THE SEARCH FOR THE QUALITATIVE DYNAMIC IN JOB EVALUATION IN THE PUBLIC SECTOR

BY

JO WICKER

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[Signatures and names]
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CHAPTER 1: INTRODUCTION

Introduction

The search for an equitable exchange of something of value for the labor of humankind is ancient and universal. During the last 50 years, the practice of compensation developed into a profession in the United States as defined by the Department of Labor (DOL). According to the DOL there are five characteristics which separate a profession from an occupation. They are:

1. There must be a national organization or "some other type of recognized common voice" that can speak for its members and foster development in the field.

2. There must be a code of ethics that identifies standards of behavior relating to fairness, justice, truthfulness, and social responsibility.

3. The field must continue to expand its theoretical and practical knowledge base through ongoing research.

4. The field must possess a defined body of knowledge.

5. The field must have a credentialing organization which sets professional standards in the field (Society for Human Resource Management, 1994, v. 1, p. 23-24).

Compensation professionals are persons engaged in a highly specialized field of human resource management. It is a profession whose members are part economists, part statisticians, part analysts, and part artisans. The economic, statistical, and analytical components of compensation planning have received considerable research attention over the last three decades. However, the art, or the role of qualitative judgment, in compensation design is merely acknowledged by a nod toward the reality of subjective
judgment in the process. That nod is invariably followed by a cautionary note to keep the subjectivity well in check. This is especially true in the job evaluation stage of compensation design. Job evaluation is a method of comparing jobs by formal and systematic procedures in order to determine their relative value to the organization. Dov Elizur defines job evaluation's basic objectives as:

1. The comparison of jobs to determine their level within each occupational group.

2. The comparison of jobs between occupational groups; that is, to see whether the level of job X in one occupational group is equivalent to, higher or lower than, job Y in another occupational group (Elizur, 1987, p. 5).

In compensation planning, job evaluation is the function most subject to criticism and scrutiny because it is the bedrock of the pay plan. The product of job evaluation is a job hierarchy. The hierarchy illustrates the relative worth of jobs to the organization and their relationship to each other. Job evaluation also places jobs in relationship to the market and can be used to set salaries and wages. Its aim is to achieve equal pay for equal work (Elizur, 1987, p. 8).

**Purpose of the Research**

The purpose of the research is to try to isolate and identify the qualitative, or artistic choices, compensation professionals make in compensation design. The research question is twofold: First, do compensation professionals, working in the public sector,
recognize the qualitative judgments and choices they make in job evaluation? Secondly, does the public and political nature of public sector pay determine such choices? The purpose of the research is to describe the qualitative choices in terms of type and frequency. Additionally, the role of the public and political nature of pay in the public sector, specifically in the education sector, will be described. It will be described in terms of impact on the frequency and type of qualitative choices made in job evaluation.

**Chapter Summaries**

This applied research project includes 6 chapters, 3 tables, a bibliography and appendices. Chapter 1 introduces the subject, the qualitative dynamic in compensation design. Specifically, it speaks to the qualitative choice in job evaluation. The first chapter contains the research purpose and the chapter summaries. Chapter 2 is a review of the literature on job evaluation, its purpose, inception, development, and current status. The research setting is defined in Chapter 3 along with the research sample, which in this case, is unique. The working hypotheses are stated in Chapter 3. Chapter 4 contains the explanation of the research methodology, and an assessment of the methodology choice for this project. The analysis of the data is found in Chapter 5 along with a description of the statistics used. Chapter 6 contains the summary of the applied research project along with the conclusions of the researcher. Future research questions raised by this project are discussed as well. The Appendices contain an acknowledgment, the structured interview instrument, and transcripts of the interviews with the 6 participants.
CHAPTER 2: LITERATURE REVIEW

Overview

The literature has numerous references to the quantitative aspects of job evaluation. However, by comparison, there is a dearth of references solely dedicated to the study of the qualitative dynamics in job evaluation. From the references located by the researcher and listed in Table 1: *The Chronology of Job Evaluation Literature by Topic*, only one, "Interpersonal Affect and Rating Errors" was devoted solely to the qualitative dynamic of job evaluation. The purpose of the study was to determine the impact of affect as a *bias* in the *process*.1

The literature review did contain interesting asides about the illusive and troublesome qualitative dynamic:

1. ".....job evaluation systems] more of an art than a science, and awash in a sea of subjectivity....."(Manese, 1988, p. 4).

2. "Job evaluation is not a science. It's an art. It's more a profession than a scientific field. It's not measurement by micrometer. It's measurement by a yardstick--a grosser type of measurement" (Patten, 1987, p. 77).

3. "It [position classification] has not and probably will not develop into an exact science, such as chemistry, mathematics, or physics?whereby the value of a position may be weighed in an exact manner and assigned to classes on the basis of an absolute

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1 Emphasis added. Given the heavy emphasis of quantitative research over the last two decades, it is interesting that during eight years as a compensation practitioner, this researcher heard instructors, trainers, and leading thinkers in the profession, repeatedly refer to job evaluation as part science, part art.
formula. It is an objective approach in a sometime subjective and highly flexible field--people vary from themselves and others" (Yaeger, 1982, p. 21).

**TABLE 1: A Chronology of Job Evaluation Literature by Topic**

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Author</th>
</tr>
</thead>
<tbody>
<tr>
<td>1979</td>
<td>Job evaluation</td>
<td>Treiman, D. J.</td>
</tr>
<tr>
<td>1980</td>
<td>Critical assessment of conventional job evaluation methods</td>
<td>Elizur, D.</td>
</tr>
<tr>
<td>1982</td>
<td>Using job evaluation and pay surveys to deal with pay problems</td>
<td>Elizur, D.</td>
</tr>
<tr>
<td>1986</td>
<td>Interpersonal affect and rating errors</td>
<td>Tsui, A. S. &amp; Bruce, B.</td>
</tr>
<tr>
<td>1987</td>
<td>Psychological and economic aspects of pay equity</td>
<td>Elizur, D.</td>
</tr>
<tr>
<td>1987</td>
<td>Evaluating direct pay programs</td>
<td>Greene, R. J.</td>
</tr>
<tr>
<td>1987</td>
<td>Issues in cost containment</td>
<td>Patten, Jr., T. H.</td>
</tr>
<tr>
<td>1988</td>
<td>Incorporating employee values in job evaluation</td>
<td>Beuhring, T.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Milkovich, G. T.</td>
</tr>
<tr>
<td>1989</td>
<td>Sources of bias in job evaluation</td>
<td>Mount, M. K. &amp; Clarke, K. W.</td>
</tr>
<tr>
<td>1990</td>
<td>Link pay to job evaluation</td>
<td>Menge, C. J.</td>
</tr>
<tr>
<td>1990</td>
<td>Effects of job description content on job evaluation judgments</td>
<td>Smith, F. M., Hornsby, J. S. &amp;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Benson, P. G.</td>
</tr>
<tr>
<td>1991</td>
<td>Are job evaluations a barrier to excellence?</td>
<td>Emerson, S. M.</td>
</tr>
<tr>
<td>1991</td>
<td>Job pay for job work</td>
<td>Henderson, R. I. &amp; Clarke, K. W.</td>
</tr>
<tr>
<td>1993</td>
<td>Assessing construct validity of three job evaluation methods</td>
<td>Collins, J. M. &amp; Muchinsky, P. M.</td>
</tr>
<tr>
<td>1993</td>
<td>Estimating sex-related bias in job evaluation</td>
<td>De Corte, W.</td>
</tr>
<tr>
<td>1993</td>
<td>Job evaluation: The creation of and &quot;institutional&quot; myth</td>
<td>Quaid, M.</td>
</tr>
<tr>
<td>1994</td>
<td>Entrepreneurial approach to compensation</td>
<td>Cantoni, C. J.</td>
</tr>
<tr>
<td>1996</td>
<td>Reward strategies for reinvented public sector organizations</td>
<td>Leavitt, W. M. &amp; Greene, R. J.</td>
</tr>
<tr>
<td>1996</td>
<td>Broadbanding in the federal government</td>
<td>Leavitt, W. M. &amp; Schay, B. W.</td>
</tr>
</tbody>
</table>

Both researchers and compensation professionals acknowledge that qualitative choices are made. However, the preponderance of research literature leaves no theoretically legitimate place for such choices in quantitative job evaluation systems. Advocates of quantitative job evaluation view subjectivity and qualitative choices as a "corruption" of pristine quantitative plans. In *Systematic Job Evaluation and Comparable Worth*, Elizur states that, "most job evaluation methods apply absolute rather
than relative judgments" (Elizur, 1987, p.8). Maeve Quaid in her book *Job Evaluation: The Myth of Equitable Assessment* makes the observation that:

> behind the complex language and procedures of job evaluation, lies the belief that the act of ‘formalizing’ or ‘refining’ its methods can better, or more convincingly, solve the vexing problems of how to mediate between internal organizational equity, on the one hand, and external market competitiveness, on the other....science is the 'golden calf' of Western Civilization...people have come to identify the 'complex' with the 'scientific' (p. 47).

Given that the rational model still underlies much of current day-to-day business operations, it is not difficult to see that the more ‘scientific’ model(s) are preferred.

In quantitative systems, such as point factor, an effective job evaluation plan should reduce the complex dynamic of work to a numerical score.’ The generally recognized methods of job evaluation are: ranking, classification, factor comparison and point method. Of the four, the latter two are the most widely used and accepted. They are also the most “purely” quantitative.

The point method and factor comparison comprise the central conventional techniques in quantitative job evaluation. These have been modified in recent years with addition of more rigid regression techniques. Common to all these approaches is a firm reliance on step-by-step standardized methods and procedures, which avoid in varying degrees the vagaries of qualitative techniques (Elizur, 1987, p.85).³

It is understandable why quantitative methods are preferable to public administrators given the public and political venues in which they function. Cloaked in the mystique of scientific method, job evaluation results are more credible and therefore

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² This is no mean feat considering that it must evaluate work which is occurring within an environment of even greater complexity--the ever-evolving organization.
³ Emphasis added.
easier to defend. For the most part, the bureaucratic model still defines the environment of today's public administrators. Bureaucracy and quantitative job evaluation methods have a symbiotic relationship. Weberian organizational structure lends itself to quantitative methods (Osborne & Gaebler, 1994. pp. 12-13). In turn, the quantitative methods reinforce existing top-down structures by the very nature of their design. Still, the question remains. If job evaluation continues to be recognized as part art and part science by practitioners, what is the artistic dynamic? In other words, what are the qualitative choices? Furthermore, when, how and why are they used?

The History of Job Evaluation

To provide a context for these questions, it is important to have a general understanding of the development of job evaluation. Job evaluation is uniquely American even though it is now used in various forms in the other industrialized nations. Differentiation between the worth of jobs had its roots in the guild systems of pre-industrialized Europe. According to Donald Trieman, a basic tenet of job evaluation is that the job and not the worker is being evaluated (Trieman, 1979. p.1). That tenet still holds today in quantitative plans which rate and rank the job in an organization.

One of the earliest attempts at formal job evaluation occurred in the US federal government in 1838 (Quaid, 1993, p. 23). There are several anecdotal versions of the first instance of its use. However, Quaid states that the earliest recorded attempt occurred

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4 Even a cursory review of job evaluation would be remiss if it did not call the reader's attention to what is currently happening in the private sector. Global businesses are undergoing profound change at such a rapid rate that traditional compensation administration is falling by the wayside. However, the private sector is in such a state of flux that compensation practices cannot develop, be tried and tested before still a newer approach is demanded. As one author put it, "[It is] like a ship's captain who steers by looking backward at the wake..." (Cantoni, 1994, p. 54).
when a group of government clerks became upset that clerks in other branches were receiving higher pay and requested a formal investigation (p. 23).

...an inquiry be made...into the kind and character of the duties of the several clerks in all the departments and subordinated bureaus, and a general law be passed, apportioning and fixing salaries to duties, so that all clerks performing like duties shall receive like salaries and every clerk (regardless of the department to which the clerk belonged)...shall receive a salary larger or smaller, in proportion as the duties performed by him may, by Congress be deemed complex and responsible, or plain and easy (25th Congress, 2d Session, 1838) (p. 23).

In response, the Senate passed a resolution which required that department heads prepare a 'classification of the clerks...in reference to the character of the labor performed, the care and responsibility imposed, the qualifications required, and the relative value to the public of the services of each class as compared with the others' (p.23). The Senate language prefigured the classic compensable factors which drive all quantitative systems to date: skill, effort, and responsibility are couched in the directive.

Job evaluation moved into the private sector during World War II. This was promoted by decisions of the National War Labor Board allowing increases only to correct demonstrated inequities (Treiman, 1979, p. 1). Quaid adds two other stimuli to the development of job evaluation in the private sector: (1) management’s response to the growth of industrial trade unions and (2) rapid technological change (Quaid, 1993, p. 30). Rapid technological change speaks for itself. Management’s response to trade unions was to develop defensible wage structures and to stabilize those structures to ward off increasing collective bargaining efforts. Treiman, who was charged with the task of preparing an analysis for job evaluation systems for the Equal Employment Opportunity
Commission, points out that the use of job evaluations was widespread throughout both the public and private sectors. In 1979, he had no definitive data showing the number and types of workers covered by formal job evaluation systems (Treiman, 1979, p. 1). However, he did say in his report to the Equal Employment Opportunity Commission that:

...almost all federal employees, including those in the US Postal Service, are covered by job evaluation plans (Austin, 1977). Second, most state governments and most large county governments appear to use job evaluation systems (Craver 1977)...Third, the best available evidence suggests that the majority of large firms utilize formal job evaluation procedures--although the quality of the evidence leaves much to be desired (p. 49).

As both the private and public sectors moved into the decade of the eighties, then organizations primarily used classic hierarchical structures. Both sectors used job evaluation systems which reinforced those structures in the rank ordering of jobs by worth to the organization. Neither sector foresaw the massive, profound systemic changes which would reshape American business practices in both the private and public sectors.

**Job Evaluation Defined**

To have a full understanding of the importance of the job evaluation in shaping and maintaining organizational structures, a definition of the process is in order. Job evaluation is a method whereby a job is defined by a numerical score. That score may be used to place the job in a ranking with other jobs. It may be used to match it to jobs in the market for wage-setting. Dov Elizur defines it as a method of comparing jobs by use of a formal and systematic [usually quantitative] procedure (Elizur, 1981, p. 3). He cautions
that a clear distinction should be made between job evaluation and employee evaluation. Job evaluation is solely concerned with jobs and tasks and not with people. It is possible to do job evaluation for an organization which has no employees as long as it has job descriptions in some form.

The basic mechanism of quantitative job evaluation plans is to assign numerical weights to compensable factors. The rater then determines to what degree the factors are present in a given job. Compensable factors are those skills, attributes: and abilities, for which an employer will pay. The Equal Pay Act of 1963 designated four attributes [or compensable factors] which must be considered in determining job worth. They are: the skill, responsibility, and effort required to do the job; and the working conditions associated with it (Collins & Muchinsky, 1993, p. 895). Critical to the development and proliferation of quantitative plans is the recommendation of the National Academy of Sciences that a single job evaluation method be used to assess all jobs in an organization (p. 896).

**Areas of Job Evaluation Research**

The primary focus of job evaluation research falls into five categories:

1. Reliability of evaluations,
2. Validity of evaluations,
3. Abbreviated scales,
4. Comparison of job evaluation methods, and
5. Effects of rater's characteristics and bias in evaluation (Elizur, 1987, pp. 86-87). It should be noted that each of the topics focuses on a threat to the legitimacy of the
process. What is interesting about the focus of job evaluation research is the topic that is not addressed. None of the five topics asks the question: Does job evaluation do what it is purported to do--can it define the worth of jobs?

Collins and Murchinsky conducted a field experiment using three commonly used job evaluation methods. Their conclusion was that research to date supports the reliability of the methods. However, there are conflicting findings regarding validity (1993, p. 895). Their own research raised questions about the applicability of the compensable factors as stated in the Equal Pay Act of 1963. They observe that 'job worth may be far more situationally defined than researchers have realized' (1993, p. 903). Based on their own research, Collins and Murchinsky suggest caution in implementing the National Academy of Sciences's recommendation to use the same evaluation instrument across the organization (p. 903).

**Purposes of Job Evaluation**

Foremost, job evaluation attempts to provide a basis for equitable pay (Elizur, 1981, p. 14). Organizational-specific job evaluation plans insure that the organization's reasons for being are reflected in job sizing and pay. Valid job evaluation is necessary to give compensation professionals and management the rationale needed to make pay decisions based on the results of the evaluation plan (Menge, 1990, p. 98). Management wants to retain control of evaluation plans. It wants to reserve its right to use job evaluation as a component in the reward system (Patten, 1987, p. 77). Thomas H. Patten goes on to say that job evaluation is a managerial prerogative based on two theories which often remain unstated: (a) Management's view of the actual importance of specific

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5 Emphasis added.
jobs (demand) and (b) management’s view of actual or imputed scarcity of human talent (supply) needed for specific jobs (1987, p. 77). Job worth has traditionally been determined by two processes. One is an assessment of a job’s contribution to the overall organization. The second is a comparison of the level of pay other employers are paying for similar jobs (Collins & Murchinsky, 1993, p. 896).

