) in the application of the system has demonstrated that the factors in the system provide important, acceptable and comprehensive criteria for ranking jobs. The factors used can measure the characteristics of all jobs to which they have been applied and are defined in levels that differentiate between jobs. The factor levels have been carefully defined to avoid double counting of the features of jobs.

Factor weightings of the job evaluation and grading system

The weightings of the five factors in the scheme are as follows.



The appropriateness of these weightings has been determined through long and extensive use on thousands and thousands of jobs across all sectors of the employment market. In all that time, not a single claim of gender bias has ever been raised against the system.

The system does not provide for the tailoring of these weightings.

The system has no factors that are exclusive to jobs mainly held by women or men. Some advocates have claimed that factors on interpersonal skills tend to relate more closely to jobs held by women while factors on experience tend to relate more closely to jobs held by men. As is evident above, the weightings of these factors are comparable and therefore provide no 'advantage' to either group.

(Insert details here) regularly reviews its job evaluation and grading systems and processes and tests them for potential exposure to bias of various kinds. The latest review was in mid-2007 when the job evaluation and grading manual was audited closely for any such exposure. Documentation on that review is available for inspection.

Training of data gatherers

Data gatherers will be selected by management for purposes of facilitating completion of the questionnaires by employees. Data gatherers will be chosen with due regard to balance in terms of job level, pay grade, tenure, gender, and representation of any groups considered appropriate. The job evaluation practitioner will arrange for training of the data gatherers in gender bias recognition and techniques for avoiding it in the data collection process. If appropriate, external experts in gender-inclusive training may be invited to assist at this stage of the project.

Information collection

In this exercise, we will draw on sources of information to ensure the job information is comprehensive. Sources of information will include:

1. Interviews with selected managers in order to obtain their views on how the jobs are expected to function in relation to each other within the organisation along with a clearer understanding of the structure and operations of the organisation.
2. Existing position descriptions for those jobs where such documentation is available.
3. Questionnaires completed by selected job holders or other knowledgeable persons to supplement the information typically available in position descriptions. This is optional depending on the quality of other sources of information.
4. Written materials on the organisation provided in the course of the project, including material from the organisation's website.

A sample questionnaire is provided which will be reviewed and revised as appropriate.

Collection of information will be done within the following principles:

- The information collection process will be applied consistently across all jobs, and all participating job holders will be given equal opportunity for input into the process;
- All information collected will be current and relevant to the job evaluation and grading process; and
- The focus will be on the job as it currently exists and not as it once was or may be in the future.

Use of committee in evaluation review process

Evaluation of positions will be done through a review of current position descriptions and questionnaires by the consultant who will provisionally determine the assigned job sizes for each position. This approach is considered the most effective in terms of time and resources required for the initial evaluations.

Following this, a select group will review the provisional results with the job evaluation practitioner to arrive at a final agreed ranking of jobs. This would be accomplished through a workshop process likely to take most of a day. The resulting ranking will be appropriate for further work, and the management group will become familiar with the job evaluation and grading process and be able to draft further evaluations as required.

As part of this process, the job evaluation practitioner will provide training and informational materials as appropriate on the job evaluation and grading process, the particular scheme used and the gender equity aspects of the exercise.

The evaluation review process

In the committee review stage, the job evaluation practitioner will ensure that all members have appropriate opportunity to participate and contribute. It will be the job evaluation practitioner's responsibility to ensure that all members apply the job evaluation and grading process consistently across all jobs reviewed. A written record of the decisions reached including any exceptions or issues of note will be included in the project report on completion of the project.

Checking the results of the job evaluation and grading process

Upon completion of the exercise, the job evaluation practitioner will provide a report on the process. This report will include an analysis of any detectable distinction in the outcomes as they relate to jobs mainly held by women or men at any levels. This will include the final point scores as well as the individual factor scores of all jobs reviewed.

Comment will be provided on any differences detected in the ranking of jobs held mainly by women or men before and after the job evaluation and grading process and whether any such differences can be justified.

Recommendations will be made for addressing any such differences detected that are not justified.

Review or appeals processes

Following completion of the deliberations of the job evaluation and grading review committee, the results will be provided to job holders in an agreed format. The outcomes will be explained to job holders in a clear format. A review or appeals process will be made available to those employees who feel strongly that the outcome does not fairly reflect the contribution of their roles to the organisation. A model for that review process is attached as a supplement to this plan.

Monitoring the outcome of review or appeals process

The outcome of the review process will be reviewed for any gender distinctions that may be detected. Any such distinctions will be documented and justified. Any such distinctions that cannot be justified will be reviewed further.

On-going job sizing process

While there are different approaches to the on-going use of a job evaluation and grading process, we propose the following slotting process as the most effective means of meeting the client's needs as outlined in our discussion. When evaluations are required, up to date position descriptions, along with any relevant information on that part of the organisation and its activities, will be provided for any new positions.

If you wish, job holders, or other appropriate personnel, will be allowed to complete individual questionnaires providing additional information on the roles.

Slotting will be applied only as single jobs are required to be sized, and management will undertake to complete a wider, more formal job evaluation and grading process whenever any substantial number of jobs requires reviewing.

Slotting will be undertaken by the job evaluation practitioner who understands the jobs, the organisation and the job evaluation and grading methodology.

The job evaluation practitioner is competent in all aspects of gender-inclusive job evaluation and grading as described in this Standard.

Slotting will be based on full information comparable to that used in the initial project, including a current position description that has been prepared using the gender-inclusive requirements set out in the Standard.

The job evaluation practitioner will apply the same analytical process in comparing demands made in individual jobs (as identified in the job documentation) as in the original exercise.

Slotting recommendations will be validated in the same manner as the evaluated positions.

Slotted positions will be identified and distinguished from those job evaluated in all relevant documentation.

The outcomes of the slotting process will be checked against the outcomes of the initial exercise to ensure all applicable principles are applied equally.

Job holders have access to an appeals process similar to that set out for the job evaluated benchmark roles.

On-going maintenance of the job evaluation and grading process

Management will undertake to review the status of the job evaluation and grading process every three years. Such review will include an analysis of any distinctions among roles by gender that may be identified.

Criteria will be identified to use for checking the currency of evaluations and relativities.

Data relating to the gender composition of the jobs and roles in the organisation will be collected and reviewed regularly.

