



# The Value of Work and Gender Equality

Guide to applying a methodology for assessing  
the value of work free from gender bias



Co-financed by







# Technical Data

## REVALUING WORK TO PROMOTE EQUALITY PROJECT

**Title** Value of Work and Gender Equality – Guide to applying a methodology for assessing the value of work free from gender bias

**Authors**

- Confederação Geral dos Trabalhadores Portugueses - Intersindical Nacional (CGTP-IN - General Confederation of Portuguese Workers) – Coordinating Organisation
- Autoridade para as Condições de Trabalho (ACT - Working Conditions Authority)
- Associação da Restauração e Similares de Portugal (ARESP - Portuguese Association of Restaurants and Similar Establishments)
- Centro de Estudos para a Intervenção Social (CESIS – Social Intervention Research Centre)
- Comissão para a Igualdade no Trabalho e no Emprego (CITE - Commission for Equality at Work and in Employment)
- Federação dos Sindicatos da Agricultura, Alimentação, Bebidas, Hotelaria e Turismo de Portugal (FESAHT – Portuguese Trade Union Federation for the Agriculture, Food, Beverages, Hotels and Tourism Industries)
- International Labour Organization

**Production** Development Partnership

**Graphic Design** Formiga Amarela, Lda.

**Printing and finishing** Emipapel

**Print run** 500 copies

**Contacto** Confederação Geral dos Trabalhadores Portugueses - Intersindical Nacional (CGTP-IN)  
Telf. (351) 213236500  
Fax: (351) 213236695  
e-mail: [cgtp@cgtp.pt](mailto:cgtp@cgtp.pt)

For free distribution  
November 2008

# Contents

Introduction	7
1- Methodologies for assessing the value of work free from gender bias	9
1.1 What are job evaluation methods free from gender bias?	9
1.2 The evaluation method tested in the Restaurant and Beverages sector	13
1.2.1 The project – how it emerged and the need it seeks to address	13
1.2.2 Demarcating the sector’s boundaries	14
1.2.3 Some characteristics of the Restaurant and Beverages sector	14
2- Building the method and job evaluation	15
2.1 The working group	15
2.1.1 Constitution of the sectoral Working Group with tripartite representation	15
2.1.2. Training the working group	16
2.1.2.1. The WISER Workshop	16
2.1.2.2. Training sessions for the working group and trade union leaders	16
2.1.3 Data gathering	17
2.1.4 Checklist	18
2.2 Selecting the jobs to be compared	18
2.2.1 Identifying strategic occupations	18
2.2.2 Criteria for determining gender predominance	19
2.2.3 Checklist	20
2.3 The job evaluation method free from gender bias – analytical points rating method	21
2.3.1 The points rating method	21
2.3.2 Building the method	21
2.3.3 Factors and sub-factors	21
2.3.4 Checklist	23
2.4 Information gathering on the jobs to be evaluated	23
2.4.1 Developing job data collection tools	23
2.4.2 Pre-testing the questionnaire	24
2.4.3 Observing jobs and administering the questionnaire	24
2.4.4 Results analysis	26
2.4.5 Checklist	27
2.5 Determining the value of jobs	27
2.5.1 Establishing the weighting grid – ranking and assigning point scores	27
2.5.2 Allocating points to levels	28
2.5.3 Checklist	29
2.6 Assigning points and identifying jobs of equal value	29
2.6.1 Scoring each job	29
2.6.2 Grouping jobs in point intervals/classes	30
2.6.3 Checklist	31
Final Remarks	33
Bibliography/Resources	75
Glossary of terms	77





# Introduction

This Guide was assembled in the course of the **Revaluing Work to Promote Equality Project**<sup>1</sup>, carried out under the EQUAL Community Initiative Programme.

It is the result of a pilot project carried out between 2005 and 2008 by a tripartite partnership comprising: CGTP-IN<sup>2</sup>, ACT<sup>3</sup>, ARESP<sup>4</sup>, CESIS<sup>5</sup>, CITE<sup>6</sup>, FESAHT<sup>7</sup>, ILO<sup>8</sup> (project's advisory body) and CIES/ISCTE<sup>9</sup> (evaluation team).

The Guide was designed to support organisations that want to conduct a job evaluation process that is free from gender bias, for the purpose of: revaluing work, contributing to greater objectivity in human resource management and work organisation processes, and promoting equal pay between men and women.

It is intended as a support tool for non-discriminatory appraisal and comparison of the value of jobs.

One of the distinctive characteristics of the Guide is that it describes a pioneering initiative, at European level, to construct a methodology for assessing the value of work free from gender bias (henceforward referred to as evaluation methodology), in a specific activity sector and in a context of social dialogue. This has not only made the Guide remarkably innovative, but has also placed the pay equity issue on the social dialogue agenda. Although developed around the Restaurant and Beverages sector, with some adjustments the Guide could be viable for use in other activity sectors, or even enterprises and/or organisations.

This document comprises two main parts. In the first part, the process of building a methodology for assessing the value of work free from gender bias is put into context, and some background is given to illustrate this type of methodology's evolution, particularities and usefulness. This is followed by a brief characterisation of the Restaurant and Beverages sector in which the methodology proposed by the **Revaluing Work to Promote Equality** project was developed. The second part covers the process of building the Evaluation Methodology, and describes each stage, from the set up of the working group to the scoring and appraisal of the jobs that had been observed.

Given the complexity of the process, efforts were made to make the Guide as easy as possible for users. A checklist of the most important points in every stage was therefore included at the end of each section<sup>10</sup>.

The data collection tools on which the Evaluation Methodology is based – a Job Evaluation Questionnaire and a Grid of Factors and Sub-factors – have also been annexed to this document.

<sup>1</sup> The project's website is at [http://www.cgtp.pt/index.php?option=com\\_content&task=category&sectionid=21&id=146&Itemid=205](http://www.cgtp.pt/index.php?option=com_content&task=category&sectionid=21&id=146&Itemid=205) ([www.cgtp.pt](http://www.cgtp.pt) → Projectos → Equal → Revalorizar o Trabalho para Promover a Igualdade)

<sup>2</sup> Confederação Geral dos Trabalhadores Portugueses - Intersindical Nacional (General Confederation of Portuguese Workers)

<sup>3</sup> Autoridade para as Condições do Trabalho (Working Conditions Authority), formerly the IGT – Inspeção Geral do Trabalho (General Labour Inspection)

<sup>4</sup> Associação da Restauração e Similares de Portugal (Portuguese Association of Restaurants and Similar Establishments)

<sup>5</sup> Centro de Estudos para a Intervenção Social (Social Intervention Research Centre)

<sup>6</sup> Comissão para a Igualdade no Trabalho e no Emprego (Commission for Equality at Work and in Employment)

<sup>7</sup> Federação dos Sindicatos de Alimentação, Bebidas, Hotelaria e Turismo de Portugal (Portuguese Trade Union Federation for the Agriculture, Food, Beverages, Hotels and Tourism Industries)

<sup>8</sup> International Labour Organization

<sup>9</sup> Centro de Investigação e Estudos de Sociologia do Instituto Superior de Ciências do Trabalho e da Empresa (Sociological Research and Study Centre of the Higher Institute of Labour & Enterprise Sciences)

<sup>10</sup> The structure of this Guide was inspired by the Guide developed by Marie-Thérèse Chicha (2007), see Bibliography for complete reference.







# 1 - Methodologies for assessing the value of work free from gender bias

## 1.1 What are job evaluation methods free from gender bias?

*Comparing the content of two jobs poses the same order of problems as comparing the value of two goods. Universal criteria have to be found, just like currency makes it possible to compare the value of a loaf of bread and a rifle. Market mechanisms set the relative prices for these goods. When it comes to skills, however, lawmakers have chosen a different way: the formulation of criteria of varying complexity inspired by job evaluation methods<sup>11</sup>.*

*François Eyraud*

Job evaluation was described by the ILO in 1960 as a technique for addressing questions such as: How can pay be differentiated? How and on what basis are pay differentials established? To what extent are they fair?<sup>12</sup>

This technique is intended to create a common language and rationale for measuring the relative value of different jobs.<sup>13</sup>

Its purpose is to make the ranking of professional occupations logical<sup>14</sup>, by systematically determining the relative position of one occupation in relation to another on a salary scale, based on the tasks involved in those occupations<sup>15</sup>.

Although job evaluation free from gender bias has already come a long way, especially in some countries<sup>16</sup>, the purpose associated with it, i.e. its underlying meaning – comparison of occupations that are different in content but equal in value – is still far from clear.

The ILO's 1951 Equal Remuneration Convention (number 100)<sup>17</sup>, clarifies the meaning of the term equal remuneration for men and women: rates of remuneration established for work of equal value, regardless of who carries out the work.

Fifty years have passed since the Convention was adopted and there are still difficulties when it comes to applying the principle of “equal pay for work of equal value”, in spite of it being widely endorsed and a statutory entitlement. To support application of the principle of “equal remuneration for men and women workers for work of equal value”<sup>18</sup>, measures can “be taken to encourage the objective appraisal of jobs on the basis of the respective tasks they entail”<sup>19</sup>.

The ultimate aim of applying this principle is to achieve pay equity, and consequently improve the earnings of the lowest-paid workers, who are mainly women.

<sup>11</sup> Free translation of the original: «La comparaison du contenu de deux emplois pose des problèmes du même ordre que la comparaison de la valeur de deux biens. Il faut trouver des critères universels, comme la monnaie permet de comparer la valeur du pain et du fusil. Pour ces biens, les mécanismes du marché fixent les prix relatifs. Pour les qualifications, le législateur a choisi une voie différente: l'élaboration de critères de complexités variables inspirés des méthodes d'évaluation des postes». in «La discrimination salariale entre les sexes: les limites de l'action législative et les nouveaux défis». Guaranteeing pay equity rights, p.34.

<sup>12</sup> BIT (1984), L'évaluation des emplois.

<sup>13</sup> Idem.

<sup>14</sup> Chicha, Marie-Thérèse, (2000).

<sup>15</sup> BIT (1984), L'évaluation des emplois.

<sup>16</sup> For example, Canada, Netherlands, United Kingdom, Sweden, and Switzerland are referred to in Chicha, Marie-Thérèse: 2006

<sup>17</sup> [http://www.ilo.org/public/portugue/region/eurpro/lisbon/pdf/conv\\_100.pdf](http://www.ilo.org/public/portugue/region/eurpro/lisbon/pdf/conv_100.pdf)

<sup>18</sup> The official description adopted by Portugal, Diário do Governo, I Série n° 26 of 4.11.1966.

<sup>19</sup> ILO Convention (no. 100), Articles 2 and 3.



Job evaluation methods have been around since the 1930s<sup>20</sup>. They were used to provide a coherent basis on which to determine pay, and based on objective evaluation, task analysis, and comparison of jobs according to their value<sup>21</sup>.

According to Marie-Thérèse Chicha, in the 1970s these methods started to be used for a different purpose – to promote pay equity, because discriminatory features had been detected in the traditional methods, which reflected the majority (male) composition of the workforce and did not provide for visibility or value to be given to the demands of female-dominated occupations<sup>22</sup>.

A job evaluation method free from gender bias is, therefore:

a process for comparing jobs, which takes account of their importance and complexity, and whose aim is to determine the relative position of one job in relation to another in a sector or organisation, regardless of whether the job holder is a man or a woman<sup>23</sup>.

Job evaluation methods can be global (by ranking) or analytical (by points rating).

Global job evaluation methods compare jobs and rank them according to the importance of the requirements for holding each job, without any detailed analysis of their content. These methods make it possible to ascertain the importance of jobs within an organisation, but they do not establish differences between them in terms of value. Furthermore, they do not make it possible to identify or eliminate any influences caused by prejudices or stereotyping, which undervalue female-dominated jobs.

Analytical or points and factors rating methods, on the other hand, allow for all the demands of jobs in a given organisation to be scrutinised, evaluated, and compared using common, precise, and detailed criteria. These are the methods that are most appropriate for job evaluation in a gender equality context. They break jobs down the work involved into components, that is, into a certain number of factors that will then allow the jobs to be compared. The four factors generally used are: **skills, responsibilities, effort, and working conditions**<sup>24</sup>.

Each factor is divided into sub-factors so that further (increasingly detailed) information about the jobs may be collected<sup>25</sup>. For example, the “skills” factor could be broken down into professional experience, educational attainment, etc., while the “working conditions” factor could consist of sub-factors such as exposure to noise, weekend work, etc.

To differentiate between jobs, each sub-factor may then be sub-divided into levels or grades, depending on the quantitative or qualitative nature of the dimension to be assessed<sup>26</sup>. The purpose of this sub-division is to differentiate between jobs on the basis of certain variables: frequency, intensity, duration, weight, etc. For example, in “responsibility for money”, the degree of responsibility (importance) could vary according to the amounts of money being handled, so the levels would be defined in terms of values. Four levels could be set: up to 1 000 Euros (level 1); between 1 001 and 1 500 Euros (level 2); 1 501 to 2 000 Euros (level 3), and more than 2 001 Euros (level 4).

<sup>20</sup> Marie-Thérèse Chicha, 2000; BIT, 1984.

<sup>21</sup> Marie-Thérèse Chicha, 2007.

<sup>22</sup> Ibidem.

<sup>23</sup> Tomei, Manuela (2005), Métodos de avaliação de postos de trabalho sem enviesamento de género.

<sup>24</sup> Chicha, Marie-Thérèse, 2007; Eyraud, François 1993.

<sup>25</sup> Ibidem.

<sup>26</sup> Idem, p.28.

A job evaluation method free from gender bias for use in a pay equity context should:

- compare **predominantly female** occupations with **predominantly male** occupations;
- compare **work of equal value** with work of unequal value;
- focus on the **content of the work** (job/occupation) rather than on the skills/characteristics or performance of the job holders;
- **give visibility** to job demands that are usually overlooked because they do not appear in the respective job description;
- produce a measurement scale (by points allocated to factors and sub-factors) for attributing **fair value** to a job.

Whilst these methods must be rigorous, they do not necessarily have to adhere to a scientific paradigm. They must, however, be built in a way that ensures they are systematic, precise, and agreed upon by all the stakeholders concerned.

