



Pay Equity in DHBs: Tools and Resources

Hybrid Equitable Job Evaluation

Factor Plan

USER HANDBOOK 2022

Background

This handbook reproduces the Equitable Job Evaluation (EJE) Factor Plan: Working towards Gender Equity 2007, Pay and Employment Equity Unit, Department of Labour.

The EJE system 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 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, refer Beta release version ISBN: 0-678-28101-3, 2007.

For the purposes of the Allied Health pay equity claim assessments in 2022, the parties have decided to incorporate the Te ao Māori factor from the Te Orowaru tool into EJE, to ensure a more robust recognition of the skills and knowledge in that area.

Key factors in the relevance of the Equitable Job Evaluation system material to pay equity in 2022 include:

- The 2020 amendments to the Equal Pay Act 1972 are clear that the assessment of work and work value are to be free of assumptions based on gender.
- The EJE system was purposefully developed to be gender-neutral and included in its development stakeholder organisations, including employers, unions, HR representatives and commercial job evaluation providers
- 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)¹
- 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

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¹ 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, State Services Commission, Strategic Pay Limited, Top Drawer Consultants, refer NZ Standard NZS 8007:2006.

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Introduction to Hybrid - Equitable Job Evaluation (HEJE)

Job evaluation is a process that can provide a clear and fair measure of the relative values of jobs, but it can be affected by unintentional gender bias.

The Equitable Job Evaluation System (EJE) was developed to address aspects of job evaluation that have been found to have gender bias. It is designed to be gender-neutral, capturing all relevant information about jobs, including skills, knowledge, responsibility, and working conditions that may have traditionally been overlooked.

Te Orowaru is part of a suite of pay equity tools and resources developed by Te Kawa Mataaho Public Service Commission alongside unions and other Public Sector agencies.

For the purposes of the Allied Health pay equity claim assessments in 2022, the parties have decided to incorporate the Te ao Māori factor from the Te Orowaru tool into EJE, to ensure a more robust recognition of the skills and knowledge in that area.

Like most effective job evaluation systems, the hybrid EJE tool uses a number of *Factors*, *Levels* and *Points* to analyse and compare job sizes.

The hybrid EJE tool has 13 Factors organised into three factor groups.

- **Skill factors:** knowledge, problem-solving, interpersonal, Te ao Māori, physical skills.
- **Responsibilities factors:** responsibilities for leadership, resources, organisational outcomes, services to people.
- **Demands factors:** emotional, sensory and physical demands, working conditions.

This handbook provides a structured methodology that enables the evaluator to arrive at an appropriate job score through a logical and consistent process. It is important to remember that job evaluation is a *process, not a formula*, and this handbook is a tool to assist in that process.

The guidelines in this handbook are provided to clarify the scoring levels available in establishing relativities among jobs in terms of the factors described, and their application must be interpreted in the context of the broader culture of the organisation or job grouping.

For the process of pay equity work assessment, the hybrid EJE tool 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 are uncovered and included in the assessment of work.

EJE Factor Groupings, Factors, and Factor Metrics

The Pay Equity work assessment process uses the following factor groupings and factors in the work assessment process.

FACTOR GROUPING SKILLS	The Skills Factor Grouping reflects the knowledge and problem-solving skills required of jobholders as well as the role of interpersonal and physical skills associated with the job.
METRICS	
Factor 1 Knowledge and Understanding	<ul style="list-style-type: none"> • nature, depth and breadth of the knowledge required • level of thinking associated with that level of knowledge • alternative experience equivalent to the knowledge indicated
Factor 2 Problem-solving	<ul style="list-style-type: none"> • creative, analytical, organisational and planning skills required • degree to which the jobholder is free to find solutions • support available in solving the problem
Factor 3 Interpersonal Skills	<ul style="list-style-type: none"> • nature and intent of the interactions required • any requirements for communication out of the ordinary • requirement for functioning in a multi-cultural situation
Factor 4 Te ao Māori Skills	<ul style="list-style-type: none"> • Level of knowledge and skill in te ao Māori and te reo Māori required for role • Responsibility for education of others (colleagues/clients, etc.) on cultural competency/ Māori value systems • Level of understanding of Te Tiriti O Waitangi as part of role • Responsibility for leadership or guidance on te ao Māori in workplace
Factor 5 Physical Skills	<ul style="list-style-type: none"> • nature of physical skill required • training or experience required to acquire the skill • requirement for speed and/or precision • need for adaptation/variation in use of skill

FACTOR GROUPING RESPONSIBILITY	The Responsibility Factor Grouping reflects the leadership responsibilities of jobs, as well as responsibility for resources, service outcomes and delivery of services to people.
	METRICS
Factor 6 People Leadership	<ul style="list-style-type: none"> • nature of line leadership • nature of non-line influence • numbers of direct reporting staff involved
Factor 7 Information and Resources	<ul style="list-style-type: none"> • nature and extent of the resources involved • jobholder’s authority or control over those resources • jobholder’s responsibility for financial resources
Factor 8 Organisational Outcomes	<ul style="list-style-type: none"> • nature of the position’s responsibility for outcomes • share of the organisation controlled or influenced
Factor 9 Services to People	<ul style="list-style-type: none"> • nature of the service provided directly to people • need for assessment or adjustment of the service • impact of the service

FACTOR GROUPING DEMANDS	The Demands Factor Grouping reflects the work context and interactions of the job, as well as the different stresses and the working environment that jobholders typically encounter.
	METRICS
Factor 10 Emotional Demands	<ul style="list-style-type: none"> • intensity of the emotional demand • frequency and duration of exposure to the demand
Factor 11 Sensory Demands	<ul style="list-style-type: none"> • intensity of the sensory demand • frequency and duration of exposure to the demand
Factor 12 Physical Demands	<ul style="list-style-type: none"> • nature and intensity of effort demanded • frequency and duration of the demand
Factor 13 Working Conditions	<ul style="list-style-type: none"> • nature and extent of conditions and hazards • intensity and frequency of exposure to these factors

FACTOR 1: KNOWLEDGE AND UNDERSTANDING

THE FACTOR

This factor assesses the combination of **knowledge and experience required to competently perform the job**. It covers technical, specialist, procedural, product, organisational and conceptual knowledge, including numeracy, literacy, languages, theories, techniques, policies, procedures and practices.

The factor assesses the depth and breadth of the total knowledge required for the work, whether *acquired through formal education, self-study, life experience, on-the-job training, work experience or some combination of these*.

FACTOR GUIDELINES

The factor is about the requirements to perform the job competently – not the level of knowledge and/or experience the current or any potential jobholder may possess. The incumbent may have high levels of either, but *if they are not actually required to do the job, they should not be considered* in the evaluation. The factor is assessed on the highest level of knowledge normally required on the job. Generally speaking, it does not consider how often that level of knowledge is used. However, knowledge that may be required only in rare or unique circumstances should not generally be used to determine the appropriate level.

Specific, relevant qualifications and training are not required for assignment to a particular level. However, they may provide a useful indicator of the type and level of knowledge needed to perform the job duties properly. Jobholders need not necessarily hold such qualifications – they may have acquired an equivalent level of knowledge through some combination of relevant formal or informal experience. Evaluators should take care not to under-score the knowledge requirement simply because there is no qualification equivalent.

This factor includes knowledge of language skills, including Braille and sign language, learned either formally or informally, that are required for the job. The manner of application of those skills is also addressed in Factor 3: Interpersonal Skills.