Example B:

Example of a statement by project leader regarding participants in the project, and jobs included in the benchmark sample in the project

The (insert details here) is undertaking a job evaluation and grading project with the assistance of (insert details here) Limited. It is the intent of the (insert details here) to ensure this project complies with the requirements of the Gender-inclusive Job evaluation and Grading Standard 5376: 2012 as promulgated by Standards Australia in May 2012.

This letter attests to the following:

- Key people are jointly involved in the planning and execution of the job evaluation and grading project. These include:
 - Executive Director, Communications Manager, National Manager; Finance and Administration Manager; a representative of each of the Team Leaders, Administration Team, Counsellors, Regional Managers and Social Promoters on the Review Team, a union delegate.
 - Job evaluation practitioner, on behalf of (insert details here) Limited. These people will form the committee that reviews the consultant's draft evaluations and agrees on the final outcomes of the job evaluation and grading process. The job evaluation practitioner will chair the review process which is anticipated to be too brief in duration to allow for the rotation of the role of chair among other participants.

These people provide a fair representation of the gender make up of (insert details here) staff.

These people provide appropriate representation of the range of job levels in the (insert details here).

Jobs to be included in the project

The jobs listed on the following page are to be reviewed in this project.

These jobs represent a fair sampling of the positions held by women and men in the organisation.

Due consideration was given to ensure that this sample fairly represents mixed gender jobs, the full range of job types and features in the organisation, jobs with unique characteristics and any jobs where gender or job sizing concerns may have arisen.

Research Director

National Action Manager

Communications Manager

Senior Researcher

Manager Finance & Admin Services

National Fundraising and Events Coordinator

Regional Manager – North

Regional Manager – Central

Regional Manager – Midland

Regional Manager – South

Project Coordinator

Action Team Leader

Promotion Team Leader

Team Leader

National Campaigns Coordinator

Policy Analyst

Communications Coordinator

Psychotherapist

Project Analyst District 1

Project Analyst District 2

Health Promoter Population Group 1

Health Promoter District 3

Health Promoter District 2

Health Promoter District 2

Health Promoter District 3

Health Promoter District 4

Health Promoter District 5

Health Promoter District 2

Counsellor – District 5

Counsellor – District 3

Counsellor – District 4

Counsellor – National

Counsellor/Promoter

Librarian/Network Administrator

IT and E Technology Coordinator

Administration Coordinator – District 2

Administration Assistant – District 2

Administration Assistant – District 5
Administration Assistant – District 3
Administration Assistant – District 4
Administration Assistant – District 2
Administration Assistant – District 2

Example C:

Statement by job evaluation practitioner regarding job evaluation practitioner's understanding of gender bias in job evaluation and grading and how to avoid it

The (insert details here) is undertaking a job evaluation and grading project with the assistance of (insert details here) Limited. It is the intent of the (insert details here) to ensure this project complies with the requirements of the Gender-inclusive Job Evaluation and Grading Standard 5376: 2012 as promulgated by Standards Australia in May 2012.

This letter attests to the job evaluation practitioner's understanding of gender bias and how to avoid it.

The job evaluation practitioner understands and has undertaken training on gender and job evaluation.

The job evaluation practitioner has been a job evaluation and grading practitioner since 1987. During that time he has trained hundreds of participants in job evaluation and grading including the gender equity objectives of the process.

The job evaluation practitioner is able to train participants in the job evaluation and grading project on gender equity objectives.

The job evaluation practitioner will actively monitor and review the project and document the process in relation to gender bias as provided in the Standard.

Job evaluation and grading and gender bias

(Insert details here) Limited is an advocate of equal opportunity in employment. The principles of equal employment opportunity are integral to our consulting processes. In particular, (insert details here) has examined one of its key consulting tools, its job evaluation and grading system, to ensure that it is not only the most effective way of valuing jobs, but that it is essentially gender neutral.

Traditionally, job evaluation and grading has been perceived as effective in determining the value of a combination of job responsibilities within an organisation to help explain internal job relativities, pay differentials and career opportunities. In recent years, however, there have been dramatic changes in jobs and in the workforce, including the influx of women into professional and managerial roles. In addition, jobs continue to evolve from a production to a service orientation, with a proliferation of job types and employees at all levels handling vastly more sophisticated equipment, systems and tasks. These changes have exposed some inherent weaknesses in conventional job evaluation and grading methods.

There is no evidence that traditional job evaluation and grading systems have been deliberately built on a gender-neutral basis. Concerns are now widely expressed about their potential for undervaluing women's work. Repeatedly, three aspects of the job evaluation and grading process have been criticised as inherently gender biased: the choice and weightings of factors against which jobs are evaluated, job data collection techniques and the evaluation process itself.

If it is to be a useful job analysis tool, it is essential that job evaluation and grading is a gender-neutral process. Both the process and the technology of the approach comprehensively address the issue of gender bias.

The consulting process

As a part of the system, job evaluation practitioners educate committee members in the nature of gender bias, how it arises in the workplace, and how it may be avoided. Consulting assignments are conducted in ways that allow the interests of both men and women to be seriously considered and minimise the likelihood that subjective judgements will influence evaluations of jobs.

Firstly, we recommend the balanced composition of the project steering committee or consultative committee as well as any job evaluation and grading committee used to reflect a reasonable representation of the gender balance of the organisation.

Secondly, we offer formal training sessions designed to develop the committee's understanding of how discrimination in job evaluation and grading can arise and how it can be minimised. The training sessions also outline the provisions of any applicable equal employment opportunity legislation and work practice implications of such legislation.

We then train the committee to critically analyse and understand the range of factors used and to develop criteria against which jobs will be analysed. The training will encourage the committee to question historical assumptions in job worth and to reassess factors which may under value jobs traditionally held by women.

One of the early activities in the job evaluation system is the design of the data collection questionnaire. The validity and accuracy of the questionnaire is tested through a sample of positions and then revised. This step requires those involved to assess the gender neutrality and validity of the questionnaire for the total population of the organisation's jobs using skills acquired during the training process. With the validity of the questionnaire established, the evaluations can proceed with consistent and predictable gender-neutral outcomes.