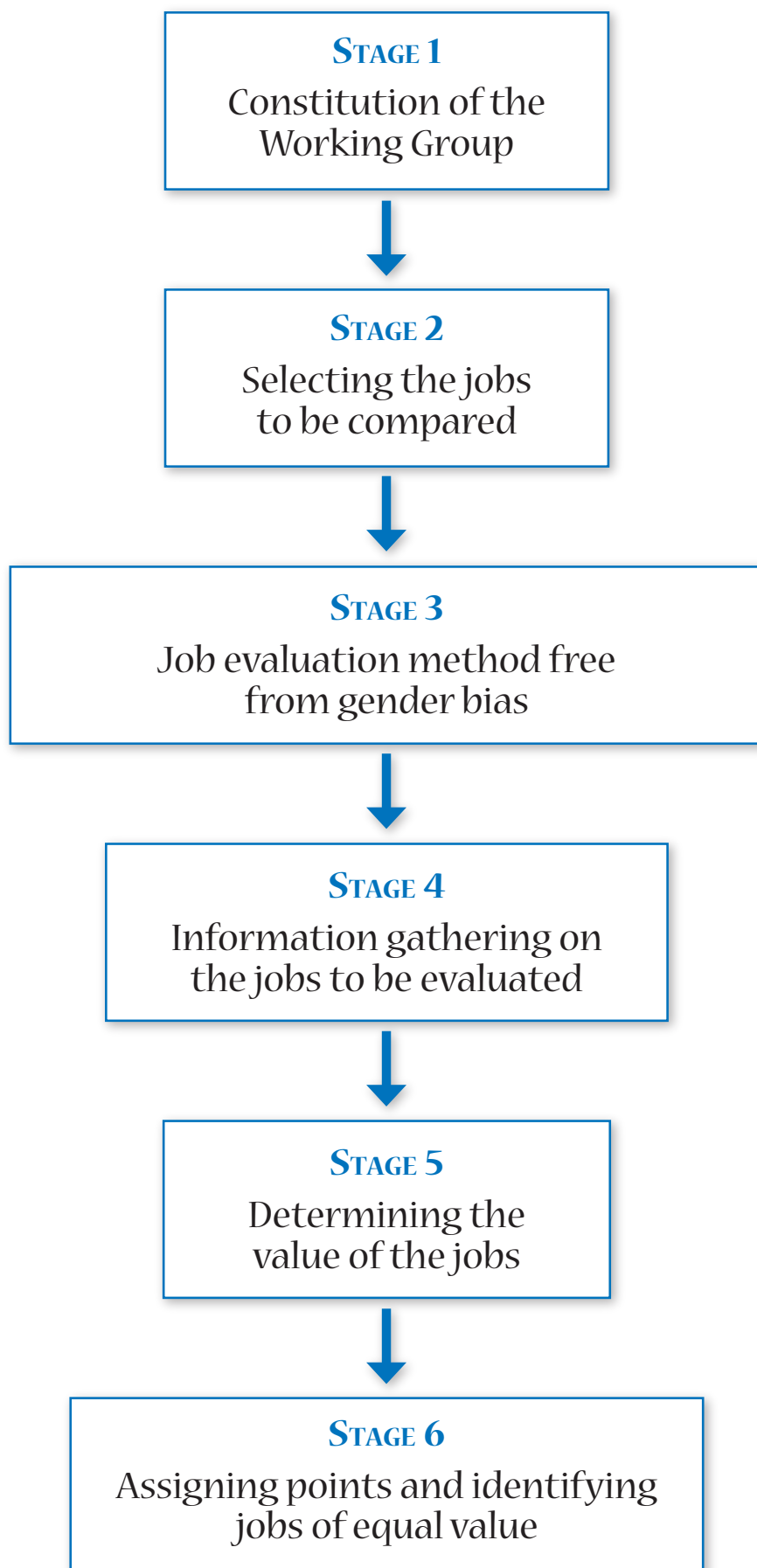
Applying the Evaluation Method can be beneficial on several levels. The in-depth examination of job characteristics/demands can help to improve human resource management and work organisation practices:

- In terms of staff recruitment and selection, it helps give a more detailed and up-to-date picture of job content, i.e. the real demands of a job in terms of skills, responsibilities, effort, and working conditions, based on systematised and accurate information. It facilitates the recruitment of the right person for the job, thereby reducing costs incurred by staff turnover caused by wrong selection or lack of awareness of the real job demands entailed;
- In terms of vocational training, it helps to identify areas where training is needed to improve professional performance;
- In terms of performance evaluation, insofar as, by having a better understanding of the factors and sub-factors that make up a job, there can be more objective performance evaluation criteria, which, as a management tool, can help improve business productivity and competitiveness and, as a result, impact positively on the quality of life of the workers themselves;
- In terms of collective bargaining, it reinforces the whole process by providing a basis of objective criteria that have been agreed upon by both parties. Applying an evaluation method presupposes the active involvement of representatives of both workforce and enterprise.
- In terms of pay, by defining a ranking order based on the real content of jobs, the question of whether pay is proportional to the respective skills, responsibilities, effort, and working conditions of the jobs in question can be addressed, from the perspective of the equal pay for work of equal value principle, enshrined in ILO Convention (no. 100);
- In terms of health, safety, and hygiene at work, by providing information that could help to alleviate/eliminate the arduousness of certain jobs.

The construction and application of a job evaluation method free from gender bias comprises various stages, which will be described in each of the points in Part II of the Guide. For a better understanding of the process as a whole, the following diagram illustrates the stages involved.



## Stages in building the job evaluation method free from gender bias



## 1.2 The evaluation method tested in the Restaurant and Beverages sector

### 1.2.1 The project – how it came about and the need it seeks to address

In 2004, a number of concerns felt by the CGTP-IN and FESAHT about working conditions affecting workers in the Restaurant and Beverages sector, particularly its women workers, identified the need to develop a methodology that would make it possible to analyse the value of work in strategic occupations in the sector, and to ascertain the fairness of existing gender pay differentials.

The Restaurant and Beverages sector, represented by the ARESP, was invited to be part of the Development Partnership of the **Revaluing Work to Promote Equality** project because of its key importance to the Portuguese economy in terms of the number of establishments it comprises, the numbers it employs, and its annual business turnover<sup>27</sup>. Furthermore, the sector has dual economic and social value because, in addition to providing an essential service to the country's people and enterprises, it is also an important cornerstone of the tourist industry.

With regard to the sector's workers, these are predominantly women (56% of the workforce in 2004<sup>28</sup>). Their presence is extensive in certain occupations, such as that of catering assistant (87.6% are women, 12.4% men) and cook (67.6% are women, 32.4% are men)<sup>29</sup>, and on lower skills levels (69.1% of semi-skilled and 82.8% of unskilled workers are women<sup>30</sup>). In contrast, women's presence in leadership and management positions is far less expressive: for example, only 32.6% of catering directors and 32.9% of head chefs are women.

In this context, the sector's women workers' average monthly basic pay is only about 91% of their male counterparts<sup>31</sup>, which raises the following question: are jobs in the Restaurant and Beverages sector valued fairly, in other words, are they free from bias associated with the job holders' gender?

Against this backdrop, it became apparent that there was a need to develop a methodology for assessing the value of work free from gender bias, which would guarantee gender pay equity and compliance with the equal pay for equal work or work of equal value principle enshrined in ILO Convention (no. 100).

This was the overriding purpose and key objective of the **Revaluing Work to Promote Equality** project, embarked on by representatives of the FESAHT – (Federação dos Sindicatos da Agricultura, Alimentação, Bebidas, Hotelaria e Turismo de Portugal – Portuguese Trade Union Federation for the Agriculture, Food, Beverages, Hotels & Tourism Industries) and ARESP (Associação de Restauração e Similares de Portugal – Portuguese Association of Restaurant and Similar Establishments). The “laboratory” would be the Restaurant and Beverages sector.

<sup>27</sup> According to INE – Instituto Nacional de Estatística (National Statistical Office) – figures for 2002 – the Accommodation and Restaurant sector accounted for 10.14% of all enterprises in all activity sectors in Portugal (93% of which were operating in the Restaurant and Beverages sub-sectors), and employed about 7.37% of the workforce in all sectors (of which, 73% were in Restaurant and Beverages), and generated 2.59% of the country's total business turnover (of which close to 70% was generated in the Restaurant and Beverages Sector).

<sup>28</sup> Employment Figures 2004, DGEEP (Direcção-Geral de Estudos, Estatística e Planeamento – Directorate General for Studies, Statistics and Planning)

<sup>29</sup> DGEEP, Idem

<sup>30</sup> DGEEP, Idem

<sup>31</sup> DGEEP, Idem

## 1.2.2 Demarcating the sector's boundaries

If the classification generally used for statistical purposes had been applied, i.e. the CAE - Portuguese Classification of Economic Activities (Revision 2.1), then the Restaurant and Beverages sector could be considered the sum total of all enterprises and establishments operating in two sub-sectors of the (wider) Accommodation and Restaurant activity. The two sub-sectors in question are Restaurants (CAE 553) and Beverages Establishments (CAE 554)<sup>32</sup>.

However, it would have been unfeasible to attempt to build a methodology for assessing the value of work in such a vast sector, whose boundaries go beyond the remits of the organisations embarking on the project.

The criterion that was used to demarcate the boundaries of the Restaurant and Beverages sector was the Sector Agreement (CCT – Contrato Colectivo de Trabalho) signed by the ARESP and FESAHT for Restaurants, Cafes and Similar Establishments<sup>33</sup>. Accordingly, the term “Restaurant and Beverages sector”<sup>34</sup> corresponds to enterprises and other establishments that, under Clause 3 (covering the classification of establishments covered by the CCT) fall within Group B – “other restaurant and beverages establishments”, and Group C – “restaurant and beverages establishments with 5 or less employees”<sup>35</sup>.

## 1.2.3 Some characteristics of the Restaurant and Beverages sector

Before describing how the methodology was built, it is worth mentioning some of the sector's features and particularities because, one way or another, these would impact on how the methodology developed.

Firstly, despite the high predominance of micro-enterprises (companies with a workforce of less than 10 employees), establishments in the sector are very heterogeneous in terms of size, management processes, and type of services they offer.

There are small family-run businesses in which employees are exclusively family members, and large concerns comprising several establishments, employing hundreds of people and using the most up-to-date management processes, and in between these two types, there is a wide variety of different combinations. This heterogeneity increases if we take into account that, among these highly different combinations, there are establishments offering a wide variety of services: breakfasts, snacks, complete meals, cafeteria service, drinks, pastry products, etc. Such diversity results in a universe of establishments ranging from restaurants, bars, and restaurant-bars to snack-bars, pastry-coffee shops, cafes, café-restaurants, etc.

Furthermore, the characteristics of each establishment affect its work organisation and determine which occupations are required and how working times are organised (night work, weekend work, working on national holidays, shift work, or split shift work).

<sup>32</sup> At the time of writing this Guide, these sub-sectors correspond, according to the Portuguese Classification of Economic Activities, Revision 3, to the sub-sectors classified as 561 – Restaurants – and 563 – Beverage Establishments – which are both part of the CAE 56 sector – Restaurants and Similar Establishments.

<sup>33</sup> Published in the Boletim do Trabalho e Emprego (BTE), no. 28, of 29 July 2004.

<sup>34</sup> The interpretation of the term “Restaurant and Beverages Sector” as used in this Guide.

<sup>35</sup> Establishments in Group A – Casinos, and luxury restaurant and beverages establishments – were not included, and neither were some Group B establishments – those in golf courses, and camping sites.



## 2 - Building the method and job evaluation

### 2.1 The Working Group

#### 2.1.1 Constitution of the sectoral working group with tripartite representation

Developing and applying an evaluation method, whether for an enterprise, organisation, or particular activity sector, calls for a working group or committee that will be responsible for the entire process. Whatever the circumstances, the involvement of employers and workers throughout the process is fundamental because:

- it provides different perspectives on jobs, by confronting the views of those responsible for human resources with those of workers;
- it legitimises the process and its results in the eyes of both employers and workers;
- it enables sharing of tasks and responsibilities<sup>36</sup>.

In the case of the **Revaluing Work to Promote Equality Project**, the originating partners – the CGTP-IN and FESAHT – believed it was paramount to form a tripartite partnership in which employer, trade union and government structures would be represented. This would not only ensure a balanced involvement on the part of employers' and workers' representatives, but would also bring social dialogue into play at the very heart of the entire process, as an agent of change for gender equality.

In this context, the project's development partnership – the equivalent to “equity committees” in other contexts<sup>37</sup>, was formed by the following organisations: CGTP-IN, FESAHT and ARESP (trade union and employers' associations respectively, and signatories to the Contrato Colectivo de Trabalho para os Restaurantes, Pastelarias e Similares<sup>38</sup>), CITE (governmental body for Equality at Work and in Employment), the IGT<sup>39</sup> (government body that oversees working conditions), CESIS (non-profit making association whose activities include promoting, supporting, and undertaking research projects in the field of gender equality), and the ILO (international agency within the United Nations system specialising in labour issues). Furthermore, the project evaluation process was conducted by a team from the CIES/ISCTE.

The working group responsible for building and testing the evaluation method in the Restaurant and Beverages sector was made up of representatives from each of the above-mentioned project partners, in order to ensure there would be:

- **very direct knowledge of the activity sector** and the jobs that would be evaluated;
- **technical competence with which to identify and eliminate gender bias** that could affect the initiative at any of its stages.

With the constitution of the working group – the first stage of the whole process – the involvement, dialogue and active participation of all those concerned commenced.

<sup>36</sup> Adapted from Chicha, Marie-Thérèse, 2007.

<sup>37</sup> Chicha, Marie-Thérèse, 2007.

<sup>38</sup> Contrato Colectivo de Trabalho (CCT) para os Restaurantes, Pastelarias e Similares, (Collective Agreement for the Restaurants, Cafes and Similar Establishments Sector), published in the Boletim do Trabalho e Emprego, no. 28, of 29 July 2004

<sup>39</sup> Formerly the IGT, now the ACT.



## 2.1.2. Training the working group

To ensure the working group executes its tasks in a coordinated and rigorous manner, specific training for each of its members is essential. Training should focus mainly on two areas: pay equity, and methodological aspects of assessing the value of work free of gender bias.

The training on pay equity issues is intended to enable the working group members to identify factors that explain pay discrimination, and understand the impact of stereotyping on how jobs are perceived, on remuneration systems, and on evaluation methods.

On the other hand, the training on methodological aspects aims to capacitate working group members to perform the tasks in the process with rigour and accuracy. Basically, this type of training should cover the evaluation method, data collection, procedures, and job evaluation procedures.

Two awareness-raising/training actions were conducted in the **Revaluing Work to Promote Equality** project. These were designed to ensure all partnership members were fully aware of gender equality issues, particularly in respect of eliminating indirect discrimination to achieve pay equity, to enable them to fully comprehend the concepts inherent to the methodology that was to be developed, and to ensure the use of a common language among all concerned. These training initiatives are explained below in more detail.

### 2.1.2.1 WISER Workshop

The WISER Workshop – Functions Analysis centred on the Value of Work and Combating Discrimination, lasted for five hours and was designed for trade union leaders and delegates and all members of the partnership. Its specific objectives were to:

- a) raise the trade union leaders' and delegates' awareness of gender equality in matters relating to the value of work, and to reinforce skills in this area within development partnership;
- b) ascertain the views of trade union leaders and delegates on what hinders or prevents genuinely equal opportunities for women and men at work, and on related issues;
- c) promote open discussion of the issue, which in time would help to tackle indirect discrimination.

A Portuguese specialist in Equal Opportunities addressed the Workshop and provided an overview of Gender Equality and Indirect Discrimination, while a representative from the ILO in Geneva gave a presentation on Job Evaluation Methods free from Gender Bias.

### 2.1.2.2 Training sessions for the working group and trade union leaders

Apart from the workshop, the Development Partnership decided it would be valuable if there were training actions on job evaluation methods free from gender bias not only for members of the project working group but also for trade union leaders. Two training initiatives were therefore arranged and held over three consecutive days.

The first 12-hour training session on pay equity and job evaluation<sup>40</sup> for the project development partnership members was designed to instil a rigorous approach to their work on the project.

The second 6-hour training session on Working Conditions, Equality and the Value of Work

<sup>40</sup> Held in Lisbon on 3 and 4 April 2006.



in Collective Bargaining was for trade union leaders. It was designed to raise their awareness of the significance of gender equality in pay related issues and, more specifically, the importance of job evaluation methods in collective bargaining

Both training courses were addressed by a Canadian specialist who is a leading international expert in job evaluation methods free from gender bias, and whose vast experience includes participation in the review of Canada's legislation on human rights and pay equity. Over the three days of training, participants were able to discuss and reflect on:

- pay equity;
- devising job evaluation methods free from gender bias;
- the costs and benefits of pay equity.