Donald J. Trieman gives a systemic description of job evaluation in practice:

1. Gives order to a haphazard pay system,
2. Makes pay comprehensible to workers,
3. Sets a pay policy which may allow for deviations,
4. Allocates new jobs to appropriate locations in the [job] hierarchy, and
5. Produces a better plan by involving employees in the plan (p. 4).

Simply put, job evaluation is designed to address both the internal and external equity of pay.

Internal Pay Equity

Internal equity is the dynamic which occurs when one data entry clerk compares his/her pay with that of a colleague doing similar work and reaches the conclusion that the pay relationship is fair. Well-designed job evaluation plans can provide a credible hierarchy of job worth within the organization. Dov Elizur gives conceptual overview of internal equity in his book Systematic Job Evaluation and Comparable Worth.

An underlying thesis is that the growing complexity of organizations and the increasingly rapid proliferation of technological developments have necessitated a consistent and systematic basis for job comparison. Without this systematic basis inequities will inevitably be created and generate dissatisfaction and grievances. On the individual level dissatisfaction may be evidenced by lowered morale, higher absenteeism and [increased,
turnover. These are costly to organizations as they disrupt production and the replacement of employees leaving the firm requires investment in recruitment and training (p. 18).

External Equity

External equity is the dynamic which occurs when one data entry clerk compares his/her pay with that of one doing similar work in another organization and reaches the conclusion that the pay relationship is fair. Labor markets are similar to many other markets. The issue is supply and demand. Labor markets have buyers (the employers) and sellers (those who have skills to sell). In addition, they also have geographic boundaries. The market may be local, regional, state-wide, national, or international (Elizur, 1987, p. 45). For example, school bus drivers are typically recruited from the local area. However, teachers will be recruited from local or regional areas while superintendents may be recruited from an nation-wide pool of applicants.

Employers who utilize a well-designed evaluation plan can more effectively compare their pay for critical jobs with those of the market place. This enables the employer to refrain from over or underpaying employees which makes fiscal sense. It also contributes to employees' perception of pay equity. As Elizur notes:

Indeed perceived equity of wages appears to be more important than their specific magnitude. As such, employers would be well served in basing wage compensation systems on principles likely to convince employees of their equity. Job evaluation offers one rational option in the endeavor (Elizur, 1987, p. 48).

Comparable Worth

The essence of comparable worth in compensation is equal pay for equal work. Comparable worth as a body of legislation began in Europe shortly after the First World
War. In both Europe and the United States, comparable worth legislation was an attempt to gain parity in pay for women and other minorities. The hallmark legislation in the US is the Equal Pay Act of 1963 and Title VII of the Civil Rights Act of 1964 (Manese, 1988, p. 4). However, an in-depth review of comparable worth legislation and case law is beyond the scope of this literature review. It is appropriate to look at the observations of several researchers on the subject. Dov Elizur views the comparable worth issue as two-dimensional: (a) as an approach to wage and salary administration and (b) as a social and political movement to achieve equal right for women (Elizur, 1987, p. 13).

He further speculates that labor-market-based pay systems as a means for equity consideration may fall short of parity for women and minorities. The comparable worth movement in the US seems to be mute evidence of this conclusion (1987, p. 49).

Congress, to date, has rejected the notion of comparable worth in favor of [equal pay for] equal work. Justice Rehnquist captures congressional intent in his dissenting opinion in County of Washington v. Gunther (452 US 967):

Congress realized that the adoption of the comparable worth doctrine would ignore the economic realities of supply and demand and would involve both governmental agencies and courts with the impossible task of ascertaining the worth of comparable jobs, an area [job evaluation] in which they have little expertise (Manese, 1988, p. 5).

On a lighter note, Civil Rights Commission Chair, Clarence Pendleton, referred to the notion of comparable worth as "the looniest idea since Looney Tunes" (Manese, 1988, p. 11). Rynes, Weber, and Milkovich conducted a study which looked at the effects of market survey rates, job evaluation, and gender on pay. They found scant evidence of compensation differentials between men and women doing the same work. What they
did find were males and females segregated\textsuperscript{6} into jobs that pay differently (Rynes, et al. 1989, p. 114). They note that where market pay survey data and job evaluation results conflict, judges tend to go with the market data (p. 115).

A common theme in the literature was that job evaluation is one of several methods employers utilize to insure that the notion of comparable worth is not violated.

**Development of Job Evaluation Methods**

There is a variety of job evaluation plans. However, they share a similar methodology. The first step usually involves a careful description of the job being evaluated. Next, each job is evaluated with respect to its value or worth to the organization. Then the jobs are ranked and the job hierarchy is developed. The results of the evaluation are used to set salaries and wages for the jobs. In some instances, placement in the hierarchy automatically sets the wage. The US Civil Service General Schedule (GS) system is an example of this type of wage determination (Trieman, 1979, p.2). Job evaluation plans fall into categories: (a) qualitative methods such as ranking or classification and (b) quantitative methods such as factor comparison and point factor .

**Ranking**

This is a qualitative procedures suitable for organizations with a small work force. The jobs are simply ranked from high to low by a member of upper management or the owner of the firm. Typically, there is no further definition.

\textsuperscript{6} Emphasis added.
Classification

In this method, an idealized hierarchy is determined. Categories of skill, effort, and responsibility are established as well as the degree to which they are required by the various jobs. Each job is fitted into the ideal structure by comparing its characteristics with the idealized level for each category. The US Civil Service Commission's GS is the best known classification system. However, Trieman notes that a difficulty with this method is that jobs with differing levels of two or more categories, i.e., skill or effort, do not always fit into the hierarchy. When this happens, arbitrary judgments are made by the raters to place the jobs (Trieman, 1979, p. 3). Elizur has identified six serious limitations to the two qualitative methods. They range from lack of defined and objective criteria for the comparison of jobs to the need to deal with interrater differences. In addition, he states that existing inequities may be perpetuated by these methods (p. 23).

Factor Comparison

With this method all jobs are ranked on a set of items, applying one item at a time. The items usually include mental requirements, skills, physical requirements, responsibility, and working conditions. (Elizur, 1981, p.24) On each factor, each of the jobs is evaluated and given a score by locating where it best fits on the emerging scale (Trieman, 1979, p. 3). This is a very complex, cumbersome, and highly subjective method. More importantly, this method is very unpopular with employees since it is difficult to understand (Trieman, 1979, p. 3). It is easy to see why factor comparison is the least used of all the methods.
Point Method

This is the most widely used evaluation method. A set of factors is chosen. Usually they are the four classic factors: skill, effort, responsibility and working conditions. The four main factors may be divided into any number of sub-factors. For example, skill could be subdivided into education, experience, knowledge, etc. A weight is assigned to each factor. A position analysis, job description, or employee questionnaire is used and the degree to which the factors and subfactors are required by the job is measured. This results in a numerical score or value for each job. Jobs are then grouped according to various mathematical models into job grades which become pay grades.

Elizur states the reason for the method’s popularity is the quantitative and analytical nature of the instrument. It also uses the same measurement standard for all jobs. (Elizur, 1981, p. 26.) However, he cautions that the point method is not a scientific technique in spite of its use of quantitative data analysis. It still involves a large measure of subjectivity in assigning numerical weights to the factors. Elizur also points out that the mathematical manipulations with scores of multiplying and adding have no theoretical or statistical justification (p. 27).7

Measuring the Effectiveness of Job Evaluation

The measurement of job evaluation effectiveness has been the subject of a wide variety of articles ranging from psychometric to economic focus. Elizur reports that to date [1987] the research is uneven and addressed mainly measurement issues. He points

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7 The emperor may have no clothes.
out that a limitation of the research was the overlooking of two crucial issues: selection of the items, and establishing their relative weights (Elizur, 1987, pp. 86-87).\(^8\)

**Types of Measurements**

According to Elizur, five main topics of interest are found in empirical research:

1. Reliability,
2. Validity,
3. Abbreviated scales,
4. Comparison of job evaluation methods, and
5. Effects of rater's characteristics and bias in evaluation.

The review of later literature revealed a sixth topic—market impact.

**Reliability of Job Evaluation Methods**

Reliability refers to the accuracy of a measuring instrument. It can be evaluated by the degree of agreement between various raters evaluating a job at the same time or in terms of agreement in various ratings by the same rater at different times (Elizur, 1987, p. 87).

In a study of the effects of job description content on job evaluation outcomes, researchers Brien N. Smith, Jeffrey S. Hornsby, and Philip G. Benson note that previous research showed that the manipulation of job title alone effected the points awarded to a significant degree during the evaluation (Smith, et. al., 1990, p. 301). In their own research, they found that job information placed at the beginning of the job description

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\(^8\) Several articles addressing these two issues were done in the 1990's and will be reviewed later in this document.
[primacy effect] carries more weight in the judgment process. In addition, they found that the inclusion of non-essential tasks in a job evaluation had the result of diluting the pertinent information when the mathematical scoring was done (p. 307).

Validity of Job Evaluations

Earl Babbie defines validity as: Referring to the extent to which a specific measurement provides data that relate to the commonly accepted meaning of a particular concept (Babbie, 1992, p. 135). Simply put, is the instrument measuring what it is designed to measure? Elizur states it another way. He says that validity is concerned with the question of the measurement’s relevance to some outside criteria. In the context of job evaluation instruments, he notes that to date [1987], the selection of job aspects to be evaluated has been based on intuitive principle (p. 90). The myriad ways that job factors are selected is beyond the scope of this literature review. However, Trieman’s summary statement on validity imparts a sound sense of the process:

There are two basic ways of arriving at factor weights. They may be assigned directly by the designers of the systems to a priori judgments about how much each factor should contribute to the total worth of a job. Alternatively, they may be divided empirically in such a way as to reproduce as closely as possible the existing wage hierarchy (p. 7).

Effects of Rater’s Bias in Job Evaluation

Michael K. Mount and Rebecca A. Ellis in their study, "Sources of Bias in Job Evaluation: A Review and Critique of Research," looked at three potential sources of bias in job evaluation: (1) direct bias, (2) indirect bias, and (3) sex-of-rater bias. The

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9 It is the experience of this researcher that employees will list the tasks they deem most important first in a job analysis questionnaire. The task(s) may or may not be the most important in terms of the organization’s definition of the job.
empirical studies they reviewed had little evidence of either direct bias or sex-of-rater bias. However, they did find consistent support for indirect bias in job evaluation. They defined indirect bias as job evaluation judgments influenced by knowledge of potentially discriminatory current wages (p.153).

Rynes, Weber, and Milkovich's study conducted the same year on "Effects of Market Survey Rates, Job Evaluation, and Job Gender on Job Pay", also found little direct gender bias in job evaluation. They did report studies which found that information about current market wages had a substantial impact on the evaluation points assigned (p.114).

In a study done by Anne S. Tsui and Bruce Barry on "Interpersonal Affect and Rating Errors" in performance evaluations,¹⁰ they found that affect directly influences the quality of job performance ratings (p. 387).¹¹

Selection and Weight of Compensable Factors:

Again, this is a complex aspect of job evaluation and one that has its own body of research literature. In this literature review, only a cursory look was taken at the concept of selection and weighing of factors to incorporate it into the total process of the job evaluation process.

Elizur in his book Systematic Job Evaluation and Comparable Worth, reports that little effort has been directed to date [1987] at assessing validity of item selection. He

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¹⁰ Even though this study's focus is performance evaluations, one could reasonably consider that the evidence they found might be applicable to job evaluations. This consideration is reasonable because the cognitive activity in both functions is similar even though one process focuses on the incumbent and the other focuses on the job.

¹¹ This is pertinent to job evaluation especially when employees make up all or part of the job evaluation committee.
states that item selection has been based on intuitive principles without benefit of a comprehensive theoretical methodology (p. 90). For Elizur, a second critical issue is the application of factor weights. They are often assigned by evaluation committees or regression methods using predictive equations based on criteria such as labor market rates. Review of the outcome indicates weighting plans render them obscure or 'contrary to common sense'. Elizur says, "Furthermore it is unclear whether the use of weighting is at all necessary" (p. 90).

Wilfried De Corte in developing a model-based approach to job evaluation says that the development of a point method is typically based on two quantification operations. The first has to do with the scaling of factors and the second involves weighting the factors and the use of weights in the calculation of job worth (De Corte, 1993, p. 85). His proposal is to move in the direction of replacing sets of highly specific quantification decisions with explicit statements of a larger number of simpler evaluations. He makes the case that this approach is more transparent and more easily understood and accepted (p. 91).

One point of agreement in the literature on measurement is that certain aspects of job evaluation are subjective and will remain so. The disagreement questions where the subjectivity is occurring in the job evaluation process, and where, if at all, is the subjectivity appropriate.

Market Impact on Job Evaluation

Rynes, Weber, and Milkovich looked at the impact of market rates on job evaluation outcomes and found it is indeed a determinant. They found that market
variables such as current pay and the market rate explained more variance in assigned pay that job evaluation points do. Like other previous researchers, they found that job gender does not appear to have systematically affected pay assignments (p.114).

**Summary of Job Evaluation Measurements**

Research in job evaluation measurements has, for the most part, ruled out gender as a bias. It has found the market to be a significant factor in the distribution of points. Various authors have reached the same conclusion. Most systems will lead to approximately similar results and no one system has a distinct advantage over another. Quoting Edward Lawler, Elizur said, "My feeling is that it does not make much difference which of the better known methods is used; what make a tremendous difference, however, is who used the method and how", (Elizur, 1987, p. 95).

**Job Evaluation and Pay Practices in the Public Sector**

Pay practices in the public sector take on significance due to the sheer number of entities and workers involved. According to Leavitt and Greene, there are some 87,000 state and local units of government. More than 15 million full- and part-time employees work in this sector which represents approximately 13 percent of nation's work force according to 1991 US Bureau of the Census data (Leavitt & Greene, 1996, p. 47).

Brigitte W. Schay reports that hierarchical pay structure and narrow pay grades characterized compensation in the federal government since the 1923 Classification Act was passed. The same trend was also present in the private sector for some 40 years (Schay, 1996, p. 32). She goes on to say that the traditional narrow pay grades are associated with controlled salary management and job evaluation procedures that focus
on the job description rather than the employee's contribution. Such practices work well in stable, fixed organizations. However, they no longer meet the needs either public or private employers who must operate in a fast-changing international, high-tech environment (p. 32).

The decade of the nineties saw a fundamental shift in public government administrative philosophies. The bureaucratic paradigm is no longer the only viable one. Public entities are following private organizations in emphasizing a leaner, more responsive, and higher performing work force. Coupled with this is more citizen/client involvement and reformed civil service systems (Leavitt & Greene, 1996, p. 47). Leavitt & Greene characterize their observations with David Osborne and Ted Gaebler's (co-authors of Reinventing Government: How the Entrepreneurial Spirit Is Transforming the Public Sector) now-famous line, "steering more and rowing less" (p. 47).

Public Sector Pay Issues

Even with the move toward more entrepreneurial systems, the public sector still retains unique qualities which impact how pay is delivered. The primary ones are the political and public arena in which pay decisions are made.

Public Impact on Pay

A powerful influence on pay practice in the public sector is the very public nature of pay decisions. Under the Open Records and the Freedom of Information Acts, salaries and wages of public employees can be easily obtained by the media and private citizens. Such information is often used in ways which further personal agendas and do not necessarily benefit the public good.
Political Impact on Pay

As Yaeger points out in his report, *Position Classification and Pay Survey Approach to the Pay Problem*, most public entities elect to formally or informally think of themselves as average paying employers. They do not want to be accused of inflating salaries or of keeping wages at or near the minimum wage level (Yaeger, 1982, p. 69).

Due to the legal restrictions in the public sector, few public managers have the administrative discretion of those in the private sector. Leavitt and Greene observe that public managers function within a system of rules and statues. The primary function is not\(^{12}\) to achieve maximum efficiency but to ensure stability of service, accountability, and equality of treatment of employees (p. 47). All too often, public employees are rewarded for compliance rather than innovation.

**Job Evaluation in Transition**

According to Leavitt and Greene, over time a culture of entitlement takes over in the public sector because it faces little or no competition in the marketplace (p. 48). For example, the public education sector in Texas is a 13-14 billion dollar enterprise with no serious threat to its monopolistic position. There simply is no other entity, to date, which is a serious threat to its exclusive ability to administer the educational mandates of the state. In many instances, the local school district is the largest employer in the community. However, there are signs that systemic changes are taking place.

The move toward privatization of some government services will introduce an element of competition from the market and require that public sector pay programs

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\(^{12}\) Emphasis added.
become more competitive. Among the first steps of reform is the delayering of bureaucratic structures and reducing the number of job classifications. Without accompanying changes in the pay systems, the result is a flatter, leaner, even high-performance organization, with pay still delivered through the old hierarchical pay system (Leavitt and Greene, 1996, p. 48). A "fit" no longer exists between the organizational structure and compensation. This leads to employee frustration, high turnover, and low morale. In other words, public officials and administrators may have a mission for their agencies, but employees will not be aligned with that mission if the compensation plan does not reward them for the new behaviors required by the new structure (p. 48).