The system provides for factors and weightings that have been carefully considered and researched. While the factors are standard for all organisations evaluated through the system, they have met the test of gender neutrality through careful examination by professionals in the field. Using the questionnaires means the accuracy and consistency of the job data provided is not dependent on job analysts' perceptions of jobs or their ability to elicit all relevant information from job holders. Therefore another potential source of gender bias, the subjectivity of job data collection, has been addressed.

Summary

While traditional job evaluation and grading systems have been heavily criticised for the ease with which they can institutionalise gender bias and undervalue women's work, the process and technology of the job evaluation and grading system significantly reduce the likelihood that job evaluation and grading decisions will result in gender bias. This methodology therefore offers a more effective way of comparing jobs predominantly held by women with those predominantly held by men. Moreover, job analyses produced for job evaluation and gradings can be used to achieve real equality of opportunity by identifying jobs which need enlarging or redesigning, and highlighting gaps which training and development can close.

Example D:

Job evaluation practitioner memorandum on gender-inclusiveness of job evaluation and grading system

This memo refers to a review of a job evaluation and grading system in relation to gendered language in the documentation. It does not include analysis of how the particular scheme meets each of the Requirements in the Standard in relation to factors and weightings. For example, the Requirements include (at 2.4.3 (f)) that the factors capture the intellectual challenges, interpersonal skills, physical skills, responsibilities for resources, contributions to integrating tasks in work flows and work processes, contributions to sharing learning and innovation in the workplace, environmental, emotional, societal or physical demands, and the impact of the role on outputs, operational effectiveness, or on customers or environments. Demonstrating that these Requirements are met is likely to require showing how each of those elements are addressed in the factors the scheme has.

In relation to weightings, the Requirements include documentation of both explicit weightings and weightings implicit in the number of levels in each factor, and consideration of the weightings of factors that apply exclusively to jobs mainly held by women or men, and consideration of the justifiability of the weightings, from a gender equity perspective. Some, not all, of this material is covered in Example A above.

Internal Memorandum

TO: Clients of (insert details here) Limited and job evaluation practitioners

FROM: Senior job evaluation practitioner

REF: Gender-inclusiveness of job evaluation system – Attestation

At the request of the directors, I was asked to review the job evaluation and grading system, including the manual, with regard to its compliance with the new Standard for Gender-inclusive Job Evaluation and Grading as drawn up by Standards Australia.

I went through the manual line by line, reviewing it for 'vulnerabilities' with regard to gender-inclusiveness issues.

In particular, I searched for words, phrases, examples, etc. that could potentially be identified as “vulnerable to discussion” as regards gender-inclusiveness issues.

In my memo of 29 January, I pointed out my belief that the manual needed some grammatical editing and that a few examples that seemed to refer mainly to particular client groups needed to be replaced.

I subsequently edited the manual wherein I substituted some examples and tidied up the grammar. I can now state unequivocally that the latest version of the manual has no problem when examined for gender-inclusive issues. The system and the manual now comply with the “Requirements” clauses of the Standard.

I would be absolutely confident in allowing interested parties to examine the manual for purposes of ascertaining the verity of my statement.

I would be happy to respond to any queries in this regard.

Example E:

Project Plan supplement on gender bias training

This document is to be read as part of the project plan in Example A. It covers:

- Selection of job evaluation and grading committee;
- Selection of benchmark sample;
- Data gathering; and
- Biasing processes that can occur – in job description and job analysis.

It includes material that is used in the training on how gender bias can affect job evaluation and grading.

Gender considerations in job evaluation and grading

Introduction

Job evaluation and grading is a system of comparing different jobs to provide a basis for developing an effective grading and pay structure. The aim is to evaluate the job, not the jobholder. However it is recognised that any assessment of a job's size relative to another will always be subjective to some extent. Moreover, job evaluation and grading is in large part a social mechanism which establishes differentials within organisations. It is because of the social mechanism nature of job evaluation and grading that the process must take account of equal employment opportunity (EEO) considerations. In this way, job evaluation and grading can be a significant force in achieving the goals of any existing or proposed EEO legislation.

Non-discriminatory job evaluation and grading should lead to a payment system within which work of equal value receives equal pay regardless of gender, ethnicity, physical ability or other trait. A job evaluation and grading exercise cannot be expected to result in an even spread of genders throughout the grades and in the average woman's pay being equal to that of the average man, if women have been recruited in the past to the less skilled jobs. At the same time, job evaluation and grading should not give a spurious objectivity to the status quo. A commitment to a fair job evaluation and grading may require that some traditional assumptions are changed regarding the value attributed to work predominantly carried out by women or other minority groups in the workplace.

This paper is intended to draw attention to some of the practices which can (often unwittingly) introduce or perpetuate gender (and other) discrimination. It aims to give guidance to practitioners on how to formulate, implement and maintain job evaluation and grading schemes which are free of such biases.

In theory job evaluation and grading can be a very useful management tool. In reality, however, it is impossible to make it a perfectly objective process. (Insert details here) acknowledges both its imperfection and its subjectivity. The job evaluation and grading process will always be subjective when people are involved in the decision making. The goal is to make the process as objective as possible while acknowledging and addressing this inherent subjectivity. It is also this subjectivity which requires that EEO considerations play a significant role in the job evaluation and grading process.

At its best as a management tool, job evaluation and grading provides a framework for making these subjective decisions. This framework should at least ensure consistency in the subjective decisions that give it value as a tool. Some important areas of concern with regard to EEO issues follow.

In particular employers should ensure that:

- Where appropriate, women or other group members participate in evaluation panels;

- Job descriptions and questionnaires should avoid explicit reference to the gender or culture of the jobholder;
- The evaluation method should be essentially analytical; and
- The individuals involved in assessment should be trained and briefed on how to avoid gender bias.

An effective job evaluation and grading system will, in the end, establish a value rate for the job, but will not directly set a specific dollar rate. The actual salary to be paid is determined by a number of factors of which job evaluation and grading is just one. Other factors that must be considered in setting salaries include market data, economic climate, employer's ability to pay, chosen relativity with the market, award or other contract negotiations and any relevant legislation.

Composition and training of the job evaluation and grading committee

It is good practice for the job evaluation and grading committee to involve a representative sample of people from the spread of jobs covered by the scheme. A participative approach will ensure easier acceptance of the scheme and the resolution of many difficulties at an early stage. While women tend to be conditioned to downgrade their own jobs, this situation is changing. A fair representation of women (in relation to their proportions in the workforce and in the job spectrum) on all job evaluation and grading committees and in allied discussions, is strongly recommended as a visible and practical means of reducing the probability of gender-bias. Committee members must act as equals, and the facilitator should ensure equal participation by all in the process.