### 2.1.3 Data gathering

To ensure that the process is trouble-free and that there are no reservations about its outcomes, it is essential that, in addition to specific training, the working group is provided with a package of complete and transparent information. This information should focus especially the sector's chief characteristics and should be up-to-date. It is, therefore, vitally important to gathering additional information.

To obtain that information, the working group decided to elicit the views of the sector's key players and, for this purpose, carried out a series of information collection initiatives:

- a survey conducted among the sector's trade union leaders and delegates, for the purpose of identifying their opinions on the main needs and constraints in the sector;
- interviews with human resources recruiters and managers<sup>41</sup> of establishments in the sector, in order to characterise their views on the foremost needs and constraints affecting the sector. The interviews were conducted in establishments, members of the ARESP, which took part in the project as associate partners<sup>42</sup>;
- a survey of Restaurant and Beverages sector workers<sup>43</sup>, to obtain an updated characterisation of the sector's workforce and identify their different views of their work and the sector.

Processing and analysing all this information, and making it available to the working group members, was an extremely valuable exercise because it produced a far more in-depth portrayal of the sector that reflected differing viewpoints, and also provided a series of vital pointers for the development of subsequent stages in the process.

<sup>41</sup> For further details of the interviews and their outcomes, consult: Resultados das entrevistas a responsáveis por recursos humanos/empresários/as do sector de restauração e bebidas, 2007, relatório do projecto (Results of interviews conducted with human resources recruiters/managers in the restaurant and beverages sector, 2007, Project report) at <http://www.ilo.org/lisbon>

<sup>42</sup> Of the 44 establishments associated with the Project, 41 are ARESP members.

<sup>43</sup> For further details of these interviews and their outcomes, see: Resultados do inquérito a trabalhadoras e trabalhadores do sector de restauração e bebidas, 2007, relatório do projecto (Results of the survey of restaurant and beverages sector workers, 2007), available at: <http://www.ilo.org/lisbon>

### 2.1.4 Checklist

The following statements point to the most important aspects to be taken into account at the constitution of the working group stage. If any of these statements is found not to be the case, then the procedures carried out should be revised so that all the statements are true.

- A working group was constituted at the very start of the initiative.
- The functions and responsibilities of the working group were clearly defined and agreed on by all parties.
- Employers and workers are equally represented on the working group. The members of the working group received training together on gender bias and the methodological aspects of job evaluation.
- All the relevant information necessary for carrying out the tasks (official statistics on the sector, sectoral collective agreement, opinions gathered from employers and workers, as well as reports and publications concerning the sector) was collated and distributed to the working group.
- Decision-making in the working group is based on consensus among all the parties involved.

## 2.2 Selecting the jobs to be compared

### 2.2.1 Identifying Strategic Occupations

Evaluating the value of work is done by comparing different jobs using a particular criterion. When the intention is to assess the value of work free of gender bias, then predominantly female jobs have to be compared with predominantly male jobs.

When applying a methodology of this type, it is advisable that all the jobs in an enterprise or organisation are included. However, given the sectoral scope of this project, it would not be feasible to include every single job in the establishments covered by the CCT of the Restaurants, Cafes and Similar Establishments Sector. For this reason the procedure adopted by the working group was to select, on the basis of available information, a group of occupations considered to be “strategic”, i.e., occupations included in the sector’s CCT (Contrato Coletivo de Trabalho – collective agreement) that are essential for the establishments to function. The selection was based on official statistics for the sector (DGEEP/MTSS and INE<sup>44</sup>) and on the findings from the information gathering among trade union representatives, and human resources recruiters and managers from establishments in the sector.

The occupations that the working group decided should undergo job evaluation were: catering director/manager, head chef, pastry chef, cook, waiter/waitress, counter assistant, catering assistant, coffee maker, barperson, and wine waiter/ess.

However, because there were only a few of some of these occupations in the selected establishments, the jobs of coffee maker, barperson and wine waiter/ess were removed. Meanwhile, the job of pastry cook was added to the group because of its importance in the sector.

<sup>44</sup> Employment Figures - DGEEP/Ministry of Labour and Social Security, and Employment Survey – INE.

The occupations finally chosen to be assessed using the evaluation method were:

- Catering director/manager
- Head chef
- Pastry chef
- Pastry cook
- Cook
- Waiter
- Counter Assistant
- Catering assistant

### 2.2.2 Criteria for determining gender predominance

The predominance of men or women in jobs is a fundamental aspect of the methodology because gender bias and stereotyping, especially relating to women's jobs, are very often major causes of jobs being undervalued.

It is therefore necessary to identify from the outset which jobs are predominantly female and, more susceptible to being undervalued, and which are predominantly male, with which the former will be compared. It would be possible to compare the female-dominated jobs with the others in the organisation or sector, but that would mean that “neutral” jobs would be included in the comparison, i.e. jobs that are neither predominantly male or female, which could lead to less accurate evaluation results.

So, what are the criteria for determining gender predominance? Several research studies have shown that there are essentially three criteria that have a direct impact on devaluing female work. These are:

- the percentage of women and men doing the job;
- the historical incumbency of the job;
- job stereotyping<sup>45</sup>.

According to the first criterion, a job is either predominantly male or predominantly female according to the percentage of men or women who usually carry it out. There is no hard and fast rule about the percentage that should be applied. In some countries, when 60% or more of the positions in a particular job are held by men or by women it is considered predominantly male or predominantly female, respectively, whilst in other countries, the figure used is 70%. In this respect, it is important that all workers are taken into account, regardless of their contractual relationship. The criterion connected with a job's historical incumbency tells us that if the percentage of men and women in a job has changed because of, for example, by staff rotation, this does not necessarily mean that the gender predominance also changes. For example, if at a given time a company had 10 cooks, only one of whom was a woman, but, later, had seven female and three male cooks, it would not mean that the job of cook had become predominantly female. In a few concrete cases<sup>46</sup>, an occupation with this record continued to be considered predominantly male. When applying this criterion, in principle, it will be necessary to revert back to when the salary for the job in question was set. If that is not possible, then considering a period of five or six years should be sufficient.

Lastly, the job stereotyping criterion refers to the way occupations or jobs are catalogued. For example, nurse, preschool teacher, catering assistance, receptionist, telephonist, etc. are catalogued as female occupations, while lorry driver, head chef, electrician, programmer, etc. are

<sup>45</sup> Chicha, Marie-Thérèse, 2007.

<sup>46</sup> Chicha, Marie-Thérèse, 2007: 23.



catalogued as male occupations. Identifying job stereotyping may not appear easy, but various sources can be useful, such as national employment statistics. Furthermore, in Portuguese, the way in which jobs are referred to can reveal stereotyping. For example, “a catering assistant” is almost invariably referred to as “uma copeira” (uma being the indefinite article used before singular female nouns, while “a head chef” is automatically referred to as “um chefe de cozinha” (um being the indefinite article preceding a singular male noun).

The criteria can be used together or individually but, in practical terms, the working group should try to apply the three criteria at the same time, comparing any tendencies and checking to see whether they are all going in the same direction. If that does not happen, the working group should choose whichever seems to be the most convincing option. If even then there is no clear conclusion, it means that the occupation is very probably neutral and should not therefore be used for comparative purposes.

In the case of the **Revaluing Work to Promote Equality** project, using the job history criterion was obviously rejected from the start as it is not possible to apply it in the context of an activity sector. The working group did apply the other two criteria, using official statistics to determine the percentage of woman and men by occupation<sup>47</sup> together with the titles by which jobs are generally known (see Table 1).

Table 1 – Gender predominance of occupations

Catering Director/Manager	Male
Head Chef	Male
Pastry Chef	Male
Pastry Cook	Male
Cook	Female
Waiter	Male
Counter Assistant	Female
Catering Assistant	Female

### 2.2.3 Checklist

The following statements point to the most important aspects to be taken into account at the selection of jobs to be compared stage. If any of these statements is found not to be the case, then the procedures that have been carried out should be revised so that all the statements are true. In this case:

- The jobs to be analysed are considered to be key jobs for the activity sector.
- Predominantly female jobs and predominantly male jobs have been identified.
- Various criteria have been applied at the same time to determine the gender predominance of the jobs.

To fully meet the methodology’s requirements, the following should also be done:

- Check whether positions that have different functions or skills might have been included under one and the same job title.
- Check whether similar jobs might be classified with two different job titles.
- Check that those involved in the process are using the same job titles to refer to jobs.
- Check that jobs’ titles correspond to the tasks carried out and the job names that appear on official documents (e.g. pay slips, staff figures, timesheets, etc.).

<sup>47</sup> The 60% limit was used, i.e. the occupations considered predominantly male or predominantly female were those in which there was at least 60% men or women, respectively.

## 2.3 The job evaluation method free from gender bias – analytical points rating method

### 2.3.1 The points rating method

The purpose of an evaluation method is to appraise, using a set of common criteria, the characteristics of different jobs in an enterprise, organisation or activity sector, in order to establish their relative value. In a pay equity framework, this method assesses whether predominantly female and predominantly male jobs of equal value are paid the same.

As stated under point 1.1, there are global and analytical methods of evaluation, each with its own advantages and disadvantages. The former do not entail detailed analysis of job content, and therefore do not enable the identification and elimination of any influences caused by prejudices or stereotyping, which undervalue jobs, especially predominantly female ones.

In contrast, analytical job evaluation methods do make it possible for all the demands of jobs in an organisation, enterprise or sector, to be ascertained, evaluated and compared using common, clear and detailed criteria. Furthermore, these methods, namely points and factors rating methods, are currently recognised as being the most appropriate for job evaluation in a gender equality context.

As the points and factors rating method is the most suitable for evaluation free of gender bias, this was the method chosen as the basis for the pilot project carried out in the Restaurant and Beverages sector.

### 2.3.2 Building the method

Previous experiences<sup>48</sup> have shown that there may be different options available for devising a non-discriminatory job evaluation method to suit a particular organisation or sector:

- modifying or adapting an evaluation method already in use in the organisation or sector;
- building a new method from scratch based on existing information and documentation;
- acquiring a method developed by a consulting firm. Although there is a wide range of methods available on the market, many do not adequately address the equality issue, so this option should be given careful consideration<sup>49</sup>.

The **Revaluing Work to Promote Equality** project chose to adapt the points rating method to the Restaurant and Beverages sector, and endeavour to make it applicable to other activity sectors. The reason for this choice was the lack of previous experience in designing and testing this type of methodology in an activity sector, and the fact that known experiences had taken place in the more limited enterprise context. In this respect, it should be remembered that the method-building process was carried out by a project partnership involving representatives of workers and employees from the Restaurant and Beverages sector, in a context of social dialogue.

### 2.3.3 Factors and sub-factors

Most evaluation points rating schemes consider four factors – **skills, effort, responsibilities and working conditions** – which, according to job evaluation and remuneration experts, are necessary and sufficient for evaluating all the tasks carried out in enterprises or organisations, regardless of the activity sector to which they belong<sup>50</sup>. These were also the factors selected for assessing the value of work in the restaurant and beverages sector.

<sup>48</sup> Chicha, Marie-Thérèse, 2007.

<sup>49</sup> Chicha, Marie-Thérèse, 2007:p.28.

<sup>50</sup> Chicha, Marie-Thérèse, 2007.



Once the factors have been defined, they have to be broken down into sub-factors that enable the consideration of all the characteristics of the different jobs in far greater detail. Whilst the choice of sub-factors is obviously based on the four main factors, sub-factors must be appropriate to the activity sector concerned, and must meet two essential conditions: methodological rigour and an absence of gender bias.

### Methodological rigour

Methodological rigour means that the sub-factors are tailored to the activity sector and that there is no ambiguity or duplication. Above all, sub-factors must be suitably adapted to match the activity sector, and encompass the different occupational groups, functions and tasks carried out, in order to ensure that the evaluation will be wholly appropriate for the sector.

To avoid ambiguity, sub-factors should not group heterogeneous elements together as this can complicate their interpretation. For example, if a sub-factor groups together two different elements, such as weight lifting and attention, then two distinct dimensions of the effort factor are being considered as one. This will result in an imprecise definition of that sub-factor and, consequently, in unreliable results.

On the other hand, the absence of duplication means that considering a particular sub-factor twice, and therefore making it redundant, should be carefully avoided. For example, if the two sub-factors handling heavy material and transporting heavy material were considered, there would be a risk of overvaluing the jobs that are particularly demanding in this respect.

### Absence of gender bias

Often, predominantly female jobs require demands that are different to those of predominantly male jobs, whether in terms of skills, effort, responsibility or working conditions. Nonetheless, predominantly female jobs are usually evaluated by using methods that were essentially designed for male jobs, which could partly explain gender pay gaps. So particular attention needs to be paid to the choice of evaluation method, and to whether its content equally suits predominantly male and predominantly female jobs.

In the **Revaluing Work to Promote Equality** project, the choice of sub-factors was negotiated among the project partners, particularly between the ARESP and FESAHT, representing the sector's employers and workers respectively. In addition to ensuring methodological rigour, this selection process sought to place special focus on particular aspects of predominantly female jobs, which are, in many cases, associated with domestic tasks and family care (for example, cooking, and caring for children or elderly people) and therefore overlooked and undervalued.

The working group's meticulous concern with every detail of the jobs to be analysed led to the number of sub-factors identified being considerably higher than the number used in previous initiatives. Once this was realised, and after joint reflection and discussion in the partnership, the working group reduced the number of sub-factors in order to make the method less complex.

The sub-factors would also be divided in levels. This procedure is explained in detail under Establishing the Weighting Grid.



### 2.3.4 Checklist

The following statements point to the most important aspects that must be taken into account at the definition of the evaluation method stage. If any of the statements is found not to be the case, then the procedures that have been carried out should be revised so that all the statements are true.

- The method covers the following factors: skills, effort, responsibility and working conditions.
- The method is tailored to the specific characteristics of the sector or organisation.
- All the skills required to perform the functions in the different jobs have been considered.
- The sub-factors make it possible to evaluate all the jobs in the sector or organisation.
- The sub-factors are easy to understand.
- The sub-factors were determined taking into account both predominantly female and predominantly male jobs.
- The sub-factors take into account characteristics of predominantly female jobs that are often overlooked.
- The different types of effort were considered – both physical and mental.
- The definition of working conditions adequately represents the specificity of this factor, especially in respect of the predominantly female jobs.

## 2.4 Information gathering on the jobs to be evaluated

### 2.4.1. Developing job data collection tools

Once the evaluation method has been chosen, the next step is to collect information about the content of each of the jobs that will be analysed. Various data collection tools can be used for this, but questionnaires (structured or with open questions) are the most suitable for a methodology that will assess the value of work free from gender bias.

In the context of the **Revaluing Work to Promote Equality** project the working group devised a structured questionnaire as a data collection tool to be administered in workplaces. This choice was based essentially on the advantages of a structured questionnaire over an open-ended questionnaire. The advantages include the fact that the structured questionnaire provides the respondent with a range of possible responses, which limits interpretation by the researcher who analyses the results, and thus prevents any gender bias at the time of evaluation. Secondly, it facilitates data processing because answers to closed questions are simpler to code and analyse. Thirdly, it is easier to adapt structured questionnaires to other activity sectors, as the questions only require some fine-tuning. Just as in all the other stages of the method development process, meticulousness is paramount in the design of the questionnaire to ensure that answers are accurate and objective and, as far as possible, free of gender bias. In the first place, the questions had to focus on the demands of the jobs rather than on the characteristics or performance of the job holders (for example, someone with a Degree could be in a job that requires no more than secondary education). Secondly, care was taken to formulate questions objectively, in a way that did not elicit the perception people might have of a particular task, because these may differ from person to person. Lastly, to ensure responses would be exact, all possible ambiguity in the questions was avoided.