**Changing Corporate Structure’s Impact on Job Evaluation**

In "Job Evaluation: A Barrier to Excellence?", Sandra M. Emerson says that job evaluation systems (in use in the early nineties) are unreliable in targeting the market values of most jobs. She also observes that there is a misfit between the traditional systems and the current demand for product and service excellence. Current structures not only fail to support management objectives, but also frustrate efforts of organizations to reform. In addition, the rigidity of the point factor rating systems assumes that the position remains static which rewards employees for non-adaptive, non-problems solving behavior. This results in employees who cannot or will not solve problems in a market driven economy (pp. 39, 44, & 45).

Robert Greene poses the question of effectiveness or efficiency in pay programs. Is it appropriate? The roots of the compensation plan should be in the nature of the organization as expressed by its mission, objective, and environment. This results in

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13 Emphasis added.
rapid and unpredictable changes in compensable factors as organizations struggle to adapt to an ever-fluctuating business environment (pp. 61-62).

One of the changes emerging in the private sector is the concept of person-based pay--a radical departure from the traditional concept of pay for the job. Person-based pay is also known as skill-based, knowledge-based, and competency-based pay. It rewards personal skills and competencies as they are acquired on the job. As a result, it reinforces employee involvement, provides incentives, and increases employee flexibility (Leavitt & Greene, 1996, pp. 50-51).

In the public sector, entities are facing the same dilemma as their private sector counterparts. How do they develop job evaluation systems which will reward personal skill, innovation, and service orientation which is being demanded by the public? Two Navy laboratories took advantage of a provision in Title VI of the Civil Service Reform Act of 1978. It allows federal agencies to experiment with alternate personnel systems under waivers granted by the US Office of Personnel Management (OPM). As a result, the Navy labs instituted a broadbanding approach to pay. The legislation is not carte blanche. It also requires rigorous evaluation of the results the alternative projects (Schay, 1996 p. 34). The results of these projects led the National Academy of Public Administration (NAPA) to advocate broadbanding as an alternative to traditional job classification (p. 34).

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14 **Broadbanding** is a compensation technique which incorporates several traditional pay grades into one band. Schay describes it as a successful way to deliver greater flexibility; promote lateral development; support business goals; develop skills; encourage team focus; and focus employee attention away from vertical advancement (1996, p. 34).
George J. Menge advocates linking pay to job evaluation in his article by that title. He also suggests that a customized, organization-specific method of job evaluation can help resolve some of the current pressing issues in devising reward systems for professionals in both the private and public sectors. This is done by incorporating the organization's business objectives, goals, and values into the plan (Menge, 1990, p. 98).

The common theme throughout all the literature addressing the changing business environment for both the public and private sectors is flexibility. Organizations must be free to and willing to make adaptations necessary to reward appropriate employee behaviors for today's business and service climate.

The Qualitative-Only Method of Job Evaluation Dilemma

Maeve Quaid in her book, *Job Evaluation: The Myth of Equitable Assessment* makes the following observation:

> By viewing job evaluation as an eminently 'rational' process, with rational people setting rational standards and ending up with rational outcomes, researchers have allowed their attention to be deflected from other possible ways of perceiving or interpreting the functions of job evaluation (Quaid, 1993, p.223).

As reported on page 4 of this document, she quotes G. Koprowki's statement that 'science is the golden calf' of Western Civilization (p. 47) thus capturing the public and private sector's penchant for choosing the scientific and quantitative business models. Dov Elizur states flatly that 'The mathematical manipulations of multiplying and adding and assignment of money values to the resulting score have no theoretical or statistical justification' (Elizur, 1987, p. 90). The more recent literature, 1988-to date, tends to find the qualitative methods more and more restrictive and less supportive of the rapid change

The Qualitative-Quantitative Dichotomy in Job Evaluation

According to Elizur, job evaluation is based on judgments--absolute and relative judgments. Absolute judgments define something as 'good' or 'not good', 'appropriate' or 'not appropriate'. Absolute judgment is made independent of other judgments. Relative judgments deals with a set of attributes and attempts to compare them. 'Which one is better?' 'What is more appropriate?' He gives the example: 'Which job require more initiative, job A or job B?' An absolute approach to the question would be: 'What degree of initiative is required to perform the job?' (Elizur, 1987, p. 8-9). Further, he says that certain authors, (Madigan, 1985), are of the opinion that job evaluation is inherently subjective (Elizur, 1987, p.9).

Earlier in this document, it was suggested that if the incumbent was known to the rater, affect could influence the evaluation process (Tsui & Bruce, 1986, p. 597). Depending on the wording, one could conceivably rate a job up or down one labor grade--'a common dilemma in job evaluation' (Patten, 1987, p. 81). Anecdotal evidence points to other factors\(^\text{15}\) (Reynes, et al. (1989) p. 115). Evaluation of jobs is primarily a subjective judgment process. Little research attention has been given to cognitive processes (Smith, et al., 1990, p. 30). Just this brief sampling of the research shows a growing tension between the old, stable, defensible forms of highly quantitative methods and the increasing need for job evaluation that can adequately "capture" the jobs in rapidly changing organizations.

\(^{15}\) Emphasis added.
Job Evaluation: The Myth of Equitable Assessment

Maeve Quaid wrote a book in 1993 whose title identifies this section of the literature review on job evaluation. The book is the outgrowth of her research for a doctoral thesis at the University of Oxford. Her research was a case study out of which came a premise this researcher did not find in any of the literature--job evaluation as an institutional rationalized myth. The scope of this document does not allow a full examination of Quaid’s work. However, it lays bare the dilemma faced by compensation practitioners of justifying, to themselves and their organizations, the use of qualitative decisions in job evaluation. Therefore, a brief overview is in order.

The Fallacy of Job Evaluation as an Authentic Assessment Mechanism

She challenges the perception from which job evaluation is commonly perceived. Quaid states that by viewing job evaluation as an eminently 'rational' process, with rational people setting rational standards and ending up with rational outcomes, researchers have allowed their attention to be deflected from other possible ways of perceiving or interpreting the functions of job evaluation (Quaid, 1993, p. 223). Quaid sees another dynamic. She attributes the main reason for the proliferation of job evaluation techniques as an attempt at 'meaning management' and social construction and reconstruction of reality.

From the social-constructionist perspective, job evaluation is defined here as an 'institutional, rationalized myth'. Job evaluation is institutional because actions are repeated and given similar meanings by the custodians of the system and those who fall under its administration. The set of meanings that evolve from job evaluation is expressed in belief (ideology), activity (norms and rituals), language, and other symbolic forms through which the members of an organization both created and sustain views and images of job worth and values. Job evaluation is rationalized
because it takes the form of rules, specifying the procedures necessary to accomplish the end goal of determining an internally equitable and externally competitive pay structure. Job evaluation is a myth because it is a process based on widely held beliefs that cannot be objectively tested; the technique is accepted as ‘true’ because it is believed (pp. 223-224).

Quaid uses the theoretical concept of social constructionism which says that social reality is a human construction that social reality is created in social interaction. It is about the way social reality is created, in this case in employing organizations (p. 225). She interprets job evaluation as a complex set of images or symbols that act to define social reality within the organization (p.23).

Quaid constructs the case for job evaluation as a rational, institutionalized myth in this way. She claims that job evaluation is a complex set of images or symbols that serves to help define the social reality for an organization. It creates a rationale for payment issues that provide order and logic to an indeterminable process. It garners power as a myth because of its rational basis. Its complex statistical charts, scoring devices, job evaluation criteria, etc., lends credence to the idea that it is possible to place the 'correct' value on jobs (pp. 232-233).

According to Quaid, the rules and procedures associated with job evaluation techniques provide the concrete substance for the myth. She suggests that the rules and procedures can be viewed as an elaborate story or narrative. This helps managers explain to workers why jobs are valued as they are. Without the narrative, Quaid argues that managers would be at a loss to make sense of the existing hierarchy and to defend it (p. 233).
Job evaluation is not only a rationalized myth, according to Quaid, it is also an institutionalized rationalized myth. She explains this by noting that during the evaluation process, actions are repeated and given similar meanings by participants and observers. It takes two forms: (a) It is institutionalized in that it is pervasive throughout the private and public sectors, and (b) It is institutionalized to the extent that the process is acted and enacted in a continuous manner within organizations. It is an ongoing process. The repetition becomes a ritual (p. 234).

Maeve Quaid’s own words provide the best summary:

Job evaluation can be interpreted, therefore, as a concrete materialization of implicit assumptions and traditional values hidden amidst a set of charts and graphs. In this sense, job evaluation removes the pay-determination process from everyday economic discourse and places it on the realm of the scientific or the mystical. It provides a verbal explanation and justification for an organizational hierarchy that might otherwise have been difficult to explain. Job evaluation beams back to employees and workers the notion that the current structure of inequality is right and just (p. 254).16

At this point in the literature review, there is an impasse. The choice is to persist adhering to a highly structured, quantifiable job evaluation system. To do this, one must ignore compelling research evidence which questions its ability to adequately measure job worth; not to mention its inability to adapt to changing business climates. Even its validity as a measurement tools is called into question.

On the other hand, there is Quaid’s premise that the entire function of job evaluation is a 'smoke and mirrors' device used by management to keep employees

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16 This researcher takes issue with the last sentence. It categorically assumes that all employers compensation plans are unjust and inequitable. Although Quaid’s work is provocative and raises a host of research questions, the last statement is the grain of salt with which the rest of her work must be taken.
confused and management-dependent. Is there no solid theoretical ground for the compensation professional who knows that compensation design is part science-part art (Manese, 1988, p. 4; Patten, 1987 p.77)? Perhaps there is.

**Pragmatism and the Public Administrator**

Patricia M. Shields's article, "Pragmatism: Exploring Public Administration's Policy Imprint," provides a solid place for the compensation professional to stand between theory and 'the messy world of bureaucracy' (Shields, 1996, p. 395). As reported earlier in this document, Leavitt and Greene observed that public organizations do not enjoy the luxury of being assigned programs and projects that are possible to accomplish (Leavitt & Greene, 1996, p.47). An example is a school district whose public mandate is to have all children reading on grade level by grade three. However, the population of that school is highly transitory with a large population of migrant students. They go on to note that programs and projects (like the example cited) are selected on the basis of what should be done, not on what can be done (p. 47). It is within these tensions that compensation professional must work to bring some legitimate order and equity to a district's pay practices.

**Pragmatism and the Art/Science of Job Evaluation**


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17 Shields article refers exclusively to public administrators. However, in keeping with the theme of this literature review, public administrator will be replaced with compensation professional(s). This does not violate the focus of her work since the definition of compensation professional(s) in this section are those persons who practice in the public education sector of Texas i.e. public administrators.

18 Emphasis added.
Pragmatism is a method of learning that focuses on process. This method draws from the scientific method [which also spawned the quantitative job evaluation models]. In this model, knowing and learning are connected. Knowing become part of the natural process of adjustment. Experiences and consequences that flow from the action become part of knowing--action and knowledge cannot be divided (p. 396).

Pragmatic truth is defined by its 'respective practical consequences...’ Holistic is another characteristic of pragmatism. It is the whole puzzle, the entire experience, embracing the novelty with no concrete facts denied. Therefore, it can incorporate dualism such as politics/administration; fact-value/theory-practice. 'It dwells in the world of tangled, muddy, painful, and perplexing concrete experience’ (p. 397)--familiar territory to the compensation professional. 'What works' is a useful organizing principle because it can be applied to so many diverse administrative [compensation planning] contexts (p. 397).

Shields points out that James has a practical justification for theory as a 'labor saving contrivance' (p. 398). Therefore, the chief value of theory for the pragmatic compensation professional is that it can be used as an organizing device to help solve real world problems (p. 399). She also observes that pragmatism is applicable at all levels of administration. While the pragmatic approach does not guarantee that the method used will work, it calls for action and then reflection upon that action (p. 403). The reflection may lead to different action or a course correction. In addition, there is an ethical component to pragmatism which calls for assessment of the end result(s) against a standard of democratic values and the public good (p. 405). Shields, as well as Leavitt
and Greene (Leavitt & Greene, 1996, p. 47), note that all public administrators are faced with more constraints than their fellows in the private sector:

...administrators in American bureaucracy are more likely to get in trouble if they instigate change than to be rewarded. Instead of learning to act, experience and consequences may teach administrators to duck. It is, however, a fragmented pragmatism. It does not provide the [compensation professional] with either the tools of pragmatism or a commitment to ethics (Shields, 1996, p.405).

**Conclusion**

In this chapter, the reader has followed the development of job evaluation in the public sector from its primitive beginnings when federal clerks pleaded for pay related to their work 'be it be deemed complex and responsible or plain and easy' (Quaid, 1993, p.23). Next came the era of scientific management and with it stringent, rigid evaluation plans followed by decades of stable bureaucracies with highly developed plans. Then came the eighties with unforeseen and profound, systemic changes to business operations in both the public and private sectors. The decade of the nineties is best characterized by flux. On one extreme are those holding fast to tried and familiar systems and at the other extreme are researchers like Quaid debunking the traditional bedrock process of compensation design--job evaluation.

Out of this chaos, the pragmatic theoretical model proposed by Shields offers compensation professionals a sound conceptual place to stand. Contemplating their craft from another vantage point, perhaps, the anecdotal wisdom of the profession will be borne out and job evaluation will be able to embrace both its artistic and scientific
components in a way that brings new integrity and equity to compensation practices in a rapidly changing public sector.
CHAPTER 3: RESEARCH SETTING

Research Setting

The research setting chosen for this project is a not-for-profit organization [sometimes referred to as the third sector]. It acts as an advocate for school governance in the public education system of Texas. The organization, which is non-regulatory, employs some 400 people in areas ranging from public education policy to research.

Among the services it provides to school districts is compensation planning, design, and implementation. This is a crucial service and in high demand. There are several reasons for this. Prior to 1984, all education employees' pay was determined by the state salary schedule that specified minimum salaries for each year of experience. The pay design was a step system which guaranteed employees a defined, predictable pay increase each year.

Funding was based on personnel units per district--the more employees, the more money a district received. When the state made adjustments to the salary schedule, it sent along the money to the districts to fund those changes. Understandably, this system contributed to an entitlement mentality in the education sector because employees were able to predict their pay increases years in advance. Under this system, the only compensation decisions left to districts were whether and how much above state base they would pay.
In 1984, the 68th Legislature passed a body of education reform legislation. Among the many changes ushered in with the legislation were significant changes to the state salary schedule and salary funding. Foremost among the changes:

1. The state minimum wage schedule covered only teachers and other professionals [exempt employees].

2. Paraprofessionals [nonexempt employees] were dropped from the schedule.

3. The number of steps was reduced by half, causing employees to reach the maximum faster. Step increases were larger.

4. The state is no longer funding the schedule. Any employee pay increases must come from available district revenues. The state no longer funds increases to the state minimum wage schedule (Wicker, 1992, pp. v-vi).

The reform legislation of 1984 was a profound, systemic shock to the economics of local school districts. The legislation returned a substantial amount of control back to local communities through block funding. Now funding was based primarily on how many students were serviced [average daily attendance (ADA)]. The old system allocated moneys based on the number of employees [personnel unit funding]. Prior to this legislation, the state earmarked the funds for certain purposes. Now, the decision of allocating the money was left to the local board of trustees.

One of the more difficult things for educators to understand is that while the state continued to set the minimum wage for educators, it no longer funded the pay system. In
other words, if the state raised the minimum wage for teachers, it did not send along the money to pay for the increase as it had under the old personnel unit funding. The state was now doing as Congress does. Congress does not send money to employers when it raises the minimum wage. Any changes in the state base and the amount a district paid above that, must come out of local funds.

This legislation put enormous pressure on local district managers to develop pay plans that the district could afford. This was especially difficult because they had no training in compensation. It simply was not, and is not, a pan of the curriculum required to receive a mid-management certification in Texas.

It was at this point, that this organization realized the urgent need for compensation planning and design services. In response, they hired, or trained, qualified compensation professionals. With this cadre of personnel, they began providing compensation services to school districts. In addition to designing and implementing pay plans for districts, they undertook a systematic and well planned effort to train school business personnel in sound compensation practices. To date, they are the principal source of compensation training specifically designed for Texas public school managers.

**Unit of Analysis**

Data to test the hypotheses were gathered through individual interviews with 6 compensation employees employed by this organization. This group was chosen for the following reasons:

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1 The compensation package makes up some 80.6 percent of the average district budget while state contributions to the budget are 40.1 percent (TASB, 1995, p. 11).
1. All work for an organization whose membership currently includes almost 100 percent of the 1,044 independent school districts' in Texas.

2. The team has two members who have been with the organization since compensation services were first offered to school districts some 10 years ago.

3. The team has worked with some 200 districts ranging in size from 20 to some 8,000 employees.

4. The team produces an annual wage and salary study of jobs in Texas public school districts. The survey is recognized as the definitive source of pay information for school employees.

There is no other group--public or private--with more experience in public education compensation, or the extensive knowledge of public school jobs. Although they represent only one segment of the public sector, they serve a sector that employs roughly 440,809\(^3\) employees. The results of this study should not be considered definitive for the rest of the public sector. However, it may well reveal avenues for similar research in other areas of public service.