FACTOR METRICS

The factor considers the

- nature, depth and breadth of the knowledge required
- level of thinking associated with that level of knowledge
- alternative experience equivalent to the knowledge indicated

FACTOR 1: KNOWLEDGE AND UNDERSTANDING

FACTOR LEVEL	FACTOR LEVEL DESCRIPTOR
1	<p>The job requires understanding of simple work procedures requiring a depth of knowledge that can be gained on the job in a limited, mainly manual, role, such as the driving of vehicles, delivery of mail, storage of materials, operation of basic tools and equipment or equivalent tasks.</p> <p>Foundation literacy, oral and mental skills are required. Knowledge is typically gained through some combination of training/induction and experience.</p>
2	<p>The job requires understanding of a number of regular work procedures of defined breadth that would require specific knowledge, job training or period of induction. The job requires literacy, numeracy and knowledge of the appropriate procedures for a range of tasks typically, but not always, gained through formal secondary education or on-the-job training or the equivalent level of experience.</p>
3	<p>The job requires skills and knowledge in an administrative, trade, craft or manual specialisation where tasks involve achievement of results initiated at a higher level. This may include ability to understand and apply administrative and operational work procedures or the ability to use complex machinery or equipment.</p> <p>Work is typically based on experience in relevant areas of work or training to a recognised standard of expertise beyond standard secondary school, supplemented by a further induction/familiarisation period.</p>
4	<p>The job requires specialised skills and knowledge of a trade, craft, technical, processing, clinical, commercial, administrative or operational nature at a skilled level, requiring a defined base of knowledge such as knowledge of work processes or technology and how to achieve end results.</p> <p>Experience would typically involve application of coordination, planning and problem-solving skills under general supervision. An equivalent depth or breadth of acquired knowledge typically involves formal training at a level equivalent to a trade certificate or one-year polytechnic certificate/diploma.</p>
5	<p>The job requires considerable skills and/or knowledge required to undertake technical, clinical, commercial, administrative or other specialist activities in the workplace, with limited supervision. The scope of tasks is reasonably complex, requiring experience in coordination, evaluation, analysis or technical investigation and solution of substantial issues and application of principles in a broad environment. This could include in-depth knowledge of use and capabilities of technical equipment, policies, practices and/or products.</p>

FACTOR 1: KNOWLEDGE AND UNDERSTANDING

FACTOR LEVEL	FACTOR LEVEL DESCRIPTOR
6	<p>The job requires advanced levels of knowledge required for the completion of complex activities in technical, clinical, administrative, operational or comparable fields where external assistance may not be immediately available. Experience would normally include planning, developing and recommending appropriate courses of action to achieve successful results.</p> <p>Work is of substantial complexity, requiring a depth or breadth of theoretical knowledge plus practical and procedural knowledge in a specialist area, typically represented at the national certificate level or a three-year polytechnic diploma.</p>
7	<p>The job requires more advanced knowledge at a recognised professional level, sufficient for complex analytical constructive thinking in a conceptual problem-solving situation where many complex issues are involved. Experience would likely be in the achievement of significant organisational or professional outputs and/or objectives in a functional, operational, technical, clinical, scientific, administrative or other broad environment.</p> <p>Specialised knowledge is typically based on a foundation of theoretical learning or expertise, backed by formal recognition equating to a university Bachelor's degree or equivalent in a specific field, although an equivalent depth or breadth of knowledge gained less formally can be equally acceptable.</p>
8	<p>The job requires the ability to contribute constructive and creative thinking in a broad range of social, technical, clinical, business, governance and/or professional environments. It requires academic, practical and procedural knowledge of a specialist area, plus detailed knowledge of the associated policies, practices and procedures.</p> <p>The work typically involves demonstrable evidence of expertise based on recognised qualifications or a combination of formal academic knowledge and less formal but advanced learning acquired through a variety of other sources. This is broadly the equivalent to a Bachelor's degree with substantial further study in an area of specialisation, or the equivalent depth or breadth of experience.</p>
9	<p>The job requires experience in planning and determining courses of action that achieve desired outcomes in a varied and complex environment. Experience would include initiating strategies and policies based on effective research and enquiry in a professional, technical, scientific or human relations environment.</p> <p>The job requires advanced knowledge at a senior level of formal qualifications or equivalent expertise derived from knowledge acquired in unique non-quantifiable areas, such as research, planning, management and/or operations and similar endeavours. This would typically be demonstrated by advanced practical and procedural knowledge across a specialist area equivalent to a Masters' degree.</p>

FACTOR 1: KNOWLEDGE AND UNDERSTANDING

FACTOR LEVEL	FACTOR LEVEL DESCRIPTOR
10	<p>The job requires advanced theoretical and practical knowledge typically calling for higher levels of specialist knowledge within the relevant field or broad knowledge from different fields. A background of advanced scientific, technological or management expertise, combined with extensive professional, practical and theoretical ability, can be demonstrated and applied effectively.</p> <p>Knowledge requirements at this level would be for conceptual and intellectual thinking typically found at the broad equivalent of a doctoral degree or other advanced specialist training, research or study.</p>
11	<p>The job requires a breadth of expertise and experience gained from working at the highest levels in a leading role, in a combination of advanced disciplines that could include management, academic, technical, scientific, administrative, clinical or political functions in a unique commercial, service, academic or government arena. The job will require increasing levels of unique expertise/experience as a cultural, business, professional or government opinion leader.</p>

FACTOR 2: PROBLEM SOLVING

THE FACTOR

This factor assesses the skills of **creativity, innovation, analytical reasoning and judgment** required to solve problems typically encountered or that may occur in the coordinating, organising and planning required to achieve the job's or the organisation's objectives. The factor considers the complexity of problems, issues or activities undertaken in usual circumstances.

FACTOR GUIDELINES

The factor considers the context, variety and relative complexity of the material or information upon which decisions are based, as well as the clarity of the problem and the accessibility of the information required to make the needed decisions. The factor assesses the highest level of problem-solving normally expected of the jobholder. It does not consider the exceptional problem or challenge that may arise in rare or unique circumstances and that would not generally be considered the responsibility of this role to address.

Commentary on Factors

In addition to commonly recognised skills, this factor takes account of planning and coordination skills often associated with female dominated work.

FACTOR METRICS

The factor considers the

- nature and intent of the interactions required
- any requirements for communication out of the ordinary
- requirement for functioning in a multi-cultural situation

FACTOR 2: PROBLEM SOLVING

FACTOR LEVEL	FACTOR LEVEL DESCRIPTOR
1	<p>The job requires skills to deal with problems of a generally minor nature that are clearly defined, needing little analysis and minimal effort in choosing between limited, clear options. The work is closely supervised and largely planned for the jobholder, although there is the opportunity to organise day-to-day tasks.</p> <p>Most information needed is straightforward and readily available, and decision-making methods and procedures are clearly established and defined.</p>
2	<p>The job requires some interpretation or judgmental skills to deal with problems or situations of a familiar or reasonably predictable nature and limited difficulty, which may involve choosing solutions from defined alternatives. Some judgment may be required to interpret information, situations or instructions, but the jobholder is expected to solve recurring problems primarily through reliance on previous experience. Little close supervision is necessary, but resources are generally available for reference or advice.</p> <p>Information needed is readily available; decision-making generally involves solid information and established procedures, with only some clarification.</p>
3	<p>The job requires analytical and judgmental skills to solve varied problems of a recurring nature (not all of which will be familiar) or to develop solutions, interventions or plans with a more immediate, localised impact. The skills include interpreting information or situations and choosing between options or existing procedures for undertaking work requirements. The jobholder generally has ready access to resources for advice and guidance on policies and non-recurring problems.</p> <p>Some information is readily available, but investigation and reference to other sources may be needed to inform solutions or the course of action.</p>
4	<p>The job requires analytical, diagnostic, creative and developmental skills. This level requires the judgmental skills to analyse unfamiliar problems, information or situations, work with multiple variables, evaluate a range of options and make decisions on new situations or processes. The jobholder is subject to occasional direction by a supervisor/manager or technical specialist who is readily accessible for guidance on more complex problems and policy interpretation.</p> <p>Information necessary to make decisions is not easily identified and investigation/research and possibly some interpretation is necessary to gather the data and ideas needed.</p>