Furthermore, efforts were made to ensure that the terminology used in the questions was simple, adapted to be appropriate to the sector, and would be easily understood by the respondents. Whenever possible, concrete examples relating to task performance in the occupations evaluated were included to illustrate the questions. To avoid gender bias, examples



of both predominantly male and predominantly female jobs were included. For the purpose of obtaining these examples, a focus group<sup>51</sup> session was held with people from the occupations that were to be analysed. The session made it possible to collect real testimonies that would serve to illustrate the questions included in the questionnaire.

The questionnaire that was designed<sup>52</sup> consists of two distinct parts:

- The first part seeks to identify the tasks performed in a particular job and to ascertain whether the tasks comply with the existing job description. All the tasks specified in the CCT were listed, and a space was provided where respondents could refer to any other tasks they performed, if this were the case, over and above the ones they had mentioned.
- The second part identifies the demands of each job according to four factors (skills, working conditions, effort and responsibilities).

To complement data collection via the questionnaires, jobs may be observed directly to obtain additional information. This is particularly useful as people sometimes find it hard to put job demands into words. It was found that when talking about what they do and their routines, people tended to under-value or overlook tasks they perform, and this can be remedied by direct observation. The project working group decided that the observation of people doing their jobs should precede the administration of the questionnaire. The reason for this was that the information gathered through observation could subsequently be confirmed through the questionnaire. The type of information in question mainly has to do with working conditions, which people often find hard to convey in words because, after working in the same place for a long time, they have got used to the conditions and these have become routine.

## 2.4.2 Pre-testing the questionnaire

Before administering the questionnaire it is important to pre-test it by first applying it to a small group of people who are representative of the jobs that are to be analysed. The pre-test serves to: check that the questionnaire is consistent; confirm there are no discriminatory elements; see whether people understand all the questions properly, and to check that all job demands have actually been addressed. After contacting some of the project's associate partners, the pre-test was conducted in three establishments<sup>53</sup>, where it was possible to survey and observe a total of 15 jobs (8 held by women and 7 held by men). As a result of the pre-test, several improvements were made to the questionnaire, especially in relation to the terminology used and the examples that had been included. This consolidated the final version that would be used in the field, i.e. when it would be used in connection with the jobs that were to be analysed.

## 2.4.3 Observing the jobs and administering the questionnaire

Although **Revaluing Work to Promote Equality** is a nationwide project, covering the districts of Castelo Branco, Santarém, Lisbon, Setúbal, Évora and Faro, the job observation and analysis work was carried out in only three of these districts – Lisbon, Setúbal e Évora. This option ensured the geographical representation of the ARESP's membership, and also an economy of resources (compared to covering establishments in all the districts covered by the project).

<sup>51</sup> Note: The focus group is a qualitative research technique, whereby a group of people is questioned about a product, idea or a concept. In this case, people were asked about various aspects of the tasks they perform in their occupations, and were able to exchange views among themselves.

<sup>52</sup> See annexed questionnaire

<sup>53</sup> Between 17 February and 1 March 2006.



Given the impossibility of obtaining statistical representativity of the sample analysed in terms of the universe of the sector's workers, or even of the sector's workers in the three districts covered, the working group decided, initially, to make the number of cases to be observed in each occupation considered correspond to their respective proportion of the sector's total workforce in all the districts. This criterion would, however, have resulted in a shortage of cases in some occupations (for example, pastry cook, head chef, pastry chef) that employ a smaller number of people. To overcome this shortage, a minimum number of observations per occupation was set, which would be in accordance with their percentage in the geographical area considered (districts of Lisbon, Setúbal and Évora):

- Minimum of 5 observations for the occupations with a weight of less than 5% of the total;
- Minimum of 10 observations for occupations with a weight of more than 5% of the total.

The jobs observation and questionnaire administration took place in 25 establishments; 79 jobs were observed and surveyed<sup>54</sup>, distributed by occupation as follows:

Table 2 – Number of cases observed by occupation

		Observations actually conducted
Predominantly male occupations	Catering Director and/or Manager	7
	Head Chef	4
	Pastry Chef	5
	Pastry Cook	5
	Waiter	18
Sub-Total		39
Predominantly female occupations	Cook	12
	Counter Assistant	10
	Catering Assistant	18
Sub-Total		40
TOTAL		79

In some cases, despite the efforts made, it was not possible to meet the criteria established. For example, it was only possible to survey and observe four people in the head chef category.

The technical team explained to all those who were surveyed and whose jobs were observed the exact purpose of the project and its objectives, as well as the specific objectives of the observation and survey processes. Particular care was taken to inform everyone involved that the aim was not to assess their professional performance but rather to gather information about their jobs.

Efforts were always made to ensure that, during the job data collection stage, the observation

<sup>54</sup> In the Revaluing Work to Promote Equality project, the team that administered the questionnaire consisted of one technician from the ARESP and another from the CGTP-IN.



and survey work was done as non-intrusively as possible, both in relation to the people being observed and surveyed, and to the establishments themselves. The distance between the research team and the individuals they were observing varied according to the characteristics of the establishments and jobs. For example, whilst it was possible to observe kitchen and catering assistant jobs<sup>55</sup> at fairly close range, since there were no customers nearby, other jobs<sup>56</sup> had to be observed at some distance because of the presence of customers.

As the jobs observation and survey work must be conducted with the calm and tranquillity that an exhaustive and objective information gathering exercise such as this calls for, it should be pointed out that in the **Revaluing Work to Promote Equality** project the duration of the observation and survey work did come up against some hitches. The different types of working hours practiced in the sector were one drawback, while shift work was a key complication, given the often limited activity timeframe of some jobs<sup>57</sup>.

Furthermore, in restaurant and beverages establishments peak activity times can vary throughout the day. This means that obtaining complete information on a given job might require conducting the observation at the establishment's busiest time of the day<sup>58</sup>, which clearly does not make the research team's work any easier. The average time it took to observe and survey each job was approximately one hour.

#### 2.4.4 Results analysis

Before the information collected can be actually used, it has to be processed, systematised and analysed. The information contained in the notational tools used for each of the 79 cases observed was therefore entered into an electronic database<sup>59</sup>.

The results were compiled in a document and given to the working group. The document included, firstly, a brief profile characterisation of the cases observed based on certain variables (gender, educational attainment, contractual relationship, daily and weekly working hours), followed by the overall findings according to factors – **skills, responsibilities, working conditions and effort** – and respective sub-factors, and lastly, the results for each of the occupations observed (Head Chef, Pastry Chef, Cook, etc.).

These results must be clearly and objectively compiled and presented to the working group so that the stage when points are assigned to jobs may also be conducted in a rigorous and objective manner.

<sup>55</sup> Head Chef, Pastry Chef, Cook, Pastry Cook, and Catering Assistant.

<sup>56</sup> Catering Director, Waiter, and Counter Assistant.

<sup>57</sup> For example, the observation of a significant part of the tasks performed by a waiter working shifts may be limited to mealtimes.

If any information is missed, the observation would have to be repeated on a different shift, or even on a different day.

<sup>58</sup> For example, observation of most of the catering assistant's tasks can only take place at the establishment's busiest time, when there is greatest demand for their work.

<sup>59</sup> Appropriate software for statistical processing and analysis of data was used.

### 2.4.5 Checklist

The following statements draw attention to the most important aspects that must be taken into account at the job information gathering stage. If any of the statements is found not to be the case, then the procedures that have been carried out should be revised so that all the statements are true.

- The data collection method used is the same for all the jobs.
- The questions focus on the jobs and not on the job holders.
- The questions are clear and unambiguous and, for example, the inclusion of several parts to one question has been avoided.
- The terminology used in the questions will be easily understood by all workers.
- The frequently disregarded aspects of predominantly female jobs have been taken into consideration.
- The examples used to illustrate questions refer to both predominantly female and male jobs.
- The questionnaire was pre-tested to check its consistency (in terms of language used, the examples used, and the demands considered), and to detect any discriminatory elements.
- The workers were previously informed about the aims of the observation and enquiry processes and they were fully briefed on how to go about answering the questionnaire.
- The confidentiality of the answers has been safeguarded.
- Every possible effort has been made to ensure that the sample is representative of the jobs to be analysed.
- The results of the observation and survey have been clearly and objectively compiled and presented to the working group.

## 2.5 Determining the value of the jobs

### 2.5.1 Establishing the weighting grid – ranking and assigning point scores

Weighting the factors and sub-factors is establishing their relative importance by assigning point scores to each of them. It is a vitally important stage in the method's development process because it is when the number of points assigned to each factor and sub-factor is determined. Even if every effort has been made to avoid gender biases in the preceding stages, this is the time when incoherence and prejudices can creep in, which would make the method once again vulnerable from the gender equality perspective.

The assignment of point scores must take into consideration the sector's mission and the relative importance of each factor and sub-factor for the success of the organisation/sector in the terms of that mission. The weighting process is, therefore, far more than a mere technical task: it has to entail in-depth reflection by the parties that interact in the sector, because of the up-to-date knowledge they have of the sector's reality, its strengths and weaknesses, the challenges it faces, and opportunities it offers. In the concrete case of this methodology, and notwithstanding the involvement of the partnership as a whole, the ARESP and FESAHT/CGTP-IN, as signatories to the CCT, played a fundamental role in the weighting process by negotiating the assignment of points to the factors and sub-factors.



By way of example, the following table shows the ranking found for the factors in the Restaurant and Beverages sector, as well as the point scores by factor.

**Table 3 – Factor weighting results in the Restaurant and Beverages sector**

Order of importance	Factors	Points
1st	Skills	325
2nd	Responsibility	275
	Working conditions	275
3rd	Effort	125

The importance of this stage and the practical consequences for enterprises, workers, and the sector itself, are of such complexity that it is vital that all the parties involved have a very clear understanding of each concept under analysis. The meaning and purpose of each factor and sub-factor must be objective, understood, and agreed by all those involved in the process. Only then will points be assigned in an informed and objective manner, and only then will the work be successful and make a real contribution to the revaluation of work and the sector. The tool that synthesises this process is the weighting grid, which shows the relative importance of each factor and sub-factor. As the common measurement tool for appraising and comparing all the jobs under consideration, this grid is one of the key elements of the whole evaluation system<sup>60</sup>.

## 2.5.2 Allocating points to levels

Once point scores have been assigned to the factors and sub-factors, the points assigned to each sub-factor still have to be allocated to the different sub-factor levels. As the purpose of the method is to achieve job evaluation free from gender bias, the distribution of points to levels is preferably done using arithmetic progression<sup>61</sup>: each sub-factor's points rating is divided by the number of levels considered, in order to determine the points value of the first level and, at the same time, the progression factor to the following levels. For example, let us look at the sub-factor Professional Experience<sup>62</sup>. The sub-factor was assigned 35 points, and four levels were identified. The value of the first level, and at the same time the progression factor, will be:  $35 \div 4 = 8.75$ . The resulting points rating is assigned to the first level and successively added to obtain the value of the remaining levels:

<p><b>Level 1</b> = <math>35/4 = 8,75</math></p> <p><b>Level 2</b> = Level 1 + <math>8,75 = 17,5</math></p> <p><b>Level 3</b> = Level 2 + <math>8,75 = 26,25</math></p> <p><b>Level 4</b> = Level 3 + <math>8,75 = 35</math></p>
--

There may, however, be sub-factors in which the first level corresponds to an absence or only minor presence of the requirement or demand. If a particular job does not have a demand for a particular sub-factor, then it should not receive points in that sub-factor. However, it is nonetheless advisable in such cases to assign a points rating, albeit a low one, to the first level.

<sup>60</sup> See annexed Factors and Sub-Factors Grid for a Job Evaluation Methodology free from gender bias. This document should be used in consultation with the annexed questionnaire that was administered at workplaces.

<sup>61</sup> Whilst arithmetic progression assigns a constant interval between levels, geometric progression tends to widen the interval for higher levels, "which accentuates, unjustifiably, the inequality between lower order functions (very often predominantly female) and higher order functions (generally predominantly male)". For this reason, M.T.Chicha believes that "such an approach is inadvisable from a pay equity perspective".

<sup>62</sup> See factors and sub-factors grid.

Let us look at the Documents and Money<sup>63</sup> sub-factor, for example, which was assigned 30 points and divided into four levels. In this case, the first level corresponds to “no responsibility for documents or for money”. If arithmetic progression were applied here, as illustrated previously, it could result in significant distortions to the total scores of the occupations because “excessive” value would have been assigned to jobs in which this sub-factor is not required. In this case, the working group decided to allocate 10% of the total of the sub-factor to Level 1. The calculation was therefore as follows:

$$\text{Level 1} = 10\% \times 30 = 3$$

$$\text{Level 2} = \text{Level 1} + [(30-3) / 3] = 3+9 = 12$$

$$\text{Level 3} = \text{Level 2} + 9 = 21$$

$$\text{Level 4} = \text{Level 3} + 9 = 30$$

### 2.5.3 Checklist

The following statements draw attention to the most important aspects that must be taken into account at the determining the value of jobs stage. If any of the statements is found not to be the case, then the procedures that have been carried out should be revised so that all the statements are true.

- The points rating assigned to factors and sub-factors reflects their relative importance to the sector’s mission.
- The number of levels in each sub-factor correctly reflects the differences between the jobs.
- The sub-factor weighting scales are not ambiguous, do not overlap, and they are not discontinuous.
- The division between levels does not have any discriminatory impact on the predominantly female jobs.
- The number of levels in the sub-factors does not have any discriminatory impact on predominantly female jobs.
- A weighting grid, which synthesises the results of the weighting process, has been constructed.

## 2.6 Assigning point scores and identifying jobs of equal value

### 2.6.1 Scoring each job

Once the levels in each sub-factor have been assigned points, the results obtained in the fieldwork must be transposed onto the scale grid, i.e. the appropriate sub-factor level must be found for each job. In the case of the **Revaluing Work to Promote Equality** project, this stage was based essentially on two criteria:

- **Majority:** observations of a particular job can, and do give rise to different results for the same sub-factor. So, the criterion selected for determining the correct sub-factor level for a job was that of majority (50%+1). In other words, the level for each job within a particular sub-factor was determined by the answer that obtained the majority.

For example, in the case of the Catering Assistant job, and the Professional Experience sub-factor which has four levels, it was found that 13 of the 18 catering assistants were on Level 4. According to the majority criterion, we would say that, in this sub-factor, the job of

<sup>63</sup> Idem.



Catering Assistant should be assigned the value that corresponds to Level 4, i.e. 35 points. It would have been enough if only 10 catering assistants had been on Level 4 ( $50\% + 1 = 10$ ).

- **Average:** this criterion was applied in situations where it was not possible to apply the previous criterion because the results obtained regarding levels in a sub-factor were too dispersed.

Taking the Waiter job, for example, and the Thermal Environmental Conditions sub-factor that has five levels, it was found that out of 18 jobs, 9 were on the first level, 6 on the second, and 3 on the fifth. Therefore:

$$(9 \times 1 + 6 \times 2 + 3 \times 5) / 18 = 36 / 18 = 2$$

Accordingly, in this sub-factor the job of Waiter is assigned the value that corresponds to Level 2, i.e. 12 points.