**Population or Sample?**

The group of project participants described in the preceding section is unique. Therefore, it is important to make a determination whether they constitute a population or a sample. Explanatory/descriptive methodology was chosen for this project. Therefore, it is exempt from the more rigorous statistical demands of other research methodologies.

\(^2\) Data Source: Public Information Office of the Texas Education Agency

\(^3\) Data Source: Public Information Office of the Texas Education Agency
However, the attempt to accurately define terminology used in this report is important to the integrity of the effort and its findings.

According to Babbie population is defined as: The theoretically specified aggregation of study elements (1992, p. 198). This project is attempting to isolate the qualitative decisions made by compensation professionals working with public sector employers. Compensation professionals working for other public sector employers were not included in this project. Likewise, all compensation professionals who work with public sector employers are not employed in the public sector. Some, who work on a consulting basis, are employed by private sector employers. Therefore, the 6 project participants do not fit statistical definition of a population.

A sample is a smaller "slice" of a larger population. For example: If the population is defined as all 13 years old pregnant girls in Texas. The sample would be 100 pregnant 13 year old girls selected, by a variety of methods, from Texas.

The participants in this project were chosen for the following reasons:

1. They were easy to access.
2. They were willing to participate in the project.
3. They are doing the definitive work in compensation for a large public sector employer. Therefore, for the purpose of this project, they constitute a sample of the population of compensation professionals who work in the public sector.

**Working Hypotheses**

Exploratory/descriptive research does not require a formal hypothesis. However, working hypotheses provided a useful conceptual framework in this instance. The

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4 Emphasis added.
following were formulated based on the literature review, Dr. Patricia Shield’s work on pragmatism in public administration, and the researcher's 8 years experience with compensation design in the education sector.

**Working Hypothesis 1:** The public nature of pay practices in Texas public education necessitates the use of the qualitative choices in quantitative job evaluation methods.

**Working Hypothesis 2:** The political nature of pay practices in Texas public education necessitates the use of the qualitative choices in quantitative job evaluation methods.

**Working Hypothesis 3:** Public sector compensation professionals make qualitative choices when using quantitative job evaluation instruments.

**Working Sub-Hypothesis 3a:** Public sector compensation professionals do not believe they have a theoretical construct which legitimizes their qualitative choices.

**Working Sub-Hypothesis 3b:** Public sector compensation professionals will alter numerical data to legitimize their qualitative choices.

The next chapter will explain the methodology chosen to gather the data to test the hypotheses and discuss its strengths and weaknesses.


CHAPTER 4: METHODOLOGY

Research Methodology

The exploratory/descriptive research model was chosen as the methodology for this project. As stated on page 2 of Chapter 1, the purpose of the research is to try to isolate and identify the qualitative, or artistic choices, compensation professionals make in compensation design. The research question is twofold: First, do compensation professionals, working in the public sector, recognize the qualitative judgments and choices they make in job evaluation? Secondly, does the public and political nature of public sector pay determine such choices? The purpose of the research is to describe the qualitative choices in terms of type and frequency. Additionally, the role of the public and political nature of pay in the public sector, specifically in the education sector, will be described. The exploratory/descriptive method was clearly the best choice for this research question.

Research Instrument

The data were collected through a structured interview with each of the 6 staff members currently doing compensation work for school districts. The first draft of the instrument was tested with the staff member who has had the most experience with job evaluations in school districts, both in terms of length and depth of experience. The first interview instrument had 35 questions. After careful analysis of the first interview, the researcher made the decision to reduced the number of questions to 25. Ten questions were eliminated because there were redundancies, some did not elicit pertinent

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1 Emphasis added.
2 Emphasis added.
information, and some were simply unnecessary. A copy of the structured interview instrument is located in the Appendices as Appendix B.

The instrument was used to conduct a structured interview with each participant. Each interview was taped with the participant's consent. Then the interview was transcribed adhering as closely as possible to Babbie's model for recording responses. His remarks about recording responses presume the use of neutral interviewers, who may or may not be knowledgeable about the research subject. However, the researcher decided that the stringency Babbie imposes on transcription would add to the credibility of the project. Specifically, the transcriptions found in the Appendices as Appendices 3-8 adhere to the following as closely as was practical and possible:

Whenever the questionnaire contains open-ended questions, those soliciting the respondent's own answer, it is very important that the interviewer record [transcribe] that answer exactly as given. No attempt should be made to summarize, paraphrase, or correct bad grammar...In each case, however, the exact verbal response should also be recorded (Babbie, 1992, p. 272).

**Research Strengths and Weaknesses**

The greatest strength of the research is the unit of analysis. The participants represent the total cadre of compensation professionals who work solely within the Texas public school system. There are other compensation professionals from the private sector who, from time to time, will work with a district. What they lack is the knowledge of the industry, especially its public and political nature. Typically, they are not successful in leaving compensation systems in place that last.

Another strength of the research was the structured interview method of data collection. The participants are educated, articulate, and highly skilled. They have few
opportunities to talk about the aesthetic and philosophical aspects of their work. Their verbal responses to open-ended questions produced a quality of data that would not have been possible with other forms of data collection. Though this project was not a case study, Robert K. Yin's observations about the advantages of interviews in a case study apply:

Most commonly, case study interviews are of an open-ended nature, in which you can ask key respondents for the facts of a matter as well as for the respondents' opinions about events. In some situations, you may even ask the respondent to propose his or her own insights into certain occurrences and may use such propositions as the basis for further inquiry3 (Yin, 1994, p. 84).

J. W. Darnall notes the observations of Floyd J. Fowler that personal interviews are probably the most effective way of gaining the cooperation of most populations. He sees structured interviews allowing an interviewer to probe for adequate answers and guide the interviewee in a productive direction (Darnall, 1996, p. 70). This researcher found that to be the case. Having a working knowledge of the participants' profession and the environment in which they work was of significant benefit to the researcher.

On the other hand, one of the weaknesses of the research was the lack of neutrality of the researcher. One half of the participants were former colleagues. Consequently, it was impossible to meet one of Babbie's basic criteria for effective interviews.

The interviewer's presence should not affect a respondent's perception of a question or the answer given. The interviewer, then, should be a neutral medium through which questions and answers are transmitted (p.270).

---

3 Emphasis added. Yin's observation about the value of the personal interview is applicable in this case because the research prospective addressed the possibility that the project "may well reveal avenues for similar research in other areas of the public sector," page 8.
A cursory reading of the transcripts will indicate that the reviewer was not neutral, especially with the participants who were former colleagues. However, this is offset by the quality of the responses the researcher was able to obtain because of the level of trust and shared experiences.

Chapter 5 contains the analysis of the data collected through the 6 structured interviews. The analysis is used to test the validity of the three working hypotheses and two sub-hypotheses.
CHAPTER 5: ANALYSIS

Statistical Methods

Due to the small number of participants, only nominal and ordinal scales are used. Percentages were rejected because of the small sample size. More sophisticated statistical operations are not required in explanatory/descriptive research methodology. However, because of the unique characteristics of this sample group, support of the working hypotheses, or the lack thereof, can indicate the direction for future and more rigorous research.

Analysis

The data from the 6 interviews are reported in tabular and narrative forms as appropriate. Questions 1-9 of the interview instrument elicited background/demographic information about the participants. That information is presented in Table 2.

<table>
<thead>
<tr>
<th>Participant Number</th>
<th>Level of Education</th>
<th>CCP¹</th>
<th>Length of Service</th>
<th>Previous Employer</th>
<th>Level of Expertise</th>
<th>Gender</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>BA</td>
<td>No</td>
<td>2.5 months</td>
<td>Public Sector</td>
<td>Very practiced</td>
<td>Male</td>
</tr>
<tr>
<td>2</td>
<td>BA</td>
<td>Yes</td>
<td>6.5 years</td>
<td>Public Sector</td>
<td>Very practiced</td>
<td>Male</td>
</tr>
<tr>
<td>3</td>
<td>BA</td>
<td>No</td>
<td>1 year</td>
<td>Third Sector</td>
<td>Practiced</td>
<td>Female</td>
</tr>
<tr>
<td>4</td>
<td>PhD</td>
<td>Yes</td>
<td>3 years</td>
<td>Private Sector</td>
<td>Very practiced</td>
<td>Female</td>
</tr>
<tr>
<td>5</td>
<td>EdD</td>
<td>No</td>
<td>11 years</td>
<td>Public Sector</td>
<td>Extremely well practiced</td>
<td>Male</td>
</tr>
<tr>
<td>6</td>
<td>MA</td>
<td>Yes</td>
<td>15 years</td>
<td>Public Sector</td>
<td>Very practiced</td>
<td>Female</td>
</tr>
</tbody>
</table>

¹ CCP refers to the certification, Certified Compensation Professional, which is issued by the American Compensation Association after the candidate completes a course of study and passes a series of examinations.
The data show a group of educated, highly skilled practitioners with in-depth experience working in the education sector. As a group, they are highly knowledgeable about jobs in the education sector. The participants' experiences with job evaluation range from work with 6 districts to some 200 districts. Three of the 6 hold graduate degrees and 3 of the 6 are Certified Compensation Professionals. Three participants are female and 3 participants are male.

Based on the length of service in compensation, it is reasonable to assume the sample has had a variety of experiences with job evaluation. This makes them credible sources of information about the quantitative and qualitative choices compensation professionals make in job evaluation in the public sector.

Each of the working hypotheses and sub-hypotheses will be examined against the responses in narrative form. The table concluding the chapter contains the data ordered in a way showing which hypotheses are supported.

**Working Hypothesis 1:** Qualitative choices are necessitated by the public nature of pay

Texas public school districts are subject to the Open Records Act. The act allows any citizen to request—and obtain—the salaries of district employees. There are numerous instances where salaries of coaches, athletic directors, teachers, and administrators have been presented by the local media to support a variety of agendas. This is the context for question number 14: *Does the public nature of the education sector influence the decisions you make in job evaluation?*

---

2 A simple Likert scale was used to define the levels of expertise: Not Practiced: Has little or no experience doing job evaluations; Practiced: Can do job evaluation independently with results checked by a supervisor; Very Practiced: Routinely does job evaluations independently. May train or assist others in the process; Extremely Well Practiced: Routinely does job evaluations independently. Develops and trains others in new classification systems as needed.
Three of the 6 participants responded that it did not influence their choices. Two gave ambivalent responses. One participant responded affirmatively. The 3 negative responses came with very different rationales. One respondent said:

My work is going to be scrutinized whether it's public or private...whether it's going to be in a public view scrutiny--it could be in a newspaper and probably television in the public sector. In the private sector, in a supervisor's office behind a closed door. I have to be able to back up my decisions.

Another participant, who has not served as a lead consultant, gave a negative response saying:

For me, it has not been an issue. At least at this point it has not been. I'm sure it's more of an issue for the people actually presenting.

The third negative response was explained in this way:

No, that part [the public nature of pay] doesn't influence me at all--what the media would pick up and say is significant or where a job should be related or classified. They are typically clueless in any conversation you have.

The 2 ambivalent responses indicate the influence the public nature of pay has on some practitioners. One participant expressed ambivalence this way:

I'm thinking long and hard about that. I don't think so. With the only difference being if we are doing a stipend study, then it might. Well, let me think about the question some more. The answer is no. Even now I'm not sure that's correct. My concern is that it be fair regardless of what the public perception might be.

The other participant said:

---

3 Stipends are a method used in Texas public schools to pay employees more for certain jobs that are market driven and do not fit the traditional model of pay. For example, head football coaches are often paid a stipend which may be a flat dollar amount above their "teaching" salary. Sometimes the additional pay is delivered by assigning them more days to work. [Traditionally, education employees' pay is figured on a daily rate basis. The more days an employee works the more pay.] Sometimes, the stipend is a combination of the two. A stipend study looks at these practices in a school district. Stipend pay is often a gage of community values.
It doesn't influence so much my decision as it influences the process [wherein] I work specifically with the district.

The participant who responded affirmatively said:

Definitely. It's managing the change process and figuring out how to come up with a system that will be acceptable, that people can live with. I don't think it can be just straight by the points...it's a starting point, and the points are an excellent guide, but there is very much a public, human side to everything in public education.

**Working Hypothesis 2: Qualitative choices are necessitated by the political nature of pay**

One of the 5 respondents said that the political nature of pay in the education sector did not drive qualitative choices. The other 5 participants said that the political nature of the education sector did cause them to make qualitative choices. A sampling of their responses show the various ways they cope with the political pressure of the environment. The responses are in ascending order by years of experience. The impact of experience is evident in the increasing degree of pragmatism in the responses.

**Participant #4, 3 years experience:**

It does [influence choices]. It's the same type of dynamic as to politically who's up for reelection. But maybe even a more micro analysis. who are the people related to on the board? Who's related to whom and what position and that I try, when I do the ratings, I take that out, but I know full well it comes back into play when I meet with the administrators and we have a very candid discussion about it.

**Participant #2, 6.5 years experience:**

There are what I call political choices. If I know that because of the organizational structure, something will cause a problem, I will make an adjustment. I'll make a qualitative decision if there is someone in the lead, responsible position, but there aren't enough points to separate the job grades, I'll make the decision just arbitrarily to move it.
Participant #5, 11 years experience:

The political nature of it, which is a little different than the other questions has to do with sort of the effect of the long term, or short term choices, about where jobs are placed, classified, organized...you just say, 'well, does this make sense?' Sometimes in the context of raising 'does this make sense' it becomes sort of a political type question. Usually is just makes more sense as a practical kind of question rather than a political one.

Participant #6, 15 years experience:

It wouldn't be a total driving force. As consultants to the public sector, when you go in and recommend as system and the foundation of that is job classification, you've got to give them something they can live with. I guess that's been our philosophy. I think because of the public nature and the political nature of education, there's probably a tighter parameter about how much change can be accommodated.

The one dissenting voice, with 2.5 months experience in the education sector, observed:

It wouldn't [necessitate qualitative choices]. No. Because the whole reasons for many times we are called in to do an analysis is to get an objective second or third point of view. Otherwise, politics plays heavily in the internally driven decisions. There is no way you could be subjective and allow the political nature of that to get in the way of how I would see one job over another...our decisions can take the politics out of it.

Working Hypothesis 3: Qualitative choices are made with quantitative instruments.

Responses to questions 10, 11, and 12 by the 6 participants indicate that:

1. The group uses a point factor rating system.

2. The rating system is a quantitative form job evaluation.

3. All 6 participants reported making qualitative choices while using a quantitative job evaluation system.
The reasons for making the qualitative choices vary. One participant said:

You have to make, to some degree, qualitative choices because many times you may find employees who...inflate the importance of what they do.

Another one pointed to the "flaw" in several commonly used quantitative systems:

In particular on ours, or any of them that I've used, since I've been trained on two or three other point factors systems, it seems to be more subjective around the supervision part of it...I think I make more judgment calls because its harder to quantify some of those dynamics which just require more interpretation.

A third participant noted:

I start looking for rationale for why jobs are described the way they are described. Why employees give the kind of input they give. So, I guess on that level I start to arrive at sort of a qualitative analysis, or rationale, or framework for the job as opposed to just taking the data from the job.

The sample's general rationale for bringing qualitative choices into a quantitative system was best articulated by the participant who observed, "Some compensable factors just require a lot more subjective kind of judgment than others, and there is a 'known' that is the most qualitative."

**Working Sub-Hypothesis 3a: Public sector compensation professionals lack a theoretical construct which legitimizes their qualitative choices.**

In analyzing the data collected in the 6 structured interviews, a flaw in the interview instrument became apparent. There was no question which specifically elicited information pertinent to Working Sub-Hypotheses 3a. The erroneous assumption of the researcher was that such data would emerge in answers to questions 20, 21, 24, and 25.

---

4 In classic compensation terminology, compensable factors what the employer pays for. Typically they are grouped under three or four global factors: skill, effort, responsibility, and working conditions where applicable.
That was not the case. It is worth noting that Participant #2 responding to question 22 which asks about changing data in response to political pressure said: “...yes I have! but it has to be defensible.,[if] I can't get the scores high enough [for the job] to be in an appropriate job grade that the market dictates.”

The researcher responded, "You've got a theoretical construct for that one." "Oh sure," Participant #2 said, "but I don’t⁵ have one for some of the political manipulations."

Working Sub-Hypothesis 3b: Public sector compensation professionals will alter numerical data to legitimize qualitative choices.

Five of the 6 participants said that they have altered numerical data on job evaluations to legitimize qualitative choices they make. In contrast, Participant 5 said:

No, no, no. I’ll get new information and I’ll ask questions for clarification, and if they're not provided, then I’ll keep it the way it is unless I'm told differently, and then I’ll record that I was told to push some job somewhere else. Then I’ll go on record with them [district management] that I’ll defer to them when it comes time to defend the placement of the job.

**Summary**

The data are summarized in the following table. It shows 2 Working Hypotheses and 1 Working Sub-Hypothesis supported by the data; 2 Working Hypotheses not supported by the data; and 1 Working Sub-Hypothesis not supported for lack of data. This lack was due to an erroneous assumption on the researcher's part in constructing the interview instrument.