FACTOR 2: PROBLEM SOLVING

FACTOR LEVEL	FACTOR LEVEL DESCRIPTOR
5	<p>The job requires creative ability essential for solving problems of considerable complexity, along with the development of new approaches, solutions and/or recommendations for further action. Judgment is required in planning, researching a range of actions and evaluating alternative solutions and strategies over the longer term. Responsibilities and objectives are assigned with considerable latitude, with work reviewed according to achievement of objectives and pre-defined goals. The jobholder is expected to set quality standards for work.</p> <p>Information necessary to make decisions is available through research, but requires considerable clarification, interpretation and adaptation to the needs and nature of the particular problem.</p>
6	<p>The job requires multiple, advanced skills for the solution of problems of advanced complexity. The role involves interpreting overall policies and strategies within broad parameters and undertaking significant conceptual and imaginative approaches to solutions in areas of major development. The jobholder has wide discretion for setting objectives and assessing organisational or professional performance.</p> <p>Information necessary for decisions requires extensive research or development. Considerable analysis is needed to clarify the possible problems.</p>
7	<p>The job requires highly creative skills for development of solutions to highly complex problems. Solutions may require the application of sophisticated research or enquiry techniques and analysis. The jobholder generally sets strategic goals and longer-term objectives, as well as assessing the levels of outcomes to complex problem-solving processes.</p> <p>Decision-making areas are multi-faceted, vague and difficult to identify. Information must often be generated from source material, using specialised knowledge of the function/service and/or technical discipline.</p>
8	<p>The job requires development of innovative solutions to 'one-of-a-kind' problems. Issues dealt with will have major significance for future services, policies or practices. The solutions will involve the development of action or plans that have broad implications for the organisation, with support only distantly available.</p> <p>Decision-making involves conceptual skills, abstract intellectual thought and the creation of hypotheses or theories. Information is unavailable or incomplete and options are difficult to identify and apply.</p>

FACTOR 3: INTERPERSONAL SKILLS

THE FACTOR

This factor assesses the level of **communication and interpersonal skills** required for competent performance of the role. It measures communication, including the need to communicate through means other than verbal exchange. The factor assesses the nature of personal contacts required with other people, including clients, customers, suppliers, government agencies, the media or peers in other organisations or professional associations, as well as relationships with other employees.

The purpose of the communication and interpersonal skills and the complexity or contentiousness of the material being communicated are both considered. The subject matter may be complex, sensitive, confidential or unwelcome. The factor also takes into account the nature, diversity, cultural background, size and receptiveness of the intended audience.

FACTOR GUIDELINES

The factor measures the highest level of interpersonal skills required of the job. Frequency of use of the indicated skills is not generally considered in this factor. However, contacts that may occur only in rare or unique circumstances should not generally be used to determine the appropriate level.

The purpose of the interaction may include training, promotion, informing, advising, motivating, empathising, persuading, presenting, counselling, reassuring, negotiating, gaining cooperation, meeting the needs of others or caring for others. It considers human relations skills such as empathy, sensitivity, understanding of human and organisational behaviour and motivational techniques.

The score on this factor generally will increase with the greater sensitivity or complexity of the interpersonal situation and the criticality of the interaction for individuals, groups of people or the organisation as a whole.

FACTOR METRICS

The factor considers

- the nature and intent of the interpersonal skills required
- any requirements for communication out of the ordinary
- the requirements for functioning in a multi-cultural situation

Please note that as Te ao Māori skills are captured in the next factor (factor 4), then anything mentioned in this factor about those specific skills should be included there. Additional consideration needs to apply to all roles that would not be covered by factor 4; ie any other multi-cultural knowledge, language skills, working with sight/hearing impaired, etc.

FACTOR 3: INTERPERSONAL SKILLS

FACTOR LEVEL	FACTOR LEVEL DESCRIPTOR
1	The job requires exchanging straightforward information, usually orally, with work colleagues, but could include other people. It involves politeness to avoid friction in relationships while working with others.
2	The job requires effective exchange or transfer of information, as well as courtesy and cooperation, when dealing with external clients or people in the workplace on a day-to-day basis. It involves skills to explain, present or discuss ideas or data pertinent to an assignment. The job requires satisfactory people-responsiveness skills based on careful listening and some tact or diplomacy.
3	The job requires instructing or guiding others in activities or considering complaints and suggestions from others. It involves effective people-responsiveness skills to elicit and understand people's personal or service needs. Contact is transactional in nature, requiring tact in coping with enquiries or challenges.
4	The job requires use of strong interpersonal skills that contribute to the effectiveness of the organisation or service when negotiating, interviewing, motivating, persuading or information-gathering, with either other employees or external clients/customers. The jobholder may teach, motivate, influence, advise or give counsel to others through an interactional relationship based on professional background, expert knowledge and experience. The job requires very good people-responsiveness skills, involving discretion and diplomacy in dealing with others in situations of some stress or concern and/or in emotionally charged situations.
5	The job requires influencing others to accept a point of view or convincing people to take a different course of action willingly. The jobholder may negotiate with or influence others to promote significant ideas or resolve major issues or demonstrate leadership with a high level of communication, where the outcome depends on diplomacy and professional counselling skills or building of empathetic relationships in situations of considerable stress. Contacts require exceptional human relations skills to deal with difficult, specialised or emotionally charged situations.
6	The job requires diverse and complex negotiation, counselling, influence and/or leadership skills of a very high level, involving intensive personal effort and profound participation in discussions and interactions that are critical to outcomes for people, groups of people or the organisation/service as a whole. This level of skill may be required when representing the interests of the organisation or profession as a whole on matters of critical importance where the impact internally/externally is significant. Contacts are of such importance that their effective handling becomes a major consideration.

FACTOR 4: TE AO MĀORI SKILLS

This factor examines four key aspects to skills in te ao Māori. It is one factor divided into four components.

It is important to go through each component as a jobholder may be strong in one area but not another.

FACTOR CONSIDERATIONS

Strategic thinking and Te Tiriti o Waitangi

- the level of knowledge and understanding of Te Tiriti o Waitangi in the workplace
- the level of leadership involved in implementation and promotion of Te Tiriti o Waitangi in the workplace

Actioning te reo me nga Tikanga Māori

- the level of fluency in te reo Māori
- the level of leadership and support of others in the use of te reo Māori and Tikanga Māori

Connection to Māori value systems

- the level of understanding of Māori value systems
- the level of leadership in implementing these value systems in the workplace.

Connectedness to and engagement with Māori communities

- the level of connection to Māori communities
- the ability to generate partnership and engagement with Māori.