Once the jobs have been assessed in all the sub-factors identified, their value in each factor is calculated. The value of each factor will be the sum of the values obtained in its respective sub-factors. Similarly, the overall value of each occupation will be the sum of the values obtained in each of the four factors considered.

It may happen that levels in certain sub-factors for particular occupations do not fully reflect the reality of a job in the sector or organisation. It is very important, therefore, that the working group, especially the employers' and trade union representatives, carefully analyse these cases and, if necessary, rectify them. These adjustments are negotiated between the parties, and do not call into question the accuracy of the evaluation tool used. Once this stage has been finalised, jobs can be ranked in order of their point scores, and then predominantly female jobs and predominantly male jobs with the same value can be identified.

## 2.6.2 Grouping jobs in point intervals/classes

In order to establish equivalences between jobs, they have to be grouped according to point intervals, as some points differences are generally to be found between a particular predominantly female job and another male-dominated job. However, these differences do not mean that the jobs are not, within certain limits, equivalent to each other in terms of value. By defining point intervals, jobs with similar scores can be grouped together into classes, and in this way conclusions may be reached regarding the comparability of different jobs in terms of their value.

Before grouping jobs into point intervals, the width/range of the intervals/classes in terms of job evaluation points must be established. According to the methodology developed by M.T. Chicha, interval width should be determined on the basis of the number of total points and the final number of classes required, and can be 30, 50 or 70 points per interval. The same methodology emphasises that when deciding the number of points per interval, it should be remembered that too small a width can mean that the differences between jobs become hard to explain, whilst too large a width can make the notion of equal value meaningless because the likelihood of jobs falling in the same points interval is greater.

In the **Revaluing Work to Promote Equality** project, the working group members directly linked to the Restaurant and Beverages sector – ARESP and FESAHT/CGTP-IN – played a fundamental role in defining these intervals, and decided on 8 classes with a width of 30 points.

The following table shows the distribution of the occupations according to the agreed point intervals, based on the respective job scores. The conclusion that may be drawn is that the jobs which, because of their scores, fall into the same class are equivalent in terms of value. For example, the value of the Head Chef position will be **equivalent in terms of value** to the Pastry Chef position.

Table 4 – Distribution of the jobs observed according to point classes

Classes	Points	Manager	Head Chef	Pastry Chef	Counter Assistant	Cook	Waiter/ waitress	Pastry Cook	Catering Assistant
A	720-749	743							
B	690-719								
C	660-689								
D	630-659		652	641					
E	600-629								
F	570-599				598	592	579	578	
G	540-569								
H	510-539								527

### 2.6.3 Checklist

The following statements draw attention to the most important aspects that must be taken into account at the assigning point scores and identifying jobs of equal value stage. If any of the statements is found not to be the case, then the procedures that have been carried out should be revised so that all the statements are true.

- Disproportionate positioning of predominantly female jobs immediately below the preceding point interval break point/boundary has been avoided.
- Disproportionate positioning of predominantly female jobs, in which there are high numbers of employees, immediately below the preceding interval break point/boundary has been avoided.
- Overlapping the intervals has been avoided.







# Final remarks

The results achieved during this process permit us to leave a few considerations that should be read and interpreted in light of the project's experimental character, permanent dialogue between the parties, and genuine commitment to combating pay inequality.

If we had to pinpoint the most valuable aspect of this long and complex process, without question it would be the interesting triangular relationship between partnership, innovation generation, and gender equality.

The analysis, reflection and decision-making were always conducted in a spirit of open negotiation between the parties. That does not mean that there was always a convergence of views, but rather that there was always room for overcoming differences and reaching compromises based on consensus.

The experiment resulted in a highly innovative product with great potential. Many lessons were learned, and a variety of possible uses for the methodology were identified. So a path has been opened.

We have endeavoured to describe the lived process and have achieved not a recipe but a technical, systematic process, whose succession of stages and specific criteria must be followed to ensure a credible, consensual and viable result.

The methodology's success largely depends on the observance of the often cited key requirements – clarity, absence of ambiguity, and no gender bias. Mastery of the technique is fundamental, as is a clear understanding of the pay equity principle and real determination to eliminate inequality caused by pay discrimination.

Lastly, the outcomes achieved can only be assumed and legitimised by the stakeholders if they have actively participated in the whole process. That was the aim of the project.







# Job Evaluation Questionnaire

Manager	
Head Chef	
Head Pastry Chef	
Pastry Cook	
Waiter/Waitress	
Cook	
Counter Assistant	
Catering Assistant	





This questionnaire was developed as part of the process of building a job evaluation methodology free of gender bias. All information collected through the questionnaire will be treated as confidential and used exclusively for the purpose stated.

The questionnaire consists of 5 parts:

**Part 1:** Characterisation of the establishment

**Part 2:** Characterisation data on the employees

**Part 3:** Description of tasks performed

**Part 4:** Job Evaluation

- Skills
- Responsibilities
- Effort
- Working Conditions

**Part 5:** Comments





## Information to be gathered from the establishment

1. Establishment's Code number : \_\_\_\_\_
2. Location: \_\_\_\_\_
3. No. of Employees: \_\_\_\_\_  
(1) Permanent: \_\_\_\_\_ (2) Non-permanent: \_\_\_\_\_
4. Establishment Classification Group\*:  
B ☐ C ☐
5. Opening Hours: \_\_\_\_\_ / \_\_\_\_\_

\* Establishment's Classification Group according to the CCT (Contrato Colectivo de Trabalho – Collective Agreement) signed by the ARESP (Associação da Restauração e Similares de Portugal – Association of Portuguese Catering and Similar Establishments) and FESAHT (Federação dos Sindicatos de Alimentação, Bebidas, Hotelaria e Turismo de Portugal – Federation of Food, Beverages, Hotel and Tourism Trade Unions) for the Restaurants, Cafes and Similar Establishments Sector, and published in the Boletim do Trabalho e Emprego, no. 28, of 29 July 2004:

### GRUPO B

- Restaurants and Food and Beverages Establishments with more than 5 employees
- Camping Sites

### GRUPO C

- Food and Beverages Establishments with less than 5 employees







Date: \_\_\_\_\_

Day: \_\_\_\_\_

Start Time: \_\_\_\_\_

### Information to be gathered from employees

In view of how valuable your occupation is to the sector, it is important that there is a better understanding of the tasks involved in your work. We would be grateful, therefore, if you would kindly complete the following questionnaire.

**1. Gender** (1) M (2) F

**2. Age:** \_\_\_\_\_

**3. Occupational Category:** \_\_\_\_\_ Level \_\_\_\_\_  
Grade \_\_\_\_\_ 1<sup>a</sup> ☐ 2<sup>a</sup> ☐ 3<sup>a</sup> ☐

**4. Employment Relationship:**

(1) Permanent ☐ (2) Fixed Term ☐ (3) Other ☐

**5. No. of hours worked per day:**

(1) Up to 8 hours/day ☐ (2) 8 to 10 hours/day ☐ (3) More than 10 hours/day ☐

**6. No. of days worked per week:**

(1) Up to 6 days/week ☐ (2) 6 days/week ☐

**7. What is the position or occupational category of the person to whom you are directly responsible?**

**8. How many people in your workplace carry out the same tasks as you (i.e. do the same job as you)?**



### 9. Of the following tasks, indicate below which ones you perform, and how often you perform them?

List the tasks that correspond to the job observed (the job descriptions contained in the CCT signed by the ARESP and FESAHT, and published in the BTE, series 1, no. 28 of 29 July 2004, were used for the purposes of this questionnaire).

Tasks	Frequency			
	(1) NA/N	(2) O	(3) F	(4) A

### 10. Apart from the tasks you have already mentioned above, state any additional tasks you perform, and how often you perform them.

Other tasks	Frequency		
	(2) O	(3) F	(4) A

### 11. What equipment or utensils do you use in the course of your work?

- (1) Calculator ☐
- (2) Computer (Word, Excel e Access) ☐
- (3) Computer with special software (state which) \_\_\_\_\_ ☐
- (4) Fax ☐
- (5) Printer ☐
- (6) Telephone ☐
- (7) Electronic ordering device ☐
- (8) Cash Register ☐
- (9) Automatic payment system ☐
- (10) Cutting utensils ☐
- (11) Fine china ☐
- (12) Catering tableware ☐
- (13) Machines (dishwasher, electric meat slicer, meat grinder, coffee maker, electric band saw, etc.) \_\_\_\_\_ ☐
- (14) Others (state which) ☐

## Skills

### 12. What is your educational background?

Educational attainment	Level
Less than Primary (Years 1 to 4)	1
Completion of Basic Education (to Year 9)	2
Completion of Secondary Education (to Year 12) or equivalent	3
Completion of a Higher Education course	4

**13. Did you do any vocational training that was required for your present occupation?** If you answer “YES” to this question, please continue to the next question (13.a). If you answer to “NO”, then please go on to question 14.

Vocational Training	Level
No	1
Yes	2

### 13. a) How long did the training course last?

Number of hours	Level
Training for my present occupation was not required	1
Up to 90 hours	2
91-300 hours	3
More than 300 hours	4

### 14. How long have you been working in your present job?

Professional Experience	Level
For less than 1 year	1
For more than 1 year, but less than 2	2
For more than 2 years, but less than 4	3
For 4 years or more	4



**15. Which tasks relating to Health, Safety and Hygiene at Work (H&S) do you perform?**

- Cleaning the work area and/or equipment and utensils
- Receiving and/or selecting and/or separating food items
- Storing food
- Conserving food
- Preparing food for cooking
- Cooking food
- Checking expiry dates, recording temperatures, checking the saturates content of oils, etc.

H&S	Level
Use one skill	1
Use between 2 and 3 skills	2
Use 4 skills	3
Use between 5 and 6 skills	4
Use 7 skills	5

**16. Regarding Information and Communication Technologies (ICT), state which of the following are required for your job:**

ICT	Level
Use of information and communication technologies is not required	1
Basic cash register, and/or electronic and/or computerised ordering device, and/or computer work (Word, Excel, Access)	2
Specific management software ( <u>WINREST; SAP; HR Management, Others</u> )	3

**17. Do the tasks connected with Health, Safety and Hygiene at Work (H&S) that you perform, require you to:**

H&S	Level
Have a basic understanding or knowledge or Workplace H&S	1
Use personal protective clothing/equipment connected with your work (gloves and/or anti-slip footwear, etc.)	2
Identify hazards and/or risks (risk of cuts, intoxication, burns, etc.)	3
Take preventive measures and/or take action in emergencies (give first aid treatment, fire fighting, emergency evacuation)	4

**18. Do you need to know how to speak foreign languages in your job?**

Foreign Languages	Level
There is no need – only Portuguese is required	1
Basic knowledge of one foreign language is required, for understanding and responding to orders/requests	2
Knowledge of more than one foreign language is required, for speaking to clients and understanding written text	3
Good proficiency in one foreign language is required (for discussing documents and writing texts)	4

**19. Do you sometimes have to manage conflict situations at work?**

If so, please state in which type of situation you intervene.

Conflict Management	Level
Conflict management is not required.	1
Internal conflicts, among staff (involving one department or section, various departments or sections, the whole organisation)	2
External conflicts (involving clients – complaints or difficult customers; suppliers – delivery mistakes or delays, etc.; with clients and suppliers)	3
Management of both internal and external conflict situations	4

**20. State how many of the following types of interlocutor you have to communicate with in the course of your work:**

- Colleagues
- Superiors
- Subordinates
- Suppliers
- Clients

Communication	Level
With 1 of the above types of interlocutor	1
With 2 of the above types of interlocutor	2
With 3 of the above types of interlocutor	3
With 4 of the above types of interlocutor	4
With 5 of the above types of interlocutor	5

**21. To perform the tasks in your job you need to have:**

(Illustrate with examples of tasks specific to each job being observed)

Manual Dexterity *	Level
Tasks involved do not require manual dexterity	1
Manual skills, namely dexterity	2
Manual skills, namely dexterity <b>and</b> meticulousness <b>or</b> accuracy	3
Manual skills, namely meticulousness <b>and</b> accuracy	4
Manual skills, namely dexterity, meticulousness <b>and</b> accuracy	5



**22. Do you need to be physically agile to carry out your job?**

Physical Agility*	Level
Not necessary, but occasionally required	1
Necessary and frequently required	2
Necessary and always required	3

\* By direct observation, taking into account whether, for example, service at tables is direct (food served at the table by the waiting staff) or indirect (food is already plated up when it leaves the kitchen).

**23. Are you expected to work fast in your job?**

Ability to Work Fast*	Level
Ability to work fast occasionally required	1
Ability to work fast frequently required	2
Ability to work fast always required	3

\* Questão a ser respondida através de observação directa

**24. Do you have to be creative, and develop new features in your job?** (for example, a) thinking up new combinations of seasonings; b) inventing ways to use new ingredients/products; c) creating new cake decorations; d) creating new recipes; e) changing the ingredients of dishes.)

Creativity	Level
Creativity is not required	1
Creativity is required for designing <b>or</b> producing original initiatives and new solutions	2
Creativity is required for designing <b>and</b> producing original initiatives and new solutions	3

**Responsibilities****25. Are you responsible for the health and safety of others (e.g. clients) in your job?**

Health & Safety of Others	Level
Yes, when attending to clients	1
Yes, when providing service support	2
Yes, when preparing food	3
Yes, in more areas than those referred to above	4

**26. Are you responsible for overseeing the work of others (supervisory responsibilities)?**

Management/Supervision	Level
No, or just occasional responsibility for supervising the work of one section	1
Responsible for supervising the work of one section	2
Responsible for two or more sections	3
Responsible for the entire establishment	4

**27. Does your job require cooperation with other employees?**

Cooperation	Level
Cooperation with employees in one section	1
Cooperation with employees in two sections	2
Cooperation with employees in more than two sections	3

**28. Does your job involve preparing for your own work, or do you have someone to help you with this? When you prepare for others, is it for someone in your own section or other sections?**

Preparatory tasks	Level
Preparatory tasks for own work	1
Preparatory tasks for other people's work	2
Preparatory tasks for own as well as for other people's work	3

**29. Are you responsible for checking the condition/maintenance of equipment and products that you use?**

Compare with question 11

Products, Equipment and Material	Level
No responsibility for conservation/maintenance of products, equipment or material	1
Responsibility for products	2
Material <b>and/or</b> equipment	3
Products, material <b>and</b> equipment	4



**30. Do you have to plan and/or organise your own tasks/work?**

For example, do you have to think about how to organise the layout of tables to facilitate people's circulation, or decide who does what, and when?

<b>Work methods and processes</b>	<b>Level</b>
Just my own work	1
The work of one section/department	2
The work of 2 or more sections/departments	3
The work of the entire establishment	4

**31. Do you usually handle documents and/or money?**

(Bills, receipts, holiday chart, wage slips, absence justification slips, etc.)