⁵ Emphasis added.
Table 3: *Summary of Working Hypotheses and Evidence of Support*

<table>
<thead>
<tr>
<th>Working Hypothesis</th>
<th>Summary of Evidence by Response</th>
<th>Supported by Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>WH-1 The public nature of pay practices in Texas public education necessitates the use of qualitative choice in quantitative job evaluation methods.</td>
<td>Affirmative-1 respondent</td>
<td>Not supported. The ambivalent responses were more to the negative end of the continuum than the affirmative.</td>
</tr>
<tr>
<td></td>
<td>Ambivalent-2 respondents</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Negative-3 respondents</td>
<td></td>
</tr>
<tr>
<td>WH-2 The political nature of pay practices in Texas public education necessitates the use of qualitative choices in quantitative job evaluation methods.</td>
<td>Affirmative-5 respondents</td>
<td>Supported. The one negative response was given by the participant with least number of years experience in the public education sector.</td>
</tr>
<tr>
<td></td>
<td>Negative-1 respondent</td>
<td></td>
</tr>
<tr>
<td>WH-3 Public sector compensation professionals make qualitative choices when using quantitative job evaluation instruments.</td>
<td>Affirmative-6 respondents</td>
<td>Supported.</td>
</tr>
<tr>
<td>WS-H-3a Public sector compensation professionals do not believe they have a theoretical construct which legitimizes their qualitative choices.</td>
<td>No data. The only response was embedded in the answer to another question.</td>
<td>Not supported due to lack of data.</td>
</tr>
<tr>
<td>WS-H-3b Public sector compensation professionals will alter numerical data to legitimize their qualitative choices.</td>
<td>Affirmative-5 respondents</td>
<td>Supported.</td>
</tr>
<tr>
<td></td>
<td>Negative-1 respondent</td>
<td></td>
</tr>
</tbody>
</table>
CHAPTER 6: SUMMARY AND CONCLUSION

Summary

The research showed several things about qualitative choices in job evaluation. The most significant is that such choices are routinely made. The sample group reported when they made them and why. It would be interesting research to do an analysis of the transcriptions. The purpose would be to create a typology of qualitative choices and what motivates one type of choice over another. A second interesting research question: Is there a correlation between the political pressures on the practitioner and qualitative choices? If so, what is it?

Another dynamic was reported by the participants. Qualitative choices are motivated by the politicized environment of the education sector but not by the public nature of the sector. This was unexpected by the researcher.

There were not enough data to determine whether the lack of a theoretical construct to validate qualitative choices was troublesome to the sample group.

Conclusion

The intent of this project was to describe the qualitative choices made by compensation professionals working in the education sector and to determine why they make them. The data collected from the sample group reveal that they make qualitative choices even though they are using a quantitative job evaluation system. They do this to make the pay system work' for that particular school district. The sample group has clearly held fast to some modicum of common sense when it comes to job evaluation.

1 Emphasis added,
Throughout the transcriptions are statements of their awareness that the product they deliver must work for the client district.

John Dewey in his book The Theory of Inquiry speaks directly to the thread of common sense running through all of the participants’ statements found in Footnote 2:

[Common sense] deals with the kinds of situations that...continuously arise in the conduct of life and the ordering of day-by-day behavior...Sagacity is the power to discriminate the factors that are relevant and important in significance in given situations; it is the power of discernment...(1938, p. 60).

We never experience nor form judgments about objects and events in isolation, but only in connection with a contextual whole (1938, p. 66) The pervasively qualitative is not only that which binds all constituents into a whole, but it is also unique; it constitutes in each situation or individual situation, indivisible and unduplicable. Distinctions and relations are instituted with a situation [district]; they are recurrent and repeatable in different situations (p. 68).

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2. Following are examples of the participants’ pragmatic understanding of compensation design:

**Participant # 5:** As consultants to the public sector, when you go in and recommend a system and the foundation of that is job classification, you’ve got to give them something they can live with.

**Participant #1:** The nature of evaluation tends to be standard. It’s the rating criteria that tends to be different from one sector to another. It’s just a matter of using that specific sector’s--you know--what do they value.

**Participant #2:** ...if I know that because of the organizational structure, something will cause a problem. I will make an adjustment.

**Participant #4:** So, having used as many systems as I’ve used, this one is the most delineated [referring to specificity of factors] of any yet, and yet you still have to make the judgment that comes clearly from the knowledge of the industry.

**Participant #6:** Then sometime you just go hack and review [the job classification] and you just say, "Does this make sense?" And sometimes in the context of [asking] 'does this make sense' it becomes sort of a political type question. ...usually it just makes more sense as a practical kind of question rather than a political one.
Dewey argues that the scientific (quantitative) can hedge out common sense (qualitative).

Another factor driving the participants' qualitative choices is their expressed need for equity. Quoting Dewey again:

...it is possible to carry on observations that amass facts tirelessly and yet the observed 'facts' lead nowhere. On the other hand, it is possible to have the work of observation so controlled by a conceptual framework fixed in advance that the very things which are genuinely decisive in the problem in hand, and its solution?are completely overlooked (1938, p. 70).

There are some persons who deplore the reduction by the scientist of all materials to numerical terms on the grounds that it seems to them to destroy value which is qualitative (p. 205).

A cursory look at the participants' responses shows the powerful pull of equity and fairness on the practitioners. The purely quantitative approach fails to meet the equity and fairness needs.

**Participant #1:** [Job evaluation is difficult because I'm] keeping concentrated and focused on the job at hand and understanding that every position I look at there is a person attached to that position that I'm in essence effecting their level of compensation.

**Participant #4:** [The most difficult thing] for me is trying to quantify data consistently across a variance in jobs. And to have someone write what they do compared to how someone writes what they do and on and on and on. This lens that we use, these glasses that you put on to try to be fair and consistent with everyone of them...That's what worries me the most: Have I been fair and consistent with every [job] questionnaire? That's the one that I walk away and go, 'Oh my goodness, I hope that, that I really quantified the data correctly.'

**Participant #5:** One [difficult thing] is just rating the gray areas--the gray zone where there is more subjective judgment on factors. That's tough and you really have to check your own biases because everybody has [them]. You do this long enough in one industry you have [to] keep a really fresh, open mind. It takes some self discipline.
John Dewey gathers together the variety of motivations which drive qualitative choices in the midst of a quantitative system in this observation:

...we institute standards of justice, truth, esthetic quality, etc., in order that different objects and events may be so intelligently compared with one another as to give direction to activities dealing with 'concrete objects' (1938, p. 216).

In the final analysis, job evaluation is foremost an attempt to provide a basis for equitable pay (Elizur, 1981, p. 14). It is not pure science nor is it pure art but perhaps--in the hands of skilled, ethical practitioners--the best of both.
BIBLIOGRAPHY


APPENDIX A - ACKNOWLEDGMENTS

I gratefully acknowledge the contribution of Dr. Patricia M. Shields, Professor, Southwest Texas State University, who pointed a way out of a professional and ethical conundrum and generously shared her published work, work-in-progress, and notes on a pragmatic philosophy for public administrators with me, and to CHC who generously made her staff available to me during this project and who once tossed me head-first into a quantitative analysis class with this observation: "If you can pass this, it will give you all the self-confidence you'll ever need to do compensation"...she was right.
APPENDIX B: STRUCTURED INTERVIEW

1. What is your highest level of formal education?

2. Are you a Certified Compensation Professional?

3. How long have you worked for this department?

4. Where did you work before you came here?

5. Did you work in the field of compensation?

(If 'yes', continue with # 6-7. If 'no', skip to # 8.)

6. Did you do job evaluation?

7. Were your clients from the public or private sector?

8. Describe your level of expertise in job evaluation.

9. Can you give me an estimate of how many districts in which you have done all or part of the job evaluation?

10. Describe the type of plan you use to do job evaluations for school districts.

11. Is it a qualitative or quantitative plan?

12. You use a quantitative job evaluation instrument. Do you ever make qualitative choices?

13. Can you give me an example of such a choice?

14. Does the public nature of the education sector influence decisions you make in job evaluation?

15. Can you give me an example?

16. Does the political nature of the education sector influence decisions you make in job evaluation?

17. Can you give me an example?

18. You read three questionnaires from three high school principals' secretaries. They have very similar scores, within 10 points of each other. However, their scores are some
175 points higher than the two assistant superintendent's secretaries. What would you do?

19. Tell me why you would do that.

20. What is the most difficult thing for you in the job evaluation process?


22. Have you ever manipulated the numbers on the quantitative instrument in order to produce an job hierarchy that was politically correct?

24. Which is more defensible to yourself and your colleagues: your qualitative choices or your quantitative choices?

25. Which is easier to explain to district administrators and school boards: your qualitative choices or your quantitative choices?
APPENDIX C: PARTICIPANT #1

What is your highest level of formal education?
Bachelor's degree.

What was that in?
Journalism.

Are you a Certified Compensation Professional?
No.

How long have you worked for Personnel Services?
Here? For two and one-half months.

And where did you work before that?
Prior to that. I was employed by Travis County for four years; for the last two years handling compensation matters for Travis County employees.

Okay. Give me some examples of the kind of tasks you did for them. Was it surveys, market studies, job evaluation?
Certainly all of that. We would conduct our own market studies. Many of the positions within a county structure are certainly comparable with other county structures. So, we maintained a liaison relationship with the other county governments to get the information you needed. We looked at market data for as are we competitive certainly not only with other counties' comparable positions but you had to look at where is your competition? Sometimes it was locally; so you had to look at your local markets.

I would also review new job descriptions that came on line and determine a pay range or rather recommend a pay range for those. Of course the Commissioners’ Court had the final okay in any type of salary considerations.

So, then would you say that the county structure is in some ways is similar to that in a public school district?
Very similar. In relating between the county and school district you still are dealing with elected people and government entities. So the government structure is still there; the elected status of people are still there. Probably, certainly more so in a county structure as compared to the school boards, but still a very similar type environment.

...with the Commissioners’ Court. Okay.

And you did do job evaluations?
Yes.

And your clients were obviously from the public sector?
Right.

*Describe your level of expertise* in job evaluation and by that I mean have you done a little, have you done some, have you done enough that if you had *the* job descriptions, you feel like you could probably go into any industry and evaluate their jobs?

Yes, I could. The nature of evaluation tends to be standard. It’s the rating criteria that tends to be different from one sector to another. It’s just a matter of using that specific sector’s—you know, what do they value?

*Exactly.*

As long as you know what they value and to what degree, the job of evaluation is quantitatively is the same.

*So you are saying that the quantitative factors stay the same. But what may vary is the value which would be for you...in your opinion, is that a quantitative matter or qualitative matter?*

Certainly quantitative. That’s a subjective opinion. Do you value education? Do you value experience? Do you value certifications, ratings in certain fields? What do you value? That’s a subjective approach within the organization. But that subjective idea can be turned around and put on paper. Okay, this degree equals this many points. That degree is that many points. The higher level of points given certain higher degrees and that’s qualitative.

*Okay so you’re taking the...*

I said quantitative.

*I heard you use...I know it’s hard for me. After typing for about two hours, I’m going quana, quali, what is it?*

Laughter.]

*But I heard you used the word 'subjective' several times, so in your opinion what can happen here is that the subjective aspect (i.e. the value the organization puts on it) can be quantified?*

Sure.

*Give me an estimate—now I know you just been here two and one-half months so you may want to include some of your experience from the four years that you were with the county—but give me an estimate of how many districts or entities in which you have done job evaluation?*

I’ve done job evaluations, I’d say, in probably six different districts right now.

*That’s a good many in two and one-half months.*

And that is from the smallest of districts numbering 300 employees including up through Ft. Bend in the Houston area.
Okay. Describe the type of plan that you use to do job evaluations for school districts. Is it, is it whole job, is it point factor, is it...
No, it's point factor.

Then that...would I be correct in saying that you would characterize that as a quantitative plan?
That's a qualitative because you can qualify what is the factors. In other words, how many points do you assign a certain factor that an employee has.

So the qualitative dimension comes in for you at the rating and scaling level?
Sure.

You use a...in the literature, in compensation literature a point factor system when they are rating either as qualitative or quantitative, the industry is always going to rate it as quantitative. Even though, I think you've brought a very interesting twist to what you've just said to that whole question. So, from a research perspective, a point factor, I'm going to say is a quantitative job analysis instrument.
Sure.

But you're telling me you do make qualitative choices?
You have to make, to some degree, qualitative choices because many times you may find employees who, I call, inflate the importance of what they do.

How do they do that?
They may say I'm responsible for, let's say $300,000. But then there is that of point of--okay--just exactly what is your responsibility? Do you write and recommend a budget for $300,000? Do you process purchase orders and check it line item to determine if you have enough money to cover, given a $300,000 range that you have to work with? Or do you merely just hand checks from one vendor or mail out checks to vendors out of certain accounts?

Any step in the way, an error could effect the financial end of the district. But there is that degree--to what level is that effect? You know, you handle $300,000 of accounts. There are certain degrees of "handling". Just exactly what does it mean to "handle"?

Exactly. Okay.
So in that respect, that is the qualitative aspect, I'd say. But, when it comes down to once you've determined the level of responsibility for that $300,000 account, then you can rate that to a quantitative point factor.

Okay.
Historically doing job evaluations], and I even learned this more and more and I'm still in the learning phase of knowing what are some typical job responsibilities given similar titles of employees in a school district. If I know through experience, 90-95
percent of the same titled employee has similar duties, then all of sudden I have a title that says they have this responsibility. If I have never seen that type employee have that level of responsibility. I will certainly question it. May even certainly contact the district and specifically question "the employee stated this". Does that employee really handle this by themselves or are they just a go-between or do they just monitor and notify a higher authority when they realize the implications of this task and are not really responsible for handling it themselves?

**Right.** I'll never forget one district I worked in the secretary to the Food Service Director was doing all the hiring--literally. It came in on the job questionnaire and I thought, "Oh right!" She's screening applicants. Well, she was screening them, interviewing them, and then she was offering them the job.

Right. There is another qualitative component. Certainly we survey if there are many employees who have the job title, we'll survey 3, 4, 5 employees within that same title. You can take those job evaluation forms and put them side by side and let's say the impact of decisions in their job you could have five different impacts of the decisions what these employees do. You almost have to say, "Okay, where is it? Where is the median of their responsibility or the median of the impact of wrong decisions? Because it's almost--you really don't want to have entirely different levels given the entire similar job title.

**An example would be classroom aides?**

Classroom aides, sure, any of your manual trades types, custodians, or anything like that. If one custodian says, "Yes, I have a low level of responsibility". And another one says they have a moderate level and another one says, "Yes, I have a high level of responsibility". You have to really make a judgment call. Obviously, once you read all three job evaluations, you can kind of get a feel for [whether] what's coming out on paper [is] personality driven. Or, is [it] their personal input of their values of their value of the job as opposed to how does the district value that job? Certainly, how does [Participant #1’s employer] value that job given similar jobs throughout other districts in the state?

Okay. You eluded to this earlier in some responses you made. But tell me, does the public nature of the education and this would have been true for the county, too, does the public nature of the education [sector] influence decisions you make in job evaluation?

I don't think so. I don't see that the public, the nature of it being public private, doesn't have any bearing on how I would rate. I mean, you could give me the same job and it could be with a public employer and the same job with a private employer.

**Let me clarify what I mean by that.** The fact that if you do this for Motorola, it would not end up in the business section of the paper. It very well can end up on the front page of the paper if it's with a school district and they are the largest employer in town. That's what I mean by the public nature of it--that your work could be scrutinized by the public.

Okay, okay. My work is going to be scrutinized whether it's public or private. If someone questions why I have evaluated a certain job at level that I did, I have to defend that. Now the level of defense, whether it's going to be in a public view scrutiny--it could
be in a newspaper and probably television in the public sector. Or in the private sector, in a supervisor's office behind a closed door. I have to be able to back up my decisions. As long as I can back up my decisions, quantitatively, then it wouldn't matter if it were public or private.

Okay. Now how about this one? Does the political nature i.e. the fact that at some point in time, if you haven't done it already, you are going to have to stand up in front of a board and say, "Here's the job hierarchy", knowing that the doctor's wife has just come out two pay grades below the minister's son, for example. You've got two important political figures in that community. They all know each other. They've all gone to school together. So, given the political nature of education, does that influence any decisions you make?

It wouldn't. No. Because the whole reason for many times we are called in to do an analysis is to get an objective second or third point of view. Otherwise, politics plays heavily in the internally driven decisions. There is no way you could be subjective and allow the political nature of that to get in the way of how you would, how I would see one job over another.

So, let me clarify one thing you said. In your mind, many times you are called in simply because you can be apolitical.

Sure. We can take--our decisions can take the politics out of it.

All right. Here's a hypothetical. You read three questionnaires from three high school principals' secretaries. They have very similar scores, within 10 points of each other. However, combined, their scores are 175 points higher than the two assistant superintendent's secretaries and that 175 points under your rating system is enough to move them from a pay grade. How are you going to handle that?

I'm going to put them in the higher pay grade.

Why would you do that?