TECHNICAL GUIDELINES

- Each of the four components of this factor are assessed separately and independently. Ensure that the score given to one does not influence the assessment of another. It is possible to have a high score on one component and not on another.
- The final score for the factor will be chosen from the highest score of any of the four categories, not added together

FACTOR 4: TE AO MĀORI SKILLS

FACTOR LEVEL	FACTOR LEVEL DESCRIPTOR
	<p>Strategic thinking and Te Tiriti o Waitangi</p> <p>Definition: The factor measures the competencies required to lead a commitment to Te Tiriti o Waitangi from a Tangata Whenua perspective.</p>
1	The job requires a basic understanding of Te Tiriti o Waitangi from a Tangata Whenua perspective.
2	The job requires understanding Te Tiriti o Waitangi from a Tangata Whenua perspective and how it can be applied within the workplace to drive positive outcomes for Māori.
3	The job requires the implementation of Te Tiriti o Waitangi based outcomes for Māori by applying existing organisational frameworks and ideas for strengthening these. This requires providing leadership to colleagues, supporting them to understand the organisation’s Treaty of Waitangi policy, and its application to their work and the workplace.
4	<p>The job requires leadership of strategic development of organisational frameworks for upholding Te Tiriti o Waitangi and developing outcomes for Māori.</p> <p>The job requires compelling arguments to be communicated as to why equitable outcomes for Māori are critically important in a way that influences others. This level of skill may include the ability to confidently lead the organisation to partner with Māori to co-develop and co-design projects that garner mutual benefit for both Māori and the organisation.</p>
FACTOR LEVEL	FACTOR LEVEL DESCRIPTOR
	<p>Actioning te reo me ngā tikanga Māori</p> <p>Definition: The factor measures the competencies required to integrate a culturally responsive approach to engaging in and with Māori communities; and other key internal and external Māori stakeholders.</p>
1	The job requires pronunciation of Māori words well, the ability to confidently say some basic phrases in te reo Māori, and to have a basic understanding of Māori cultural norms, protocol and etiquette.
2	The job requires the need to speak te reo Māori at a very basic conversational level and have the ability to participate confidently in Māori customary practices and protocols.
3	<p>The job requires fluent speaking of te reo Māori, and has to have skills in te ao Māori settings including with respect to Māori customary practices and protocols.</p> <p>The job requires support to others to engage safely and appropriately in cultural practices. The ability to translate short phrases into te reo Māori upon request is needed.</p>
4	<p>The job requires fluent speaking of te reo Māori and to have competent translator skills. There is the ability to move comfortably in te ao Māori settings, lead organisational engagement in Māori customary practices and protocols, and lead others to understand how Māori identity, language and culture are essential to define success as Māori - within the organisation and externally.</p> <p>The job requires the ability to empower others to better understand their own cultural perspectives to advance the work of the organisation across a range of social contexts. The need to competently lead the organisation to engage with and value iwi and Māori generally as repositories, and kaitiaki of their identity, language and culture is required.</p>

FACTOR LEVEL	FACTOR LEVEL DESCRIPTOR
	Connection to Māori values systems Definition: The factor measures the competencies required to demonstrate a connection to Māori values systems and how they are implemented in workplace practice including to guide bicultural value sets at a strategic level.
1	The job requires the understanding of Māori values systems, including but not limited to manaakitanga, whanaungatanga, and kaitiakitanga, and to be able to incorporate them in practice with the support of others.
2	The job requires (to have) an affinity and inherent understanding of Māori values systems, including but not limited to manaakitanga, whanaungatanga, and kaitiakitanga, and be able to incorporate them in practice.
3	The job requires (to have) an affinity to and inherent understanding of Māori values systems, including but not limited to manaakitanga, wairuatanga, and kaitiakitanga. The ability to make decisions guided by these values and confidently incorporate them in practice is required.
4	<p>The job requires (to have) an affinity to and inherent understanding of Māori values systems, including but not limited to manaakitanga, wairuatanga, and kaitiakitanga.</p> <p>The ability to lead organisational strategic thinking guided by these values, such as leading the development of bicultural organisational values is a must.</p> <p>The job requires the ability to confidently implement these values in practice, in a culturally appropriate way, both internally and externally, in dealing with external stakeholders.</p>
FACTOR LEVEL	FACTOR LEVEL DESCRIPTOR
	Connectedness to and engagement with Māori communities Definition: The factor measures the degree of connectedness to Māori communities to carry out the role efficiently and effectively in a supported and joined-up manner.
1	The job requires some connections within Māori communities and the ability to draw on those connections to promote awareness of and support for the kaupapa of the organisation.
2	The job requires the ability to demonstrate the ability to engage Māori communities in the kaupapa of the organisation through engendering mana, trust and respect.
3	<p>The job requires a good profile amongst Māori communities and the ability to be well connected to a number of Māori networks including professional and socially based entities.</p> <p>The work must to connect the organisation to a range of external Māori key stakeholder groups to, improve organisational outcomes, and the effectiveness of Māori responsiveness strategies.</p>
4	<p>The job requires a strong profile of mana amongst Māori communities and to be well connected to a broad range of Māori networks including professional and socially based entities.</p> <p>There must be the ability to demonstrate the ability to work in a connected way to promote awareness of and support for the kaupapa of the organisation in a sophisticated joined-up and holistic way, by drawing on personal connections to a range of Māori systems and networks. Understanding approaches to Māori partnership, engagement, and effectiveness in implementing those within the organisation to the mutual benefit of Treaty partners is important.</p>

FACTOR 5: PHYSICAL SKILLS

THE FACTOR

This factor assesses **physical or fine motor skills** required on the job.

Physical skills encompass manual dexterity, hand/eye coordination, coordination of limbs, manipulation and sensory skills. It takes into account requirements for speed, precision and accuracy in tasks requiring accurate coordination and fine motor movements.

Frequency of use of the indicated skills is not considered in this factor. However, skills that may be required only in rare or unique circumstances should not generally be used to determine the appropriate level. If the demand for the skill is sustained over a period of time, that additional requirement will be accounted for in Factor 12, Physical Demands. Physical skills are about dexterity, coordination and fine motor movement skills, rather than the effort or energy expended.

FACTOR GUIDELINES

The factor measures the highest level of physical skills required in the job. The skills involve the use of large or small muscle groups and associated hand/eye coordination. The skills are acquired through practice or formal training.

Rating on this factor will increase with the level and sophistication of the training and experience required, the detail of the activity, the need for precision, exactness and speed and the degree to which the skill set is used in existing work situations or adapted to new ones.

There are many jobs where some level of physical skill is required but is not central to the role. Examples of this include using a laptop or computer or driving in professional roles. Skill requirements of this nature will be captured at level 2 of this factor.

FACTOR METRICS

The factor considers the

- nature of the skill required
- training or experience required to acquire the skill
- requirement for speed and/or precision
- need for adaptation/variation in use of skills

FACTOR 5: PHYSICAL SKILLS

FACTOR LEVEL	FACTOR LEVEL DESCRIPTOR
1	<p>The job does not require specific training or experience in particular physical skills. There may be requirements for physical activity, but these are what might be considered typical of everyday life.</p>
2	<p>The job requires acquired physical motor skills normally obtained through practice or practical training. The skills usually involve the manipulation or manoeuvring of objects, equipment or machinery where the same skill set is used throughout the job. Care, but not precision, is required.</p> <p>This skill level also covers jobs where there is some demand for physical dexterity beyond the requirements of everyday life.</p>
3	<p>The job requires physical skills where training or specific experience is the key to proficiency. There is a need for precision in meeting the particular physical specifications of the job. Dexterity and hand/eye coordination, in addition to larger muscle movements and possibly speed of action, is typically required. It is also likely to require some variation in the application of the skill set while performing the job.</p>
4	<p>The job requires more complex physical skills that are acquired through a formal training programme. The skills generally involve detailed hand and/or finger dexterity and hand/eye coordination. There is always a need for precision and generally for speed – although in some jobs a higher level of precision may mean less speed is expected. The requirement can be for either one very detailed physical activity or adaptation across activities.</p>
5	<p>The job requires physical skills for which formal training is highly specialised and typically lengthy and complex. The job involves detailed and very precise hand/eye coordination and dexterous movement. The skills are applied in a variety of complex ways, require adaptation to different job situations and are likely to be updated over time.</p>

FACTOR 6: RESPONSIBILITY FOR PEOPLE LEADERSHIP

THE FACTOR

This factor assesses the **leadership and influence requirements** of the position. This includes responsibility for direct line leadership, as well as functional control of staff, advisers, trainees, volunteers, consultants, contractors or other individuals whom the role can influence or for whom it has responsibility. Leadership may be in the form of direct management or supervision, functional guidance, professional leadership, coordination, technical influence or direction and/or specialty advice or any of many other forms of direct influence over the work patterns of others.

Influence is causing or achieving action or work by others where direct control is absent, that is, causing others to act in a desired way without having direct control over them. These “others” can be either within or outside the organisation. This ranges from achieving immediate tasks to establishing broader habits of work or professionalism across the organisation or associated group. Other forms of leadership or influence include:

- Project responsibility involving coordination with others, internal and/or external to the organisation
- Consultative and advisory roles that have an impact on people and organisational operations
- Technical or professional direction provided by a knowledgeable expert in a field; or
- Discipline to others for whom they have no formal responsibility.

FACTOR GUIDELINES

At levels 1 and 2, the emphasis is on either close or intermittent supervision and on monitoring of the work processes, without full-time responsibility for personnel actions.

Level 3 supervision is generally periodic, as in shifts, projects, or work teams that form over time.

Level 4 supervision refers to situations where there is a direct, clearly understood reporting relationship between the leader and staff. Leaders are typically responsible for assigning the work, reviewing progress, and checking the results. They may also be responsible for performance reviews, discipline, coaching and recommending promotion or demotion, but generally do not hold the final authority.

Level 5 management usually includes ultimate responsibility for the personnel functions listed below. Supervisors at level 4 are unlikely to have full responsibility or final accountability for these personnel actions. Note that levels 4 and 5 make a distinction between supervising/managing a single person and multiple staff.

PERSONNEL ACTIONS TO CONSIDER IN THIS FACTOR

Supervisory level (4) recommends, while management level (5 or 6) makes final decisions, or gives formal approval

- Evaluating employee performance
- Providing on-the-job counselling
- Taking disciplinary actions
- Employing new staff
- Negotiating contracts
- Promoting employees
- Making salary adjustments
- Discharging employees
- Acting on complaints and grievances
- Coaching/counselling on the job
- Reviewing work performance
- Assigning work activities
- Scheduling work hours
- Providing on-the-job training
- Planning/scheduling training

FACTOR 6: RESPONSIBILITY FOR PEOPLE LEADERSHIP

EXCLUSIONS

The factor does not address influence that may have an effect at a time in the future, such as that of teachers, lecturers, journalists, politicians, or other popularly influential people on students/clients/customers. The intention in using the term “influence” is to recognise non-line leadership in an organisation.

FACTOR METRICS

The factor considers the

- nature of line leadership
- nature of non-line influence
- numbers of direct reporting staff involved

FACTOR 6: RESPONSIBILITY FOR PEOPLE LEADERSHIP

FACTOR LEVEL	FACTOR LEVEL DESCRIPTOR
1	The jobholder is responsible only for their own work. They are not normally required to lead, supervise, coordinate or otherwise direct other employees. The job has very limited or no accountability or responsibility for other staff.
Influence	The jobholder may be required to show others how to perform tasks or duties (that is, orientation) or provide guidance or on-the-job training to new employees.
2	The jobholder has occasional supervisory responsibility for immediate, on-site work allocation to other employees, such as supervising trainees, students, volunteers or other temporary staff. This may include occasional direction of contractors or consultants.
Influence	The jobholder is responsible for providing advice of an authoritative nature, such as in relation to compliance with quality or safety requirements, audit controls, by-laws, regulations, statutes, and so on, either within or outside the organisation.
3	The jobholder is responsible for the provision of non-permanent coordination or direction of a number of people with similar work responsibilities, such as a shift or duty roster. The job involves some direct accountability/responsibility for other people for specified periods of time, such as project leadership or periodic coordination/direction of small groups or individual staff focused on work assignments and achievement of job outputs. This may also include full-time supervision of a single staff member.
Influence	The jobholder applies mentoring or coaching skills in the regular provision of direction, guidance and/or training to people, without supervisory responsibility. They may coordinate contractors, consultants or other non-employees, either within the organisation or externally, on a regular basis. This may include regular influencing through dissemination of expertise or professional advice to non-reporting staff.
4	The jobholder has full-time, direct accountability/responsibility for supervision of more than one staff member in work assignments or coordination/direction of groups on an ongoing basis. This is generally full-time supervision, responsible for allocation, direction and monitoring of work while exercising team leadership and coaching skills. The jobholder is likely to make recommendations on most personnel actions (see Factor Guidelines), but will generally not have final approval/disapproval authority.
Influence	The jobholder provides professional mentoring and maintenance of standards through direct influence on designated staff within a discipline, without line management responsibility. They are accountable for directly influencing professional outputs and levels of performance within the organisation, or of associated people outside the organisation.

FACTOR 6: RESPONSIBILITY FOR PEOPLE LEADERSHIP

FACTOR LEVEL	FACTOR LEVEL DESCRIPTOR
5	The jobholder has full-time, direct authority and accountability for the range of personnel management functions within the organisational context (see Factor Guidelines) for more than one staff member. People at the next level down are managed rather than merely supervised. The jobholder is required to demonstrate ongoing people-management skills in which direction, counselling, coaching and leadership of staff, often through supervisors, is required to ensure effective operation.
Influence	The jobholder has a high level of influence over people, including peers, through professional, traditional, social or other accepted measures of recognition. The position plays a key role in setting professional standards both within and outside the organisation.
6	The jobholder has direct accountability/responsibility for higher-level management of other staff. Accountability typically involves leadership, performance management and direction of a significant number of other staff, covering several different organisational units or areas of activity through subordinates/managers or different senior staff, ranging from key specialists and professional staff to leaders of functions. This typically includes the management of a number of positions at level 5, that is, managing other managers with little direct responsibility for, or involvement with, staff at level 4 and below.
7	The jobholder has overall accountability for the full personnel resources of the organisation or of a major division or unit within a large organisation where accountability for personnel management is devolved to that division or unit. This typically involves the management of a number of positions at levels 5 and 6.

FACTOR 7: RESPONSIBILITY FOR INFORMATION AND RESOURCES

THE FACTOR

This factor assesses the responsibility the jobholder has for **control, management, acquisition, disposal, security or use** of various resources. The range of resources extends from the most basic tools, equipment and information required for individual task completion to the broad spectrum of diverse material, intellectual and financial resources that make up the organisation. These resources are used by employees at all levels to achieve outputs and goals, but the degree of responsibility for them varies among those employees.

The factor measures the responsibility for three distinct kinds of resources – physical, information and financial. Some jobs will involve responsibility for more than one of these. In such cases, the score for the job will be the highest score for any of the resource responsibilities. For example, if a job would score at level 3 for financial resources and level 4 for equipment, the score for the job will be level 4.

FACTOR GUIDELINES

Physical and Information Resources

Resources include such elements as manual or computerised information, data and records, materials, processes, technology, office and other equipment, tools and instruments, vehicles, plant, machinery, land, construction work, buildings and fittings and fixtures, goods, produce, stocks and supplies, natural and other such resources. The nature of the accountability/responsibility includes handling, cleaning, maintenance and repair, security and confidentiality, deployment, purchasing, replacement, development, issuing, preserving, protecting, storing, collation, controlling access and quality control of physical or natural resources.