<b>Documents and Money</b>	<b>Level</b>
No responsibility for handling documents and money	1
Responsibility for handling documents	2
Responsibility for handling money	3
Responsibility for handling documents <b>and</b> money	4

**32. Does your job involve responsibility for purchasing and managing stock?**

<b>Stock Management</b>	<b>Level</b>
Purchasing or managing food products is not required	1
Purchase of food products	2
Management of food products	3
Purchase and management of food products	4

## Effort

**33. Do you spend more time standing or sitting in your job? About how many hours do you spend in that position every day?**

<b>Body Position</b>	<b>Level</b>
In a sitting position throughout the working day	1
Standing for up to 2 hours a day	2
Standing for up to 4 hours a day	3
Standing for up to 6 hours a day	4
Standing throughout the working day	5



**34. Does your work involve repetitive movements? For example, long periods spent making coffee, chopping vegetables, cash register work, dough-making, etc.? If so, for how long?**

<b>Repetitive Movements</b>	<b>Níveis</b>
No repetitive movements involved	1
Repetitive movements for up to 2 hours a day	2
Repetitive movements for up to 4 hours a day	3
Repetitive movements for up to 6 hours a day	4
Repetitive movements throughout the entire working day	5

**35. What is your most usual body posture when you are working?**

<b>Body Posture</b>	<b>Níveis</b>
Working with elbows at right angles	1
Working with elbows at right angles and knees bent	2
Working with elbows at right angles and head raised	3
Working with elbows at right angles, knees bent, and head raised	4

\* Question should be answered by means of direct observation and enquiry; the interviewer should demonstrate what is meant for each level.

**36. Does your occupation entail lifting and/or carrying weights?**

(Do you do it alone or with help? Have you any idea of the weight of the loads you carry?):

<b>Lifting and Carrying Weights</b>	<b>Level</b>	<b>Up to 10 Kg</b>	<b>10-20 Kg</b>
No lifting or carrying of weights required	1	-	-
Discontinuous lifting/carrying, with help	2	1	2
Continuous lifting/carrying, with help	3	1	2
Discontinuous, without help	4	1	2
Continuous, without help	5	1	2

**37 - Does your work require you to pay attention to several things at the same time, or to concentrate on just one thing at a time?**

<b>Attention</b>	<b>Level</b>
Concentrated <b>or</b> divided	1
Concentrated <b>and</b> divided	2

**38. In the course of your work, do unexpected situations sometimes arise that you have to sort out quickly? If so, these situations are connected with:**

<b>Management of the Unexpected</b>	<b>Level</b>
Goods (shortage of certain items, products and/or equipment)	1
People inside the establishment (colleagues)	2
Goods <b>and</b> people inside the establishment	3
People inside <b>or</b> outside the establishment (clients, suppliers)	4
Goods, people inside <b>and</b> outside the establishment	5



**39. Is your work liable to be interrupted?**

Interruptions	Level
No interruptions	1
With occasional interruptions	2
With frequent interruptions	3
With constant interruptions	4

**Working Conditions****40. Is it noisy where you work? Is the noise caused by machinery, equipment and/or people?**

(Sub-factor that can be observed as well as asked about)

Noise	Level
Sporadic noise from machinery, equipment <u>or</u> people	1
Constant from people	2
Constant from machinery <u>and</u> equipment	3
Constant noise from people, machinery <u>and</u> equipment	4

**41. In your job you work with:** (Sub-factor that can be observed and asked about)

Lighting	Level
Natural and artificial lighting	1
Natural and artificial lighting with some poorly-lit areas	2
Artificial lighting	3
Artificial lighting with poorly-lit areas	4

**42. Where you work, the temperature is:**

(Sub-factor that can be observed and enquired about)

Thermal Environmental Conditions	Level
Mild <sup>64</sup> and constant temperature	1
Mild, with exposure to draughts <u>or</u> sudden temperature changes	2
Hot or cold temperatures	3
Hot or cold, with exposure to draughts <u>or</u> sudden temperature changes	4
Hot or cold, with exposure to draughts <u>and</u> sudden temperature changes	5

<sup>64</sup> Natural environmental temperature is understood to be 18° to 22° C and, exceptionally, up to 25° C (Article 11, Decree Law 243/86, of 20 August).

**43. Do you come into contact with steam and/or gases in the course of your work?**

For example, carbon monoxide produced by the cooking process, residual gases, fumes from detergents and drying agents, etc. (Sub-factor that can be observed and asked about)

Steam, Gases and Toxic Products	Level
No exposure to steam, gases <u>or</u> toxic products	1
Exposure to steam	2
Exposure to gases/toxic products	3
Exposure to steam, gases/toxic products	4

**44. Does your job involve working weekends?**

Weekend Work	Level
No weekend work	1
Work on Saturdays <u>or</u> Sundays	2
Work both Saturdays <u>and</u> Sundays	3

**45. Are your working hours split?**

Shift Work	Level
Continuous working hours	1
Shift work, with a break of up to 3 hours	2
Shift work, with a break of more than 3 hours	3

**46. How often do you work between midnight and 7 a.m.?**

Night Work	Level
No night work	1
Up to 5 nights per month, with day work	2
7 nights or more, with day work	3

**47. What is your pace of work?**

Pace of Work	Level
Constant	1
Varies according to the season	2
Varies according to the day of the week	3
Varies according to the time of day	4
Varies and combines 2 or more of the above	5



**48. Are you at risk of any of the following accidents or illnesses in your job?**

- Cuts
- Burns
- Falls
- Intoxication
- Explosion
- Fire
- Electric shock
- Injury from impact
- Bodily injury
- Hearing disorders
- Respiratory disorders
- Communicable diseases
- Musculoskeletal disorders
- Aggression
- Stress
- Allergic disorders
- Dermatological disorders
- Others (state which)

<b>Risk of Workplace Injury and Illness</b>	<b>Level</b>
Exposed to up to 4 risks	1
Exposed to between 5 and 8 risks	2
Exposed to between 9 and 12 risks	3
Exposed to between 13 and 16 risks	4
Exposed to between 17 and 20 risks	5



## Comments

For the CGTP-IN

Anabela Vogado

For the ARESP

Maria Albertina Martins







# Grid of Factors and Sub-factors







The purpose of this document is to aid the understanding of the **Job Evaluation Questionnaire**. The two tools originally used (questionnaire and grid) now incorporate changes that resulted from their application, analysis of the responses, and subsequent fine-tuning.

This document deals with the content of the Factors, Sub-factors, and Levels that were identified as being those that most closely reflect the demands, characteristics, and complexity of the occupations that have been identified as strategically important to Portugal's Restaurant and Beverages Sector.

Occupations Analysed	Predominance
Catering Manager/Director	Male
Head Chef	Male
Pastry Chef	Male
Pastry Cook	Male
Waiter	Male
Cook	Female
Counter Service Assistant	Female
Catering Assistant	Female

The process of identifying the Factors, Sub-factors and Levels is a crucial stage in devising a methodology for job evaluation that is free of gender bias. The aim of the methodology is to evaluate and compare jobs in an organisation/activity sector, by applying common, precise and detailed criteria.

The methodology enables the relative position of a job in relation to another in a sector or organisation to be ascertained, regardless of whether the job holder is a man or a woman. To this end, each job is analysed and compared against a set of four Factors (skills, responsibilities, effort, and working conditions).

Each Factor comprises a group of Sub-factors, the number of which varies according to the maximum information needed to characterise the jobs most accurately.

In order to differentiate between the jobs, each Sub-factor is broken down into Levels that are ranked (according to frequency, weight, intensity, or other aspects<sup>65</sup>) on a scale.

To observe jobs according to this method, a tool must be designed for the purpose of collecting information on job content (see the Questionnaire containing questions relating to each Sub-factor, which was especially designed during the project).

<sup>65</sup> Marie-Thérèse Chicha , (2006) p.24.



	<b>Sub-factors</b> (in the same order as they appear on the Questionnaire)	<b>No. of Levels</b>
Skills	1. Educational Attainment	4
	2. Vocational Training	4
	3. Professional Experience	4
	4. Food Safety and Hygiene (FSH)	5
	5. Information and Communication Technologies (ICT)	3
	6. Health, Safety and Hygiene at Work (H&S)	4
	7. Foreign Languages	4
	8. Conflict Resolution	4
	9. Communication Skills	5
	10. Manual Skills/Dexterity	5
	11. Physical Agility	3
	12. Ability to Work Fast	3
	13. Creativity	3
Responsibilities	1. Safeguarding the Health & Safety of Others	4
	2. Supervisory Responsibilities	4
	3. Cooperation	3
	4. Preparatory Tasks	3
	5. Products, Equipment and Materials	4
	6. Work Processes and Methods	4
	7. Documents and Money	4
	8. Stock Management	4
Effort	1. Body Position	5
	2. Repetitive Movements	5
	3. Posture	4
	4. Lifting and Carrying Weight	5
	5. Attention	2
	6. Managing the Unexpected	5
	7. Interruptions	4
Working Conditions	1. Noise	4
	2. Lighting	4
	3. Thermal Environmental Conditions	5
	4. Steam, Fumes, and Toxic Products	4
	5. Weekend Work	3
	6. Split Shifts	3
	7. Night Work	3
	8. Pace of Work	5
	9. Risk of Workplace Injury and Illness	5

## Factor: Skills

Skills comprise the knowledge, abilities and attitudes required to carry out a job. They cover three types of capabilities and their respective learning domains, i.e. knowing how to learn – cognitive domain, know-how – psychomotor domain, and knowing how to behave – behavioural domain. These capabilities can be acquired through study and training (formal and non-formal learning), and also gained through experience – informal learning. Skills include, therefore, the ability to interact and relate to different groups (internal groups – peers, subordinates and supervisors at work, and external – clients and suppliers of goods and services), and sensory and physical abilities, such as manual dexterity, ability to work fast, etc.

Below are the **13 Sub-factors** that define **Skills** for the purposes of this sector, its objectives and importance.

**Educational attainment:** educational attainment refers to the formal qualifications obtained at a recognised educational institution. This sub-factor is intended to ascertain which educational level is necessary to work effectively in a given occupation, in accordance with what the CCT<sup>66</sup> stipulates as being required for entering that occupation.

Level 1	Attendance but non-completion of the 1st Cycle (Years 1 to 4) of Basic Education, i.e. less than 4 years of schooling.
Level 2	Attendance and completion of the 1st, 2nd, and 3rd Cycles (Years 1 to 9) of Basic Education, i.e. attendance and completion of any one of these Cycles, the 1st Cycle being equivalent to 4 years of schooling, the 2nd being equivalent to 6 years of schooling, and the 3rd equivalent to 9 years of schooling.
Level 3	Attendance and completion of secondary education (11 years of schooling), to Year 12 or equivalent.
Level 4	Attendance and completion of a higher education course.

**Vocational Training (basic occupational):** Refers to the vocational qualifications obtained after attendance and successful completion of a vocational training course delivered by an accredited provider.

Level 1	Lack of any basic occupational training.
Level 2	Attendance and successful completion of a vocational training course with a duration of at least 90 hours.
Level 3	Attendance and successful completion of a vocational training course with a duration of between 91 and 300 hours.
Level 4	Attendance and successful completion of a vocational training course with a duration of more than 300 hours.

<sup>66</sup> Contrato Colectivo de Trabalho (Collective Agreement) for the Restaurants, Cafés and Similar Establishments Sector, published in the Boletim do Trabalho e Emprego (BTE), 1st series, no. 28 of 29 July 2004.



**Professional Experience:** Refers to length of experience in the occupation, regardless of the establishment(s) in which that experience was acquired.

Level 1	Less than one year's professional experience.
Level 2	Professional experience of one year or more but less than two years.
Level 3	Two or more years' professional experience but less than four years.
Level 4	Four or more years' professional experience.

**Food Safety & Hygiene (FSH):** Refers to the range of skills called for to carry out correct procedures and practices at every stage of food handling and storage, which will safeguard the health and safety of the community to which the service is provided.

They include:

- Cleaning the work area and/or equipment and/or utensils;
- Receiving and/or selecting and/or separating food items;
- Food storage;
- Food preservation;
- Food preparation;
- Cooking of food;
- Checking expiry dates and/or temperatures and/or saturates content of cooking oils.

As all the skills are equivalent (in value), it is the number of skills necessary to perform the respective tasks that is the distinguishing factor. (This criterion was selected because all skills in FSH make a significant impact on the work chain).

Level 1	Corresponds to one skill
Level 2	Corresponds to two or three skills
Level 3	Corresponds to four skills
Level 4	Corresponds to five or six skills
Level 5	Corresponds to seven skills

**Information & Communication Technologies (ICT):** This sub-factor seeks to identify the skills that have to be mobilised, according to the type of technology used in the different recording methods, to ensure the smooth running of the enterprise/establishment.

Level 1	Does not require the use of processing equipment
Level 2	Requires simple and/or electronic and/or computerised data processing technology.
Level 3	Uses industry-specific software.

**Health, Safety and Hygiene at Work (H&S):** This sub-factor refers to the extent of understanding and knowledge required for the occupation/activity sector according to current Workplace H&S regulations.

Level 1	Requires understanding or basic knowledge of Workplace H&S.
Level 2	Requires the use of individual protective equipment (IPE) for the respective occupation, namely appropriate use of gloves, anti-slip footwear, etc.
Level 3	Requires identification of hazards and/or risks to health, i.e. risks of cuts, intoxication, burns, tendonitis, etc.
Level 4	Requires implementing preventative measures, and/or taking action in emergencies (delivering first aid treatment, fire fighting, and emergency evacuation).

**Foreign languages:** Refers to the spoken and/or written fluency in foreign languages necessary for the occupation, specifically English, French, German and/or Spanish.

Level 1	Only Portuguese required
Level 2	Basic knowledge of one foreign language that is sufficient for understanding and responding to orders/requests
Level 3	Knowledge of more than one foreign language, for speaking to clients and understanding written text
Level 4	Good proficiency in one foreign language

**Conflict Resolution:** Refers to preventing, anticipating, and resolving situations caused by internal and external interaction at work that result in disagreements and/or tension.

- **Internal conflicts:** conflicts between people working in the same establishment, regardless of their position. They may occur between people in the same department or section, different departments or sections, or involve all levels of the organisation.
- **External conflicts:** conflicts with/between clients, suppliers, or others who do not work in the establishment.

Examples: managing complaints involving suppliers or delivery mistakes or delays, or both.

Example of conflict that is internal and external at the same time: a waiter/ess who, when confronted with a dissatisfied customer, blames the cook who, in turn, says the customer is in the wrong.

Level 1	Does not require conflict resolution skills.
Level 2	Internal conflict management skills required.
Level 3	Conflict resolution skills required to deal with external conflicts involving clients and/or suppliers.
Level 4	Conflict resolution skills needed to deal with internal and external situations, and possibly both at the same time.



**Communication:** This sub-factor aims to determine the number of interlocutors with whom employees need to communicate in a given establishment. For the purposes of this sub-factor, different kinds of interlocutors are considered: colleagues, clients, subordinates, superiors, and suppliers. This criterion was selected because although the type of communication skills involved varies, they are equivalent in value, and have a significant impact on the work chain, so it is ranked according to the number of different types of interlocutors involved.

Level 1	1 Type of interlocutor
Level 2	2 Types of interlocutor
Level 3	3 Types of interlocutor
Level 4	4 Types of interlocutor
Level 5	5 Types of interlocutor

**Manual Dexterity/Skills:** Refers to the manual agility/nimbleness required to perform a task, namely in terms of:

**Dexterity** – agility and speed

Example: Serving at tables: serving drinks

- In the kitchen: carrying trays/plates.
- Tableware: speedy handling and care of dishes

**Meticulousness** – carrying out manual tasks that require precision and detail, and may involve working on small items.