There is obviously some reason why they scored higher in the first place. Now, what I may do, is knowing a track record of doing those sort of positions--knowing that the trend is that that's not how they fall out in the hierarchy of ratings, I would certainly look back at my reviews and my assessments of the particular factors and I how I graded them. I would take a second look. Yes. But if after that second look, if they still fell out in the scenario you described, yes they would go higher. Or, they would go in an order that I would normally not place in a hierarchy, I normally would not place those positions in relation to one another.

When you do job evaluation, what is the most difficult part for you? Maybe difficult...sometimes people associate difficult with unpleasant. I don't necessarily mean that. I mean what is the part that engages the most intellectual effort from you?

Keeping concentrated and focused on the job at hand and understanding that every position I look at there is a person attached to that position that I'm, in essence, effecting
their level of compensation. Therefore, the first person, or the first position rather, that I evaluate, I have to give the 80th person the same attention and detail that I did the first.

Now, when you sit down and do 80, after the first 10, they can certainly become monotonous because you are seeing the same evaluation, the same questions, repetitively. And yes, that, can like almost lull you to sleep. But again you have to stay focused in that in each position there is something, someone attached to that and my decision certainly effects that. You just have to remain focused; just try not to let the repetitiveness and the monotony of looking at the same document over and over and over effect how I rate or view jobs.

Other than that, I think again, trying to read between the lines if I know a certain position has historically not been assigned or been responsible for a certain higher level duty...[at this point the tape was turned and the rest of sentence lost. We continued with the same question.]

**Now, go back.**

I'll even elaborate on doing sheer volume and how the crispness and attention from the first one is compared to the last one. Let say, take 80 evaluations. It would probably take me 8 hours a day on that number, it would probably take me three or four days to evaluate 80 [jobs] and this if I spent eight hours a day. Now, I will tell you that I will bum myself out if I had to do that eight hours a day. I'm good for about five or six hours of evaluating jobs. Therefore it takes longer. It may take a week or a week and a half then to do that many.

To do them faster, then, you call in another consultant. Given that many, two or three consultants can probably knock that many out in one day. Now, I feel, the most fairest way to evaluate jobs is to use the same or one evaluator evaluate everything; because, therefore if there is a bias, that same bias is carried forth from every position and there is no change. So, therefore, they, relatively speaking, that bias is spread equally among all positions.

**Right. So you have interrator reliability.**

Sure. Now, when you have two or three consultants, every consultant may have a different bias or different idea of what's important to what degree. And that can effect the evaluations. So, how I would see the scoring of one versus another consultant and another consultant, [it's really] a little more difficult because you have to get on the same part and say, "Now this is how we, as a group, will value this component or this factor that we are grading." Okay? And you have to be on the same bar so that the overall evaluations won't be effected by someone's different bias. Because in essence, you have first of all, gotten all those issues clarified and said this is how we treat this and this is how we treat that. We are going to be on the same level playing field in our evaluations. It takes a little bit to get adjusted to that.

**To get calibrated?**
Sure.

Have you ever manipulated the numbers on the quantitative instrument in order to produce an job hierarchy that you knew was 'politically correct' or that you knew you were going to have manipulate the numbers or it never would be accepted by the board or the Commissioners' Court or whatever?

If I've ever manipulated any numbers, there is always a reason and a basis I could defend as to why a number had changed. I will never change a number without having a basis as to what that change was done and rationalize it.

Just to press, and obviously I'm pressing on this one. But what if the only basis for it was this superintendent said to me that if this job ends up in this pay grade, the whole thing is down the tubes? Now, I know that in two and one-half months you haven't had that experience, but you will.

Yeah. I had it with the County.

Oh, okay.

And again, that's when you really have to sit down with that person that is dead-set on why it should be this way. That where you really need to have a dialogue and question and get to the bottom why is it you feel this way. If there is a favoritism, a relative involved, that's where it's nice to be able to talk it and find out what am I dealing with here. Why is it that? You know. There could be situation where, yes, I may be wrong. I'm not so set in stone to say that my evaluation is the ultimate and it can't be changed. Yes, it can be changed. Again, you know, I have a certain idea what's important and how things are important in a district. Just like someone else in the district may even sometimes have better idea. Obviously, evidently, obviously, it is their district and that superintendent certainly knows, I would think, knows their positions probably a little better than I do.

Now, I think an idea of the biases in any subjective opinions, you know, I think that's where we come in and have that second look. But, you know, there could be valid reasons as to why. But I would certainly want to have a face-to-face meeting or phone call and try to get to the bottom. Okay, tell me why do you value this position as more or less important than other positions. Tell me why; and, I will tell you why I see it this way. Now maybe somewhere, I'm willing to give a certain aspect or certain component of it because I've heard your side and yeah, okay, I can agree with that. I see your point on that. Again, I think there needs to be a dialogue and I think it could be a give and take. But give and take is going to based on some type of rationalization. It wouldn't be where a number is this and it's that number, that rating just because it is and I have no way to back it up or defend it.

Right. Okay. Which is more defensible to yourself and...this may he two separate questions. It's the first time I've asked this one. Which is more defensible to yourself and your colleagues and I would say your clients also: your qualitative choices or your quantitative choices?
Well, I’d say probably your quantitative are more defensible.

*Just musing about the question, why do think that’s so?*

I think that quantitative again the word means you quantify it, you quantify it with a quantity of something. As matter of assigning a certain quantity to a certain degree within a factor, So if I say high school education is worth this many points and bachelor's degree is worth that many points a master's degree can be worth that many points. There may be...that component of it is quantifiable. I can say "yes" we have agreed that a bachelor's degree is worth this many points or this much of a factor. Now, there may be some discussion on is a certain college degree, a high school education worth that many points. Of course, that's the qualitative aspect of it.

*Would you say that's an instrument design issue?*

Sure, sure.

*Okay. Last question. Now this one is going to sound the same but let me emphasize the word which for me make it a critical mass difference from the other one. In the first one, I said, "Which is more defensible to you and your colleagues?" Assuming that you all are coming out of the same professional body of knowledge. Okay. Which is easier to explain to district administrators and school boards, qualitative or quantitative?*

I still say quantitative. Many times when you're dealing with administrators, boards, elected type officials, they want something concrete on paper to justify why it is this way. I've never known, when it comes down to policy of any elected [person] or person in a position to make decisions--high level decisions, that they would base that decision on a qualitative-type instrument. They want something to support their ideas as well and that's certainly done better on a quantitative structure. Something that can be put in writing, put in print that can say this equals that.

*All right! Thank you for your time.*
APPENDIX D: PARTICIPANT #2

What is your highest level of formal education?
   Bachelor's degree.

And what was that in?
   Marketing and management.

You are a Certified Compensation Professional?
   I am indeed.

How long have you worked for Personnel Services?
   Six and a half years.

Okay.
   God! [Laughter.]

Where did you work before you came here?
   City of Austin.

Did you work in the field of compensation?
   Yes.

And did you do job evaluation in that position?
   Yes--among other things.

[Laughter.] I'll put that down--not that I really care.

And so obviously your clients were from the public sector. All right, now describe for me your level of expertise in job evaluation. Would you say that you are very experienced?
   Yeah, I would say I am very experienced and very practiced particularly as it relates to public education.

Now this, I just want a ballpark figure. Can you give me just a rough estimate of how many districts you think you have done all or part of the job evaluation? And let me give you a parameter. [Colleague] said that in the ten years or so he/she’s worked here, that the department has probably done 200 districts.
   I would say I’ve been involved in 70.

So, I'll put 70, plus or minus. All right describe the kind of plan that use to do job evaluations for school districts.
   The kind of job evaluation plan?

Yeah. Is it a point factor, is it classification, is it whole job ranking?
For the great majority it’s point factor. There have been a few where I've done whole job rankings.

When you have done whole job ranking, correlate that to the size of the district.

Very small. Less than--I don’t want to put it in those terms--very small, less than 500 kids enrollment.

You use a quantitative job evaluation instrument here. Do you ever make qualitative choices?

In the rating itself?

Yes, when you are doing job evaluations, using a point factor system which is a quantitative system, do you ever make qualitative choices?

Well, after the quantitative has been done, I will.

Okay. Give me an example.

Okay, and sometimes it’s not my choice, sometimes it's an administrator's choice.

Okay, that very important. So I want the whole thing. I want the whole scenario.

Okay. There are what I call political choices. Where if I know that because of the organizational structure, something will cause a problem, I will make an adjustment.

Okay.

Sometimes if, I'll make qualitative decision if there is someone in a lead, responsible position but there weren't enough points to separate the job grades, I’ll make the decision just arbitrarily to move it.

[At the end of the interview, the participant returned to the issue of qualitative choices. Those statements are recorded here for context.]

We might have three assistant superintendents. One for business, one for personnel and one for curriculum. But in that business office, they'll have secretary to the assistant superintendent, they'll have a payroll clerk, they'll have three accounts payable clerks, and maybe a clerical supervisor.

That assistant superintendent for business's secretary may not have the same responsibilities as the one for curriculum and instruction because of the very nature of the offices. So, just because the assistant superintendents are all there, quantitatively I can’t always support them being together. Politically or qualitatively I might have to; and that’s a problem sometimes. It's harder to defend. But, usually when that happens, though, I want them [district management] to tell me to do it [put the assistant superintendents’ secretaries in the same pay grade] and tell me why it is [unintelligible on the tape].
In most other cases, if they want me to move something, they have to kind of defend it a little bit more. But if they tell me I want them all to be at the same level...I've had situations though, where I wanted to separate assistant superintendents. I just got through doing one and both those assistant superintendents where in there with me at the time and anyway I went on and said what I said and the superintendent said, 'No, he couldn't have that' and I said that, 'Well, I didn't think you could, but I had to come in with it that way.' And the reason is because that one assistant superintendent's doing basically maintenance and operations stuff and the other one's doing curriculum stuff and you know that guy in maintenance, he doesn't have to have mid-management [certification], curriculum does. This one supervising auxiliary employees. This one's professionals. You know it went back and forth that way......There's all kinds of arguments about who's more important.

This is just a...I'm looking at the public nature of the education [sector] and I'm looking at the political nature. You've already spoken to the political nature.

Okay.

But does the public, the fact that it can end up on the front page of the newspaper; the fact that any employee can see anybody else's pay because it's a matter of public record; does the public nature of the education sector influence decisions you make in job evaluation? Whereas, if you were doing it, say for Motorola, you might do it differently.

I'm thinking long and hard about that. I don't think so. With the only difference being if we are doing a stipend study, then it might.

Why would that make a difference if you were doing a stipend study?

Well, let me think about the question some more. The answer is no. Even now I'm not sure that's correct [the reference to the public nature of pay and its effect on choice in a stipend study]. My concern is that it be fair regardless of what the public perception might be.

[At the end of the interview, the participant returned to the issue of stipends. Those statements are recorded here for context.]

So we are talking about stipends studies.

Yeah, I think, and this is me personally, I think it's absolutely ridiculous some of the coaching supplement amounts that are being paid out there and less on education. You know most board presentations when I'm doing this type of study [stipend study] they bring up that issue too. They can't believe we're paying this much for--and it doesn't have to be football, it can be baseball or soccer or anything, and not enough for academic decathlon or for National Honor Society club sponsorship.

They are just really, I mean they know they are doing it, but they don't understand why they are doing it.
Bur I'm wondering if they do know they are doing it until you have gone in and done the study and isolated those stipends.

Well, publicly they're saying they didn't know it. But see, what I think has been happening with stipends is that--and this is the way I think the board perceived it--they say, 'Okay we're paying $4,000 plus ten days.' They have no idea what the value of ten is. And they go 'Wow! We had no idea.'

Now you know I think some places are waking up to it. In fact, I get calls asking 'Can we pay just a flat fee?' And I tell them, 'Of course you can. You can pay anything you want for this.' But, I think don't people actually realized also that when, in the past, employee daily rates went up, those coaches, their pay went up also whereas people in the academic area didn't have extra days that were going up and I think that has created a pretty big disparity, in my opinion.....and when I do these, I tell them I'm not there to impose my values on them but they are telling me who they compete with in terms of employment for stipends or who they want to compare with and then what they value.

And regardless of the questions--I don't do questionnaires anymore for stipends because it's so market driven any way, it's what I rely on. For those that don't have a market, then I will talk to the supervisors usually about...let them define what the markets are.

In X county, the superintendent flat out told me he trusted the athletic director to be representative of the community values for athletics and that was fine with me. And then the board can either agree or disagree with it and that was a different decision to make. Someone has to represent to me what the community values are.

Okay. Here's a hypothetical. You read three questionnaires from three high school principals' secretaries. They are in different campuses. They're not off the same campus. They have very similar scores, within 10 points of each other. However, the aggregate of their scores id 175 points higher than the two assistant superintendent's secretaries. Now, how are you going to handle that?

I'm going to say the high school principal's secretaries should be paid higher then.

What kind of response can you expect from that?

Well, it depends. In some cases, everybody agrees that's the correct response, particularly if it's a small school district. More times than not, that would be held up to be true and correct.

To put the high school secretaries in the higher pay grade?

Yes.

Interesting.

Sometimes it's not that way. Sometimes someone will have a problem with it; that's the political nature of the beast. In which case, the first thing I'm going to do is go back and verify the information I've got. Because sometimes, and I think our
questionnaire is lacking in this, I think there is a little bit of a problem, but a lot of times the secretaries for [the] assistant superintendent came from a campuses and its considered a promotion and sometimes that's not always reflected in the questionnaire that we have.

When you think about doing job evaluation...
Which I try not to do. [Laughter.]

What is the most difficult thing for you in the job evaluation process? What is it that takes the most intellectual effort? That's what I'm trying to get at.
Hmm. The most intellectual effort?.

Or just difficult.
Well, [sigh] and I'll tell you, I think I'm jaded a little bit because I've done so many of them. Sometimes I think I can do these things in my sleep, so I feel it's like it's almost second nature to do it now--

...with the classic jobs?
Yeah, you know, I'm not sure if this counts, but I think redefining the terms is becoming more and more difficult: or, distinguishing between terms sometimes.

You mean on the scoring sheet itself?
Yeah, how we are going to define things. Sometimes we go through our annual periodic adjustments and--well, I'll tell you something else I find difficult. I find it difficult when people don't tell me something that I think is true. Like if they don't tell me that a job or a district requires X experience, but I think it doesn't make sense if they wouldn't. And, huh, it's hard for me to say, on the first cut particularly, to say okay, I'll go with what the employee says rather than use my own feelings.

Have you ever manipulated the numbers on your scoring instrument in order to produce a job hierarchy that was politically correct or you knew the board would buy off on?
Well, yes I have, but it has to be defensible. Now I've done other things where I've just moved them without changing the scores. I'm more likely to do that than I am to change the score itself. For example, bus driver and usually there's a reason like with bus driver I can't get the scores high enough to be in an appropriate job grade that the market dictates. So it's basically a market driven placement.

So, that's what you would say: 'This is a market placement thing'.
Right.

But you've got a theoretical construct for that one.
Oh sure.

Okay.
But I don't have one for some of the political manipulations.
Now this one...the last two questions are...they are going to sound the same, Name, but they really are--content wise they're really very different. And I'll tell you what the key word. The key word in this one is defensible. Which is more defensible to yourself and your colleagues: your qualitative choices or your quantitative choices?

Quantitative.

Can you give me a reason why you think that's so?

Because the same the same factors are being used to measure all the jobs. And you know the one problem I think we have is that maybe we don't have all the right factors in there. But as long we are applying all the same criteria to each job in a job family, I think that is more defensible than some qualitative choices.

Here's sort of the flip side of that question. Which is easier, and the key word here is easier, to explain to district administrators, staff and school boards: your qualitative choices or your quantitative choices?

I would say my quantitative choices are easier because the ones that are adjusted for qualitative reasons, there are fewer of them. And it's usually not a hard sell for people to understand it. Like, you know the superintendent's secretary. You know they're always going to be higher that the assistant superintendent's secretary or the principal's secretary and everybody kind of expects that.

Okay, so you are saying then the qualitative are easier to explain?

Well, yeah, okay. I'm not having to justify it. But I usually don't bring it up at all. In a group with employees, I'd be loath to bring it up. But you're right then, qualitative would be easier.

So there are things that you would say...there are levels of explanations that you give to employees and then there are levels of explanation you give to administrators?

Oh yeah. Yes.

And then levels of explanations you give to boards?

Yes.

Remembering [district Name] and the bus drivers and your first day of work.

Yes. Yes. [Laughter.] However, and I won't say it on tape...

[The participant then returned to the subject of stipends. These comments are reported and noted earlier in this transcription for context and continuity.]
APPENDIX E PARTICIPANT #3

What is your highest level of formal education?
  Bachelor's degree in finance.

Are you a Certified Compensation Professional?
  No.

How long have you worked for Personnel Services?
  One year.

Where did you work before you came here?
  [Name of organization] which was a not-for-profit organization.

Did you work in the field of compensation?
  I was the benefits manager and handled compensation. They eventually went to broadbanning.

Did you do job evaluation?
  No.

Who were your at [name of organization]?
  Basically we had members. We had over 40,000 members and they paid membership dues basically and they would purchase magazines from us, books. And our members consisted of college professors, students, people who worked in sewage plants, operations managers.

