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Pay Equity in the State Sector: Tools and Resources  
Pay Equity Work Assessment  
Process Guide



**Te Kawa Mataaho**  
Public Service Commission



**Manatū Wāhine**  
**Ministry for Women**

**Te Kāwanatanga o Aotearoa**  
New Zealand Government

November 2020

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These tools and resources do not constitute legal advice. Parties must seek their own legal advice in respect of this guide and how it applies to the pay equity claim being raised.

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## Purpose

The work assessment is a vital part of the pay equity process that allows the parties to understand the work performed by claimants and comparators. The [Equal Pay Act 1972](#) (the Act, section 13ZD) is clear that the assessment of work and work value must be free of assumptions based on sex.

This Pay Equity Work Assessment Process Guide (PEWA Process Guide) provides practical guidance and templates that step you through a gender-neutral work assessment. The steps outlined in this Guide include:

- Establishing joint processes and agreements
- Information/data gathering (existing work information and work assessment interviews)
- Application of the Pay Equity Work Assessment Factor Plan (PEWA Factor Plan)
- Conducting a work assessment
- Compiling and analysing remuneration information
- Comparing the work and remuneration of claimant and comparators

## Structure of tools and resources

This PEWA Process Guide is part of a suite of tools and resources developed by the Te Kawa Mataaho Public Service Commission (the Commission). The following pay equity tools and resources also relate to pay equity work assessment and should be read with this document:

- **Pay Equity Work Assessment Factor Plan**
- **Pay Equity Work Assessment Factor Plan Questionnaire** – guides the gender-neutral work assessment interview and must be used in conjunction with this PEWA Factor Plan
- **Pay Equity Claimant and Comparator Process Guide** – gives more detail on how to select and assess comparators and how to compare the claimant and comparators.

The structure of the tools and resources is set out in the pay equity arrow diagram below to help users navigate and find the components they need.

The tools and resources are designed to enable the parties to pay equity claims in the State sector to progress claims consistently with the Act which is informed by the [Pay Equity Principles](#), and ultimately to achieve pay equity. The tools and resources support the parties throughout the process, from raising a claim to pay equity negotiations/settlement.

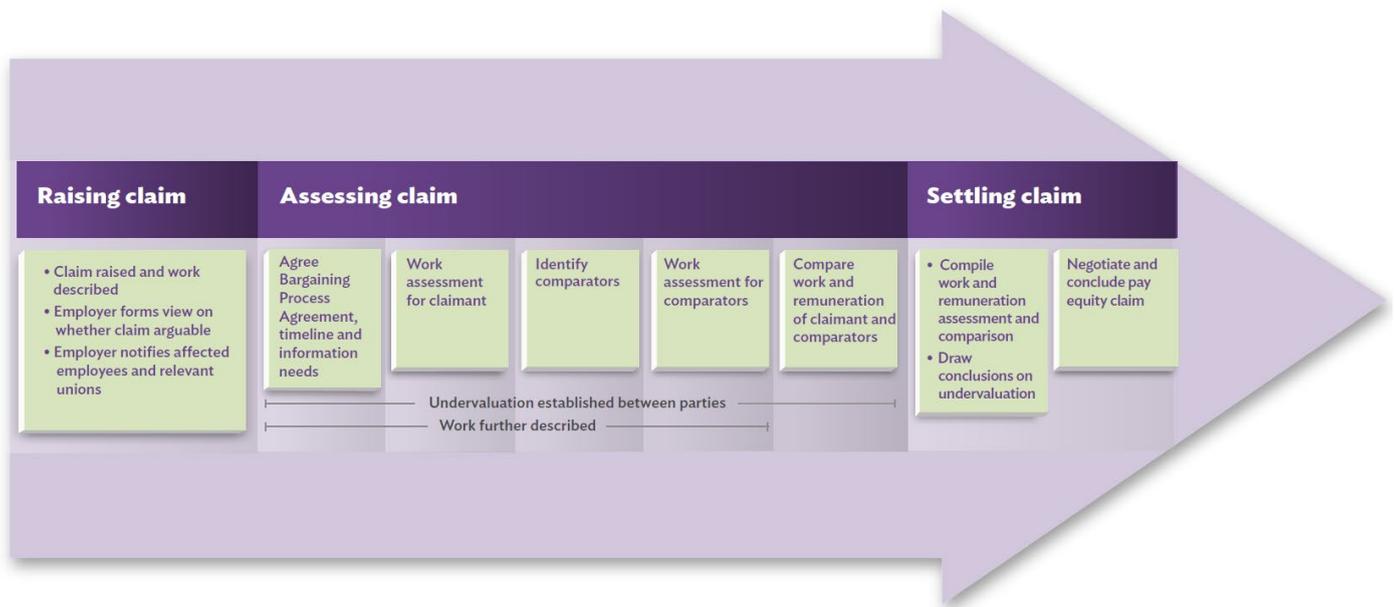
The process that is used to put the tools and resources into practice is just as important as the tools themselves. It is the process used between the parties that will determine the robustness, internal integrity, and validity of the outcomes

# Pay equity process

The arrow diagram below was developed to demonstrate the steps involved when working through the pay equity process.

The pay equity arrow diagram does not describe a linear process where one step must be completed before another is started.

Based on the experience of parties to date, the process is flexible enough for some steps to be done in parallel or slightly overlapping as appropriate. The main underpinning is for the parties to work together through a process of engagement.



## Pay equity work assessment

The work assessment is a vital part of the pay equity process that allows the parties to understand the work performed by claimants and comparators. The Act (section 13ZD) is clear that this work assessment must be free of assumptions based on sex. For example, taking responsibility for the well-being of others is often overlooked or undervalued because this is considered women's work and so the work assessment must evaluate these skills free from this gender bias. If the work assessment is not gender-neutral there is a risk that the work will remain undervalued and outcomes may be subject to future legal challenge.

To undertake a gender-neutral pay equity work assessment, the first step is to define what is being assessed. To do this it is necessary to unpack the work into its constituent parts, which are often referred to as factors. The factors describe elements of what the work entails including skills used, responsibilities undertaken and the conditions and demands placed on someone who is carrying out the work.

Factor-based analysis of work represents a way to take a structured approach to work assessment. The factors that are used, and what is recognised in factor-based analysis, is key to ensuring that overlooked, hidden or undervalued skills, responsibilities, effort and conditions are uncovered and included in the assessment of work (the Act, section 13ZD).

There are two parts to a factor-based work assessment process:

- a work assessment interview guided by a gender-neutral questionnaire which is designed to elicit information from workers about their work.
- using a factor plan to analyse the information that the parties have gathered about the work of the claimant and comparators. The factor plan sets out a series of factors which have different levels to reflect the degree of effort and complexity required from the jobholder for each factor. Using the factor plan requires the parties to consolidate and analyse all the information that they have gathered, including interview data and information from other sources (e.g. health and safety data, job descriptions and professional standards), and then use this to locate the work at the appropriate level for each factor. This process gives a good understanding of the work, where it sits within each of the factors and how the work of the claimant compares to the work of the comparator(s). The parties may then agree to use the optional scoring process to test the initial conclusions based on the work assessment (More information is contained about this in the Factor Scoring section below).