Example: Decorating almonds

**Precision** – understood here as manual work that has to be accurate and flawless.

Example: Drawing a face on a birthday cake.

Level 1	Tasks involved do not require manual skills
Level 2	Tasks call for manual skills, namely dexterity
Level 3	Tasks call for manual skills, namely dexterity <b>and</b> meticulousness <b>or</b> accuracy
Level 4	Tasks call for manual skills, namely meticulousness <b>and</b> accuracy
Level 5	Tasks require manual skills, namely dexterity, meticulousness <b>and</b> accuracy

**Physical Agility:** Refers to the nimbleness needed to perform tasks, which may be restricted by the amount of space available or the way in which work is organised. For example, physical agility may be required for waiting at tables, cleaning work, washing and handling dishes, etc. Agility is ranked according to the frequency with which it is required.

Level 1	Agility is <b>not required</b> or required only <b>occasionally</b>
Level 2	Agility is <b>frequently</b> required
Level 3	Agility is <b>always</b> required

**Ability to Work Fast:** This sub-factor is intended to assess the extent to which fast working is needed in order to perform the tasks involved in the job. Ability to work fast is ranked according to the frequency that speed is required.

Level 1	Tasks involved may <b>occasionally</b> require ability to work fast.
Level 2	Tasks involved <b>frequently</b> require ability to work fast.
Level 3	Tasks involved <b>always</b> require the ability to work fast

**Creativity:** Refers to designing and introducing innovative/original elements when performing tasks and/or in the occupation concerned.

Examples:

- In the dining room: decorations (birthday or student parties, group lunches, dinners), furniture arrangement, displays (it is the first selling point; regularly changing displays); informing clients about dishes/drinks – entails constantly updating and systematically seeking new things;
- In the kitchen: changing meals foods, creating new recipes; inventing new combinations of seasonings, using new ingredients;
- At the service counter: preparing desserts (fruit arrangements);
- In the bakery: creating new cake decorations.

Level 1	Does not require creativity
Level 2	Requires creativity for designing or producing original initiatives and new solutions
Level 3	Requires creativity for designing and producing original initiatives and new solutions

## Factor: Responsibility

This refers to responsibilities that, because of their importance, can impact on the entire organisational system. Responsibility here relates to:

- **People** – health and safety, coordination, supervision, collaboration and work organisation;
- **Goods and equipment** (machinery, products and utensils used at every stage of the work process);
- **Documents and/or money** (bills, receipts, cheques, etc.).

Following are the **8 sub-factors** that define **responsibility** for the purposes of this sector, its aims and importance.

**Safeguarding the health and safety of others:** this sub-factor is intended to identify the various situations in which people's health and safety may be affected. Responsibility for safeguarding clients' health and well-being is vital, if risks to their health/lives from spoiled or contaminated food are to be avoided.

Examples:

Serving the customer

- Following the rules of hygiene when handling equipment and utensils, and avoiding direct contact with food by using the appropriate utensils;
- Attention to temperature and noise levels in the dining room.





### Service support

- Keeping service support tables clean;
- Separating waste, ensuring it is properly binned and discarded, and making sure rubbish/waste bins/containers are kept outside the kitchen;
- Knowing the correct amount of detergent/drying agent to use;
- Knowing the correct water temperature that ensures dishes, cutlery, etc. are properly cleaned;
- Taking into account the hardness of the water and its effects.

### Food preparation

- Observing the rules for defrosting food;
- Using different areas for work involving meat, fish, raw vegetables, and cooked foods;
- Disinfecting fresh vegetables and fruit;
- Observing the correct cooking times to guarantee food safety;
- Checking and recording cooking temperatures;
- Checking saturates content of oil and changing oils when necessary;
- Making sure recipients used in food handling/preparation/storage are clean and disinfected.

Level 1	Responsibility for health and safety when <b>attending to customers</b>
Level 2	Responsibility for health and safety when <b>providing service support</b>
Level 3	Responsibility for health and safety when <b>preparing food</b>
Level 4	Responsibility for health and safety in more areas than those referred to above

**Supervisory responsibilities:** Refers to responsibilities connected with overseeing the work of others in one or more sections/departments or in the entire establishment.

Level 1	No, or just occasional responsibility for supervising the work of a section.
Level 2	Responsibility for supervising the work of a section/department.
Level 3	Responsibility for supervising the work of two or more sections/departments.
Level 4	Responsibility for overseeing the work of the whole establishment.

**Cooperation:** Refers to responsibility for cooperation, in view of the fact that different sections and occupations are mutually dependent. Ranking is based on the extent to which cooperation occurs – with employees in one, two, or more sections.

Level 1	Corresponds to cooperation with employees in one section
Level 2	Corresponds to cooperation with employees in two sections.
Level 3	Corresponds to cooperation with employees in more than two sections.

**Preparatory tasks:** This sub-factor seeks to assess responsibility for preparatory tasks involved in a job, taking into account for whom and the frequency with which they are performed.

From the Work Design<sup>67</sup> perspective, performing a task involves two distinct occurrences – pre-

<sup>67</sup> REFA – Associação para o Estudo do Trabalho e Organização Empresarial (Association for Work Design/Work Structure, Industrial Organization and Corporate Development), Fundamentos da Metodologia de Estudo do Trabalho (1986).



paration for the job and execution of the job. Preparation is understood to mean the sub-tasks performed once, which make execution of the job itself possible. For example:

- **Task 1:** peeling and slicing a sack of potatoes.

Preparation for the job: fetching the sack of potatoes from the storeroom, arranging a recipient for the peeled potatoes, getting the necessary utensils ready for carrying out the job and, once the job has been done, cleaning up and putting away the utensils used.

- **Task 2:** cooking a dish of grilled fish

Preparation for the job: gutting/cleaning and preparing the fish for cooking, getting the necessary accompaniments to the dish ready, preparing the grill/barbecue coals and, later, cleaning and putting away all equipment used.

Complexity and responsibility increase according to for whom the preparatory work is done, while responsibility in the production chain of the person doing the preparatory work also increases.

Level 1	Corresponds to responsibility for preparing for one's own work.
Level 2	Corresponds to responsibility for preparing for work to be carried out by others.
Level 3	Corresponds to responsibility for preparing for one's own work and for work to be carried out by others.

**Products, equipment and materials:** Refers to responsibility for equipment, material and products used in the work station and/or section, i.e., ensuring food (flour, eggs, oil, meat, fish, etc.) and others products (detergents, etc.) are in good condition and correctly used (to avoid waste), as well as keeping equipment (slicing machine, coffee maker, dough roller, etc.) and utensils (cutlery, tablecloths, dishes) in a good state of repair.

Examples (conservation and use of products)

- Serving orders in good condition;
- Checking the quality of what is being served by its appearance and smell;

Examples (conservation and repair of material and equipment)

- Checking glassware for chips/cracks and cleanliness;
- Replacing chairs as soon as they are not 100% safe;
- Discarding rusty utensils;
- Making sure machinery and equipment is serviced at the scheduled times;

Level 1	No responsibility for conservation and usage of products and/or equipment and/or materials.
Level 2	Responsibility for the conservation and usage of products, by checking/observing expiry dates and correct storage conditions.
Level 3	Responsibility for the conservation and maintenance of materials and/or equipment.
Level 4	Responsibility for the conservation, use, and maintenance of products, equipment and materials.



**Work methods and processes:** This refers to responsibility for defining and planning work methods and processes, in terms of the person's own work and that of one or more sections/departments. The complexity and responsibility concerned are proportional to the number of sections/departments.

Level 1	Defining <b>and/or</b> planning one's own work.
Level 2	Defining <b>and/or</b> planning the work of one section/department.
Level 3	Defining <b>and/or</b> planning the work of two or more sections/departments.
Level 4	Defining <b>and/or</b> planning the work of the entire establishment

**Documents and money:** Refers to responsibility for receiving and/or handling the establishment's money and documents (bills, receipts, holiday chart, wage slips, absence justification slips, etc.).

Level 1	No responsibility for documents and money.
Level 2	Receipt and/or handling of documents.
Level 3	Receipt and/or handling of money.
Level 4	Receipt and/or handling of documents <b>and</b> money.

**Stock management:** Refers to responsibility for purchasing and/or managing the stock of food products needed for the establishment.

Level 1	No responsibility for stock management.
Level 2	Purchase of food products.
Level 3	Management of food products.
Level 4	Purchase and management of food products.

## Factor: Effort

**Effort**<sup>68</sup> is the response on the part of employees to any load that is assigned to them – the term load<sup>69</sup> being used here in the sense of all the negative influences with which people are encumbered in the workplace. Effort falls into two categories:

- **Predominantly energy exertion/physical/muscular** (body positions, repetitive movements, posture, lifting and/or carrying weights, and muscular exertion such as stacking/shelving drinks and food items);
- **Predominantly informative/mental** (sensory, such as concentration, and mental exertion, such as being exposed to interruptions and having to deal with unexpected situations).

Following are the **7 sub-factors** that define **effort**, for the purposes of this sector, its objectives and importance.

**Body position:** Refers to muscular exertion caused by maintaining the same body position (standing or seated) for given periods of time during the working day.

Level 1	In a sitting position throughout the working day.
Level 2	Standing for up to 2 hours a day.
Level 3	Standing for up to 4 hours a day.
Level 4	Standing for up to 6 hours a day.
Level 5	Standing throughout the working day.

**Repetitive movements:** Refers to the exertion caused by repetition of occupation-related movements during the course of the working day. The term repetitive movement is used to refer to any movement requiring a muscle contraction frequency of 15 or more per minute<sup>70</sup>.

Level 1	No repetitive movements involved in the job.
Level 2	Repetitive movements for up to 2 hours per day.
Level 3	Repetitive movements for up to 4 hours per day.
Level 4	Repetitive movements for up to 6 hours per day.
Level 5	Repetitive movements throughout the whole working day.

**Posture:** Refers to muscular exertion associated with the body positions that are necessary to do the job. Posture involving static muscular contraction (i.e. with no movement) is more damaging as it restricts blood flow. Examples of this would be stacking drinks in a fridge underneath a service counter.

Level 1	Working position involves elbows at right angles.
Level 2	Working position involves elbows at right angles and knees bent.
Level 3	Working position involves elbows at right angles and arms raised above the shoulders.
Level 4	Working position involves elbows at right angles, knees bent and head raised.

<sup>68</sup> CGTP-IN, Manual de Unidades de Formação em Higiene e Segurança no Trabalho, 1999, Lisboa.

<sup>69</sup> Ibidem.

<sup>70</sup> REFA, 1986.



**Lifting and carrying weight:** Refers to the muscular exertion required to lift and/or carry weights associated with the job/occupation (equipment, utensils, drinks, food items, etc.). Lifting and carrying weight is rated according to whether it is continuous or discontinuous, and with or without help.

Level 1	No lifting or carrying of weights required.	<10 kg	10 a 20 Kg
Level 2	Continuous lifting and/or carrying of weights with help (from people and/or machinery), discontinuous with help.	<10 kg	10 a 20 Kg
Level 3	Continuous lifting and/or carrying of weights with help (from people and/or machinery), continuous with help.	<10 kg	10 a 20 Kg
Level 4	Continuous lifting and/or carrying of weights with help (from people and/or machinery), discontinuous without help	<10 kg	10 a 20 Kg
Level 5	Continuous lifting and/or carrying of weights with help (from people and/or machinery), continuous without help	<10 kg	10 a 20 Kg

**Attention:** Refers to the mental effort exerted in performing the tasks. This sub-factor aims to assess the types of attention (divided and concentrated) involved. Concentrated attention is that which centres/focuses on a single point, while divided attention centres on various points.

Level 1	Tasks that require concentrated <u>or</u> divided attention.
Level 2	Tasks that require concentrated <u>and</u> divided attention.

**Managing the unexpected:** Refers to mental effort expended when a person is confronted with an unexpected situation that is not the result of their own action, but for which they must quickly find a solution.

Level 1	Mental effort required to manage unexpected situations involving goods (shortage of certain products, equipment breakdown, etc.).
Level 2	Mental effort required to manage unexpected situations involving people inside the establishment (colleagues).
Level 3	Mental effort required to manage unexpected situations involving goods <u>and</u> people inside the establishment.
Level 4	Mental effort required to manage unexpected situations involving people both from within the establishment (colleagues) <u>and</u> outside it (clients, suppliers).
Level 5	Mental effort required to manage unexpected situations involving goods, people within the establishment, <u>and</u> outsiders.

**Interruptions:** Corresponds to mental effort needed to deal with being interrupted (frequency of interruptions) to deal with other requests, and the impact interruptions have on the mental exertion required to resume the original task.

Level 1	Corresponds to no interruptions.
Level 2	Low mental effort required in connection with interruptions to work, because interruptions are only occasional.
Level 3	Medium mental effort required in connection with interruptions to work, due to frequent interruptions.
Level 4	High mental effort required due to constant interruptions to work and subsequent need to resume the tasks in hand without allowing the interruptions to affect the work being done.



## Factor: Working Conditions

**Working conditions**<sup>71</sup> refers to all the characteristics of the 7 essential elements of the working process (task, person, necessary means for the work, work process, input, output and influences), and to all the environmental influences that affect, positively or negatively, the person undertaking a task.

Following are the **9 sub-factors** that define **working conditions** for the purposes of this sector, its objectives and importance.

**Noise:** Is an acoustic phenomenon that produces an unpleasant or annoying audible sensation that is often harmful to people. It may be caused by machinery, equipment and/or people, and is rated here according to the frequency and length of exposure to it. This sub-factor refers to noise sources that affect people at their workplace.

Level 1	Sporadic noise from machinery, equipment, <b>and</b> people.
Level 2	Sporadic noise from machinery <b>and</b> equipment, but <b>constant noise from people</b> .
Level 3	Sporadic noise from people, but <b>constant noise from machinery and equipment</b> .
Level 4	<b>Constant noise from people, machinery and equipment.</b>

**Lighting:** Refers to the type of lighting and distribution of light sources (natural and artificial) in the space or area in which the job or function-related tasks are performed.

Level 1	Work area with mixed – natural and artificial – lighting.
Level 2	Work area with natural lighting, as well as artificial lighting with some poorly-lit areas.
Level 3	Work area with exclusively artificial lighting.
Level 4	Work area with exclusively artificial lighting where there are also poorly-lit areas.

**Thermal environmental conditions:** Refers to the possibility of exposure to sudden temperature changes, draughts, and extreme temperatures associated with the job (below 18° C and above 22° C or, exceptionally, above 25°C)<sup>72</sup>.

Level 1	Job and/or functions carried out in a mild and constant thermal environment.
Level 2	Job and/or functions carried out in a mild and constant thermal environment but that, due to the nature of the tasks involved, could entail exposure to draughts <b>or</b> sudden changes of temperature.
Level 3	Job and/or functions carried out in a hot <b>or</b> cold environment, <b>without</b> exposure to draughts <b>and</b> sudden changes in temperature.
Level 4	Job and/or functions carried out in a hot <b>or</b> cold environment, <b>with</b> exposure to draughts or sudden temperature changes.
Level 5	Job and/or functions carried out in a hot <b>or</b> cold environment, <b>with</b> exposure to draughts and sudden changes of temperature.

<sup>71</sup> REFA, 1986.

<sup>72</sup> Article 11, Decree Law 243/86, of 20 August

**Steam, fumes and toxic products:** Refers to exposure to steam, gas fumes (butane or propane) and/or chemicals in the space or area in which tasks associated with the function/occupation are performed. Included in this sub-factor are carbon monoxide (produced by the cooking process) and toxic products such as detergents, ammonia, and drying agents.