So you really had the whole spectrum from people who worked in for profit agencies who interested in it perhaps as an environmental concern and then you had people [for whom] it was job related.

  Right. People who were doing research.

Right now, describe your level--on a scale of one to five--describe your level of expertise in job evaluation relates strictly to the education sector.

  I would say a four.

Can you give me an estimate, and it certainly does not have to be precise, of how many districts in which you've worked on job descriptions--oh, evaluations?
  [Laughter.] I would say roughly, 30.

Okay. That sounds about right given how many [compensation plans] you do a year.

Describe the type of plan you all use to do job evaluations for school districts. Is it a whole job ranking, classification, or is it a point factor system.
For the most part it is a point factor system but in the small school districts I sometimes use the whole ranking just depending on, you know, if they didn't submit questionnaires then I would look at the market data and look at what they are paying their employees and then just go ahead and slot them.

Now, the point factor system, is that a qualitative or quantitative plan?
Quantitative.

How would you describe the whole job ranking [system]?
Whole job ranking? I would say probably, oh, I would say quantitative.

What do you use to quantify with?
Well, it not really so much: really, like the point factor, but I just do a comparison looking at the numbers so I guess........

Is the whole job system more subjective?
It is more subjective. You are not actually rating the job you're just making comparisons.

So by in large, [your department] uses a quantitative instrument.
That is correct.

When you are using that instrument, do you ever make qualitative choices or subjective choices?
Hmmmm. sometimes.

Can you give me an example?
An example would that sometimes we may have a position that will rate a little lower than what the market indicates. A good example would be a bus driver.

And what will you do?
Basically, I will look at the market data and look at what they are paying the bus drivers and I tend to go ahead and move them up a pay grade. If they may have rated in pay grade 2, I’ll push them up to pay grade 3.

And the market is the driver in that?
Yes.

Have you been with Participant #5 or Participant #2 or Participant #4 or Participant #1 to any of the districts yet to do a presentation?
Yes.
Does the public nature of the education sector influence decisions that you make in job evaluation? In other words, unlike the private sector, the education sector is subject to the Open Records Act. Anybody can...they can take every employees' name, print it in the paper with their salaries. Does the fact that pay in that sector is so public, do you feel that has any influence on the kind of decisions you make when you do job evaluation?

For me, it has not been an issue. [This participant has not acted as a lead consultant in a compensation study at the time of the interview.] At least, at this point it has not been. I'm sure its more of an issue for the people actually presenting. They may be aware of a circumstance that I'm not maybe a board member's wife is a position and she may be higher paid than what the market calls for and they may make an opportune decision to move her up a pay grade. I don't know.

This is the same question but with a little bit different slant. Does the political nature--and I think the example you gave--does the political nature of the education sector influence decisions you make in job evaluation?

Yes.

And your example would he the board member's wife?

The board member's wife or it could be a superintendent's relative.

This is a hypothetical. You read three questionnaires from three high school principals' secretaries. They are principals on three different campuses. All of those secretaries come out very close to each other in scores within 10 points or so. And, the aggregate of those scores is some 175 points higher than the two assistant superintendent's secretaries. What are you going to do in a case like that?

Well, in a case like that I tend to look and see first what the school district is paying the assistant superintendent's secretary compared to the high school principals' secretaries. I look at the market to see what the market is indicating as far as what type of salaries that they should be making or how they should come close to making and then I'll just make a decision based on that data.

What if you found the market data did not support putting high school principals' secretaries in that level and yet in that district they really did require that level of skill, effort, and responsibility? Assuming you were the lead consultant, how would you imagine handling that?

Well, it really depends. I mean in that instance I would probably discussed with the administration why... Let me see if I understand your question first. You're basically saying that if a score is 75 points higher and if the school district has it rated higher than the assistant superintendent's...

No, they don't have it rated higher, you have looked at the market and the market does not support—the market, overall pays assistant superintendents' secretaries higher 15-20 percent higher than it pays high school principals' secretaries, it's just that in this district when you used your quantitative instrument, it's very clear that those people's jobs require more skill, effort, and responsibility than an assistant superintendent's.
I would probably put them a grade below the assistant superintendent's secretaries or I may put them in the same grade, just depending on the school district.

And again, how would you justify that decision? Would that be a political issue for you? Would that be a public issue for you?

I would probably say more of a political one.

I should have told you at the beginning of this, there are no right or wrong answers.

I know. [Laughter.] I'm trying to think back about what I've done in the past. I've had an instance where a secretary was rated higher than the assistant supt's because the assistant supt's secretary wasn't doing very much and in that case they had her paid higher and she was in a higher level; and basically I think what I ended up doing in that case was I put the secretary together with the assistant supt's.

When you sit down in here with your colleagues to do job evaluation, what is the most difficult thing for you in the job evaluation process and I what I mean by this--strangely enough, the one question has caused more furrowed brows than any of the others. But, at what point in the process do you have spend the most intellectual and ethical energy?

For just the evaluation?

When you are doing the job evaluations with the questionnaires.

I think the most difficult part for has been all the different definitions and sometimes they don't quite make sense to me—not very many. Also, I feel that the clerical/technical and the manual trades need to have two separate questionnaires along with definitions instead of combined as they are right now.

Tell me why do you think it would work better if they had separate questionnaires?

Well, it doesn't seem like the auxiliary one is very conducive to the manual trades. I would say it works well overall for the clerical/technical but there are just some areas that really need to be worked on under a job accountability and probably under working environment.
Now, you have to remember that I'm not the compensation police here, but have you ever manipulated the numbers on the quantitative instrument in order to produce an job hierarchy that was politically correct?

At times, I have.

This is another one that is a shift on the same question but the key word here is defensible. Which is more defensible to yourself and your colleagues: your qualitative choices or your quantitative choices?

Hmmm. Defensible. I would probably say quantitative.

And why do you think that's so?

For me, I'm a numbers person and numbers, you can see the numbers and you can see where they numbers break as far as which pay grades they should fall in. And I tend to go more by the quantitative—you know, just by looking at the numbers than so much the qualitative—at least initially. Maybe down the road, if I find out for example, that a wife who's in an assistant superintendent's secretary position is getting paid more than the superintendent's secretary maybe in that instance I would bump her up. But you know, that's pretty rare. Most of the time, I usually go by the numbers.

Again, a little bit different slant here and the key word is explain. Now assume that you were the lead consultant or what usually happens here is that you will go out with the consultants more and more and more. At some point, they'll say, "All right, we want you to do the presentation for the nonexempt personnel. So let's assume that you are in that role. Which do you think would be easier to explain to district administrators and boards members: your qualitative choices or your quantitative choices?

Easier to explain....

Well, maybe easier for them to understand.

They would probably understand the qualitative more than the quantitative, I would guess. You know, they aren't familiar with the instrument and some people have a difficult time with numbers. Not everybody is number oriented.

This isn't a question that's on here but it's a question that either they other participants have brought up or just come out in the conversation but just thinking about the education sector as a whole, do you think they tend to more credence in something that's quantifiable?

I would think so, yeah

I certainly do thank you for your time.
APPENDIX F: PARTICIPANT #4

What is your highest level of formal education?
   Short of a dissertation, "ABD. [Laughter.] I've done it three times now. I'm on my third dissertation. [A discussion of the participant's academic trials followed. It is omitted because it is not pertinent.]

Are you a Certified Compensation Professional?
   Yes.

How long have you worked for [name of organization]?
   Since '93. If feels like 15 years but I think it's only been three.

I do understand. There is a different time warp here. Where did you work before you came here?
   A manufacturing plant here in town and prior to that, I was in a software development organization in Dallas. I moved to Austin for school. I disrupted my entire life for school and like Dorothy in The Wizard of Oz, I'm just tapping my heels together--I just want to go home. I want to go home.

When you with the [other employers], did you work in the field of compensation?
   Yes.

Did you do job evaluation?
   Yes.

Were your clients from the public or private sector?
   Private sector

How would you describe your level of expertise in job evaluation?
   Do you have any context?

Like on a scale of 1 to 5.
   Probably between 4 and 5, depending. It's in schools, closer to five. Going back into the private, it's so specific to each industry.

Okay. Since we are just looking at the education sector, I'm going to put 5.
Can you give me an estimate, and all I need is a ballpark figure, of how many districts in which you have done all or part of the job evaluations since you've been here? To give you some kind of context, Participant 5 told me that he/she has worked here, the department has done plus or minus, 200 districts.
   I would say since I've been here, in partial or full, it's somewhere around 50-40 to 50.
Describe the type of plan you use to do job evaluations for school districts.
Such as a point factor?

Yes.

Point factor that’s divided into what, at any point in time, we change it every year, but probably 13 to 14 subfactors with a rating from somewhere between 10 to 160 per factor. So, you know, any job could be evaluated with around 130-140 depending on how many subfactors up to 1,200, 1,300, 1,400 points.

Okay. So would I be correct in saying that’s a quantitative plan as opposed to a qualitative plan?

Yes. It’s a point factor driven by numbers.

Now, when you use the quantitative instrument, do you ever make qualitative choices?

Yes.

Can you give me an example of such a choice?

In particular on ours, or any of them that I’ve used since, I’ve been trained on two or three other point factor systems, it seems to be more subjective around the supervision part of it; particularly in education because of the supervisory hire-fire responsibility and the number of folks they may supervise. If they are a principal level vs. assistant principal.

So, I think that’s probably where I do more, plus organizational impact. I think I make more judgment call because it’s harder to quantify some of those dynamics which just requires more interpretation.

Does the public nature of the education sector influence decisions you make in job evaluation? By public nature, what I mean is—unlike the private sector—a newspaper can go down and under the Open Records Act get every employee’s...

And they do!

And they do and they have. So, does that influence decisions that you make in job evaluation?

It doesn’t influence so much my decision as it influences the process [wherein] I work specifically with the district. I may evaluate it knowing full well that my quantitative evaluation has all sorts of political dynamics and those political dynamics are the reality of that environment. And so I, we as a team, then with the administration, make some judgment calls based on it.

Can you give me a specific example using a particular job where this might be the case?

Athletic director. It will evaluate, quantitatively, in a lower pay grade but politically, in pay, must be placed in the next higher pay grade. And if it doesn’t happen by the administration, that position is often moved by board approval.
Only in Texas. [Laughter.]

The other one is just a little bit different slant on the same question. The athletic director was a good sequey into this. Does the political nature of the education sector influence decisions you make in job evaluation? By that I mean the fact we know for example in Region 13, the average tenure of superintendents is 2 years and 1 month which I find just horrifying from an organizational perspective.

Oh, it is.

But you and I both know that’s directly related to the political manner in which school districts are operated and managed and administrated. So, does that political component influence decisions that you make or can we just say "ditto" on the athletic director?

It does. It’s the same type of dynamic as to politically who’s up for reelection. But maybe even a more micro analysis, who are the people related to on the board. Who’s relate to who and what position and that I try, when I do the ratings, I take that out. But I know full well that it comes back into play when I meet with the administrators and we have very candid discussions about it.

This is a hypothetical. You read three questionnaires from three high school principals' secretaries. They have very similar scores, within 10 points of each other. However, their aggregate scores are some 175 points higher than the two assistant superintendent’s secretaries. How are you going to handle that scenario?

[Laughter] Before I lose my job or after I lose my job? I take it out on the first draft, on the draft with the administrators. I take it out and tell them why I rated it that way. Then we talk about why they see it differently and, quite frankly, I’ve had some that have not seen it differently and have agreed with what I’ve said. That’s not the norm. The norm is that central office, whoever you are, will be rate higher than the key positions but I always just take out what I’ve seen quantitatively first.

It is very interesting to me that with site-based management, I think it’s very, very slow because education is such a behemoth it just can’t move rapidly, but I’m seeing more and more--it’s not just that... jobs in central office aren’t being replaced, positions aren’t being replaced and are being delegated to the campuses.

The campuses are becoming much more a division, a separate operation.

They are. It’s very interesting to watch.

When you sit down to do job evaluation for a district, what is the most difficult thing for you. By that I mean what demands the most intellectual effort from you? Or, the most ethical--you kind of have to put those two together I think--but what is it that make job evaluation difficult?

It is, for me, trying to quantify data consistently across a variance in jobs. And to have someone write what they do compared to how someone writes what they do and on and on and on. And this lens that use, these glasses that you put on to try to be fair and consistent with everyone of them. And interpreting that fairly and consistently across.
And the way they write the number--and not only just the way they write, but every question that they complete or don’t complete and trying to be consistent on that I think is probably the most difficult. Because that is what worries me the most: Have I been fair and consistent with every questionnaire? That's the one that I walk away and go 'Oh my goodness, I hope that, that I really quantified the data correctly.'

Let me ask you this and you're the first person I've asked this. Do you think it would be possible to develop an instrument that would be so... have such a level of discretion that it would remove that issue for you?

No, I don't. I've used, I've been trained on Hay and I've used Hay. I've used John Davidson's Individual. I've use a different point factor at [former employer]. Ours actually, has less openness to it than any other plan I've ever used.

Every other one that I've been trained on--that not true--Hay is driven off knowledge [know-how]. With Hay, once you determine the knowledge factor, you right there have set that job's pay grade because every other one is a multiplier off of knowledge. So, it is heavily weighted to the knowledge, which discounts the communications part of it, the supervision, decision, and all the other stuff to me. I don't like the Hay system because of that.

When I used John Davidson's, it's so open-ended. There were no, there were very few definitions. It was somewhere between here and there and you had 2 or 3 points and you could place it. Ours probably does the best job I've seen. And oh, I was much more of a dart in the wall with what they [Hay and Davidson systems] used. Ours takes more subjectivity out of it [as] possible. But if you could move to that level, then you don't need people doing it. You'd just do a scantron and let someone fill out something throw it through the machine and I don't see...I think you miss too much of nuances in the job to be able to do that. So, having used as many systems as I've used, this one is the most delineated of any and yet you still have to make the judgment that comes clearly from the knowledge of the industry.

Again, there are no right or wrong answers here. Have you ever manipulated the numbers on the quantitative instrument in order to produce an job hierarchy that was politically correct?

After the first meeting [with district management], yes. Actually what it gets down to is that you don't even have to manipulate the numbers, you just have to change a few jobs in the pay grades. But yes, ultimately what you are doing is manipulating it to get due to administration and board's [unintelligible].

Which is more defensible and the key word is defensible to you personally and to your colleagues: your qualitative choices or your quantitative choices?

Legally defensible, under the court system, probably would be my quantitative choices. To my customers, it's going to be a combination of both. But if I had to go into a court of law as an expert witness, I'd better have those numbers to back up and match my ratings.
The last question. Which is easier to explain to district administrators and school boards: your qualitative choices or your quantitative choices?

The quantitative.

Do you have any guesses as to why that might be so?

Because, we base our whole study, our whole business on the fact that you hire us as outsiders to give you an objective pay study. If too much appears to be qualitative in nature, such that 'the superintendent told you to put it there--right?', then you are going to lose a lot of credibility. So, I think that is the basis of our business is that we don’t know anyone there. We purposely...if we do [know someone there], we have somebody else rate that person’s job. We go out of our way to insure objectivity in our work.

I appreciate your time.
APPENDIX G: PARTICIPANT #5

What is your highest level of formal education?
Master’s degree in Health Science Profession--by a circuitous route I’ve gotten here.

Are you a Certified Compensation Professional?
Yes, I am.

How long have you worked for this department?
Fifteen years, this month.

Oh! Happy Anniversary.
Yes, I get a watch with the [company] logo it...[Laughter.] 

Well, lord knows, you’ve earned it. [Laughter..] 
Yes, I have.

Where did you work before you came here?
[Names a state agency]

And did you do compensation there?
Somewhat, we were under the state classification and salary schedule. My work there involved classifying jobs within that system.

Were your clients--and by clients I mean--obviously your clients were the [names the clients]--but you were working in the public sector?
My own personal job was dealing with the employees of [state agency].

One a scale of one to five, where would you describe your level of expertise in job evaluation.
Oh, that’s a good one.

Well, by five I mean you haven’t learned anything significantly new in the last three years about job evaluation.
No.

Then you are advanced.

Can you give me an estimate of how many districts in which you, personally, have done all or part of the job evaluation and to give you a context, Participant #6 thinks, that in the years he/she has been here, that there have been probably 200, plus or minus, studies done.
Yeah, and I'd say, because I don't personally do that myself anymore. I've been out of it for awhile, so my currency with it...but I would say that I've probably done maybe 20 to 30.

And were those quantitative or qualitative systems?
Quantitative...for the most part. The vast majority were quantitative.

Okay. So I'm assuming you did some that were whole job ranking.

In real little districts with just a handful of people in a [job] family where you just talk it through.

Okay, so it was determined by size. And was the quantitative a point factor [system]?
Yes.

You used a quantitative job evaluation instrument. Did you ever make qualitative choices?
Yes.

Can you give me an example of one?
The scales. We've played with scales for years in terms of trying to find the right number of degrees of things...you know. For example, defining degrees of judgment that have to be made in routine decision making on a job. We have struggled over the years with trying to find words to describe distinct levels. And, other than the far ends of spectrum, you get into the middle range of trying to decide between some or a lot and sometimes you really have to...I think everybody's got their own technique of splitting between the hairs but it often gets down to comparing one job against another. Well, is it more than this job or less than this job? Those are the kind of questions I ask people I've talked to. Is that an answer?