It is essential that the issues raised in this paper be raised with all personnel involved in the job evaluation and grading exercise. This includes not only the job evaluation and grading committee members and data gatherers, but also the job-holders themselves, management personnel involved in the exercise and any advisers or job evaluation practitioners assisting. The issues must be examined freely and in depth in order to identify any biases and ensure they are addressed effectively.

Committee members must acknowledge all potential biases, including their own, and be prepared to deal with them openly and honestly. In addition to any other training given, members of all the committees should receive training in how gender-bias in job evaluation and grading can arise and they should understand how their actions and decisions can produce such discrimination.

The questionnaire and job evaluation and grading manual are critical tools in the job evaluation and grading process. Unfortunately, they are also two of the tools that can be subject to bias with regard to EEO issues. Care must be given to the design and use of these materials in order to effectively incorporate all of the points addressed in this paper.

Initial selection of jobs to be evaluated

Job evaluation and grading schemes typically involve the selection of an initial range of jobs which are used as a standard because they are considered to be representative of the full range of jobs. It is against these initial jobs that all other jobs in the scheme can eventually be assessed. Discrimination can occur if the first jobs selected do not represent a fair spread of the work done in the organisation. It can also occur when there are small numbers of female staff employed. It is essential to ensure a representative sample of jobs performed predominantly by women is included amongst the first jobs as a means of ensuring that the job evaluation and grading scheme takes due account of job elements that are peculiar to these predominantly female jobs. This eliminates the bias that results from the practice of comparing the jobs of female employees with a ranking that has been built on male-oriented jobs.

The preparation of the job description or job questionnaire involves at least three people: the employee who does the job or a representative employee, that person's supervisor or manager, and the job analyst or person responsible for the procedure. Close involvement of employees in the preparation of descriptions of their own jobs will benefit from their detailed knowledge of the job, and help to ensure that important aspects of their jobs are not overlooked. Involvement of the manager or supervisor is essential because of that person's responsibility for stating what is required of the job.

The impact of presentation must be considered. Such things as neatness, legibility, order of items and the language will all have an impact on the Committee. Care must be taken to ensure that the impact is equally positive for all positions being evaluated. Research has shown that the process of writing job descriptions or completing questionnaires and the subsequent evaluation process can be influenced by several different kinds of bias. The following points raise some of the issues most commonly encountered in the job evaluation and grading process as well as of the kinds of bias that can occur. Careful, effective job

evaluation and grading implementation may not be able to eliminate completely all of these biases, but with thorough preparation and training of those involved, they can be minimised.

Data gathering

The person(s) responsible for the collation of the job descriptions or questionnaires should be trained in the skills of preparing comprehensive descriptions that neither omit aspects of women's jobs because they are considered unimportant or irrelevant, nor over-emphasise those job characteristics that are typical of jobs performed by men. Data gathering for a job evaluation and grading exercise can be accomplished in many ways: in one-on-one meetings, in group discussions or any other combination of data gatherers and job holders.

Each approach has its own particular vulnerabilities to the biases discussed below.

Biasing processes that can occur

A) Prioritising by frequency or evidence

Job holders will generally tend to think first of the things they do most often. However, these may or may not be the most difficult or complex activities in the job. Whether or not activities are supposed to be written in order of importance, the committee is likely to read and understand them as if they were in that order. It is therefore important for job holders to understand that they must describe their jobs in an order that reflects the importance of tasks rather than their frequency.

For example an employee may photocopy materials frequently during the day and co-ordinate the work of several staff during the initial half-hour of the day. However, the relative frequency of these tasks does not reflect the skills and experience involved in each, nor their relative importance to the organisation. It is therefore vital to prioritise activities by importance, not by frequency.

It is clear that the most frequently performed activity may not necessarily be the most important aspect of the job for evaluation purposes. However, there is another aspect, people might think a task is performed more frequently than it is simply because it is more evident. Supervisors and job holders might believe that secretaries spend more time at the keyboard than they actually do because the noisier and more visible activities come to one's mind more readily than do the quieter and less visible tasks in the job.

B) Using "loaded" language

The language used to describe the same activities performed by different job holders can have a strong impact on how the work is evaluated. Considerable research on the impact of language on job evaluation and grading has confirmed this link. For example, stating that two different employees handle client enquiries "pleasantly" or "effectively and efficiently" clearly places different values on these actions. The former implies little more than acceptable behaviour, while the latter gives a very positive aspect to the job. A word that appears especially frequently is "routine" as in "routinely (performs some task)" or "performs routine office work". This word clearly suggests that the work is easy or even boring. However what it may really mean is that the job holders do all the work on their own or are handling a wide range of different tasks. While the word itself is unlikely to gain much credit in the evaluation process, it may hide significant activities.

C) Attributing responsibility to the "boss"

It may be particularly difficult for a job holder to write down some activities because they are technically part of the boss's job. It is very common for supervisors to delegate certain of their own activities to subordinates but to continue to take credit for the results. It can be difficult for the subordinate to put this fact in writing unless a very supportive atmosphere is created in the job evaluation and grading process. It is important for the job holder to include all activities in the job description. The process must be able to cope if there is disagreement as to who actually performs the task concerned.

Often, supervisors have a view of the subordinate's job as being less complex or less demanding than it is because of not appreciating the number of tasks that are performed for the supervisor by the job holder. It can be harmful to the job evaluation and grading process if the employee avoids mentioning these added responsibilities just for the sake of harmony with a superior.

D) Underestimating support work

There are frequently jobs that involve coordination and liaison work and other administrative tasks vital to the organisation's continued functioning. Rather than describing these as merely "routine" or "clerical", they should be identified by the job holder for the administrative skills involved. This work may build upon knowledge acquired over a considerable time of service and indicate the ability to take charge of many complex work processes. Coordinating and scheduling the activities of many different people requires both

considerable conceptual skills and communications ability. The position may also frequently be the first in the organisation to encounter problems and be required to initiate actions to deal with them. In organisations where staffing patterns change frequently, this could be the one stable person able to anticipate and to organise responses to deal with potential problems and to actually organise the activities of "superiors". All this "coordination" should be fully appreciated and broken down into its many "non-routine" task responsibilities.