This PEWA Process Guide supports the use of the PEWA Factor Plan and the accompanying PEWA Questionnaire. It provides practical guidance and templates that step you through a gender-neutral work assessment, including

- establishing joint processes and agreements
- information/data gathering (existing work information and work assessment interviews)
- application of the PEWA Factor Plan
- conducting a work assessment
- compiling and analysing remuneration information
- comparing the work and remuneration of claimant and comparators.

## The three gender-neutral work assessment tools

There are three available gender-neutral tools in New Zealand, all of which are consistent with the Act and use factor-based analysis, including:

- The Equitable Job Evaluation (EJE)
- The PEWA Factor Plan
- Pay Equity Aromatawai Mahi (PEAM)

## EJE

The EJE system is the gender-neutral job evaluation tool developed in New Zealand. It was developed by a project team comprising consultants from Watson Wyatt (later taken over by Mercer), Top Drawer Consultants, Pulse HR, a representative of the then State Services Commission and the Director and Senior Adviser from the Pay and Employment Equity Unit, Department of Labour, with the involvement of employers and unions in the pilot process. The EJE system was developed at the same time as, and was designed to be consistent with, the Gender-Inclusive Job Evaluation Standard (NZS 8007:2006),<sup>1</sup> which guides best practice gender-neutral job evaluation.

There are 12 factors within the EJE system, for example knowledge, problem-solving, emotional demands, working conditions, interpersonal skills. Each factor has different levels which help the user identify where a role best fits. In EJE the number of levels contained in each factor does vary, for example emotional demand has four levels while knowledge skills has 11 levels. This was designed to reflect that some factors require a broader range of levels in order to most accurately capture the position of the role being analysed. The number of levels does not reflect the importance of the factor overall.

There are factors or aspects of factors in the EJE system that are not commonly present in standard job evaluation systems and which represent overlooked, hidden or undervalued skills that are often part of female-dominated work. An example of this is present in the people leadership factor. In most traditional job evaluation systems whether or not someone has direct reports is the only element measured in the factor. In EJE the people leadership factor also considers whether workers must lead without the authority to do so, therefore must be skilled influencers and consensus builders.

## PEWA Factor Plan

The gender-neutral PEWA Factor Plan was developed specifically for use in pay equity claims. It enables the work of both claimant and comparators to be understood and compared on an equivalent basis (as required by the Act, sections 13ZD and 13ZE).

The PEWA Factor Plan uses the EJE factor plan framework as its foundation<sup>2</sup>, however the PEWA Factor Plan has adapted the EJE framework in response to key feedback from stakeholders (outlined in more detail below).

This adaptation was intended to make the PEWA Factor Plan more straightforward, user-friendly and accessible. Another key difference is that the PEWA Factor Plan is a work assessment tool instead of a job evaluation tool. This means that it does not measure the relative value of jobs but instead it describes and compares work for the purposes of the pay equity claims-based process.

Stakeholder feedback highlighted that, although the EJE factor framework was seen to provide a good basis for assessing the work, the number of levels within each factor added complexity to what should be a straightforward, transparent process. Stakeholders felt that where a high number of levels is provided, the parties would have to agree on relatively fine levels of distinction for some factors.

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<sup>1</sup> The Gender-Inclusive Job Evaluation Standard was prepared under the supervision of a committee established under the Standards Act 1988 comprising Business NZ, Council of Trade Unions (CTU), Department of Labour, District Health Boards NZ, Equal Employment Opportunities Trust (EEO Trust), Expertise Limited, Hay Group, Human Resources Institute of NZ (HRINZ), Human Rights Commission, Mercer Human Resource Consulting, Ministry of Health, the then State Services Commission, Strategic Pay Limited, Top Drawer Consultants, refer NZ Standard NZS 8007:2006. The Standard is available at: [www.shop.standards.govt.nz/catalog/view](http://www.shop.standards.govt.nz/catalog/view)

<sup>2</sup> The full details of the PEWA Factor Plan are set out in the Pay Equity Work Assessment Factor Plan, The Commission, 2020.

In response to this feedback, further work was carried out on the PEWA Factor Plan to reduce the number of levels from the levels used in EJE (ranging up to 11) to five for each factor. There are a number of reference points for adopting five levels as listed below:

- ANZSCO (Australia and NZ Standard Classification of Occupations) uses five skill levels for each occupation. The skill level is a measure of the skills typically required to competently perform the tasks of a particular occupation.
- A government funded pay equity resource, Equity at Work<sup>3</sup>, was designed to provide gender neutral job evaluation previous to the development of EJE. This tool had a factor plan that was similar to that of EJE, but provided five levels within each factor.
- The skills recognition resource, Spotlight<sup>4</sup>, which was developed to help uncover hidden skills and is used to complement the development of gender-neutral practices in organisations. The hidden skills are process skills which are about linking tasks up into effective performance and adapting previous learning to the work situations that arise. Five levels of process skills are identified by the Spotlight resource.

The Commission has developed two resources to support the parties to use the PEWA system in pay equity claims processes in the State sector:

- Pay Equity Work Assessment Factor Plan
- Pay Equity Work Assessment Factor Plan Questionnaire.

*Note:* the PEWA Factor Plan and PEWA Questionnaire are designed to be used together.

## PEAM

The Pay Equity Aromatawai Mahi (PEAM) is the third gender-neutral work assessment tool available in New Zealand. It is also based on the original EJE tool. PEAM was developed collaboratively between the Ministry of Education Te Tahuu o te Matauranga, New Zealand School Trustees Association E Tipu Enea and the New Zealand Educational Institute Te Ruroa. The PEAM tool has now been used in two education sector claims and is supplemented by gender-neutral guidance from the National Health Service in the United Kingdom.

The EJE tool can be found here [www.employment.govt.nz/hours-and-wages/pay/pay-equity/equitable-job-evaluation](http://www.employment.govt.nz/hours-and-wages/pay/pay-equity/equitable-job-evaluation)

It is important to note that parties may be more familiar with one of the EJE, PEWA or PEAM tools and may agree to use the factor plan tool that they are most comfortable with. Regardless of which gender-neutral tool is chosen, the parties should use the questionnaire designed to complement it.

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<sup>3</sup> Researched and designed by Janice Burns and Martha Coleman with contributions from the Ontario Pay Equity Commission, the UK Equal Opportunities Commission, UDT Finance (UK), staff and management of Electricity Corporation of NZ Ltd and staff and management of the NZ Employment Service with contributions from NZ experts in employment equity, refer Equity at Work, the then State Services Commission; Department of Labour, ISBN No. 0-477-01565 July 1991.

<sup>4</sup> Spotlight is a resource package designed to support gender neutral HR/ER practice, refer Spotlight: A Skills Recognition Tool, Department of Labour Pay and Employment Equity Unit, 2009. [www.employment.govt.nz/hours-and-wages/pay/pay-equity/spotlight-skills-recognition-tool](http://www.employment.govt.nz/hours-and-wages/pay/pay-equity/spotlight-skills-recognition-tool)

## Factor scoring

The parties may agree to test outcomes of the work assessment by overlaying a points system to each of the factor levels allocated to the work of claimant and comparators. This is an optional process that can help the parties to confirm, get clarity on differences/degree of comparability between claimant work and the work of comparators. The scoring and use of points is intended to be a last step after the parties have drawn initial conclusions that reflect qualitative assessment of not only the factor level outcomes but also comparative analysis of foundation material including job descriptions, job histories, interview material, any legislative requirements for the respective roles, etc.