Yes, that is [laughter] an answer. It's just that my brain is making all sorts of connections and synapses are leaping and...

Some compensable factors just require a lot more subjective kind of judgment than others and there is a 'known' that is the most qualitative, I guess.

Now these are going to be two questions that have to do with the public and political nature of the education sector. Does the public nature of the education sector influence decisions you make in job evaluation--the fact that you knew that that job hierarchy could be published on the front page of the paper and even the names of the people who had the jobs could end up in the paper.
Definitely.

Can you give me an example and of a choice that would be influenced by the public nature of pay?
Downgrading positions that are very...well, actually downgrading any position because you know there's going to be...there's generally going to be a negative reaction if you downgrade a position that is dominated by a very organized group of people. You just know going into the situation where the battles are going to be. I'm...it's not that you'd make a different decision than you would anyway. It's just preparing, you know, preparing the rationale and, you know, making sure there is really good justification for making changes that are...you know, it's different to go into...you never go into a school district without something already set up.

It's managing that change process and figuring out, you know, how to come up with a system will be acceptable that people can live with. It can't just be, well, to me, I don't think it can be just straight by the points. I mean, it's a starting point and the points are an excellent guide but there is very much a public, human side to everything in public education.

You have to ready to go on trial...

*Exactly [laughter].*

...and defend yourself and face the music.

*It may sound like the same question, but really is a bit of a different slant. The political nature of the education, the fact that you're dealing with the people who have to buy off on this system are elected officials, does that influence [decisions you make in job evaluation]?*

Yes. Well, when you say 'influence' I don't...you know, 'influence' is: do you think about it: does it have a role in preparing the recommendation? Yeah, I mean would you go in and recommend a pay structure that has no data? Would you recommend putting a job in a pay grade that has no market data to support it's being there and that is way out of sync with compensation practices of the industry? No.

So, it wouldn't be just a total driving force. But as consultants to the public sector, when you go in a recommend a system and the foundation of that is job classification you've got to give them something that is...that they can live with. I guess that's been our philosophy--you've got to give them a...if you went into a school district and handed them a completely inverted job classification, than they've had in the past, they couldn't live with that.

I think because of the public nature and the political nature of education, there's probably tighter parameters about what...about how much change can be accommodated.

*All right. This is a hypothetical. You go into a district and they have three high school campuses and you interview each of the principals' secretaries on each one of those campuses. When you come and score the instrument, the aggregate is...they are very close to each other--let's say 10 points apiece. But the aggregate of their scores is a 175*
points higher than the aggregate scores for the two assistant superintendents' secretaries. Now, how are you going to handle that?

If that were to happen, and it was legitimate, I mean...the first thing I would do is go back and question where did those rating come from? I mean, I would go back and re-rate the jobs and really examine those factors and maybe get a little more information; because I would not accept that just on face value. If that was really the result and there was no other explanation for it--are we really being honest here?

[Laughter] Yes, we really are being honest here. [Laughter] Your anonymity will be protected.

Job evaluation has to be balanced against the market data. When there is a conflict between the rating the job duties versus the market data, every plan designer makes a decision about how much balance to give the job points versus the market points.

Okay.

If that was really the way it fell out based on the duties, the first thing I'd do is have kind of a talk. But, if that was something that needed to be that way, then I would go to the market data which I'm sure would support a different hierarchy; or put them in the same grade. You would either widen the point range or you'd use the market data to justify putting the [job grade] breaks where they were.

When you used to do job evaluation on a regular basis, can you remember at what point in that process was the most difficult thing for you. By difficult, I mean which one demanded the most intellectual and ethical effort from you?

Which employee group?

No, no. Which point in the whole job evaluation--from reading the questionnaires, scoring the questionnaire, putting them into job grades, assessing the job grade--before you take the product to the district, for the first time, what was the most difficult point for you?

Can I say two?

Sure.

One is just rating the gray areas--the gray zone where there is more subjective judgment on factors. That's tough and you really have to check your own biases because everybody has...you do this long enough in one industry you have--keeping really a fresh open mind, it takes some self-discipline.

The other one that most difficult is deciding where to draw those lines for pay grade breaks in the hierarchy. Sometimes they are close and you've got to look at other things. Again, that's where I'll go back...and I think different people put more or less reliance on...you know, you have your real pure point people and then you have people that blend it more with the market figures. That was always my...when you got in a pinch or a bind, I would always look at the market data [unreadable] there are kind of decisions. Do I draw the line here or do I draw the line there?
Now, this is one where you have to tell the truth on because everybody else has.

[Laughter]

Some of them under duress, but they did tell the truth. That what I had to put in my methodology section as a weakness was that I knew these people and I would know if they were lying.

[Laughter]

Have you ever manipulated the numbers on the quantitative instrument in order to produce an job hierarchy that was politically correct?

Yes. Well, what I do is go back and re-rate the job. You just go back and look for more, more something. So, if that's what you mean, then yes.

So you would go back and look for some justification to change the points?

I wouldn't change the point rating plan, but yeah, go back and look at the job.

Do you want to say something else?

I want to say that actually with experience in an industry, probably any industry, you go in, I mean the experienced job classifier probably knows from the outset that there is an acceptable and an unacceptable hierarchy. It's more like if you rate jobs and you come out with something that you know right off the bat is not acceptable in that culture, climate, whatever, then you've got to find a way to make it fit. You know that even before you start.

Right, and that's what the empirical research is denying—exactly what you are saying.

Really?

They are denying it by ignoring it. They don't bring that into the discussion. That's looked at as rater bias because what they are focusing on is...well, I'm taking up tape time.

Well, yeah I know there's bound to be...but there's probably a lot more in the public sector.

That would be my intuitive feeling, too.

Okay. The key word here is defensible. Which is more defensible to yourself when you are staring at the ceiling at night thinking about this job hierarchy and the five or so odd jobs that just don't feel right where you've got them, which is more defensible to yourself and your colleagues: your qualitative choices or your quantitative choices?

We're talking strictly about the job evaluation plan?

Yes, we're not talking about other factors.

I don't know if I understand that correctly. I don't want to answer that wrong.
Well, there's not a right or a wrong. Let me tell you what I mean by qualitative and quantitative. The bus drivers ended up in pay grade three because I factored into their responsibility the fact they are personally responsible for--not even counting the children--but for a piece of equipment that's costing that district tens of thousands of dollars. So, that why they are in pay grade three.

That's a qualitative---

Yes.

Okay. Yes, it's the qualitative ones. These plans are limited and if you can't see beyond the words on the page than you're not very good at this anyway. I think the qualitative choices are...sure, there are maybe some unduly politically motivated, but a lot of them are not. There are highly defensible and correct qualitative decisions that have to be made because these plans are limited.

That's wonderful! I have to remember to put that in italics.

Are we all saying pretty much the same thing?

Oh yeah! That's what I was going to tell you when we are finished. Okay. This is the last one and the key word is easier. Which is easier to explain to district administrators and school boards and I'm not lumping those into one group. You may have a different answer for administrators and different answer for school boards or it may be the same answer. Which is easier to explain to those two groups of people: your qualitative choices or your quantitative choices?

Quantitative.

Why do think that's so?

Because job rating plans have numbers and measures and they are all symmetrical. There is often an assumption, or an expectation, that they are infallible and all encompassing. When you explain things that are outside the boxes, it undermines the credibility of the process in some ways and then you have people attacking the entire idea behind it all. Or, it's just subjective opinion. They have their own biases and you get into the battle of the biases. So, yeah, it's harder...you know, it's harder to explain.

I really appreciate your time.
What is your highest level of formal education?
   Ed.D.

Are you a Certified Compensation Professional?
   No.

How long have you worked for [name of department]?
   Eleven or so years.

Where did you work before you came here?
   Austin Independent School District.

Did you work in the field of compensation?
   Yes.

Did you do job evaluation?
   Yes.

Were your clients from the public or private sector?
   Public sector.

Describe your level of expertise in job evaluation.
   Very practiced.

Can you give me an estimate of how many districts in which you have done all or part of the job evaluation?
   Oh, I'd say around 175 to 200.

Describe the type of plan you use to do job evaluations for school districts.
   It's a point factor system.

Is it a qualitative or quantitative plan?
   That's a quantitative plan.

You use a quantitative job evaluation instrument. Do you ever make qualitative choices and can you give me an example of what those choices are?
   Qualitative choices. I think I follow pretty rigorously the quantitative part until I get to the point where I'm trying to discern differences between jobs as a total group or where pay grades break, or things like that. Then I start looking for rationale for why jobs are described the way they are described. Why employees give the kind of input they give. So I guess on that level I start to arrive at sort of a qualitative analysis or rationale or framework for the job as opposed to just taking the data from the job.
Does the public nature of the education sector influence decisions you make? and by the public nature I mean the fact that any newspaper can go down and get the salaries of any public school employee and publish those in the newspaper. 

No, that part doesn't influence me at all—what the media would pick up and say is significant or where a job should be related or classified. They are typically clueless in any conversation you have. It's very quick, they (a) don't understand it and (b) they looking for a story rather than information and so when you give them information they're pretty well satisfied with information.

What about the public nature in that employees all know, in a school district, what everybody's paid?

It doesn't influence how I am going to place the job. The fact that one employee will know where another employee's job is classified or can obviously discover for themselves what another employee is paid, that does not influence where I'm going to place a job.

What about the political nature of the education sector?

The political nature of it, which is a little different than the other questions have to do with sort of the effect of the long term, or short term choices, about where jobs are placed, classified, organized. Again, this is after jobs are treated like all other jobs in the structure. Then sometimes you just go back and review and ask is this what is traditionally called a [unintelligible] technique—you just say, 'Well, does this make sense?' And sometimes in the context of raising 'does this make sense' it becomes sort of a political type question. That may be—usually it just makes more sense as a practical kind of question rather than a political question.

If you have five elementary principals' secretaries that you've rated, and one clearly gave inconsistent information with the other employees and you know that for no good reason, meaning that the campuses are very similar or the background and history of these people are about the same, but whatever reason, the person just gave inconsistent information. Then instead of quote, classifying the job exactly where the data says, meaning what they reported, then you can consider how that relates to the other jobs.

That's a lot more difficult when you have one job—to try to balance it out. That's why we look at all the jobs as closely as possible in the same time frame so we can figure out the relationship[s] between jobs are as a way to [unintelligible] or check it when you're finished. Meaning again, if you have some employee that supervises some other employees very clearly according to the structure of the organization, normally that's an administrative kind of position. That person or position wouldn't necessarily be classified above them just because one happen to do one bang up job about how they reported information through a job analysis questionnaire. Where if you had some additional information which would be the job description or common sense might suggest that the jobs are in a different place.
So, that's not quite political but that's just common sense kind of things. Political I never just say, "Oh, this is a board member's wife", or something like that without--that would only mean that you need to be very careful and considerate and feel very comfortable with all the information. That's all that tells me.

You said something about a difficult thing was an individual job. Do you mean a single incumbent job?

Right.

Okay, and it doesn't clearly go one place or another.

If it's a complete stand-alone job that really is wrapped up a lot in the person's individual qualifications, then it gets to be more complicated by far, because you may somebody who is exercising a job role primarily because of their qualifications. So the job role needs to be done. It might be reconfigured differently if this one person weren't there to do it.

So the incumbent is defining the job rather than the tasks defining the job? Is that the kind of anomaly you're talking about?

Well, the incumbent, the skill base of the incumbent would have an impact on how the job was classified. The accountability would be the same whether...that part's the same. So, it's typically a matter of whether it goes to grade four and opposed to grade five or grade three as opposed to grade two. So, it's not like job grade one compared to job grade ten or something like that. It's not that much of a shift. Typically it's more subtle and more that kind of understanding.

This is one of the questions I did keep from the one that we field tested first. This is the one with the three high school principals' secretaries. They are within 10 points of each other. But, their aggregate score is some 175 points higher than the two assistant superintendent's secretaries. What would you do there?

Well, I'd validate the data. I in fact, as first off, not assume that the assistant superintendents' secretaries are supposed to be above the high school principals' secretaries. That's not the correct answer, or procedure, or process, or reflection. First, you go and validate the data. If the data, in fact, stays placed, then certainly lead with that as a basis of information. That is, the assistant superintendents' secretaries are place in a range less than the high school principals' secretaries--which has happened before.

Sometimes, even though the range difference based internal equity may say that one job is higher than the other, that is also a time to look at what the market rates pay would be--such that a skill or executive secretary might be significantly paid differently than the others. In general, those would be about the same skill base level secretaries--some other things and so I probably would be looking at--if there was that much difference I'd probably just hold to that. If in fact, there was that much difference and the request was strongly made those jobs be different, then as far as I would take it is to put them in the same pay range. I would not reverse that relationship at all.
I'd also study a little more carefully about the history of where these folks came from. Meaning what's the pattern? Is it traditional that the high school principal[‘s secretary] becomes the assistant superintendent's secretary or...

...is that a career path, in other words?

Right. Is it somewhat expected and for some reason this is just a way of handling some sort of personnel matter rather than really job [related]. In that case, I would say the district needs to take some other tact about what it's doing with pay and those kinds of things. Which I do.

*When you get ready to sit down and do a series of job evaluations, at what point in that process does the difficulty for you appear? Is it...at what point do you expend the most intellectual and ethical effort?*

That's good question. Probably just doing it. The other part is the design where you are integrate the market, the classification.....

*Wait a minute. Go back and define the point of design. What are you talking about?*

At the point of looking at the distribution of what the current pay is for the employees, what the market relationship is for each benchmark position compared to market. Trying to treat consistently every job in a job family, that's the most difficult part to do. Sometimes, it's made very easy by a district that pays consistently low. The district I was in today [there] was a trades group, it was, in one sense, the structure part was very simple. They had very consistent below market pattern. Very consistent, but not much scattering of pay.

*[Name of participant].*

Yes?

You are not answering the question. You've moved beyond to the next step. You're building the structure. I asked you when you sit down in the Pecan Room with stacks of job [questionnaires] and the score sheets, at point in that process does the difficulty come in for you...before you even look at the market data? Now, I know you are doing a lot of these things concurrently.

Right.

*You do, at some point, shut yourself up in a room and you do rate jobs?*

That's correct--typically early in the morning before the sun comes up and shines light on the process I'm involved in. [Laughter.]

*What is the most difficult part of that process for you? Or is it difficult?*

The most difficult part is to make sure I read each piece of information and analyze it in the context of the job the person is reporting. And not bring anything else to bear except the data that's there.
This question I retained also. You will recognize it. Have you ever manipulated the numbers on the quantitative instrument in order to produce a job hierarchy that you knew was politically correct?

No, no, no. I'll get new information and I'll ask questions of clarification and if they're not provided then I'll keep it the way it is unless I'm told differently and then I'll record that I was told to push some job somewhere else. Then I'll go on record with them that I'll defer to them when it comes time to defend the placement of the job.

Have you ever looked at a spreadsheet of scores, [sorted] them ascending order, or descending order, looked across at, say, 150 scores for classroom aides and looked for anomalies in those and gone back and changed those figures? You've never done that?

If I pick up the job description and review it again and find that there is, you know, an inconsistency there, yeah, but I try to be very consistent so that when I go back and look at it, I'm not looking one job that's out of place. I'm looking for clarification of patterns and jobs.

Which is, and the key word here is defensible...

....and I look at each one of the factors one at a time so that I go through and say, okay. In fact, the sequence on how you rate the factors is important, how you change them, how you review them, I think.

So you are telling me that you go through, like on teacher aides, and you'll rate all of the knowledge-related sub-factors. You'll do all those at one time?

No, when I go back to review them, I'll look at them.

Okay.

So, I'll look and say, okay, why is this one inconsistent? Yes, this one is inconsistent and there is a good reason for its inconsistency. It's because of this. All right. I'm comfortable. So, I look both across the job and then I look across the factors across the jobs.

Okay. The next question. Which is more defensible to yourself and your colleagues? Is it easier to defend your qualitative choices or your quantitative choices?

Quantitative ones.

Why?

Because, it's a, ahh, usually on the quantitative part I have supporting notes in the rating forms or sheets and I'm comfortable with defending that at that level until, again, we have some different piece of information. So, you know, if I just put jobs together and say, 'Well, I think these jobs go here and these jobs go there', I feel very uncomfortable with that, even though, I think that may be true and the district would feel comfortable with it, I would feel that I, I couldn't, that I can't do that. I think you've just got to have the points and stuff to do that. I feel very uncomfortable with it being other than that way. So, even if somebody is telling me to do a, ah...they've got five jobs, I'll look at those five jobs and I'll rate them so that I know there's a difference between them.
All right. Last question. Which is easier, easier to explain to district management and school boards, qualitative choices or quantitative ones?

Oh, quantitative ones. They may not like them, but they certainly are more...again. I try not to shroud this in some mystery or shroud it in scientific stuff. I try to tell them it's a rigorous approach to evaluating the jobs. And that's it. I don't claim it to be anymore than that. [Very long pause.]

Why is this thing [the recorder] melting’?

Thank you so much.