E) "Naturalising" interpersonal skills

This point again relates to the use of language in describing the work of men and women in the same jobs. The use of such words as "tactful, courteous and pleasant" and similar terms typically associated with women, makes the work sound "natural" rather than needing acquired skills. Words such as "effective, efficient, and diplomatic" give a different perception of these abilities. It is important to recognise the many real skills involved in these interpersonal activities; liaison, coordination, negotiation, public relations and the like. Much of this work requires considerable skill and experience if it is to be effective. It is not something that an employee does "naturally" without knowing a great deal about the organisation. Having good interpersonal skills means more than merely being helpful to the organisation. They contribute to smooth operations, improve the public image, promote harmonious staff relationships and enable other workers to perform more effectively. Thus it is important to use positive, "strong" words to describe these activities to give the position full credit for the skills, experience and training necessary.

F) Trivialising skills

Research has shown that some activities are perceived as being simple just because many people can perform them. For example keyboard skills are often seen as just pressing buttons in order. However, the mental and interpersonal skills in accuracy, language, interpretation, and planning can be considerable, especially as the equipment involved becomes more sophisticated.

Other aspects of keyboard work may include composition, sourcing of information, decision-making, editing, proofing, presentation and prioritising. It is important not to underestimate the level and variety of skills used in such activities. Full consideration must be given to what is being done and the responsibility of the job holder for the results produced.

It has also been demonstrated that men tend to provide more self-enhancing descriptions of their work than women do. Women tend to underestimate the requirements of their jobs and to dismiss the experience and skills required for effective performance. This may be a response to the "social mores" around them. If people in the workplace behave as if secretarial and keyboard work is simple, undemanding and routine, then it is harder for a woman to report that the job is demanding in its thinking requirements, because this may imply incompetence. This may lead to a feeling on the part of many keyboard workers that they are "stigmatised" by their typing ability, that it makes their job appear to others as less, rather than more, skilled than some other jobs around them.

G) Assuming consistency

For a wide range of reasons, a job may encounter a significant level of change in its activities. Changes to schedules, technology, responsibilities, communication lines and environment all conspire to make a job more difficult or "larger". The job holder must be able to identify such change and act on it. If such increased job demands occur frequently they must be recognised and the ability to cope credited. Few jobs are completely consistent and some are hardly ever consistent, especially those with ranges of activities often described as merely "routine" or "varied".

H) Taking skills for granted

It is important that job holders do not take skills or experience for granted and underestimate their importance in the workplace. It may seem that people are able to drive cars "automatically", but they all had to learn at some time. There are real qualifications and skills involved in every job and the job holder should be aware of what they are. The skills may have been accumulated over a long time and represent a significant investment in time and energy. Just because they are familiar is no reason to underestimate their value.

For example, keyboard workers sometimes feel that people around them think their job is simple. This sometime leads them to underestimate the time it has taken for their skills to develop, they might appear stupid if they said that a job believed to be simple by others took a long time to learn. This leads to the undervaluing of many jobs, particularly women's jobs and it is important to counteract this tendency.

There may also be a tendency to describe a job through characteristics which are culturally expected for the job, given the gender of the typical incumbent. An example of this is when sewing machinists were employed by one government office. The women were regarded as naturally experienced, but the men were paid more because they had to "learn" the sewing skills involved.

Another example is in a newspaper office where the "sales work" of the telephonists in attracting clients and retaining them was recognised. However, it was regarded as the outcome of the "natural" interpersonal skills of the women and was therefore not rewarded as other sales work was.

I) Misusing job titles

Job titles alone can play a significant part in shaping people's perceptions of the job content. The fact that some secretaries perform administrative work is less likely to be identified when the job title is "secretary" and the incumbent is a woman.

There is a long tradition of using different titles for the jobs of men and women who are doing essentially the same work. This has frequently also denoted a status difference, reflected in a pay difference which is based on gender discrimination and not on the content of the work done. Job titles which are applied predominantly to one gender and which have a counterpart applied to the other gender should be carefully examined. If they do not reflect a genuine difference in the nature of the work done they should be changed and the same title applied to both jobs. Examples of such job titles are listed below:

| 'Male' Job Title | 'Female' Job Title |
|-------------------------|---------------------------|
| Sales Clerk | Shop Assistant |
| Assistant Manager | Manager's Assistant |
| Technician | Operator |
| Administrator | Secretary |
| Chef | Cook |

It is, of course, recognised that in some circumstances these different job titles are applied to essentially different jobs. They are only discriminatory where they are applied to the same job and result in different status or pay levels.

Strongly ingrained attitudes still exist about what work is appropriate to each gender and these attitudes can lead to the acceptance of a grading and pay structure based unthinkingly on current and/or past practice, which can undermine equality of treatment. Unless steps are taken to prevent it, job evaluation and grading schemes can maintain a situation in which the jobs most frequently performed by women are regarded as having less value than those mostly performed by men. A variation on the misuse of job titles could be where a "male" job which has become de-skilled through technological change is still regarded as skilled, even though in the process it has become equivalent to the "female" job, which has always been regarded as semi or unskilled.

J) Allowing halo effect

The halo effect refers to the process where job holders who are seen as competent or skilled in one area are, as a consequence, then presumed to be competent or skilled in other areas, whether or not this is the case. There is a "positive halo" around the things these people do. This is especially true of high ranking "male" positions, and this creates a danger of upgrading every skill or activity of a manager just because it is done by a high level jobholder.

One example may be telephone work where men and women are perceived differently: the man as high ranking manager is more likely to be seen as "liaising" and promoting a good image for the organisation, while the woman as secretary is simply being "courteous" and "having a pleasant manner". In reality, the content and nature of the telephone conversation may be identical. Conversely, jobs with low status and low pay in an organisation are surrounded with a "negative" halo effect. The budgeting work done by the secretary for the office is likely to be seen as little more than balancing a cheque book, while even the social club's accounts are viewed as significant financial dealings when handled by the male treasurer.

Job analysts' expectations

It has been shown in experiments that when jobs were shown to job analysts as having male incumbents, they were often rated as being more central to the company's assets and operations, as involving more responsibility and as being less structured than when the same jobs had female incumbents.