The intention with the pay equity work assessment resources is to enable transparent application of the Act through a user-friendly, straightforward tool that is not costly and is not dependent on experts.

The framework is for the parties to use as part of the wider pay equity bargaining process. The factor plan is intended to provide the work assessment evidence base for parties involved in pay equity bargaining.

If adopted by the parties, the factor plan will promote and support a consistent approach to pay equity work assessment across the State sector. This will enable cross agency learnings and shared understanding of pay equity work assessment.

Appendix 1 provides an overview template for comparing the work of claimant and comparators factor analysis and Appendix 2 provides more detail about factor scoring and a template to help summarise the points allocated claimants and comparators.

This template summarises the points allocated through the process of allocating factor levels to the work of claimant and comparators.

## Establishing joint processes and the Bargaining Process Agreement (sometimes called a Terms of Reference)

Pay equity in New Zealand is aligned with the existing employment relations framework. The primary undertaking is that parties involved in pay equity bargaining will commit to addressing pay equity claims in good faith as per the spirit and intent of section 13C of the Act.

The aim is for a constructive, efficient and effective process.

As part of setting up the framework that is needed for managing the claim, it is recommended that the parties develop and sign their own Bargaining Process Agreement at the start of the pay equity process (refer to the Pay Equity Bargaining Process Agreement template in this suite of tools and resources<sup>5</sup>). The Bargaining Process Agreement establishes the good faith bargaining process and is the frame for the parties' working relationship.

This should include defining the scope of work, how parties will work together, process to be followed, agreed outcomes, commitments to engagement/problem-solving and communication/information-sharing processes.

This provides the framework to facilitate the dialogue needed between the parties to jointly work through the pay equity tools and resources. The Bargaining Process Agreement envisages a consistent framework for engagement between the parties that is consistent with the Act.

The pay equity process diagram (on page 4) was developed to provide a guide to the parties to show the process steps involved when working through the process.

The main underpinning to the claims process is for the parties to be working together through a process of engagement.

### Contributing comparator information to the central pay equity data repository once it has been gathered

A central repository for pay equity data and information (that of claimants and comparators) was implemented in 2020 with the agreement and support of Ministers. The repository is located at the Ministry of Business, Innovation and Employment and is governed by a Tripartite Governance Group.

Parties are encouraged to agree to contributing claims data to the repository for use in other claims processes in order to expedite claims and to avoid comparator fatigue. The repository has a Tripartite Oversight Group which oversees it to ensure agreed principles and protocols are adhered to regarding the collection, storage and access to the data. Data is contributed to the repository on the understanding that parties can withdraw their data from the repository at any time.

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<sup>5</sup> This is recommended as best practice for State sector claims processes.

## Central Agency Pay Equity Governance Group framework

Under the Central Agency Pay Equity Governance Group (Governance Group) framework<sup>6</sup>, State sector agencies are required to present to the Governance Group at Milestone 3 and provide evidence that the work assessment (outcomes) is representative and gender neutral. The Governance Group will also test whether the agency's rationale for potential comparators is supported by sound evidence and analysis (refer to the Claimant and Comparator Process Guide).

Milestone 4 relates to conclusions drawn on the existence and extent of sex-based undervaluation and whether they are supported by thorough comparison of remuneration information and work assessments of both the claimant and the comparators. This will help agencies to think about what the Governance Group will be looking at and considering.

Agencies can present the information in a way that works for their organisation, rather than following the template as long as the information the Governance Group needs to see is covered. The Gender Pay Taskforce (Taskforce) at the Commission is available to support agencies with this work and it is recommended that they engage with their Taskforce contact regularly throughout the entire pay equity journey.

Agencies will need to submit the Milestone 3 paper to their Taskforce contact at the Commission prior to presenting it to the Governance Group as the Taskforce will need to produce advice for the Governance Group.

It is important to submit all material one week prior to a meeting of the Governance Group to ensure all information is considered.

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<sup>6</sup> The Framework for the Governance and Oversight of State Sector Pay Equity Claims (the Framework) was endorsed by Cabinet in December 2019 [CAB-MIN-19-0678 refers]. The Governance Group consists of representatives of the central agencies and representatives of the sector whose claim they are considering at the time, e.g. health, education or Public Service.

## Establishing undervaluation – practical guide

<b>Purpose</b>	Establishing sex-based undervaluation is a key part of the case for pay equity. Establishing the pay equity evidence base for the claimant’s work is covered by sections 2AAC, 13F(3) and 13ZD of the Act.		
<b>Historical or current undervaluation considerations</b>	Origins and evolution of Work	<p>Things to consider:</p> <ul style="list-style-type: none"> <li>• where and when the work originated including:</li> <li>• changes from unpaid to paid work</li> <li>• changes from male to female dominated</li> <li>• any social/historical advances/changes that have impacted on the work</li> <li>• how the work may have evolved over time</li> <li>• historical and current perceptions of the work</li> </ul>	<p>Where to look – possible options:</p> <ul style="list-style-type: none"> <li>• NZ history literature</li> <li>• international literature where there is no NZ literature</li> <li>• professional bodies (if applicable) records and archives</li> <li>• retired employees who have institutional and or occupational knowledge</li> </ul>
	Women's work	<p>Things to consider:</p> <ul style="list-style-type: none"> <li>• presence of skills seen as inherent in women</li> <li>• social/historical context that has given rise to label women’s work</li> <li>• the work is seen as extension to women's work in the home and to their traditional caring roles</li> <li>• whether the nature of work is perceived as ‘more suitable for women’</li> <li>• any impact of volunteer/charitable history associated with the work</li> <li>• sources of funding for the work</li> <li>• any features of the market that have enabled gender discrimination</li> </ul>	<p>Where to look – possible options:</p> <ul style="list-style-type: none"> <li>• whether there is a single buyer (source of funding)</li> <li>• history of charities in NZ</li> <li>• the perception of the value of what may be classed as soft skills</li> </ul>
	Remuneration history	<p>Things to consider:</p> <ul style="list-style-type: none"> <li>• market undervaluation</li> <li>• long term impact of low start rates</li> <li>• limited career pathways</li> <li>• casualisation</li> <li>• impact of changes in the pay-setting framework (centralised/decentralised)</li> <li>• the market that has been used to measure the value of the work</li> <li>• perceptions of the job relative to others</li> <li>• application of measures (of work value) that are not gender-neutral</li> <li>• lack of adjustment of pay over time</li> <li>• lack of formal training and qualifications to recognise the work</li> </ul>	<p>Where to look – possible options:</p> <ul style="list-style-type: none"> <li>• how claimant work has been valued/sized (if at all) and in relation to what other roles</li> <li>• history of what has happened with pay for this work</li> <li>• information on career pathways and any training and qualifications associated with the work (or lack of)</li> </ul>

## Step 1: Information/data gathering

The outcome of work assessment is only as good as the information or data that is being assessed.

Existing work information should be gathered in the initial phase. Existing information may include relevant position descriptions, delegations, task lists, standard operating procedures, health and safety procedures, industry standards, information from collective agreements, information from registration bodies and any legislative requirements.