Financial Resources

The factor also assesses the direct accountability for budgeting, handling, spending, allocating, authorising, saving or otherwise disposing of the financial assets of the organisation. This includes cash, vouchers, debits and credits, credit card payments, invoices, budgets and revenue. The responsibility can be for correctness and accuracy, safekeeping, confidentiality and security, deployment and degree of direct control, cost control and budgetary processes. Responsibility/accountability means the authority to make final decisions to affect the activities described.

FACTOR METRICS

The factor considers the

- nature and extent of the resources involved
- jobholder's authority or control over those resources
- jobholder's responsibility for financial resources

FACTOR 7: RESPONSIBILITY FOR INFORMATION AND RESOURCES

FACTOR LEVEL	FACTOR LEVEL DESCRIPTOR
1	<p>The job involves responsibility for the use of or access to resources provided. This job involves limited responsibility for personally generated information and/or physical resources, including low-value equipment or materials. There is limited or no responsibility for financial resources, possibly extending to the occasional handling or allocation of small amounts of cash, processing cheques, invoices or equivalent.</p>
2	<p>The job involves responsibility for ensuring that specific assignments/tasks are resourced appropriately. This involves some direct accountability/responsibility for limited physical or information resources, along the following lines:</p> <ul style="list-style-type: none">• use of expensive equipment or facilities• controlling limited amounts of stock or supplies• provision and maintenance of materials and resources for limited tasks• responsibility for processing or maintenance of significant amounts of confidential information or data• responsibility for day-to-day security/maintenance of buildings, materials, equipment or other resources <p>Financial Resources</p> <ul style="list-style-type: none">• handling or processing limited amounts of cash, cheques, invoices or equivalent• accounting for considerable sums of money• accountability for expenditures from an agreed budget or equivalent income
3	<p>The job involves responsibility for the allocation and utilisation of resources within a work unit to meet service requirements. This involves significant direct accountability/responsibility for physical resources, along the following lines:</p> <ul style="list-style-type: none">• regular use of very expensive equipment or facilities• controlling a large range of stock, equipment or supplies• provision and maintenance of materials and resources within a work unit• processing of substantial manual or computerised information of a sensitive personal nature where confidentiality is paramount• security, protection, maintenance and repair of a range of equipment, buildings, materials or other physical resources <p>Financial Resources</p> <ul style="list-style-type: none">• accounting for large sums of money in various forms• accountability for significant expenditures from an agreed budget or equivalent income <p>Responsibility may include involvement in setting and monitoring of the relevant budget and its expenditure.</p>

FACTOR 7: RESPONSIBILITY FOR INFORMATION AND RESOURCES

FACTOR LEVEL	FACTOR LEVEL DESCRIPTOR
4	<p>The job ensures resource requirements for a major function/department to meet operational objectives. This involves high, direct accountability/responsibility for physical resources, along the following lines:</p> <ul style="list-style-type: none">• ensuring resource requirements for a major function/department are organised to meet performance/operational objectives• maintaining information systems to meet specifications, or operation of an information system at a higher level, as a major job responsibility• adaptation, development or design of a wide range of equipment, land or buildings• security and protection of high-value physical or natural resources• discretionary ordering of a wide range of equipment and supplies <p>Financial Resources</p> <ul style="list-style-type: none">• accounting for very large sums of money in various forms• accountability for large expenditures from an agreed budget or equivalent income <hr/> <p>Responsibility may include setting/monitoring of the budget and its expenditure.</p>
5	<p>The job ensures organisational structure and service execution among multiple major functions/departments aligned with organisational goals. This involves a major direct accountability/responsibility for physical resources, along the following lines:</p> <ul style="list-style-type: none">• ensuring organisational structure and service execution among multiple major functions/departments are aligned with business/organisational goals• operation/maintenance of large-scale information systems• security, protection or confidentiality of a wide and very high-value range of physical resources• ordering of a wide and high-value range of equipment and supplies• adaptation, development or design of a wide range of high-value equipment, land, buildings or other physical resources <p>Financial Resources</p> <ul style="list-style-type: none">• major direct accountability/responsibility for major financial resources. The responsibility includes contributing to the setting and monitoring of the relevant budget(s) and physical assets of several services <hr/>

FACTOR 7: RESPONSIBILITY FOR INFORMATION AND RESOURCES

FACTOR LEVEL	FACTOR LEVEL DESCRIPTOR
6	<p>The job determines wide-scale, long-term resourcing requirements needed to satisfy organisational or professional goals. This involves the highest level of direct responsibility for substantial physical resources, along the following lines:</p> <ul style="list-style-type: none">• determining wide-scale, long-term resourcing requirements needed to satisfy business/organisational/professional goals• managing/developing information systems across the organisation or profession• broad accountability for the physical resources of the organisation or profession <p>Financial Resources</p> <ul style="list-style-type: none">• very major direct responsibility for the financial resources of the organisation or profession, including accountability for very large expenditures from an agreed budget or equivalent income and direct involvement in setting and monitoring the relevant budget(s), long-term financial planning and altering the budget or expenditures to meet service or other requirements.

FACTOR 8: RESPONSIBILITY FOR ORGANISATIONAL OUTCOMES

THE FACTOR

This factor assesses the nature of the job's **impact on the achievement of the organisation's mission** and outcomes, that is, its services to the organisation's clients. While focused on external outcomes in most cases, the factor may also assess the job's impact on internal clients where there is a clear service relationship.

At the same time, the factor reflects how many of the service outcomes the jobholder is responsible for. The size of the organisation will have an impact on the level that some jobs are operating at. Generally, the multiple roles referred to in the lower levels are more typical of larger organisations.

FACTOR GUIDELINES

The application of this factor depends on clearly defining the nature of the service outcomes. For many organisations and professions, particularly the health, education and welfare sectors, this will include responsibility for people and services to people. At higher levels, the factor also reflects the span of influence the position holds within or across the organisation or profession, that is, the breadth or extent of responsibility for delivery of service outcomes to clients.

Assigning a job to a level in this factor does not necessarily imply any particular leadership or people management role - that will be reflected in the Leadership Factor. This factor is about responsibility for and impact on service outcomes, not leadership.

FACTOR METRICS

The factor considers the

- nature of the position's responsibility for outcomes
- share of the organisation controlled or influenced
- span of control
- nature of the service outcomes

FACTOR 8: RESPONSIBILITY FOR ORGANISATIONAL OUTCOMES

FACTOR LEVEL	FACTOR LEVEL DESCRIPTOR
1	The jobholder carries out familiar assignments under detailed instructions and close supervision. The job may be one of several essentially similar jobs that do the same or similar clearly defined activities within a work unit, following policies determined by others, with little or no responsibility for service development or delivery.
2	The jobholder is accountable for delivering individual service outcomes in their own work area, while sharing or contributing to team outcomes. The job entails work assignments following clear instructions under intermittent or regular supervision. Routine tasks are governed by established work routines and the influence is restricted to the immediate task, with some contribution to organisational or professional outcomes. There is often more than one jobholder performing duties of this nature.
3	The jobholder performs tasks or activities where key result areas are localised but may have some impact on service outcomes. The job may be accountable for provision of the service outcomes of a team or may share or contribute to larger unit outcomes, but still under direction from a higher level. The specific role is often interchangeable with other employees working in the same/similar disciplines, with their own areas of work responsibility, performing comparable tasks in other parts of the organisation.
4	The jobholder is responsible for or in control of a “patch” or identifiable area of activity, for example a function, operation, output or physically defined area. The job coordinates defined assignments or projects in that specified work area or function with an impact on the service outcomes. This is often the lowest level with “ownership” or independent responsibility for outcomes. It is generally specialised in function, with skills not readily applicable to other positions.
5	The jobholder controls or is responsible for an element of the organisation that is responsible for service outcomes in one or (frequently) more functional areas or operational units comparable to the following examples: provision of specialised services to clients, information processing, clinical services, technical services, maintenance, distribution, finance, research, legal and/or administration or other special services or projects critical to the outcomes.

FACTOR 8: RESPONSIBILITY FOR ORGANISATIONAL OUTCOMES

FACTOR LEVEL	FACTOR LEVEL DESCRIPTOR
6	The jobholder directs or controls a major element of the organisation that has a significant impact on the service outcomes of the organisation, for example a major business or operational unit. The job is responsible for operation of a large division, business unit or structure within a higher-level organisation, including policy and service development. This may be for divisional, regional, area, or other units or other structures with large unit or cross-organisational outcomes with a major influence on organisational end results.
7	The jobholder directs or controls a single-purpose organisation, or a division of a larger organisation, usually controlling its own resources and providing major service outcomes in a private, public, quasi-public or not-for-profit sector. This is the most frequent category for the most senior leader responsible for strategic, policy and service development of a whole, stand-alone organisation. It may also include a major functional advisor with influence across a large organisation or whole profession.
8	The jobholder directs or controls a multi-divisional organisation providing service outcomes across a range of sectors in a private, public, quasi-public or not-for-profit sector. This category is suitable for the most senior leader of a large, complex organisation with multiple service outputs operating independently of each other.

FACTOR 9: RESPONSIBILITY FOR SERVICES TO PEOPLE

THE FACTOR

The factor assesses the responsibility the jobholder has for the **direct provision of services** to individuals or groups of people/clients/customers/patients, etc. While the main focus of the factor is on external service provision, services to internal clients are also acknowledged at the lower levels. It measures the nature of the service provided and the degree to which the service impacts on the person's needs and well-being.

The factor *excludes consideration of any "services" that may be provided by a manager or supervisor or other leadership role to any reporting staff.* It also does not measure the higher levels of accountability for the design or funding of the service – this is measured in Factor 7 Responsibility for Organisational Outcomes.

FACTOR GUIDELINES

The factor measures service delivery to people both inside and external to the organisation. The service relationship may involve the provision of information, advice, assistance, instruction, support or some other form of direct service intervention that impacts on the individual or group or meets their needs. The complexity of the service relationship is increased by the need to make the initial assessment of the nature of the service required and any need to re-assess needs or progress over time.

At the higher levels of the factor, service delivery or development will be a substantial or total component of the role.

Commentary on Factors

This factor is not commonly recognised in measurement of work systems. It recognises the skills associated with direct delivery of services to people, which is a field often associated with female dominated work.

FACTOR METRICS

The factor considers the

- nature of the service provided directly to people
- need for assessment or adjustment of the service
- impact of the service

FACTOR 9: RESPONSIBILITY FOR SERVICES TO PEOPLE

FACTOR LEVEL	FACTOR LEVEL DESCRIPTOR
1	The job provides little or minimal service to other people either inside or outside the organisation or associated group.
2	The job provides information or assistance to people to help them access or provide appropriate services to others.
3	The job actively gains understanding of people's particular situations or needs in order to provide advice, instruction, care or assistance to individuals or groups of people either within or outside the organisation or associated group. Jobs at this level also include those that develop systems or services to assist others manage or perform their work.
4	The job provides direct support for external client needs of a more complex or sensitive nature. The service and service relationship directly impact on people's ability to manage, improve, be independent and/or participate. This level also includes jobs involved in the development, design or improvement of such services.
5	The job provides services that impact on people's well-being or development. The services will need assessment and adjustment over time and require sensitivity to progress or change. The job will either directly provide the services or develop, support and resource the service for delivery.
6	The job provides ongoing services to people that will involve regular assessment of complex and changing needs throughout the duration of the service. The service support or service intervention is central to the well-being or development of individuals or groups.
7	The job directly assesses people's complex, changing and potentially competing needs in order to provide, create, develop, modify or resource services of crucial importance to people's direct well-being or development.

FACTOR 10: EMOTIONAL DEMANDS

THE FACTOR

This factor assesses the **emotional demands arising from contact or work with people or situations** that are intrinsically stressful, upsetting or traumatic.

FACTOR GUIDELINES

Emotional demands arise from working in a variety of situations in which pain, distress, anxiety, anguish, and other emotional conditions are a necessary part of the job context.

This can occur when working with people with communication difficulties or who are angry, difficult, upset, unwell or somehow difficult to work with or who require some form of care, protection, attention, instruction or assistance. It can also come from the emotional demands of work with people who may be terminally ill, very frail, at risk of abuse, homeless or seriously disadvantaged in some other way.

The work may require deliberate control of emotions, demeanour, language or feelings on the part of the jobholder in order to support the dignity or calmness of the person or people being worked with.

Consider also the ability to seek relief by breaking off from the task or performing less demanding tasks. The ability to break off from the distressing situation when desired indicates a lesser stress level.

Emotional demands are those demands that are a necessary and an inherent part of the job. In some cases, different combinations of intensity and frequency may apply to the job, for example high intensity infrequently and low intensity frequently. In such cases, choose the higher level.

Exclusions

This factor *does not consider the existence of deadlines* associated with completion of the task or activity or stress from overwork or the challenges of any particular tasks or activities, as the job is presumed to be designed correctly for competent performance and employees are presumed to be capable of completing the assigned work.

This factor *does not consider stress arising from work with difficult or demanding colleagues, managers or other staff* at any level.

FACTOR METRICS

The factor considers the

- nature of the demand or the situation of the people
- intensity of the emotional demand
- frequency and duration of exposure to the demand

FACTOR 10: EMOTIONAL DEMANDS

FACTOR LEVEL	FACTOR LEVEL DESCRIPTOR
1	The job involves minimal emotional demand. There is limited contact with or work for people who, through their circumstances or behaviour, could place emotional demands on the jobholder.
2	The work involves working in emotionally demanding situations on an occasional basis.
3	<p>The work involves working in situations of high levels of emotional demand including distress, personal need or crisis on an occasional basis.</p> <p>Alternatively, it involves working in emotionally demanding situations on a frequent basis or working in situations where there are multiple “low level” individual demands with cumulative impact.</p>
4	<p>The work involves working in situations of trauma or extreme levels of emotional demand on an occasional basis.</p> <p>Alternatively, it involves working in situations of high levels of emotional demand including distress, personal need or crisis on a frequent basis.</p>

FREQUENCY SCALE	
A - Occasional	Demand occurs occasionally, generally less than a third of the time.
B - Frequent	Demand occurs frequently, generally more than a third of the time.

FACTOR 11: SENSORY DEMANDS

THE FACTOR

This factor assesses the demands for **sensory attention, that is, concentration, alertness or focused attention** required by the job.

FACTOR GUIDELINES

Sensory demands arise from the requirement to focus on an activity or process with an intensity where an interruption could have a negative impact. This could include activities such as listening, comprehending, watching, driving or thinking when applied in combination with one or more of the five senses (sight, taste, smell, touch and hearing) to a degree that results in mental/sensory fatigue. This includes work that involves multiple areas of focus or rapid shifts in concentration on an ongoing basis.

Some degree of attention is required in all jobs, but this factor considers only those jobs that require higher levels of concentration. It is about the demand for focused mental concentration in a challenging environment.

Consider the intensity and severity of the concentration required by the job, as well as the continuity and frequency of that effort. Consider also the ability to seek relief by breaking off from the task or performing less demanding tasks. The ability to break off from the work as desired indicates a lesser demand for that attention.

In some cases, different combinations of intensity and frequency may apply to the job, for example, high intensity infrequently and low intensity frequently. In such cases, apply the higher level.

Exclusions

This factor does not consider “thinking” concentration or purely mental effort, such as reading or problem-solving, which is accounted for elsewhere. Nor does this factor consider any demand for “paying attention” or otherwise relating to other people that may be considered an interpersonal skill. It requires effort through the other senses that may be linked to mental concentration, to be recognised by this factor.

FACTOR METRICS

The factor considers the

- intensity of the sensory demand
- frequency and duration of exposure to the demand.
- impact of interruptions on concentration
- thinking in association with other sensory activity
- ability to control breaks etc.

FACTOR 11: SENSORY DEMANDS

FACTOR LEVELS	FACTOR LEVEL DESCRIPTORS
1	The job presents sensory demands requiring the jobholder to focus or concentrate on specific activities. The jobholder is free to focus attention as desired.
2	The job requires extra attention, demanding the jobholder to focus on the activity at hand, though maintenance of that focus is not exceptionally difficult. The jobholder needs to be particularly alert or attentive to a task for periods of one to two hours at a time, but interruptions can be easily handled.
3	<p>The job requires occasional focused sensory and mental concentration, demanding distinct effort to maintain that focus where a distraction can mean a disruption in the work process. The requirement for concentration is made more difficult by possible interruptions, deadlines or conflicting demands beyond the control of the jobholder.</p> <p>Alternatively, it involves working in situations where there are multiple individual demands at level 2 with cumulative impact.</p>
4	<p>The work requires occasional intense concentration demanding in-depth mental attention, combined with proactive engagement with the subject. Interruptions to the concentration will result in serious disruption to the work process.</p> <p>Alternatively, the work may involve frequent demands at level 3 above with cumulative impact.</p>



FREQUENCY SCALE

A - Occasional	Demand occurs occasionally, generally less than a third of the time.
B - Frequent	Demand occurs frequently, generally more than a third of the time.

FACTOR 12: PHYSICAL DEMANDS

THE FACTOR

This factor assesses the physical demands of the work.

FACTOR GUIDELINES

Physical demands cover **strength and stamina required for strenuous or repeated use** of muscles (including fine muscle movements). The factor takes into account all forms of bodily effort, for example, those required for standing or walking, lifting and carrying, pulling and pushing and other similar forms of exertion.

It also takes account of any circumstances that may affect the degree of effort required, such as working in a confined space or in an awkward position, for example, bending, crouching, stretching or holding a position for an extended period of time.

Consider the length of time the effort is required and the frequency of the task occurring during the normal workday or shift. Standing or being on foot all day in a single place will score at level 2. The ability to move freely and break the routine does not create the same demand.

Consider the *intensity and severity of the physical effort, rather than the strength or energy needed* to perform the task as required by the job, as well as the continuity and frequency of that effort. It does not measure the fitness of the individual jobholder.

Consider also the ability to seek relief or perform less demanding tasks. The ability to break off from the work requirements or situation requiring attention as desired indicates a lesser demand for that attention.

In some cases, different combinations of intensity and frequency may apply to the job, for example, high intensity infrequently and low intensity frequently. In such cases choose the higher level.

FACTOR METRICS

The factor considers the

- nature and intensity of effort demanded; the strength and/or stamina required
- strenuous or repetitive muscle movements
- frequency and duration of the demand

FACTOR 12: PHYSICAL DEMANDS

FACTOR LEVEL	FACTOR LEVEL DESCRIPTOR
1	The job requires light effort, involving little physical effort beyond normal day-to-day movements.
2	The job requires moderate effort, involving physical effort such as lifting, carrying, pushing or pulling items of light to moderate weight. It may require periodic repetitive fine muscle movements or working in an awkward or constrained position.
3	The job requires considerable physical effort, involving either the lifting, carrying or manoeuvring of heavy items (including people), or sustained repetitive fine muscle movements or work performed in a constrained or awkward position. Alternatively, the work may involve frequent demands at level 2 above with cumulative impact.
4	The job requires intense physical effort, involving either the occasional lifting or manoeuvring of very heavy items (or people) or prolonged, extremely fine muscle movements or work performed in a highly constrained or awkward position. Alternatively, the work may involve frequent demands at level 3 above with cumulative impact.

FREQUENCY SCALE	
A - Occasional	Demand occurs occasionally, generally less than a third of the time.
B - Frequent	Demand occurs frequently, generally more than a third of the time.

FACTOR 13: WORKING CONDITIONS

THE FACTOR

This factor assesses **exposure to recognised disagreeable, unpleasant or uncomfortable conditions or hazards** arising from the work environment. Essentially, the factor measures those physical aspects of the work that the jobholder cannot control, yet are integral to the job being done.

The factor covers things like dust, dirt, extremes of temperature, humidity, human or animal waste, grease or oil and the risk of illness or injury arising from exposure to diseases, toxic substances, machinery or work locations. The emphasis is on the degree of unpleasantness, discomfort or hazard caused. It also covers recognised risk of injury from other people, such as clients or patients.

FACTOR GUIDELINES

The factor addresses only those conditions or hazards that are inherent in the nature of the work. The factor is about exposure to these conditions and hazards, not the actual incidence of such events. This does not include extreme situations where the risk of a specific situation or accident occurring is unlikely.

All applicable health and safety regulations are assumed to be met and jobholders are presumed to follow safe working practices, including wearing of appropriate protective gear. However, a requirement to wear certain kinds of protective gear may in itself create a degree of discomfort that may be considered in this factor or in Factor 12, Physical Demands.

Exclusions

This factor does not cover irregular work hours or shift work, per se, although it may be used to recognise conditions encountered in such work that may differ from the standard workday.

Driving, other than that involving specialised equipment, is covered in Factor 10, Sensory Demands.

FACTOR METRICS

The factor considers the

- nature and extent of conditions and hazards
- intensity and frequency of exposure to these factors.

FACTOR 13: WORKING CONDITIONS

FACTOR LEVELS

1 The work involves minimal or no exposure to disagreeable, unpleasant or hazardous environmental conditions or risk of injury, illness or health problems. It involves “normal” working conditions, as experienced by most employees.

2 Conditions – The work involves minor conditions such as dust, dirt, chemicals, fumes, heat or cold, noise, humidity, vibration, inclement weather, poor lighting, extreme isolation, or human/animal waste/bodily fluids, which can be unpleasant and a discomfort possibly detracting from work, but are unlikely to pose any actual danger to personal health or well-being.

Potential hazards – These could be:

- injuries causing slight discomfort for a short period of time, with little inconvenience
- minor health and accident hazards, such as mild sprains, abrasions, minor cuts, burns, bruises, etc., resulting from procedures, equipment or machinery
- exposure to mild infectious diseases

3 Conditions – The job involves extreme conditions, such as those listed above, that may result in actual or potential danger to personal health or well-being.

Potential hazards – These could be health and accident hazards of a serious nature, for example severe cuts, burns or injuries requiring medical attention and involving lost time, from working with risky procedures, hazardous materials or equipment, or exposure to serious infectious disease.

FREQUENCY SCALE

A - Occasional

Demand occurs occasionally, generally less than a third of the time.

B - Frequent

Demand occurs frequently, generally more than a third of the time.