In other words, although classification systems are intended to assess the job content and not be influenced by who does the job, it is hard not to be influenced by what is known of typical incumbents. The facilitator of the job evaluation and grading process must work towards minimising this sort of bias, so that low paying jobs performed by women are not assumed to be simpler and more routine than they actually are.

Summary

The job evaluation and grading process should ask job holders to think carefully about the content of their jobs: the training and qualifications required for effective performance, the skill and experience demands, the type of responsibility, the extent to which decisions are made, the ability to carry out work and determine priorities without consultation, the interpersonal skills utilised in various contexts, and the various liaising and coordinating functions performed which contribute to the smooth running of the department. The fact that the workplace may be convenient in some way, does not have to be at the expense of appropriate classifications. The job holder should be able to enjoy the workplace and be equitably remunerated! Job holders should be encouraged to try to identify the particular aspects of the job that may be inadequately recognised, and raise them either in a submission to the committee or in answers to the questionnaire.

Provision is normally made for a formal review procedure to deal with those cases where the employees believe their job has been unfairly evaluated. All employees should be informed that care has been taken to ensure that the job evaluation and grading procedure has not discriminated against employees of either gender, and that the appeals procedure can be used if they feel that they have been wrongly graded because of their gender, or if they feel that the scheme has resulted in gender discrimination in some way.

Example F:

Project report supplement on monitoring and checking gender outcomes of job evaluation and grading, appeals, and slotting of jobs that were not fully evaluated

Through all stages of the project, the job evaluation practitioner monitored and reviewed project proceedings to ensure compliance with the Standard in ensuring gender-inclusiveness. This included informing client staff about the potential for gender bias creeping into the process at various points as well as giving examples from other projects where such bias was detected.

The evaluation process

Evaluations were conducted initially by the consultant whose credentials in gender-inclusiveness are established elsewhere. In the course of the review of provisional evaluations by the management team, the job evaluation practitioner reminded participants of the relevance and importance of gender-inclusiveness throughout the process.

In the course of the review of the provisional evaluations, all members of the management team were encouraged to voice their opinions and express concerns they may have had over any particular factor in the evaluations. Each manager was particularly requested to consider the relativities among positions reporting to them. Participation and contribution to the process by the management team was full and equal.

The job evaluation practitioner ensured further that the evaluation process and all commentary and discussion were applied to all positions equally and consistently.

The factor by factor evaluation table produced at the end of the project provides a written record of the evaluation decisions made by the job evaluation practitioner and confirmed by the review group. Written statements of the five factor evaluation statements are available to serve as a record of the decisions made and the language that supports these decisions.

Monitoring and checking evaluation outcomes

Following completion of the job evaluation and grading exercise and agreement on all scores and the overall ranking, the job evaluation practitioner analysed the results in terms of gender.

While it is difficult to undertake detailed analysis of any great length with a small sample of positions, the following was noted in relation to the gender outcomes of the evaluation and grading process:

Band A includes the female Chief Executive role alone.

Band B includes three jobs filled by males. In the job evaluation practitioner's view, gender issues at this level are likely to be a function of employment practices, not job sizing.

Band C includes two jobs. The male Researcher role scored higher in Work Complexity and Expertise while the female Finance/Admin Manager role scored higher in Accountability and Responsibility for People. Due

to the lower weighting of the Responsibility for People factor, the female role was scored lower overall (478 points to 458 points), but both roles were placed in the same band.

Band D includes five jobs, two filled by males, two by females and one vacant. Due to a higher requirement for Relating to People, the male Fundraising role scored higher, while the remaining Regional Manager roles all scored equally. The jobs are all in the same band.

Band E includes seven jobs, one of which is vacant and all the others filled by males. With the exception of the Communications role, these are Team Leader roles that scored higher than the following Band due to greater Accountability and Responsibility for People.

Band F includes 21 jobs, nine of which are filled by females. This is the only band with enough job holders to identify different 'kinds' of jobs. The three main 'kinds' of jobs in this band are Psychotherapists (three out of four female), Health Promoters (three out of seven female), and Counsellors (three out of five female). In each of these cases, the females were scored the same as the males, and the role with the highest proportion of females (Psychotherapists) was scored the highest. The male Support Worker role was scored in the middle of the group and the male Librarian received the lowest score of the band.

Band G includes two jobs. The male IT role scored higher in Work Complexity and Expertise while the female Administration role scored higher in Accountability and Responsibility for People. Due to the lower weighting of the Responsibility for People factor, the female role was scored lower overall (236 points to 249 points), but both roles were placed in the same band.

Band H includes six jobs, three held by males and three by females. Four of these roles scoring at a higher level (168 points) were filled by two males and two females. The two lower scoring roles were filled by a male and a female.

This analysis shows that any differences between job evaluation and grading scores of male and female roles are justified in the different requirements of the roles. The distribution of female job holders and female roles throughout the organisation and their distribution across the resulting job size bands is unremarkable in this regard.

Appeal process – preparation

Requests for review of job evaluation and grading outcomes were received from the following job holders:

Communications Coordinator

Health Promoter

Librarian/Network Administrator

Administration Assistant – National Office

Requests were first reviewed by the job evaluation practitioner for completeness and relevancy of the case made by the jobholder. The same standards of gender-inclusiveness as noted previously were applied in this process.

Appeal process – committee

Requests deemed complete were then considered by the Review Committee consisting of senior staff representing both male and female employees.

The review process began with a reminder by the job evaluation practitioner of the continued applicability of the gender-inclusive training provided previously.

Appeal process – documentation

Following consideration of the submission of each review applicant, a written report was provided to each job holder detailing the findings of the Review Committee. These reports form the documentation for the review process.

Outcome of appeal process

The outcomes of the review process were monitored for gender issues in the same manner as the initial outcomes of the job sizing process.

The Review Committee agreed that the following differences were justified. Further, the Committee submits that any of these jobs could be filled equally by male or female employees and that these detectable differences cannot be seen to be a result of gender bias.

The documented review process forms part of the overall project report and establishes a procedure through which jobs may be reviewed in the future.

Slotting of future jobs

As an alternative to the committee process applied in the job evaluation and grading of the first 46 jobs in the organisation, a slotting process will be used for the sizing of one off roles as required in the near future. The slotting process will be applied only as single jobs are required to be sized, and management will undertake to complete a wider, more formal job evaluation and grading process whenever any substantial number of jobs require reviewing.

Slotting will be undertaken by an external job evaluation practitioner familiar with the jobs, the organisation and the job evaluation and grading methodology.

The job evaluation practitioner will demonstrate understanding of gender-inclusive job evaluation and grading as required.

Slotting will be based on information comparable to that used in the initial project, i.e. position descriptions and completed supplementary job questionnaires.

The job evaluation practitioner will apply the same analytical job evaluation and grading process in sizing new roles and will document the outcomes of that process.

The slotted jobs will be validated by the Management Review Committee.

Slotted jobs will be identified as such in the records relevant to the job evaluation and grading process.

The slotting will be checked against the outcomes of the initial job evaluation and grading process to ensure all applicable principles are applied equally.

Job holders of slotted jobs will have access to the same appeals process as that used initially.

Example G:

Review process – Example of advice to staff about the outcomes of the job evaluation and grading process, the relationship of job evaluation and grading to remuneration, and the review process (including application form)

Memorandum to staff

TO Staff

FROM Human Resources

REF Job evaluation and grading exercise

The evaluation stage of the job evaluation and grading project has now been completed. This work was completed by a job evaluation and grading committee working with a job evaluation practitioner from Consulting.

The project committee would now like to share the results of that work with you. Firstly, it is important to remember that no individual salaries will be reduced as a result of the job evaluation and grading exercise.

Accompanying this memorandum are the following documents:

- Results of the job evaluation and grading exercise in band list form which indicates which jobs have been evaluated as being broadly the same size;
- Clarification of some aspects of the job evaluation and grading process to assist your understanding of how it works;
- Notes on the job evaluation and grading band list explaining its meaning and how decisions were reached as well as the relationship of these bands to the remuneration setting process. While the job evaluation and grading exercise comes to an end when the bands are assigned and accepted for each position, staff are often concerned with how the exercise and resulting points scores might affect their individual remuneration. These notes are provided to cover some of the relevant points in this regard; and
- Sample "Request for review" form – should you feel your position has been placed in an inappropriate band.

The job evaluation and grading committee studied position descriptions along with the questionnaires job holders completed and made its decisions carefully using the job evaluation and grading manual. We would like to re-emphasise that we looked only at the jobs and not at any individual job holders or their performance in their jobs.

If you have any questions about the process or outcomes, please contact your manager.

Memorandum to staff

Notes on the relationship of the job evaluation and grading exercise to remuneration practices

You have all been aware of the job evaluation and grading exercise that has been undertaken recently in which all positions were job sized. The objective of the exercise was to develop an overall job size order of all the jobs in our organisation. Using that size order, the jobs have been placed into bands as shown on the attached list.

There are some important points to understand with regard to this banding list.

The jobs are presented alphabetically within each band. While some jobs may have scored higher or lower than others in actual points, such small point distinctions are not critical. What is important is that jobs of approximately the same size are grouped together.

These bands are a reflection of the relative sizes of jobs as competently performed. They are not a reflection of either you as a jobholder or how you may be performing your own job. While management expects everyone to perform his or her job at 100% competency or better, that performance is not considered in this process.

These bands are not direct reflections of the pay of any individuals, nor are they the sole criteria for setting pay levels. While job evaluation and grading provides a sound basis for determining pay levels when all other issues are equal, the fact is that those other issues are rarely, if ever, equal. The result is that the actual pay of individuals will vary even among jobs that are apparently sized the same depending on the influence of those other issues.

Those 'other issues' include, but are not limited to, such things as:

- Market forces that mean jobs at the start of a professional track may be paid lower because of the oversupply of entrants;
- Market forces that mean jobs in a particular professional or technical field may be paid higher because of the scarcity of qualified people;
- Length of service and previous salary history of individuals;
- Supplementary skills people bring to the job that may not be required of the position but are of value to the organisation;
- Provisions of previous employment agreements or other contractual arrangements;
- Additional contributions made to the organisation in terms of the social or human environment of a small organisation; and
- Most importantly, the performance of individuals in their jobs.

These are all things that individuals and organisations bring to the table that lead to jobs being paid at different rates even though they are assessed as being the 'same' size through job evaluation and grading. It is also likely that the remuneration ranges associated with any job size bands will overlap sufficiently so that a high performing individual in a lower grade range can actually be paid at a higher rate than a low performer or new entrant in a higher grade range.

Memorandum to staff

Request for review

TO Job holders

FROM General Manager

REF Job evaluation and grading exercise review procedure

Attached to this memorandum is a copy of the "Request for Review" form which you may use if you wish to have the results of the job evaluation and grading exercise for your position reconsidered. Note that a separate copy of the form must be used for each factor to be reviewed.

The procedure to be followed in requesting a review is as follows:

- a. Review the individual job statement and explanatory notes provided.
- b. Review the job evaluation and grading manual used in this exercise to understand what factor levels were available and the explanatory notes that accompanied them. A copy of the manual may be obtained from Human Resources.

- c. Submit a “Request for Review” form for each factor of the evaluation that you wish to be reviewed. The reasons given for any suggested alteration must be solid and convincing. Your review must be based on the results for your position. You cannot appeal on the basis of how other positions were scored. Nor can you appeal on the basis of any previous job evaluation and grading scores or results. Your submission should provide clear examples in support of your case. Appeals may be made on the basis of perceived gender bias if this can be clearly identified and documented.

A “Request for Review” may be submitted either by the jobholder or by management.

Job holders wishing to submit a “Request for Review” may ask for assistance from their managers or other appropriate persons in preparing and presenting their appeals.

All Requests for Review must be submitted to Human Resources by(date).....

- d. All Requests for Review will be forwarded to the job evaluation practitioner for screening. The job evaluation practitioner will not approve or disapprove any requests. They will examine each request for completeness and will return any incomplete requests to the jobholder for further information. They may also provide clarification of the job evaluation and grading process as it was applied to specific jobs as well as interpretations of the manual as the committee applied the job evaluation and grading system to these positions.
- e. All requests that meet the requirements for review will be considered by the committee prior to(date).....
- f. All job holders requesting a review of any factors will be notified of the committee’s decision.

Job evaluation and grading project

Request for Review

Please complete a separate form for each factor decision you wish to have reviewed by the job evaluation and grading committee.

Name

Job title

I acknowledge that I have received the position banding list and explanatory memorandum. I have reviewed this material and understand essentially how decisions are made in the job evaluation and grading process.

I wish for the job evaluation and grading review committee to review the following factor(s) in the evaluation of my positions.

In factor X, the score given was:

I believe that factor would be more appropriately scored as:

My reasons are the following:

Signed Date

| | |
|--|--|
| | |
|--|--|

In deciding the outcome of any review, the committee reserves the right to review any and all factors for any position for which a review is requested. The committee may:

- accept new findings and vary the banding; or
- disallow the requested review and make no changes; or
- make such determination as it considers appropriate.

Example H:

The basis and operation of the grading system – example of a rationale

Introduction

This document sets out the Classification and Levels Descriptors (CLDs) which define the ‘whole of job’ requirements and expectations of staff operating at a particular classification level. They provide a comprehensive statement of the broad job requirements, key duties and responsibilities, required skills and attributes, and operating context and performance characteristics that embody effective performance at a particular work level. It describes expected standards of performance.

The CLDs are used for a number of corporate processes, in particular job design and redesign, evaluation of work value, position classification and more generally in performance management and recruitment where CLDs are a resource for creating job descriptions. CLDs concentrate on the job rather than the person and are complementary to a Capability Framework. The CLDs refer to the Capability Framework and are designed to be used in the context of that document along with the Values and Code of Conduct.

Classification management and the classification structure

The Classification Rules provide the framework for classification management arrangements. The CLDs include two broad bands (levels 1/2 and 3/4). Broad banding is the process of defining two or more classification levels within a single level of work value. Job requirements, key duties and responsibilities, required skills and attributes, operating context and performance characteristics are combined for each classification level in the broadband, with definition of performance at any specific classification level highlighted where necessary. Broad banding helps to provide greater flexibility in career progression and facilitates a more flexible working pattern.

In a broad banded structure it must always be possible to identify what classification the employee holds. The classification held will determine some other entitlements which may arise in respect of the employee. Broad banding reduces the emphasis on hierarchical pay structures and enables individuals to advance within a broadband without the need for a merit selection process for promotion.

The levels in the classification framework

The CLDs have been developed to provide a logical and systematic approach to the determination of the appropriate classification level of jobs. As outlined above, the CLDs define ‘whole of job’ requirements and are focused on the particular tasks and responsibilities that should be ‘seen’ at each of the classification levels. They describe the ‘work value’ of a level and are used to determine the appropriate level for each position. They do not prescribe the classification level of an individual person or group of persons; rather, they guide such tasks as job design and redesign, the creation of job documentation and job analysis.

Each of the levels set out in this document comprises four sections:

5. An overview of the role which includes a list of those skills, abilities and responsibilities that typically characterise a role at that particular level;
6. The typical primary responsibilities of staff working at that level;
7. The leadership capabilities which broadly describe the attributes and personal behaviours required; and
8. A list of typical skills, experience and/or abilities that staff would need to develop in order to progress to the next highest classification level.

not possible to include every individual task or set of circumstances that may apply for any one job at that level. Similarly, there may be some tasks and responsibilities that are not relevant to some positions at that level, e.g. at the 3/4 level one of the tasks listed is records management, a task that is only relevant to those

staff engaged in specific positions, but also a task that can be seen as indicative of the nature of work for the 3/4 classification level. The classification and levels descriptors should be considered as an attempt to capture the typical characteristics of a level, rather than an exhaustive list of everything staff at that level may do.

Using the Classification and Levels Descriptors

The primary use of the CLDs is to support job design and classification decisions. However, as outlined above, the CLDs are also relevant to a number of other activities including:

- Development of job descriptions, job documentation and other selection tools;
- Redesigning and reclassifying existing and/or new roles (eg where there has been significant change in the work value of a job or there has been significant changes in the capability of an individual to perform a job);
- Setting of an employee's salary on engagement, promotion or movement, assignment of duties, and movement within the broadband on the basis of changes in work value or an individual's capacity;
- Development of organisation-wide learning and development agreements;
- Development of individual performance and learning and development agreements;
- Performance management including managing underperformance;
- Determination of individual career progression; and
- Succession planning.

An outline of pay points within and between each classification level is separately provided.

Classification systems describe and set the work value for a job, rather than the person who is doing it. When using the CLDs to determine the appropriate classification it is important to focus on the skills and capabilities required ensuring competent performance in the job, not the level at which the occupant is presently performing. The current occupant, for example, may have qualifications that are not required to do the job.

When using the CLDs to inform performance management processes, it is important to understand the complementary nature of descriptions of job requirements, skills, abilities, tasks and responsibilities and the capabilities inherent in the person who holds the position. CLDs provide key material to define the job, responsibilities and standards to which performance is expected – i.e. focussing on the job, while capabilities focus on the person. In performance management, both sets of documents should be used to inform decisions about the appropriate allocation of duties, responsibilities and performance standards. CLDs may also be used to identify required skills or capabilities that form the basis for learning and development plans and subsequent activities.

Example I:

Example of a competency framework for practitioners on gender and job evaluation and grading

Gender pay equity:

- Understands how to identify and eliminate gender pay equity problems;
- Understands processes and practices that may constitute barriers to gender pay equity;
- Can monitor actions taken to reduce gender pay inequity; and
- Understands the characteristics and processes of gender-related undervaluation of work.

Job evaluation and grading:

- Demonstrates experience with job evaluation and grading systems;
- Understands the characteristics of robust job information, and the practices for collecting it;
- Competently analyses and ranks positions using comprehensive job information;
- Understands the relationships between levels, points and weightings in job evaluation tools;
- Understands the principles and practices underlying sound job classification and grading systems;
- Is aware of research on aspects of job evaluation and grading design and practice that have led to gender-biased outcomes; and
- Recognises the impact of job evaluation and grading on other human resources management processes including training and development, remuneration, and recruitment and selection.

Education and training on gender and job evaluation and training:

- Experience in group facilitation and education and training;
- Demonstrates active training delivery methods that engage, encourage and challenge to create a positive learning environment;
- Experience in identifying learning barriers and learning styles; and
- Experience in delivering to women and men of various roles, levels of literacy and education, cultural background, and organisational levels.