Such existing information, however, cannot be the only information that is used to assess the work. Current views, conclusions or assessments are not to be assumed to be free of assumptions based on gender (section 13ZD(2)).

For that reason, the key source of information on the work of the claimant and comparators is the data gathered through undertaking interviewing of those who carry out the work. The undertaking of this primary research is integral to the process of work assessment (section 13ZD(1)) of the Act.

In some cases, there may be previous pay equity work which included interview material. Parties may decide to use such data if the work has not essentially changed and if it is able to be validated through an agreed process involving the parties.

This process of data-gathering will also need to be carried out for comparator roles. This entails identifying appropriate comparators and engaging with comparator employer organisations (sections 13ZD and 13ZE of the Act). This is covered in the Claimant and Comparators Process Guide.

The method and process for data-gathering is critical. The process itself needs to be able to demonstrate that it is gender-neutral.

It is also recommended that prior to data-gathering, participants are given access to the PEWA Factor Plan. This familiarises those involved with the factors and helps to develop an understanding of how the factors are set up to be gender-neutral.

Data gathering should be compliant with section 13ZC of the Act and, also with the Privacy Act 1993.

One of the key resources needed for data gathering is the PEWA Questionnaire. This is designed to gather the interview information needed to enable the parties to evaluate the work using the PEWA Factor Plan. The next section sets out a practical guide for undertaking data-gathering and Appendices 1 to 4 contain templates as a guide to collecting and summarising data collected.

## Data gathering - practical guide

<b>Data gathering - practical guide</b>					
<b>Purpose of data gathering</b>	<ul style="list-style-type: none"> <li>To collect worker experience</li> <li>To obtain validation of the work information</li> <li>To ensure that accurate and gender inclusive work information is available to assess the work. Poor quality and/or biased work information leads to poor and unfair work assessments.</li> </ul>				
<b>General ground rules</b>	<table border="1"> <thead> <tr> <th><b>What to be aware of when data gathering</b></th> <th><b>What to be wary of when data gathering</b></th> </tr> </thead> <tbody> <tr> <td> <p>The ability to:</p> <ul style="list-style-type: none"> <li>base judgements on actual work requirements and work information – not the person</li> <li>consider the contribution of a competent employee</li> <li>a dedication to clarifying in all parts of the process e.g. for transparency, for participants and for good data</li> <li>consider what happens in the work 95% of the time, rather than what might happen rarely.</li> </ul> <p><b>Note:</b> Where a skill is rarely used but is integral to the job and must be maintained it is important it is included.</p> </td> <td> <ul style="list-style-type: none"> <li>Assumptions about the work competencies or the type of person suited to the work</li> <li>Assumptions based on current relativities or hierarchical relationships</li> <li>Perceived and actual conflicts of interest (that they are declared and individual is clear about how any conflicts of interest will be managed)</li> <li>Bias, gender bias, or favouritism.</li> </ul> </td> </tr> </tbody> </table>	<b>What to be aware of when data gathering</b>	<b>What to be wary of when data gathering</b>	<p>The ability to:</p> <ul style="list-style-type: none"> <li>base judgements on actual work requirements and work information – not the person</li> <li>consider the contribution of a competent employee</li> <li>a dedication to clarifying in all parts of the process e.g. for transparency, for participants and for good data</li> <li>consider what happens in the work 95% of the time, rather than what might happen rarely.</li> </ul> <p><b>Note:</b> Where a skill is rarely used but is integral to the job and must be maintained it is important it is included.</p>	<ul style="list-style-type: none"> <li>Assumptions about the work competencies or the type of person suited to the work</li> <li>Assumptions based on current relativities or hierarchical relationships</li> <li>Perceived and actual conflicts of interest (that they are declared and individual is clear about how any conflicts of interest will be managed)</li> <li>Bias, gender bias, or favouritism.</li> </ul>
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<p><b>Data gatherers</b></p> <p>The data gatherer is essential to the success of the work assessment</p>	<p><b>Who can be a data gatherer?</b></p> <ul style="list-style-type: none"> <li>A data gatherer can be a range of people including subject matter experts, managers, HR staff, a worker or union representative</li> <li>Whatever their background, the data gatherer needs to be introduced to the data gathering process and the agreed work assessment methodology.</li> </ul> <p><b>What introductory information should be given to data-gatherers?</b></p> <ul style="list-style-type: none"> <li>The work assessment methodology</li> <li>Understanding of, and how to apply, the PEWA Factor Plan</li> <li>Understanding of, and how to avoid error, bias and gender bias in data gathering and assessment</li> <li>Gender inclusion – identifying soft skills and exposing invisible and/or gendered aspects of the work</li> <li>The Factor Plan Questionnaire</li> <li>The process of interviewing using the PEWA Questionnaire.</li> </ul> <p><b>Note:</b> There are three available gender-neutral tools in New Zealand: the PEWA Factor Plan, the EJE factor plan or the PEAM tool. This PEWA Process Guide supports the use of the PEWA Factor Plan and the PEWA Questionnaire.</p>				

<p><b>Work information</b></p>	<p>Sources of work information</p> <p>Data can be gathered from a range of sources including:</p> <ul style="list-style-type: none"> <li>● relevant position descriptions</li> <li>● delegations</li> <li>● task lists</li> <li>● standard operating procedures</li> <li>● health and safety procedures</li> <li>● industry standards</li> <li>● collective agreements</li> <li>● registration bodies</li> <li>● legislative requirements.</li> </ul>	<p>Note on position descriptions</p> <ul style="list-style-type: none"> <li>● The official position description is an important source of work information, but is not the primary source of information</li> <li>● It is a supplement to primary information from interviews</li> <li>● Position descriptions cannot be the sole basis of work information because: <ul style="list-style-type: none"> <li>○ they can be out of date</li> <li>○ they can be too broadly stated or generalised</li> <li>○ they may not recognise or minimise aspects of the role due to gender bias e.g. women naturally do this</li> <li>○ they may overlook the hidden skills that are often associated with women's work such as social and communication skills, responsibility for the wellbeing of others, cultural knowledge and sensitivity (refer to section 13ZD(2)(b) of the Act).</li> </ul> </li> </ul>
<p><b>Error, bias and gender bias</b></p> <p>The way in which data-gathering is carried out (including the initial upskilling of the data-gatherers) determines the accuracy of the data)</p>	<p>Error and bias can enter the data gathering process in a variety of ways</p> <ul style="list-style-type: none"> <li>● failing to expose the invisible dimensions of work or the work may have changed subtly over time through the impact of technology</li> <li>● devaluation of the work by the worker through under describing, trivialising or minimising – this can be particularly evident with roles such as clerical and administration which may not have such a defined scope such as the role of a registered nurse</li> <li>● over inflation of the work</li> <li>● confusing personal attributes with skills</li> <li>● underestimating the experience and learning to acquire the essential skills</li> <li>● overlooking dimensions of the role that have become diminished</li> <li>● jargon and abbreviations leading to confusion</li> <li>● the use of complex language leading to an assumption that the work is complex. Technical terms may be associated with male type occupations.</li> </ul>	

## Data-gathering - practical guide

<p><b>The PEWA Questionnaire</b></p> <p>The PEWA Questionnaire ensures that the work information is gathered in a structured way that allows the application of the PEWA Factor Plan</p>	<p>The PEWA Questionnaire<sup>7</sup> provides a structured guide to the interviewing process</p> <ul style="list-style-type: none"> <li>● it allows the job information to be gathered systematically and in a manner that is consistent with the factors</li> <li>● the PEWA Questionnaire relates to obtaining work information on the following aspects: <ul style="list-style-type: none"> <li>○ SKILLS: Knowledge, Problem-solving, Interpersonal and Physical – criticality and frequency</li> <li>○ RESPONSIBILITIES: People leadership, Resources, Organisational outcomes, Services to people – frequency and variability</li> <li>○ CONDITIONS and/or DEMANDS: Emotional, Sensory, Physical, Working conditions – frequency and intensity</li> <li>○ EFFORT: Note that this is reflected by the levels within each factor.</li> </ul> </li> </ul>
	<p><b>Note:</b> The PEWA Questionnaire also gathers information on service/experience, consistent with the Equal Pay Act 1972.</p> <p>For the purposes of pay equity, the approach taken to the PEWA Questionnaire is to ensure that it is completed through interviewing. This is because if it is completed as a solo exercise with a worker completing it on their own, it may not capture the hidden, overlooked and undervalued skills, as women themselves can undervalue their own skills. In the interviewing process, the interviewer can ensure that the skills are brought out through asking additional questions and enquiring into the work with the interviewee(s). Interviewers should be trained in the use of the tool and also in skills of enquiry and probing – role play practice should be integral to the training.</p> <p>The interview-based approach ensures greater consistency and a greater assurance that all the information has been gathered as errors, biases and gender bias are avoided and a more complete level of information is gathered that includes the hidden, overlooked and undervalued skills, responsibilities and conditions of work.</p> <p><b>Selecting interviewees</b></p> <ul style="list-style-type: none"> <li>● A range of workers should be interviewed to ensure that the breadth and depth of activities pertaining to the work are captured in the work information</li> <li>● A rule of thumb can be that people selected for interview should have been in the role for at least a year - ideally interviewees should bring a range of experience and tenure in the job</li> <li>● Some have found in the process of interviewing that having two to three workers together (from the same role) can elicit more information, as they can support each other in helping to describe the work.</li> </ul>

<sup>7</sup> This reflects the PEWA Factor Plan or EJE Factor Plan. If another gender-neutral tool is agreed between the parties, the PEWA Questionnaire would reflect the relevant factor plan.

<b>Data gathering - practical guide</b>	
<p><b>The interview</b></p> <ul style="list-style-type: none"> <li>• The interview is integral to the process of data gathering</li> <li>• Gathering primary information from those who carry out the work is the key to the integrity of the data gathering process</li> </ul>	<p><b>Guide to conducting a data gathering interview</b></p> <ul style="list-style-type: none"> <li>• Ensure the employer understands the questions – reword and explain if necessary</li> <li>• Find out more with follow-up questions or examples</li> <li>• Ascertain what happens most of the time – not what happens occasionally or sometimes (unless it is required)</li> <li>• Differentiate between common sense and skills that require conceptual level competencies</li> <li>• Differentiate between the volume of work and the levels of skill, responsibilities and conditions of the job</li> <li>• Ascertain if a particular skill is actually an integral part of the competencies and requirements for the work, or if it is an added value the incumbent brings to the role and is utilised to create efficiency or better quality outcomes</li> <li>• Identify incumbent only position descriptions that include the requirement or utilisation of a specific skill that relates solely to a person rather than a general requirement of all job holders in the role</li> <li>• Look out for information relevant to one factor being buried in the information provided by another.</li> </ul>
<p><b>Validation</b></p> <p>Validation processes create the ability for parties to have confidence in the data and support the integrity of the process</p>	<p>The way in which the parties validate the data needs to be agreed between the parties prior to undertaking data gathering. It is critical to have a process of validation that has the confidence of all parties.</p> <p>The purpose of validation is to ensure that:</p> <ul style="list-style-type: none"> <li>• the information is adequate and appropriate for work assessment purposes</li> <li>• there is agreement between the range of participants involved in data gathering including workers, managers, HR staff, union delegates and organisers</li> <li>• it is formally accepted as complete and accurate data on the work of claimants and comparators.</li> </ul> <p>Disagreement and inconsistencies:</p> <ul style="list-style-type: none"> <li>• the problem-solving approaches to use where there is a disagreement on aspects of the work include: <ul style="list-style-type: none"> <li>○ revisit the factor levels and identify the basis of differentiation and how this is being applied</li> <li>○ interview further workers to get consistency</li> <li>○ bring in facilitation to assist with problem-solving.</li> </ul> </li> </ul>

## Step 2: Application of the PEWA Factor Plan

The key to the application of the PEWA Factor Plan is the understanding that the parties develop of it, the way in which the factors counter gender bias and the way the factors recognise hidden, overlooked or undervalued skills, responsibilities and conditions/demands.

The PEWA Factor Plan is designed to assess the work across the whole job that is undertaken. Hence it includes all the typical factors that are measured in New Zealand and international job evaluation. However, the PEWA Factor Plan includes a number of factors that are not commonly included and perspectives within factors that are designed to support gender-neutral analysis.<sup>8</sup>

The following templates are contained in the Appendices to this PEWA Process Guide to assist with data gathering, analysis and comparison of the work assessment and remuneration:

- Appendix 1: Comparing the work of claimant and comparators factor analysis overview template
- Appendix 2: Comparing the work of claimant and comparators – pay equity work assessment scoring points template
- Appendix 3: Template for compiling and analysing remuneration information for claimant and comparators, Template 1 Remuneration data and information
- Appendix 4: Template for compiling and analysing remuneration information for claimant and comparators, Template 2 Remuneration analysis.

<p><b>Skills factor grouping</b></p> <p>The Skills factor grouping reflects the knowledge and problem-solving skills required as well as the role of interpersonal and physical skills associated with the work.</p>	
<p><b>Factor 1</b> <b>Knowledge and understanding</b></p>	<p>Metrics</p> <hr/> <ul style="list-style-type: none"> <li>• nature, depth and breadth of the knowledge required</li> <li>• level of thinking associated with that level of knowledge</li> <li>• recognition of level of knowledge regardless of how it was acquired</li> </ul>
<p><b>Factor 2</b> <b>Problem-solving</b></p>	<ul style="list-style-type: none"> <li>• creative, analytical, coordination and planning skills required</li> <li>• degree of autonomy to find solutions</li> <li>• support available in solving the problem</li> </ul>
<p><b>Factor 3</b> <b>Interpersonal skills</b></p>	<ul style="list-style-type: none"> <li>• nature, intent and criticality of the interactions required</li> <li>• degree of resistance or sensitivity from the audience</li> <li>• requirement for functioning in a multi-cultural situation</li> </ul>
<p><b>Factor 4</b> <b>Physical skills</b></p>	<ul style="list-style-type: none"> <li>• nature of physical skill required</li> <li>• training or experience required to acquire the skill</li> <li>• requirement for speed and/or precision</li> <li>• need for adaptation/variation in use of skill</li> </ul>
<p><b>Responsibility factor grouping</b></p> <p>The Responsibility factor grouping measures the responsibility and accountability for the work including leadership responsibilities, as well as responsibility for resources, service outcomes and delivery of services to people.</p>	
<p><b>Factor 5</b> <b>People leadership</b></p>	<p>Metrics</p> <ul style="list-style-type: none"> <li>• nature of line leadership</li> <li>• nature of non-line influence</li> </ul>

<sup>8</sup> The PEWA Factor Plan includes commentary on factors that include highlighting where the factors are designed to uncover hidden, overlooked and undervalued skills, responsibilities and conditions and/or demands.

	<ul style="list-style-type: none"> <li>• numbers of direct reporting staff involved</li> </ul>
<b>Factor 6</b> <b>Information and resources</b>	<ul style="list-style-type: none"> <li>• nature and extent of the resources involved</li> <li>• jobholder's authority or control over those resources, support available in solving the problem</li> <li>• jobholder's responsibility for financial resources</li> </ul>
<b>Factor 7</b> <b>Organisational outcomes</b>	<ul style="list-style-type: none"> <li>• impact of the work on achievement of organisation's mission</li> <li>• share of the organisation controlled or influenced</li> </ul>
<b>Factor 8</b> <b>Services to people</b>	<ul style="list-style-type: none"> <li>• nature of the service provided directly to people</li> <li>• need for assessment or adjustment of the service</li> <li>• impact of the service</li> </ul>
<b>Demands factor grouping</b> <p>The Demands factor grouping measures the conditions and/or demands that are intrinsic to the work. It reflects the work context and interactions of the job, as well as the different stresses and the working environment.</p>	
<b>Factor 9</b> <b>Emotional demands</b>	Metrics <ul style="list-style-type: none"> <li>• intensity of the emotional demand</li> <li>• frequency and duration of exposure to the demand</li> </ul>
<b>Factor 10</b> <b>Sensory demands</b>	<ul style="list-style-type: none"> <li>• intensity of the sensory demand</li> <li>• frequency and duration of exposure to the demand</li> </ul>
<b>Factor 11</b> <b>Physical demands</b>	<ul style="list-style-type: none"> <li>• nature and intensity of effort demanded</li> <li>• frequency and duration of the demand</li> </ul>
<b>Factor 12</b> <b>Working conditions</b>	<ul style="list-style-type: none"> <li>• nature and extent of conditions and hazards</li> <li>• intensity and frequency of exposure to these factors</li> </ul>

## Work assessment - practical guide

<b>Work assessment - practical guide</b>		
<p><b>Purpose of work assessment</b></p>	<ul style="list-style-type: none"> <li>To assess the work of claimant and comparators (this guide does not cover steps that need to be taken to identify comparators and process of engaging with comparator organisations in order to enable data gathering on the work of comparators).</li> <li>To use a tool and process that is gender-neutral and that recognises the whole job including hidden, overlooked and undervalued skills commonly associated with women's work.</li> </ul>	
<p><b>Selecting work assessment tool</b></p> <p>The tool that is used is critical to ensuring that work assessment is gender-neutral</p>	<p><b>Deciding on tools and methods</b></p> <p>The parties need to decide on the work assessment tool to be used:</p> <ul style="list-style-type: none"> <li>consistent with the Act, the methodology used to assess work must be gender-neutral. Factor plans must be able to be shown to meet this requirement</li> <li>there are three New Zealand gender-neutral tools: PEWA Factor Plan, the EJE factor plan and PEAM - all of which meet the criteria of gender-neutrality. This PEWA Process Guide supports the use of the PEWA Factor Plan.</li> </ul> <p><b>Note:</b> All three tools are based on the same factors, but EJE has more and variable levels.</p>	<p><b>Making decisions</b></p> <ul style="list-style-type: none"> <li>a unilateral decision by one party to use an approach without agreement from the other party could create the potential for a breakdown in process</li> <li>if there is disagreement on the tool/methodology to be used, it is recommended that the parties ask for mediation or seek support for further information or other constructive intervention to help the parties come to an agreement.</li> </ul>
<p><b>Set up of process</b></p> <p>The way the parties engage is critical to having the capacity to reach agreement throughout the process</p>	<p><b>Establishing the way of working</b></p> <p>Establish how the forum/discussion will be managed</p> <ul style="list-style-type: none"> <li>chairing/facilitation</li> <li>ground rules</li> <li>record-keeping</li> <li>decision-making <ul style="list-style-type: none"> <li>consensus is recommended</li> <li>training in consensus decision-making may be necessary.</li> </ul> </li> </ul> <p>It is recommended that the group establishes a work plan at the beginning of the discussions.</p>	<p><b>Relationship/capacity to engage</b></p> <p>It is critical that a relationship exists allowing the parties to work jointly by the time that work assessment takes place.</p> <ul style="list-style-type: none"> <li>if this does not exist, or there is fundamental disagreement between parties that makes it difficult to work together, it is recommended that the parties seek support to help establish the basis for cooperation and constructive engagement.</li> <li>this could include joint training in problem-solving processes.</li> </ul>

## Work assessment - practical guide

<p><b>Work assessment</b></p> <p>Participants</p>	<p><b>Who can carry out work assessment?</b></p> <ul style="list-style-type: none"> <li>• Work assessment, as with other parts of the pay equity process, should be carried out by a group representing the parties. This should be supported by subject matter experts, HR, other support for data, record-keeping and/or facilitation.</li> <li>• Whatever their background, those carrying out work assessment need to have an agreed understanding of the process, how it will be applied and be able to challenge their own gender bias and assumptions.</li> <li>• It is recommended that the parties are jointly trained in work assessment and the methodology the parties have adopted.</li> <li>• It is important when setting up the process for work assessment that data-gatherers are included as participants, if possible, as they have the direct experience of talking to the workers to bring to the table.</li> </ul> <p><b>What introductory information should be given to those carrying out work assessment?</b></p> <ul style="list-style-type: none"> <li>• The work assessment methodology.</li> <li>• Understanding of, and how to apply, the PEWA Factor Plan.</li> <li>• Understanding of, and how to avoid, bias and gender bias in work assessment.</li> <li>• Gender inclusion – identifying soft skills and exposing invisible and/or gendered aspects of the work.</li> <li>• The process to be used for carrying out work assessment.</li> </ul> <p><b>Note:</b> There are three New Zealand gender-neutral tools: the PEWA Factor Plan, the EJE factor plan and PEAM - all of which meet the criteria of gender-neutrality. This PEWA Process Guide supports the use of the PEWA Factor Plan.</p>	
<p><b>General ground rules</b></p>	<p><b>What to bring to work assessment</b></p> <ul style="list-style-type: none"> <li>• Gender inclusiveness</li> <li>• Consistency</li> <li>• Fairness and openness</li> <li>• Respect for the values of the organisation and those who carry out the work</li> <li>• Awareness of personal bias and resistance to this.</li> </ul>	<p><b>What NOT to bring to work assessment</b></p> <ul style="list-style-type: none"> <li>• Current work/salary information or assumptions</li> <li>• Current hierarchical relationship information or assumptions</li> <li>• Hidden agendas</li> <li>• Gender bias or favouritism</li> <li>• Personal sensitivities or an ego.</li> </ul>

<b>Work assessment - practical guide</b>	
<p><b>Work information</b></p> <p>The quality of the information is critical to the quality of work assessment</p>	<p><b>Consider the work information</b></p> <ul style="list-style-type: none"> <li>• Each participant reads through all the available work information, including the data gathered through the interviewing process</li> </ul> <p><b>Questions in relation to the PEWA Questionnaire information</b></p> <ul style="list-style-type: none"> <li>• Is the information clear?</li> <li>• Is there anything you do not understand?</li> <li>• Is there enough information? Do you need more information?</li> <li>• Look out for information relevant to one factor being buried in the information provided by another - make a note of this for later reference.</li> <li>• Check to see if others agree there is enough clear information.</li> <li>• If there is consensus that more information is needed before the work assessment can progress, organise to get it.</li> </ul>
<p><b>Applying the factors Stage 1</b></p> <p>The intention of applying the PEWA Factor Plan is to capture the breadth and depth of the skills and responsibilities, and conditions/demands of the work</p>	<p><b>1. Initial application of PEWA Factor Plan</b></p> <ul style="list-style-type: none"> <li>• Each participant reads the work information for that particular factor.</li> <li>• Each participant decides on the factor level for the work and makes a note of reasons.</li> <li>• Record is made of the outcomes for each factor for the work across the group (factor levels).</li> </ul> <p><b>Note:</b> Do not discuss or challenge anyone else's view at this point.</p> <p><b>To guide the practice</b></p> <ul style="list-style-type: none"> <li>• All participants need to be familiar with the methodology including an understanding of how the PEWA Factor Plan: <ul style="list-style-type: none"> <li>○ counters gender bias</li> <li>○ provides recognition for hidden, overlooked or undervalued skills.</li> </ul> </li> <li>• Base judgements on actual work requirements and work information.</li> <li>• Evaluate the work and not the person.</li> <li>• Consider the contribution of a competent employee.</li> <li>• Consider what happens 95% of the time, rather than what might happen rarely unless it is required (e.g. emergency procedures capability may rarely be required).</li> <li>• Keep good records of decisions and the reasons for the decisions.</li> </ul>

## Work assessment - practical guide

### Applying the factors Stage 2

To reflect the assessment in the correct level for each factor

### The decision-making process

A facilitated discussion on the initial assessments takes place, keep in mind the following:

- the group should aim to reach consensus
- the discussion and debate should be robust.
- challenge the argument/issue not the person
- a factor level should reflect a best fit and does not need to comply with every detail in the factor level description
- the process is a search for the most appropriate level for the work.

The group needs to consider the answers to be correct, appropriate and defensible.

### Review validation

The review is to provide the opportunity to check outcomes and in the case of comparators to provide for validation

### Review to ensure overall accuracy

- Consider outcomes that stick out like sore thumbs and review.
- Review the overall outcomes across the areas of work (claimant and comparators) and ensure that they appear appropriate.
- If necessary, the group can decide to review decisions on factor levels by repeating the process and checking all work material and information.
- If necessary, the group may seek further information by going back for more information through data-gathering/interviewing (primary research).

### Validation

- In the case of comparators, validation should always be sought from the comparator organisation.
- The way in the parties validate the data needs to be agreed between the parties prior to undertaking data gathering. It is critical to have a process of data validation that has the confidence of all the parties.
- This is an additional step following the review process.

## Appendix 1: Comparing the work of claimant and comparators factor analysis overview template

The following template allows for the ability to see at a glance the scores across claimant and a range of comparators. It provides the basis for initial analysis and comparing across factor levels.

Factor group: skills	Claimant	Comparator 1	Comparator 2	Comparator 3
The responsibilities factor group measures the responsibilities or accountabilities for the work. It reflects the leadership responsibilities of jobs, as well as responsibility for resources, service outcomes and delivery of services to people.	Factor level	Factor level	Factor level	Factor level
F1 – Knowledge and Understanding: Assesses the combination of knowledge and experience required by the work. It covers the nature, depth and breadth of the knowledge required, regardless of how the knowledge may have been acquired. It does not refer to specific qualifications but to types of knowledge.				
F2 – Problem-solving: Assesses the level of reasoning, analysis, judgement, creativity, innovation, planning, coordination needed to make decisions and find solutions. It considers the variety and complexity of problems, the accessibility and complexity of the information/data needed and the degree of autonomy to make decisions. In addition to commonly recognised skills, this factor takes account of planning and coordination skill often found in women’s work.				
F3 – Interpersonal: Assesses the level of communication and interpersonal skills needed to interact with other people. The purpose, complexity, criticality and contentiousness of the interactions are considered. The factor levels do not necessarily reflect traditional organisational hierarchies.  There is also acknowledgement that some roles require multi-cultural skills beyond those expected of everyone who lives and works in a diverse community.				
F4 – Physical: Assesses the use of physical or fine motor skills required by the work and also recognises the level of training required. Considers the skill (including speed and/or precision) not the frequency or effort required. This factor is commonly overlooked. The higher levels are to recognise work where physical skills (dexterity, eye/hand and limb coordination) are key to the performance of the role.				

Factor group: responsibility	Claimant	Comparator 1	Comparator 2	Comparator 3
This factor group measures the responsibilities or accountabilities for the work. It reflects the leadership responsibilities of jobs, as well as responsibility for resources, service outcomes and delivery of services to people.	Factor level	Factor level	Factor level	Factor level
F5 – People leadership: Assesses leadership requirements for the role. Numbers of reporting staff are also taken into account. It recognises the management/ supervision factor common to most approaches to measurement and also recognises non-line leadership where there is no formal management responsibility.				
F6 – Resources: Includes the use, care, control, allocation, acquisition and security of resources, including data, information, financial, tools, equipment, buildings, land and flora/fauna. It covers the nature and complexity of the responsibility and the nature, extent and value of the resources. This factor includes the processing or maintenance of significant amounts of confidential information common to a number of public sector roles.				
F7 – Organisational outcomes: Assesses the nature of the work’s impact on the achievement of the organisation’s mission, delivery of services or other outcomes. It considers the nature of the service outcomes and the span of influence in achieving the outcomes. This factor is commonly recognised in assessment tools.				
F8 – Services to people: Assesses the responsibility for the direct provision of services to people or groups of people. This factor is not commonly recognised in assessment tools. It reflects the proximity of the position to the front-line service delivery of services to clients, the nature of the service or intervention and the impact of the service on people’s needs or wellbeing. It does not measure the higher levels of account ability for the design or funding of the service (this is measured under Organisational outcomes).				

Factor group: conditions and/or demands	Claimant	Comparator 1	Comparator 2	Comparator 3
<p>This factor group measures the demands and working conditions that are intrinsic to the work. It reflects the work context and interactions of the job, as well as the different stresses and the working environment that jobholders typically encounter. It assumes all health and safety requirements are met.</p>	Factor level	Factor level	Factor level	Factor level
<p>F9 – Emotional: Assesses the emotional demands arising from contact or work with people or situations that are intrinsically stressful, upsetting or traumatic. This factor is not commonly recognised in other assessment systems. Where other systems do measure demands they have generally been limited to physical demands. This factor takes into account roles that involve emotional work and considers the frequency and intensity of demand and the nature of the demand or the situation of the people.</p>				
<p>F10 – Sensory: Assesses the demands for sensory attention i.e. the concentration, alertness or focussed attention required. This factor is not commonly recognised as a separate demand – it is often incorporated into problem-solving. It is about demand for focussed mental concentration in a challenging environment. It considers intensity, impact of interruptions, multiple areas of focus or rapid shifts in concentration, frequency and duration of exposure to the demand.</p>				
<p>F11 – Physical: Assesses the level of physical exertion the work requires. It considers strength and/or stamina required, strenuous or repetitive muscle movements, activities such as lifting, carrying, pushing and working in confined or constrained positions. This factor is often recognised as part of physical skills. This is, however, not recognising skill, but the physical demand or effort required to carry out the work.</p>				
<p>F12 – Working conditions: Assesses exposure to recognised disagreeable, unpleasant or uncomfortable conditions or hazards arising from the work environment. It includes conditions inherent to getting the work done, recognising the risk of injury from other people such as clients or patients. Working conditions are more commonly associated with physical hazards of manual work. This factor ensures that recognition is also given to the range of exposure to disagreeable or uncomfortable conditions in other types of work as well as potential hazards.</p>				

## Appendix 2: Comparing the work of claimant and comparators - pay equity work assessment scoring points template

The parties may agree to test outcomes of work assessment through the points provided in the PEWA Factor Plan scoring tables. The possible benefits of using points include that:

- it may help the parties to confirm differences/degree of comparability between claimant work and the work of comparators
- for some participants/audiences it is important to be able to verify/validate through using a clear points and weightings system.

If points and weightings are to be used, this should occur after a comprehensive work assessment process where:

- the PEWA Factor Plan tool has been applied to claimant work and to the work of comparators
- there has been some initial consideration of the respective factor levels for the work across claimant and comparators
- the parties have a set of outcomes that reflect a qualitative assessment of the claimant and comparators work through consideration of both the factor level outcomes and the comparative analysis of foundation material including job descriptions, job histories, interview material, and any legislative requirements for the respective roles, etc.

Scoring and use of points is intended to be a last step, if agreed by the parties, to test conclusions. If, for example, there are a number of comparators, this process could help to confirm which were the closest to the claimant work.

A possible template for recording scoring is provided below. It is important to note that this scoring mechanism is solely for the purpose of supporting the pay equity claims-based process. Like any of the tools and resources to support the pay equity claims process, it is critical that it is used in the context of a joint process so that it is consistent with and can contribute towards the next steps in the wider pay equity bargaining process.

### PEWA Factor Plan skills grouping

Skills	Responsibility	Conditions and or Demands
The Skills factor group reflects the knowledge and problem-solving skills required, as well as the role of interpersonal and physical skills	The Responsibility factor group reflects leadership responsibilities, as well as responsibility for resources, service outcomes and delivery of services to people	The Conditions/Demands factor group reflects the working conditions context and a range of demands that are part of the working environment
Factor 1 Knowledge and understanding	Factor 5 People leadership	Factor 9 Emotional demands
Factor 2 Problem-solving skills	Factor 6 Information and resources	Factor 10 Sensory demands
Factor 3 Interpersonal skills	Factor 7 Organisational outcomes	Factor 11 Physical demands
Factor 4 Physical skills	Factor 8 Services to people	Factor 12 Working conditions

This template summarises the points allocated through the process of allocating factor levels to the work of claimant and comparators.

	Factor	Claimant	Comparator 1	Comparator 2	Comparator 3			
Skills	1 Knowledge and understanding							
	2 Problem-solving							
	3 Interpersonal skills							
	4 Physical skills							
Responsibilities	Total points	Total points	Total points	%	Total points	%	Total points	%
	5 People leadership							
	6 Information and resources							
	7 Organisational outcomes							
	8 Services to people							
Weighting Conditions and/or demands	Total points	Total points	Total points	%	Total points	%	Total points	%
	9 Emotional demands							
	10 Sensory demands							
	11 Physical demands							
	12 Working conditions							
		Total points	Total points	%	Total points	%	Total points	%
	<b>TOTALS</b>	<b>TOTAL</b>	<b>TOTAL</b>	<b>%</b>	<b>TOTAL</b>	<b>%</b>	<b>TOTAL</b>	<b>%</b>

## KEY

This table can also reflect percentages in terms of closeness of the comparator scores to claimant scores. Colour coding can be added to reflect the agreement by the parties on how close the scores are for claimant and comparator work. For example, as in the following key

Not at all comparable	50% or more
Small areas of comparability	Within 50%
Some comparability	Within 30%
Significant comparability	Within 20%
Broadly comparable	Within 10%

## Appendix 3: Templates for compiling and analysing remuneration information for claimant and comparators – Template 1 – Remuneration data and information

Category	Claimant	Comparator 1	Comparator 2	Comparator 3
Average base salary				
Median base salary				
Average total remuneration including superannuation				
Salary range (minimum, midpoint and maximum)				
Number of hours worked per week (full-time, part-time, variable)				
Hourly rate				
Employment type (permanent, fixed-term, casual)				
Total number of employees				
Gender break down				
Key components of remuneration (other than base salary, e.g. allowances)				
Superannuation				

Category	Claimant	Comparator 1	Comparator 2	Comparator 3
Collective bargaining agreements				
Information on job sizing				
Information on progression				
General overview of remuneration history				
% difference between average base of comparators/claimant				
Gap between average base salary and total remuneration				
Employment factors				
Unions				

The last four rows may need to be analysed separately as part of the preparation for bargaining.

## Appendix 4: Template for compiling and analysing remuneration information for claimant and comparators – Template 2 – Remuneration analysis

Category	Claimant	Comparator 1	Comparator 2	Comparator 3
% difference between average base salary of comparators when compared to claimant	The claimant role's average base salary is XXX and represents 100%	As average base salary is XXX  This is XXX more than the Claimant, or XXX%	Bs average base salary is XXX  This is XXX more than the Claimant role, or XXX%	Cs average base salary is XXX  This is XXX more than the Claimant role, or XXX%
Gap between average base salary and total remuneration	The Claimant role has a XXX difference between average base salary and total remuneration	As have a XXX difference between average base salary and total remuneration	Bs have a XXX difference between average base salary and total remuneration	Cs have a XXX difference between average base salary and total remuneration
Key components of remuneration (other than base salary)	3 % KiwiSaver (XXX)  Rostered duties allowance	<ul style="list-style-type: none"> <li>• XXX%</li> </ul> superannuation less XXX% withholding tax (XXX) <ul style="list-style-type: none"> <li>• Incidentals allowance (XXX)</li> <li>• Practitioners' allowance (XXX) · XXXXX allowance (XXX)</li> <li>• Shift Incentives (XXX)</li> </ul>	<ul style="list-style-type: none"> <li>• XXX%</li> </ul> superannuation less XXX% withholding tax (XXX) <ul style="list-style-type: none"> <li>• Shift incentives – which as allowances paid at an hourly rate on Saturday, Sunday or weekdays between 1800 and 0600 (XXX)</li> </ul>	<ul style="list-style-type: none"> <li>• 3% KiwiSaver (XXX)</li> <li>• Due to high demand for XXX in XXXX, associated positions currently attract a premium</li> </ul>
Employment factors	Number of Public Service and Crown Entity employers	Only one employer in NZ	Only one employer in NZ	Cs are both public and private sector, with multiple employers
Union	XXX and XXX represent the claimant group  Both are employer based multiple industry unions	XXXX single industry union	XXXX single industry union	XXX is an employer based multiple industry union