Level 1	Corresponds to no exposure to steam, fumes or toxic products.
Level 2	Corresponds to exposure to steam, regardless of its type and/or source.
Level 3	Corresponds to exposure to fumes/toxic products regardless of their type and/or source.
Level 4	Corresponds to exposure to steam <b>and</b> fumes/toxic products, regardless of their type and/or source.

**Weekend work:** Refers to work carried out on one or both weekend days (usually considered to be non-working days), and is rated here by frequency and day(s) worked.

Level 1	Corresponds to no weekend working.
Level 2	Corresponds to working either Saturdays <b>or</b> Sundays.
Level 3	Corresponds to working both Saturdays <b>and</b> Sundays.

**Split shifts:** Refers to working hours divided into two periods, i.e. with a break/interval, which can last up to 5 hours, between the two periods.

Level 1	Corresponds continuous working hours (no split shift work).
Level 2	Corresponds to split shift work with a break of up to 3 hours.
Level 3	Corresponds to split shift work with a break of more than 3 hours.

**Night work:** Refers to the frequency of working at night, i.e. between midnight and 07.00 hours on the following day<sup>73</sup>.

Level 1	No night work is involved.
Level 2	Corresponds to up to 5 night shifts worked per month, with day work.
Level 3	Corresponds to a week or more of night shift work per month, with day work.

**Pace of work:** Refers to the type of work pace (constant or variable) associated with the respective job.

- A **constant** pace of work means that it does not vary according to the times/periods indicated (seasons, days of the week, and time of day).
- A **variable** pace of work refers to situations that call for faster responses or a different manner of organising work to meet demands and which can therefore be more stressful. Work pace can be affected by:
  - seasonal aspects, e.g. during the Christmas and Easter periods;

<sup>73</sup> Clause 44 of the CCT - Contrato Colectivo de Trabalho (Collective Agreement) for the Restaurants, Cafes and Similar Establishments, published in the Boletim do Trabalho e Emprego (BTE), no. 28, of 29 July 2004, and subscribed to by the ARESP and FESAHT.



- the day of the week, depending on whether the establishment is open weekdays and/or weekends, its location, and time of day, especially meal times.

Level 1	Unchanging pace of work, regardless of the time of year, day of the week, or time of day.
Level 2	Pace of work varies according to the time of year.
Level 3	Pace of work varies according to the day of the week.
Level 4	Pace of work varies according to the time of day.
Level 5	Pace of work varies according to: <ul style="list-style-type: none"> <li>• the time of year and day of the week or time of day;</li> <li>• the day of the week and time of day;</li> <li>• the time of year, day of the week and time of day.</li> </ul>

**Risk of workplace injury and illness:** risk<sup>74</sup> refers to all situations, real or potential, that are liable, in the short, medium or long term, to cause harm to workers and/or the community, as a result of work.

Following are the risks/hazards that, with greater or lesser probability, can occur in the sector:

**Cuts** – especially in kitchens where contact with sharp objects is more frequent;

**Burns** – especially in kitchens where contact with hot oil is more likely, and tasks that involve carrying hot food and drinks;

**Falls** – in kitchens etc., especially when the floor surface is wet and no warning sign or anti-slip product is in place;

**Intoxication** – especially in kitchens, as a result of breathing carbon monoxide or chemical fumes;

**Explosion** – especially in kitchens;

**Fire** – especially in kitchens where there is proximity to cookers, burners, ovens, and hot fat;

**Electric shock** – especially in kitchens where sockets and electrical wiring are not properly earthed and/or regulations for using electrical equipment are not observed;

**Injury from impact** – especially in occupations related to product storage;

**Bodily injuries** – caused by falling objects that have not been properly stacked, and resulting in various types of injury;

**Aggression**, verbal and/or physical, occurring, for example, in dealings with difficult or inebriated customers;

**Damage to hearing** – including deafness, due to acoustic conditions, especially in kitchens because of the proximity of noisy electrical machinery and equipment;

**Dermatological disorders** – caused by contact with chemical products that can cause skin irritation;

**Communicable diseases** – due to contact with the public, and/or working in air conditioned environments when equipment filters are not properly serviced and cleaned;

<sup>74</sup> CGTP-IN, Manual de Unidades de Formação em Higiene e Segurança no Trabalho, 1999.



**Allergic disorders** – due to contact with chemical/toxic products that may cause a variety of allergic reactions;

**Stress** – related to workload/pace and having to deal quickly with orders;

**Musculoskeletal disorders** – related to repetitive movements, incorrect posture, physical exertion, handling and/or carrying heavy loads, etc. for long periods of time;

**Respiratory disorders** – as a result of exposure to varying temperatures, poorly-ventilated spaces;

This sub-factor aims to determine the number of risks to which an employee is exposed, regardless of the type of risk (the gravity of the risks and illnesses are considered to be equivalent).

Level 1	Up to 4 risks.
Level 2	Between 5 and 8 risks.
Level 3	Between 9 and 12 risks.
Level 4	Between 13 and 16 risks.
Level 5	Between 17 and 20 risks.





# Bibliography/ Resources

AA.VV. (2005), Actas da conferência final Garantir os direitos em material de igualdade de remuneração entre mulheres e homens, Lisboa, CITE (Encontros e seminários, nº 1)

AA.VV. (2004), Compilação de elementos para uma consulta especializada sobre igualdade de remuneração entre mulheres e homens, Lisboa, CITE (Estudos, nº 3).

BIT (1984), L'évaluation des emplois, Genève, BIT.

BIT (1998), Encyclopédie de sécurité et de santé au travail (1998), Genève, BIT.

CE (1996), Code de conduite concernant l'application de l'égalité de rémunération entre les femmes et les hommes pour un travail de valeur égale, Luxembourg, Direction Générale Emploi & Affaires Sociales/CE.

CCT para Restaurantes, Pastelarias e Similares, signed by the ARESP and FESAHT, published in BTE no. 28, of 29 July 2004.

CGTP-IN, (1999), Manual de unidades de formação em higiene e segurança no trabalho, Lisboa.

Chiavenato, Idalberto (2002), Recursos Humanos, São Paulo, Ed. Atlas

Chicha, Marie-Thérèse (2007), Atteindre l'égalité de remuneration au moyen de l'évaluation des emplois, Formação no Centro de Formação de Turim/OIT, 23-26 de Abril 2007 (Power Point presentation).

Chicha, Marie-Thérèse (2007), Promouvoir l'égalité de rémunération au moyen de l'évaluation des emplois: guide de mise en oeuvre, (Version Préliminaire), Genève, BIT.

Chicha, Marie-Thérèse (2006), A comparative analysis of promoting pay equity: models and impacts, Geneva, ILO (Working Paper, nº 49).

Chicha, Marie-Thérèse (2000), L'équité salariale: mise en oeuvre et enjeux. 2ème edit. Canada, Editions Yvon Blais.

Eyraud, François (1993), Egalité de remuneration et valeur du travail dans les pays industrialisés, Revue Internationale du Travail, vol. 132, nº 1, pp. 35- 52.

Freitas, Luís Conceição (2002), Gestão da segurança e saúde no trabalho, vol. I e II, Lisboa, Ed. Universitárias Lusófonas

Good Practice Guide - Job evaluation schemes free from sex bias, <http://www.eoc.org.uk> [consul. 22 August 2007].



Internationale des Services Publics, Équité salariale, maintenant!, Dossier d'information sur l'équité salariale, pp.72.

ISP, Reduciendo la brecha salarial de género. Guía practica para la revalorización del trabajo de las mujeres, pp.84.

REFA, (1986), Fundamentos da Metodologia para o Estudo do Trabalho, Darmstadt.

REFA, (1998), Metodologia para o Estudo do Trabalho: determinação de requisitos, Lisboa, Câmara de Comércio e Indústria Luso-Alemã.

REFA, (1999), Metodologia para o Estudo do Trabalho: diferenciação salarial, Lisboa, Câmara de Comércio e Indústria Luso-Alemã.

Tomei, Manuela (2005), Métodos de avaliação dos postos de trabalho sem enviesamento de género, Projecto «Revalorizar o Trabalho para Promover a Igualdade», Lisboa, EQUAL, (Power Point presentation).

UNIHSNOR (2005); Hotelaria e Restauração – Manual de Prevenção, Lisboa, ISHST.

# Glossary of Terms

## EQUAL

The EQUAL Community Initiative Programme whose aim is to promote new ways of combating all forms of discrimination and inequalities in the labour market. EQUAL is funded by the European Social Fund (ESF).

[[www.equal.pt](http://www.equal.pt)]

## Equal pay for work of equal value

Equal pay for work of equal value means that occupations that are different but require the same degree of demand in terms of skills, effort, responsibilities and working conditions are paid the same. It means that jobs may be different in content but equal in value

## European Social Fund (ESF)

Established by the Treaty of Rome, the ESF is a Structural Fund that focuses on promoting employment and the geographical and occupational mobility of the Community's workforce, and facilitating their adaptation to industrial and technological change through training and retraining.

[[www.equal.pt](http://www.equal.pt)]

## Factors (Evaluation Methodology)

Factors are the criteria that enable the demands of different jobs in an organisation to be considered. Skills, effort, responsibilities, and working conditions are the factors considered necessary and sufficient for job evaluation free from gender bias.

## Gender

Gender is a social design of biological sex, determined by the conception of tasks, functions and roles attributed to women and men in society and in public and private life.

[Final Report of Activities of the Group of Specialists on Gender Mainstreaming (1999) Lisbon: CIDM]

## Gender Bias

Is a form of benefiting or prejudicing one of the sexes, often resulting in gender stereotyping and prejudice, and representations associated with either men or women

[Adapted from M.T. Chicha, 2008]

## Gender equality or equality between men and women

Gender equality, or equality between men and women, means that men and women are entitled to equal rights, opportunities and treatment. It does not mean that men and women are the same or should be the same, but rather that men and women should be free to develop their personal abilities and make choices without the limitations set by prejudices and stereotyping.

[Adapted from ABC of Women Workers' Rights and Gender Equality, ILO]



## Gender stereotypes

Gender stereotypes are generalised and socially valued representations of what men and women should be (gender features) and do (gender roles).

[CITE , Training Manual for Gender Equality Trainers]

## Job evaluation method

A method for measuring the characteristics of jobs in an organisation, on the basis of four factors - skills, working conditions, effort and responsibility - in order to establish their relative value

[M.T. Chicha, 2008]

## Levels (in sub-factors)

The intensity, frequency, duration, and other dimensions of a sub-factor are measured by using a scale consisting of different levels, which make it possible to differentiate between jobs.

[M.T. Chicha, 2008]

## Remuneration

The term remuneration includes the basic or minimum wage or salary and any additional emoluments whatsoever payable directly or indirectly, whether in cash or in kind, by the employer to the worker and arising out of the worker's employment. According to Convention (no. 100) of the ILO, remuneration includes all paid components, in cash or kind, such as basic, overtime, seniority or bonus payments...

## Sex discrimination

Any distinction, exclusion or preference made on the basis of sex, which has the aim or effect of nullifying or impairing equality of opportunity or treatment.

- **Direct** – when a law or rule explicitly determines different treatment for men and women. For example, laws which do not allow women to enter certain professions.
- **Indirect** – when rules or practices that appear gender neutral can, in practice, place some people at a disadvantage in relation to others. For example, a rule that specifies certain height requirements for particular jobs: unless different height requirements are specified for women, the latter would be at a disadvantage due to an apparently gender neutral requirement, because men are generally taller.

[Adapted from C111 Discrimination (Employment and Occupation) Convention, and ABC of Women Workers' Rights and Gender Equality, ILO]

## Sex segregation in the labour market

Occupational segregation describes the phenomenon which sees women and men concentrated in different types and different levels of activity and employment, with women being confined to a narrower range of occupations (horizontal segregation) than men, and to the lower grades of work (vertical segregation).

[ABC of Women Workers' Rights and Gender Equality, ILO]

## Social Dialogue

Social dialogue as defined by the ILO includes all types of negotiation, consultation, or simply

exchange of information between representatives of governments, employers and workers, on issues of common interest relating to economic and social policy.

[ILO – Department for Social Dialogue, Labour Law and Labour Administration]

### Sub-factors (Evaluation Methodology)

In order to assess every aspect of the different jobs in an organisation, each factor in the job evaluation method is usually broken down into sub-factors.

[Adapted from M.T. Chicha, 2008]

### Weighting Grid (Evaluation Methodology)

The weighting grid, which shows the weight assigned to each factor and sub-factor, is a key dimension in a job evaluation method free from gender bias. Weighting evaluation factors consists of determining their respective relative importance and assigning them a numerical value.

### Work of equal value

Work of equal value is that which, whilst different in content in terms of skills, effort, responsibility, and working conditions, has the same value and should therefore be equally remunerated.



CGTP-IN – Confederação Geral dos Trabalhadores Portugueses – Intersindical Nacional (CGTP-IN - General Confederation of Portuguese Workers)

Rua Victor Cordon, n.º 1, 1249-102 Lisboa

e-mail: [cgtp@cgtp.pt](mailto:cgtp@cgtp.pt)

Telefone: (351) 213236500

Fax: (351) 213236695

ACT – Autoridade para as Condições de Trabalho

(ACT - Working Conditions Authority)

Avenida Casal Ribeiro, 18-A , 1000-092 Lisboa

e-mail: [geral@act.gov.pt](mailto:geral@act.gov.pt)

Telefone: (351) 213308700

Fax: (351) 213308710

ARESP – Associação da Restauração e Similares de Portugal

(ARESP - Portuguese Association of Restaurants and Similar Establishments)

Avenida Duque D'Ávila nº 75, 1049-011 Lisboa

e-mail: [aresp@aresp.pt](mailto:aresp@aresp.pt)

Telefone: (351) 213527060

Fax: (351) 213549428

CESIS – Centro de Estudos para a Intervenção Social

(CESIS – Social Intervention Research Centre)

Rua Rodrigues Sampaio, 31, S/L Drt<sup>a</sup>. 1150-278 Lisboa

e-mail: [cesis.geral@cesis.org](mailto:cesis.geral@cesis.org)

Telefone: (351) 213845560

Fax: (351) 213867225

CITE – Comissão para a Igualdade no Trabalho e no Emprego

(CITE - Commission for Equality at Work and in Employment)

Avenida da República, n.º 44, 2.º e 5.º 1069-033 Lisboa

e-mail: [cite@cite.gov.pt](mailto:cite@cite.gov.pt)

Telefone: (351) 217803700

Fax: (351) 217960332

FESAHT – Federação dos Sindicatos da Agricultura, Alimentação, Bebidas, Hotelaria e Turismo de Portugal

(FESAHT – Portuguese Trade Union Federation for the Agriculture, Food, Beverages, Hotels and Tourism Industries)

Páteo do Salema, 4, 3º, 1150-062 Lisboa

e-mail: [fesaht@fesaht.pt](mailto:fesaht@fesaht.pt)

Telefone: (351) 218873844

Fax: (351) 218870510

OIT – Organização Internacional do Trabalho (Escritório da OIT em Lisboa)

(ILO Office in Portugal)

Rua Viriato, 7 – 7º e 8º andares, 1050-233 Lisboa

e-mail: [jordaoa@ilo.org](mailto:jordaoa@ilo.org)

Telefone: (351) 213173440/9

Fax: (351) 213140149







Development Partnership:

