

HR Professional Practice Standards:

HR Standards Update

2017



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Setting HR standards

The Quality Assurance and
HR Professional Body



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SABPP Code of Conduct



Individual Practitioner Commitments

As a professional HR practitioner, I commit myself to uphold and be loyal to the SABPP's ethical values and standards. The core values of:

- Responsibility
- Integrity
- Respect
- Competence

underpin the value I bring to the organisation(s) in which and for which I practise my profession.

I further commit myself to enhance and support the reputation of our HR profession through my personal conduct and my professional behaviour.

I serve society through applying my knowledge and skills in partnering with and serving managers and employees to:

- Make a difference to the communities I touch;
- Develop performance, skills and quality of work life of all employees;
- Support sustainability of the organisation;
- Contribute to the economic and social development of South African society inside and in the external context of my organisation.
- Promote ethical behaviour within organisations

My part in living the four values is further elaborated on below.

Ethical Values

1. Responsibility

- I accept responsibility for the outcomes of my decisions and actions.
- I accept responsibility to think proactively and anticipate positive and negative consequences of my decisions and actions.
- I accept responsibility to ensure compliance with the Constitution, laws, regulations, Codes of Good Practice, and my organisation's policies and codes.
- I accept responsibility to work towards achieving SABPP's HR Management Standards thereby living good practice.
- I accept my responsibility to assist in building an organisation fully representative of the broader population at all levels and which eliminates institutional racism and other barriers to equality, employment equity.
- I accept responsibility to bring serious breaches of the SABPP's ethical values by other SABPP members to the attention of the SABPP in terms of the complaints procedure.

vii. I accept responsibility to work towards universal professional registration of people working in HR roles through encouraging colleagues to register with the SABPP.

2. Integrity

- i. I understand that my effectiveness as a credible activist HR practitioner rests on my personal integrity.
- ii. I commit to build trust in me through acting with:
 - Honesty
 - Objectivity
 - Fairness of judgement
 - Consistency of action.
- iii. I commit to declare and address actual and potential conflicts of interest as they arise in my professional and personal capacity.
- iv. I commit to ensuring that I meet agreed expectations of the people I serve.

3. Respect

- i. I commit to upholding human rights as enshrined in the Constitution of my country and to make human rights values part of my everyday life and language by listening, learning, communicating and educating, and by being open minded and impartial.
- ii. I commit to treat everyone with dignity, fairness and respect.
- iii. I commit to work towards eliminating discrimination of whatever type and to uphold the principles of anti-discrimination and anti-racism in the workplace and in society.
- iv. I commit to work towards achieving equality and diversity and to ensure that prejudice and discrimination do not go unchallenged. I will follow all SABPP professional guidelines and standards promoting diversity in the workplace.
- v. I respect the confidentiality of information that is entrusted to me.
- vi. I respect members of the various work teams of which I am part and ensure that I behave effectively as a team member.

4. Competence

- i. I understand and accept that it is our professional duty to integrate and apply sound human resource management principles, policies and practices in accordance with the SABPP's HRM Standards in all aspects of people management and to assess the value that we add.
- ii. I commit to ensure that I am competent to perform my professional HR role and that I have a good understanding of the business of my organisation.

- iii. I regularly assess myself against the expectations of the profession and the changing requirements of my roles and undertake personal and professional development where I have identified gaps.
- iv. I make sure I keep myself up to date with knowledge in the HR field through continuing professional development.
- v. I ensure that I am aware of the limits of my professional competence and I refer to other professionals where appropriate.
- vi. I commit to supporting my fellow HR practitioners in developing their competence including through role modelling and mentoring.



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**I AGREE TO ABIDE BY THESE
COMMITMENTS AND ACCEPT THE
PROFESSIONAL CONSEQUENCES OF ANY
BREACH OF THESE.**

Signature: _____

Name: _____

Registration Number: _____

Date: _____

Witnessed by:

Signature: _____

Name: _____

Date: _____

Introduction

From 2014 to 2017 the SA Board for People Practices (SABPP) developed a total of 25 HR Professional Practice Standards in support of the 13 National HR Management System standard elements. Each Professional Practice Standard sets out the operational/tactical process that constitutes good practice in that particular area of HR Management, giving expression to practical issues in more detail than can be covered in the main HRM standard. In 2017 SABPP formed an HR collaboration alliance with the South African Payroll Association (SAPA) and the South African Reward Association (SARA). As a first step towards collaboration, it was decided that SABPP and SAPA would work together to develop a payroll standard for South Africa (to be added to the suite of 25 HR Professional Practice Standards of SABPP). The purpose of the payroll standard is to ensure the sound governance, professionalism and a consistent approach to payroll practice. The full set of HR Professional Practice Standards are the intellectual property of SABPP, while the copyright for the Payroll Standard subsists jointly with SABPP and SAPA.

SABPP and SAPA would like to thank all the contributors to the development of the payroll standard, and in particular the following individuals for their leadership role in the development and/or comment phases of the payroll standard:

- Dr Shamila Singh, Head: HR Standards (SABPP)
- Ms Annetjie Moore, Head: HR Audit Unit (SABPP)
- Mr Allen Lombard, Chief Operating Officer (SARA)
- Ms Renske Coetzee, Head: HR (Redefine Properties)

More information about the HR Management System Standards and HR Professional Practice Standards is available from the SABPP office on (011) 045 5400 or on the website www.sabpp.co.za Regular updates about the HR Standards and payroll standard are provided via twitter @SABPP1 @SAPayroll

We trust that the payroll standard will make a contribution to improving the quality and consistency of payroll practice in South Africa. We would like to encourage users of the standard such as HR Managers, Financial Managers, Payroll Managers and Payroll Officers, Remuneration Managers and Payroll Providers to ensure the consistent application of the standard in the workplace.

Marius Meyer **James McKerrell**
CEO: SABPP Chairman: SAPA

26 October 2017

Payroll Standard

Where does Payroll fit into the HRM System?

The Payroll System fits within the Reward and Recognition Standard element of the National Human Resource Systems Standard.

Definition

Payroll is the delivery of accurate and timeous employee, contractor and third-party salary payments, while complying with statutory requirements and company policies and procedures, and the general principle of confidentiality. The payroll system needs to record data and generate reports which contribute to decision-making, good governance, effective reward and business sustainability.

Objectives

1. To pay employees, contractors, expatriates and third-parties timeously and accurately in accordance with contract, relevant legislation, statutory requirements and company policy and procedures.
2. To establish a framework for managing the payroll in accordance with legislation, governance, risk and compliance and alignment to policies, procedures and practices.
3. To analyse payroll data to identify trends for effective decision-making, governance, risk and compliance and manage people reward transactions according to best practice.
4. To effectively communicate with all the relevant stakeholders.
5. To document, record and generate reports for approved payroll.



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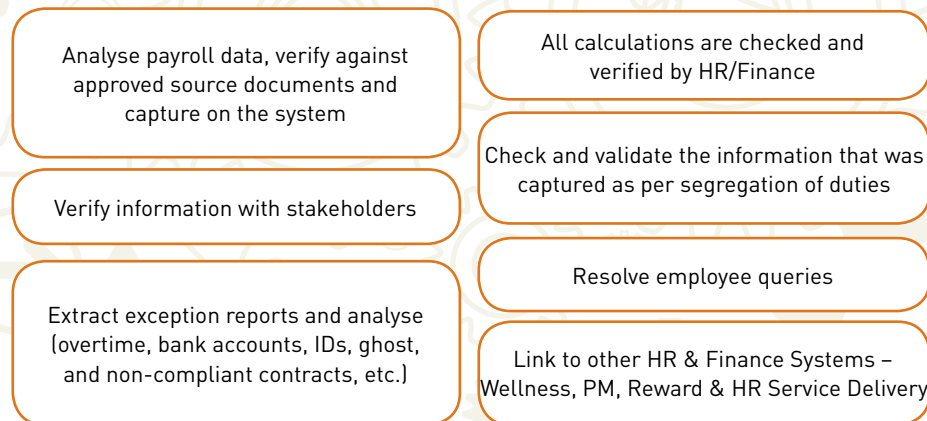


Process Map for Payroll Standard System

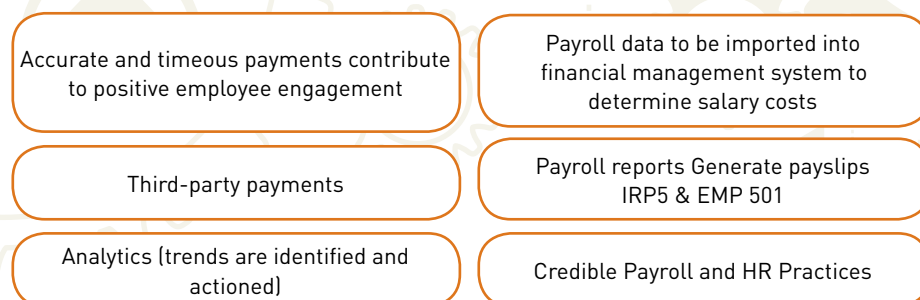
Inputs



Process



Outputs



MONITOR AND EVALUATE

What are the fundamental requirements for good payroll practice?

- a. Ensure that the payroll processing is compliant with all legislation and delegation of authorities, including segregation of duties (HR/Finance cannot capture and verify).
- b. Payroll processing practices are aligned to reward and recognition strategy, governance and philosophy of the organisation.
- c. Payroll is planned and paid timeously and accurately in accordance with the policy.
- d. The payroll processes and procedures provide the road map for the processing of the payroll and the internal and external auditing thereof.
- e. The Protection of Personal Information and levels of security, confidentiality and access to payroll information is managed.
- f. Adequate controls are in place for good payroll governance, risk management and fraud prevention.

1. Inputs

1.1 Alignment between the business strategy and the reward and recognition strategy

The term payroll generally refers to the process of identifying employees, calculating the pay and payroll taxes, recording the payroll transactions, making the payments, and completing the required statutory obligations. The reward and recognition strategy and philosophy is derived from the business strategy.

1.2 Reward and recognition philosophy and strategy

The reward and recognition philosophy should attract, engage and retain the best talent; pay competitive market related remuneration where relevant. Remuneration and benefits are benchmarked nationally, regionally and internationally in that sector where relevant.

1.3 Legislation and statutory requirements

The payroll system must be designed to adhere to all country relevant statutory requirements, collective agreements, sectorial determinations and company policies and procedures. In addition, the payroll must be aligned to governance, risk and compliance frameworks and ensure that all processes and controls are in place to manage the payroll. Thirdly, to meet statutory requirements, employees must be paid timeously and accurately to ensure a relationship of trust. Fourthly, the organisation must ensure compliance to the Protection of Personal Information (POPI) Act in the handling, retention and destruction of personal information. Lastly, HR and/or finance must implement risk controls to manage the payroll-related risks and to enforce segregation of duties.

- Any business that employs at least one employee must register with the South African Revenue Service (SARS) for pay as you earn (PAYE) and Standard Income Tax on Employees (SITE).
- Businesses employing staff must also pay a gross revenue or salary-related levy to the district council.
- Payslip requirements and termination payments are covered in detail in the Basic Conditions of Employment Act (BCEA)
- Adherence to the Labour Relations Act (LRA) covers transferring of contracts, restructuring, mergers and acquisitions and temporary employment services (TES)

1.3.1 Employment Considerations

- All employees must be registered with the necessary government departments such as Department of Labour and South African Revenue Services (SARS).
- Payroll should be processed in accordance with all country legislative requirements.
- Foreign employees are required to have the valid visas and work permits as established by immigration laws. Depending on the type of visa, enough time must be allowed for the processing of these visas.

1.3.2 Remuneration Considerations

- If applicable, remuneration must be processed in accordance with formal minimum wage determinations and legislation.
- Overtime hours must be worked in accordance with an employment agreement. Employees above the threshold are not paid overtime and employer policies may provide time off in lieu of overtime worked.
- Overtime must be processed in accordance with the maximum allowed per day and week in accordance with agreements.
- Upon termination, it is common practice to pay the employee on the final day of employment, although there is no legal mandate to do so. It is mandatory to issue and complete the necessary forms to claim unemployment. Upon retirement and restructuring, additional counselling and documentation need to be completed to third-parties.

1.3.3 Tax Requirements/Collection/Withholding

- Employers have monthly withholding obligations for income taxes and benefits.
- Income tax is deducted from employees' salaries via the PAYE system at the rate that aligns with their income, and paid to the Revenue Service.
- Contributions from both employer and employee include the Unemployment Insurance Fund (UIF), the Workmen's Compensation Fund, medical aid, and life insurance schemes.
- Every time employees are paid, they must be issued a payslip containing details of their remuneration and any deductions.
- Requirements of capturing data aligned with SARS requirements and coding (EMP 501).

1.4 Professional code of conduct

Payroll administrators are required to adhere to the Code of Professional Conduct of the SA Payroll Association, the organisational code of conduct and HR policies and procedures.

1.5 HR Policies and Procedures

All payroll related processing must be aligned and guided by human resources and finance policies to determine the rules and tax efficient remuneration structures for employees.

1.6 Finance Policies and Procedures

The payroll processing will be guided by the finance policies and procedures in terms of third-party payments, internet transfers, integration between payroll system, finance system, HR system or the outsourced party.

1.7 Payroll system, policy and procedures

The payroll policy and procedures will cover the payroll policy, purpose and goals, namely:

- Provide proper and timely earning payments to employees as stipulated in contract.
- Provide tax withholding on employee earnings and payment of those taxes to the government
- Provide other approved deductions and payment of those deductions to appropriate entities.
- Provide proper and timely reporting of wage and salary payments to employees and governmental agencies.
- Consider all the country laws, statutory requirements, collective agreements, sectorial determinations and union agreements that impact payroll.
- The policy and procedure will also address pay cycles (weekly, biweekly and monthly); employment information flows into HR/Finance/Payroll system continually; time input and special or additional payments entered according to published deadlines; payroll checking and verification processes; and to address rectification of any resulting errors and inconsistencies.
- The policy and procedure also covers the procedures to follow to finalise payroll; procedures for payslip distribution; tax and deduction remittances to the financial system; payroll transactions posted to the financial system; resolving payroll related queries; extracting and disseminating payroll reports; distributing payslips; analysing payroll data (payroll analytics) and the recording and filing of payroll related information.
- The payroll must translate into the financial statements.
- The workflow process must be drafted and disseminated to all stakeholders.
- Employees' remuneration structures must be determined and signed off in accordance with the reward and recognition policy, HR policies, company policies, collective bargaining agreements and sectorial determinations.
- Employees must be aware of and receive training on the payroll policy and procedures.
- All managers must also familiarise themselves with the payroll policy and procedures and understand their payroll related responsibilities specified in the SLA.

1.7.1 Payroll Inputs

- There is a distinction between salaried and waged employees. For salaried employees, the annual salary is divided by 12 to calculate the monthly amount to be paid. Whereas waged employees are paid weekly - which is the rate per hour, rate for overtime and number of hours worked that week. Expatriates and Contractors are paid according to outputs stipulated in their contract.
- To calculate the payroll and how much each employee should be paid, the following details or inputs are needed for the payroll master file, namely: employee number; name and surname; physical and postal address; ID Number; Date of birth; spouse and children details; next of kin, contact details; income tax numbers; physical address; IRP details; medical aid details; start date of employment; hourly rate of pay of annual salary; overtime rate; bonus details; pension and/or provident fund details and bank details.
- All types of leave (statutory sick leave details, maternity payment entitlement, annual, annual leave, etc) must be considered,

1.8 Third-party agreements

- The agreements, terms and conditions with third-parties (providers of medical aid, pension, provident, funeral funds, life cover, etc) must be considered in processing the in-house payroll.
- The procedures for tax directives and garnishee orders must be followed and deductions must be communicated to staff and processed in a timely manner.

1.9 Remuneration structures, rules and calculations

- Payroll processing consists of calculation of payments to employees for work done in the company – whether it is based on time or productivity, calculation of benefits, and/or statutory deductions. Payroll needs to be processed by each company periodically. It may be processed weekly, bimonthly, monthly or daily (for daily wage workers).
- Payroll processing involves accurate payroll calculations, disbursement, payslip generation, and managing payroll taxes and record keeping compliance.
- Payroll processing may be done manually or using payroll software to ensure accuracy in employee payments and compliance.

1.10 Communication and consultation

- HR must consult employees on the remuneration structure that will be loaded on the payroll system.
- In addition, communication should be done as required based on any deductions (e.g. garnishee orders) and bonus provisions that are paid annually.

1.11 Payroll Processing File

The file must be prepared and organised systematically to ensure that capturing is done with ease. The structure of the preparation file can be categorised and tabulated in specific areas like leave, new employees, etc.

1.12 Payroll process flow

A detailed payroll process flow chart should be made available with deadlines to guide employees, managers and other stakeholders and to serve as the basis for payroll assurance and audits.

1.13 Compliant Payroll System

A compliant payroll system must be selected and used to ensure that payroll processing is done in accordance with statutory and good governance requirements.

1.14 Process

- In some instances, payroll uses a system called batch processing where all the data is stored and processed together at the end of the week or month end.
- An exception report is produced to take account of incorrect processing and errors that occurred for the purpose of corrective action to be taken.
- The payroll inputs are based on original source documents which are used to check, verify changes and corrections, aligned with the delegation of authority.

2. Process

2.1 Analyse payroll data, verify and capture

- The payroll information received (employee self-service, time and attendance data, terminations, recruitment and selection, garnishee orders, bonuses, commission, overtime, etc) is processed.
- All information is verified for accuracy in accordance with the HR and finance policy and procedures.
- The payroll is processed in accordance with SOPs and timelines.
- The information is captured by the payroll officer in accordance with payroll source documents.
- The payroll calculations are done and checked in accordance with segregation of duties.
- A report is generated to check all the items that were captured to assess any risks (detect ghost employees, negative pay, overtime, change of banking details, etc).
- Corrections to payroll are affected to ensure the accuracy of payroll and re-checked and signed off for adequate control.
- The releasing of salary payments involves uploading the salary file into internet banking and verifying the accuracy of payments or could be manual where casuals sign for wages.

2.2 HR Service Delivery

- All employee queries related to the payroll processing must be addressed in accordance with the Service Level Agreement, HR Service delivery indicators and the payroll policy and procedures.
- The effects of payroll changes must be considered with regards to reissuing payslips and the correction to the Employee Master File. In addition, the adjustments are authorised and forwarded to Finance for processing.

3. Payroll outputs

- All contractual obligations are met.
- Payroll ensures on-time and accurate payment of employees.
- A payroll system will produce many outputs, namely: the payslips; exception reports; bank list; and payroll related reports (medical aid, leave balances, medical aid, etc).
- Payslips are produced either weekly, fortnightly, monthly or bi-monthly (twice a month), depending on the regularity of employee payments. The payslips are printed on a template so that all the details (name, UIF, tax, medical aid, etc) are printed in the same position each month.
- Payroll related reports are printed and disseminated to the relevant stakeholders (finance, line managers, employees, etc).
- The salaries/wages are transferred from the business account to the employee's bank accounts.
- The payroll policy and procedures are followed to close the current period and to roll over into the new period.
- Payroll reconciliations are completed and forwarded to the Finance Department for sign-off.
- Third-party payments are processed.

Reporting and analysis

- The payroll system can generate standard and customised reports for record-keeping and decision-making.
- Payroll related reports can be used to conduct analysis of payroll data to determine trends (overtime, leave, terminations, etc.), address exceptions, generate IRP5 information and analyse third-party reports.

Payroll reconciliation

- At the end of each month, it is necessary to pay to SARS and Department of Labour the employees' tax deducted, Unemployment Insurance Fund contributions due, COIDA and the Skills Development Levy due.
- Employers are required to complete all relevant tax and statutory reports and make payment to the necessary statutory bodies timeously.

4. Monitor and evaluate payroll

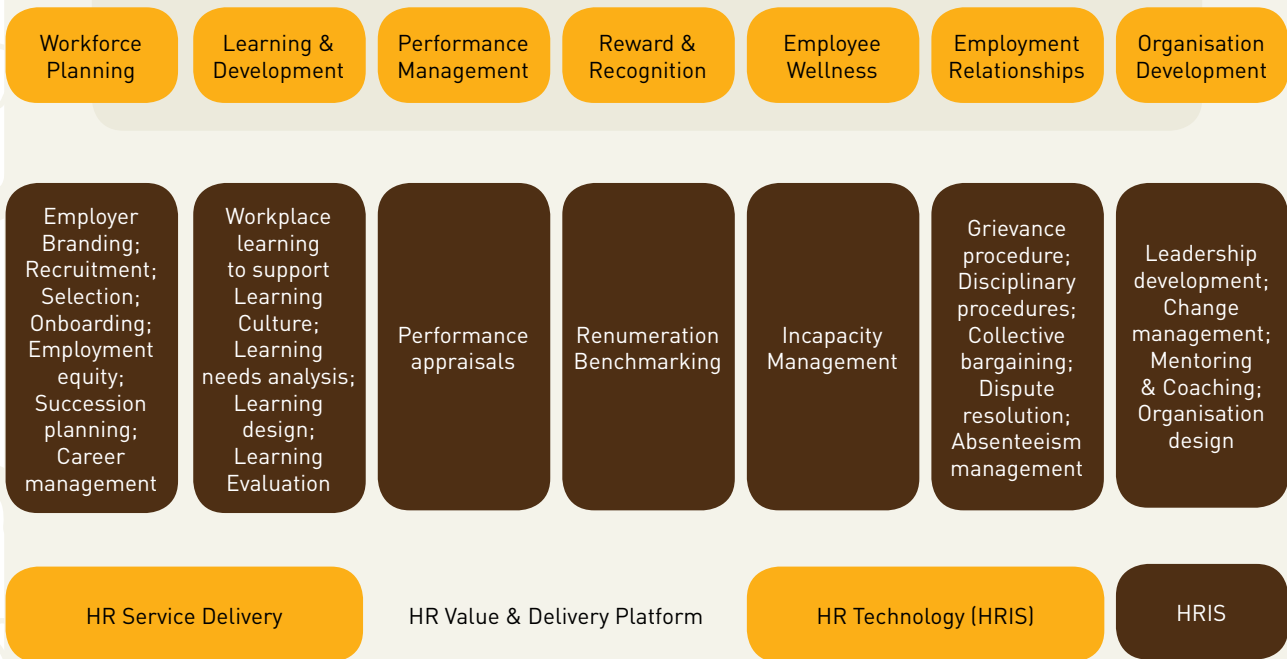
- External audits can be done by audit firms, governance structures and statutory bodies.
- Internal and external audits are done to ensure that the control systems are strengthened.

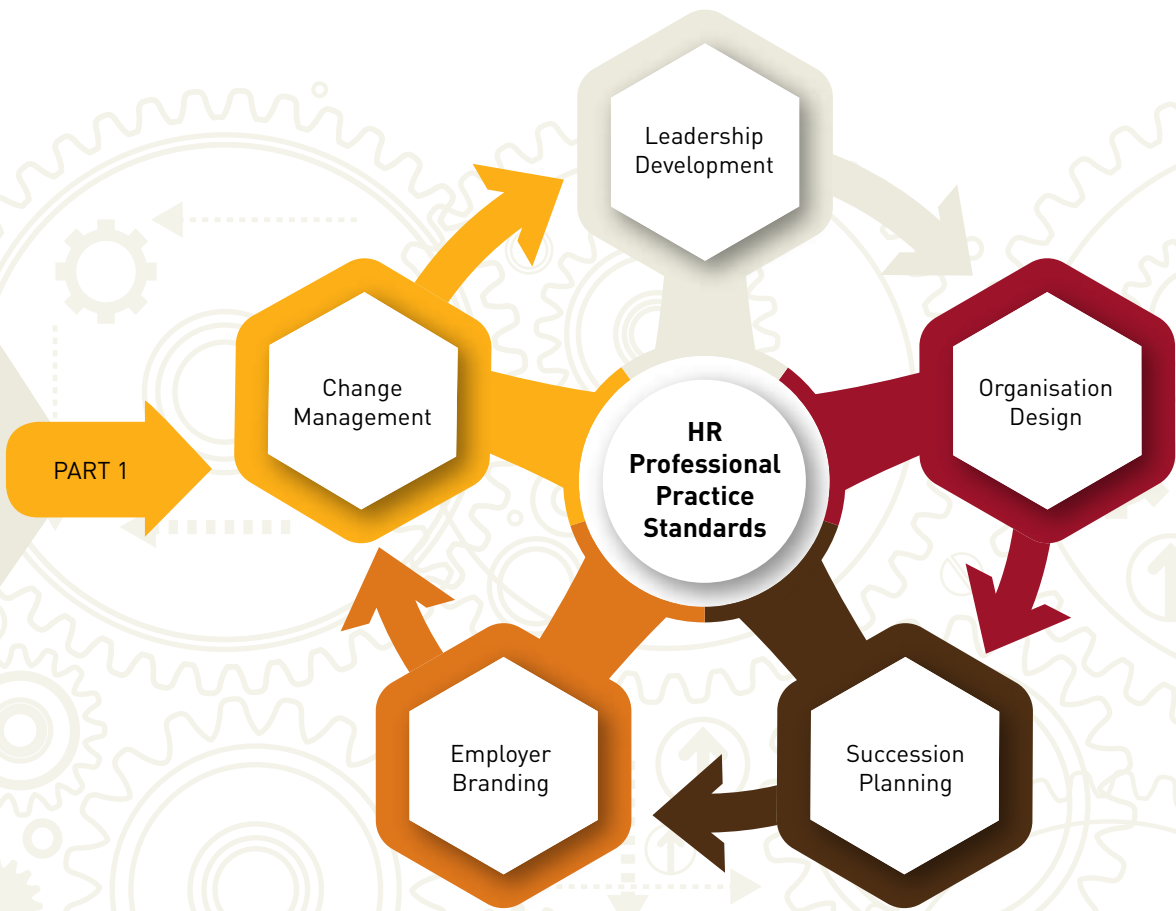
National HR Professional Practice Standards

Audit Assessment Tool – Part 1

SABPP Professional Practice Standards

HR Architecture





LEADERSHIP DEVELOPMENT¹

Leadership Development processes are informed by the Talent Management Strategy and form an important Talent Management Intervention. Leadership Development is a special form of Learning and Development and is a critical success factor to effective processes along the HR Value Chain including Performance Management, Remuneration and Recognition Management, Employment Relations Management and Wellness Management.

No	ELEMENTS	TYPE OF EVIDENCE	LIKELY SOURCE OF EVIDENCE
1.1	To ensure the leadership development strategy is derived from and aligned to the organisation's objectives in consultation with key organisation stakeholders.	<ul style="list-style-type: none"> Administration system to manage evidence Documentary Presentations, documents prepared for the strategy sessions Interviews with key stakeholders 	<ul style="list-style-type: none"> CEO/ Head of Organisation Head of HR Key stakeholders, including Senior Management
1.2	To develop a leadership development process from the organisation's leadership development strategy. This could be done through an identified mentorship/ coaching or CPD committee within the organisation.	<ul style="list-style-type: none"> Documentary Policies, procedures and flowcharts ISO certification evidence on clauses related to leadership development / performance 	<ul style="list-style-type: none"> CEO/ Head of Organisation Other Senior practitioners Head of HR Talent Management Manager Learning & Development Manager Skills Development Facilitator
1.3	To develop a leadership competency framework document in partnership with organisations' leadership.	<ul style="list-style-type: none"> Documentary Defined competencies, qualifications and functional ability documents prepared for the positions involved in the leadership development programme Interviews with key stakeholders 	<ul style="list-style-type: none"> HR management team Key stakeholders Learning & Development Manager
1.4	To determine and provide a report on the current and potential leaders identified within the organisation, their career paths, succession- and career planning. This includes the assessment evidence of as is v/s to be and gaps and their profiling.	<ul style="list-style-type: none"> Documentary evidence Interviews with key stakeholders Competency profiles Mentorship/ coaching contracts Sensitizing evidence Career paths 	<ul style="list-style-type: none"> HR management team Key stakeholders
1.5	To analyse the effectiveness of current and potential leaders as individuals, their teams/ division/ department / areas of practice. Allocate tasks and monitor the development of current and identified leaders based of the needs identified.	<ul style="list-style-type: none"> Documentary evidence Internal audits and performance management evidence Return on investment (ROI) reports 	<ul style="list-style-type: none"> CEO/ Head of Organisation Head of HR & HR management team Key stakeholders

¹ Definition: A structured and facilitated process to grow leaders and those identified as potential leaders in their ability to unlock potential in themselves, in others and through others.

No	ELEMENTS	TYPE OF EVIDENCE	LIKELY SOURCE OF EVIDENCE
1.6	To establish a Continuous Development Programme (CPD) infrastructure for the organisations' current and identified leadership aligned with the various professionals' bodies requirements. To ensure that academic and personal leadership effectiveness will be addressed through internal and external development paths, mentoring and coaching programmes. Allocate tasks and monitor the development of current and identified leaders based of the needs identified. Ensure the implementation of identified interventions.	<ul style="list-style-type: none"> • Documentary evidence • Professional registration evidence • Evidence of personal development plans • CPD project plan for leadership development • Work integrated learning (WIL) programme evidence 	<ul style="list-style-type: none"> • CEO/ Head of Organisation • Other Senior practitioners • Head of HR • Other key stakeholders • Partnerships with professional bodies • Guest speakers • Learning & Development Manager
1.7	To develop a communication intervention awareness process within the organisation based on the various steps of identified leadership development processes.	<ul style="list-style-type: none"> • Documentary evidence • Policies, procedures and flowcharts • Media communication evidence • Induction-, on boarding and refreshment training intervention evidence 	<ul style="list-style-type: none"> • The HR management team • The IT department • Learning & Development Manager • Line managers
1.8	To determine an appropriate feedback and review process on implemented interventions.	<ul style="list-style-type: none"> • Documentary evidence • Procedure for feedback and review process • Feedback reports • Impact studies • Talent management reviews 	<ul style="list-style-type: none"> • HR management team • Key stakeholders • Learning & Development Manager

ORGANISATION DESIGN (OD)²

Organisation Design is a process necessary to fulfil the Workforce Planning element of the HRM System and also falls within the Organisation Development element.

No	ELEMENTS	TYPE OF EVIDENCE	LIKELY SOURCE OF EVIDENCE
2.1	To ensure that the organisation structure follows the organisation strategy. The strategy must include the organisations' objectives, vision, mission and values – culture, drivers and enablers to support strategy – including the operating model, enterprise and divisional business plans aligned to strategy.	<ul style="list-style-type: none"> Administration system to manage evidence Documents, including metrics & climate surveys Discussions Business plans & models 	<ul style="list-style-type: none"> CEO/ Head of Organisation Head of HR Key stakeholder Focused groups
2.2	To develop a process that will lead to the development of a suitable organisational structure reflecting organisational toolkits and templates for the OD policy, framework, governance, legislation, processes and guidelines. Included will be the required OD principles, staff establishment aligned with structure, identified critical success factors, risk management and mitigation.	<ul style="list-style-type: none"> Documentary, including OD policies, procedures and flowcharts OD toolkits & templates Approved organisational structure Approved OD implementation plan Approved risk management strategy Sensitizing evidence 	<ul style="list-style-type: none"> CEO/ Head of Organisation Other Senior practitioners Head of HR OD specialists such as IOP Focused groups
2.3	To provide a structure to develop and implement processes related to the building blocks of OD – this includes job analysis, job profiles and job evaluation and where required the provision of Service Level Agreements (SLA's)	<ul style="list-style-type: none"> Documentary Evidence of available funding to ensure implementation Performance management evidence (Scorecards & PDP – linked to L&D) 	<ul style="list-style-type: none"> HR management team Key stakeholders Line managers
2.4	To implement annual OD impact study to review the impact of OD interventions in the organisation.	<ul style="list-style-type: none"> Documentary Statistics Interviews Impact studies Organisational structure reviews 	<ul style="list-style-type: none"> CEO/ Head of Organisation Head of HR Key stakeholders Focused groups

2 Definition: A planned and systematic approach to create organisational structure and individual jobs to support a high performance culture to enable the achievement of the organisation's strategic objectives.

SUCCESSION PLANNING³

Succession planning is one component of a Talent Management system, alongside job profiling, skills audits, development plans, career pathing, talent reviews and a communication strategy.

No	ELEMENTS	TYPE OF EVIDENCE	LIKELY SOURCE OF EVIDENCE
3.1	To identify and involve line-managers at appropriate levels WHO will be responsible for the existence and quality of the succession plan for his/ her part of the organisation.	<ul style="list-style-type: none"> • Documentary • Report on identified key roles • Competency models & job profiles available • Workforce plan including statistics • Talent maps/ matrix 	<ul style="list-style-type: none"> • CEO/ Head of Organisation • Head of HR • Key stakeholders • Talent Manager
3.2	To develop a succession planning process appropriate to the size and complexity of the organisation reflecting the organisation's strategy and envisaged future rather than maintaining the status quo, which also includes a "skip level" approach and sensitizing program.	<ul style="list-style-type: none"> • Organisational strategy • Organisational business / operational plan • Emergency succession plans • Succession planning policies, procedures & flowcharts 	<ul style="list-style-type: none"> • CEO/ Head of Organisation • Other Senior practitioners • Head of HR
3.3	To focus on a succession plan infrastructure by including emergency successors, short term to long term successors based on the organisational evolution process of talent identification, development and review.	<ul style="list-style-type: none"> • List with personal particulars of identified potential successors • Evidence of previous attempts • Succession & development plans 	<ul style="list-style-type: none"> • HR management team • Key stakeholders
3.4	To create an annual review and update strategy to ensure development plans closing succession gaps, the provision of a consolidated succession plan which will include important aspects such as the Employment Equity, turnover risks, retention strategies and monitoring of succession implementation.	<ul style="list-style-type: none"> • Individual development plans • Organisation design plans • Department & consolidated succession plans • Retention plans • Talent and succession reviews 	<ul style="list-style-type: none"> • Head of HR • HR management team • Key stakeholders

3 Definition: The process of identifying and mapping potential successors to leadership and key roles in an organisation in order to be able to review the adequacy of bench strength in the short, medium and long term against the organisation's needs as identified through the strategic planning process and to be able to develop people towards future roles.

EMPLOYER BRANDING⁴

Employer Branding as a practice which falls into the Talent Management element of the HRM System. However, it derives from the HR Strategy and is an essential input into Workforce Planning and into Reward and Recognition. Other HR practices such as Wellness, Employment Relations and OD interact with the employer brand.

No	ELEMENTS	TYPE OF EVIDENCE	LIKELY SOURCE OF EVIDENCE
4.1	To develop a talent strategy, including the employment value proposition that speaks to all critical employee talent groupings in the organisation to ensure retention and attraction of the right people for the future.	<ul style="list-style-type: none"> • Documentation with organisations' values, culture and practices • Talent strategy documents 	<ul style="list-style-type: none"> • CEO/ Head of Organisation • Head of HR • Talent Manager • Brand ambassadors
4.2	To develop a strategy that ensures the actual experiences of employees matches the brand of the organisation with regards to consistency, echo, products and/or services.	<ul style="list-style-type: none"> • Documentary • Consulting • Market research evidence 	<ul style="list-style-type: none"> • Head of HR • Marketing /Branding • Procurement
4.3	To develop a strong employer brand and build benchmarking progressive employment practices offered by other Employers of Choice through a project management approach which includes constant market research on the brand (internal & externally).	<ul style="list-style-type: none"> • Branding strategy • Consultancy • Employee of Choice competitions 	<ul style="list-style-type: none"> • CEO/ Head of the organisation • HR management team • Key role-players • Multi-functional project teams
4.4	To develop a brand with a full branding manual and ensure that branding is integrated with all HR practices.	<ul style="list-style-type: none"> • Branding manual • Policies, procedures and flow charts • Document employment value proposition (EVP) • Employment branding & friendly advertisements 	<ul style="list-style-type: none"> • CEO/ Head of the organisation • HR management team • Key role-players • Multi-functional project teams

⁴ Definition: Employer branding is the practice of creating the idea or image of the organisation that employees (present and potential future) connect with, and marketing that image both internally and externally, building recognition and reputation as an employer of choice in order to attract, engage and retain employees who best fit the organisation's values and enable to organisation to achieve its goals. The brand (image) should be rooted in the identification of the employer value proposition. An employment value proposition is the "deal" – what employers offer as a total employment experience to employees and what employers expect in exchange.

CHANGE MANAGEMENT⁵

Change Management is formally a sub-set of the Organisation Development element of the HRM System. However, its application reaches across all other elements of the system and change management could be regarded as the approach to implementation of any HR practice as well as any business change.

Note: The Standard for Change Management© adopted by the Association for Change Management Professionals® in 2014 constitutes an in-depth foundation for change management practitioners. This SABPP Professional Practice Standard is aimed at a more general audience. The SABPP recommends the Standard for Change Management© to any HR practitioner who wishes to obtain more in-depth expertise in the practice, particularly in relation to large scale organisational change.

No	ELEMENTS	TYPE OF EVIDENCE	LIKELY SOURCE OF EVIDENCE
5.1	To formulate the “business case” for change and choose an appropriate change model which fits the organisations’ culture, purpose and scope of the envisaged change.	<ul style="list-style-type: none"> • Organisations’ strategy • Defined business processes • Defined operational procedures • Approved change model • Project charter 	<ul style="list-style-type: none"> • CEO/ Head of Organisation • Head of HR • Key stakeholders • Change consultants & • Project manager
5.2	To create structures and mechanisms to encourage collaboration and participation of those affected by the change.	<ul style="list-style-type: none"> • List of identified ‘change champions’ or ‘super users’ • Change action plan – strategic intent 	<ul style="list-style-type: none"> • HR management team • Key stakeholders
5.3	To capture the change strategy on a project plan, implement the change, verify the impact, report findings and implement follow-up strategy to address positive impact and applying the resolution process where conflict may occur.	<ul style="list-style-type: none"> • Project planner • Consult & communicate • Quality management action list from evaluations, adapt actions and trouble shoot • Formal mentoring evidence 	<ul style="list-style-type: none"> • HR & OD management team • Project managers & project teams • Talent manager • Mentors • Change consultants/facilitators
5.4	To create an impact study culture within the organisation to measure and report impact of change, including the provision of pilot programs and measuring the impact of change.	<ul style="list-style-type: none"> • Communication & consulting • Information collection mechanism • Legislation requirements documentation • Change policy, procedures & flowcharts • Change management reports/ minutes • Pilot studies 	<ul style="list-style-type: none"> • Head of HR • HR management team • Key stakeholders • Key stakeholders • Change management specialists

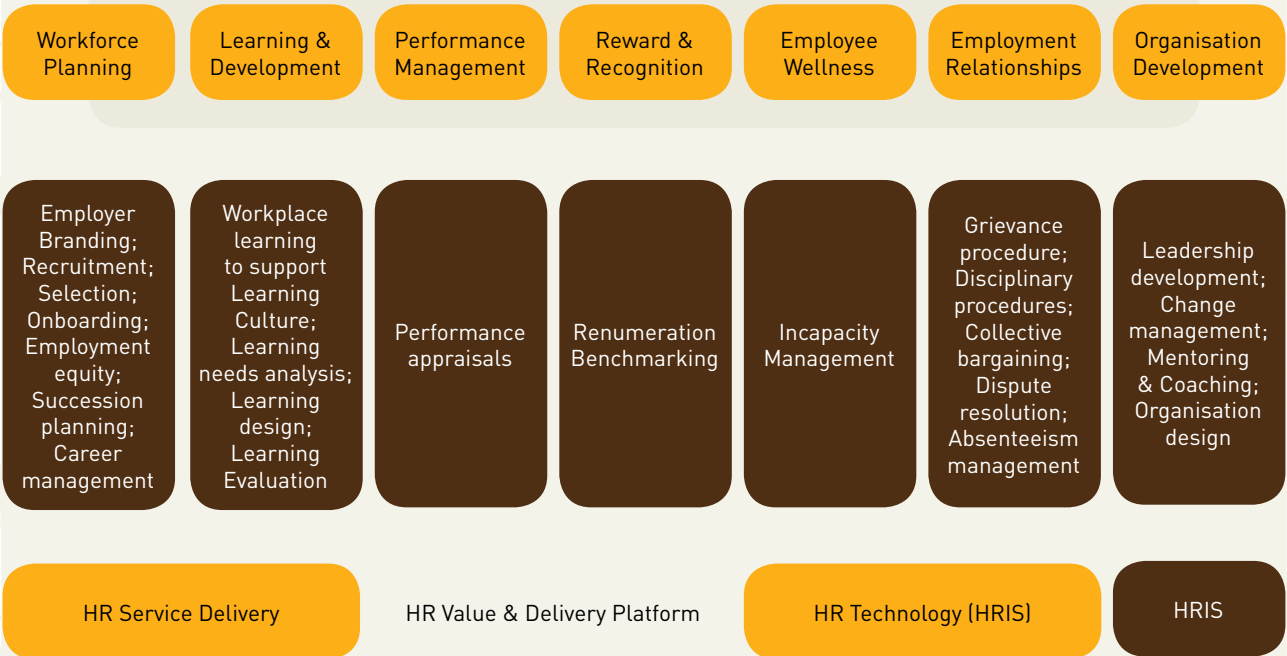
5 Definition: The process of identifying and mapping potential successors to leadership and key roles in an organisation in order to be able to review the adequacy of bench strength in the short, medium and long term against the organisation’s needs as identified through the strategic planning process and to be able to develop people towards future roles.

National HR Professional Practice Standards

Audit Assessment Tool – Part 2

SABPP Professional Practice Standards

HR Architecture



PART 2



CAREER MANAGEMENT⁶

Career Management is one component of a Talent Management system, alongside job profiling, skills audits, succession planning, development plans, talent reviews and a communication strategy.

No	ELEMENTS	TYPE OF EVIDENCE	LIKELY SOURCE OF EVIDENCE
6.1	<p>To develop and implement a Career Management Policy and Procedures which is aligned with the organisation's Talent Management System. This policy and procedures must, for example include:</p> <ul style="list-style-type: none"> • Reference to organisation's own processes; • Ethical conduct; • Career counselling services; • Clear and good communication strategies founded on career management philosophy, policy, processes and resources. • Inclusion of a technical specialisation career path up to the highest levels; • Management of accurate and up to date employee data on qualifications and skills and accurate job profiling; • Competency models and illustrative career paths through the organisation, allowing for flexibility; • Development processes, including individual development plans which are committed to and implemented; coaching/mentoring/role modelling by managers and subject matter experts; opportunities to improve qualifications); • Talent management processes which are visible and transparent so that employees know exactly where they stand (this incorporates performance management, talent review and succession planning processes); • Systematic skills development processes which are widely available and consistently offered; • Employee participation processes such as job evaluation committees, skills development committees, employment equity committees; • An organisational culture which supports honest career conversations between employees, managers and HR staff. 	<ul style="list-style-type: none"> • Career Management Policy and procedures • Administration system to manage evidence • Documentary evidence wrt indicators as provided in Column 6.1: <ul style="list-style-type: none"> - Talent Management System - Organisations operational processes - Ethical Code - Career Counselling services - Communication strategy - Technical and administration career pathing - Employee record systems - Development plans - Skills Development Strategy - Participation of various committees - Promotion reports • Evidence of job profiling, skills audits, succession planning, development plans and talent reviews. • Presentations, documents prepared for the strategy sessions, including evidence of career planning and self-development reports and ETD initiatives. • Competency Models • Interviews with key stakeholders, including employees • Career paths/maps 	<ul style="list-style-type: none"> • CEO/ Head of Organisation • Head of HR • Key stakeholders, including Senior Management and employees • Career Management Specialists • Talent Manager • Learning and Development Manager

⁶ Definition: The structured process through which individual employees and the organisation work together to achieve a best fit or match of the employees' own career planning and self-development to the development of the organisation.

No	ELEMENTS	TYPE OF EVIDENCE	LIKELY SOURCE OF EVIDENCE
6.2	To implement a career communication and advice systems in partnership with external occupational directed organisation stakeholders such as Universities, Colleges and Training Organisations. To ensure the availability of information to all employees, regardless of whether they are regarded as having potential to advance - helping them to make their own career decisions.	<ul style="list-style-type: none"> • Organisation forecast of future job opportunities • Documentary evidence wrt communication • Evidence of career guidance • Career sites/platforms 	<ul style="list-style-type: none"> • CEO/ Head of Organisation • Other Senior practitioners • Head of HR • Talent Management Manager • Learning & Development Manager • Skills Development Facilitator
6.3	To develop and manage an education, training and development strategy in partnership with the HR Department to ensure employees become more generally employable as well as being highly specialised in the organisation's own processes.	<ul style="list-style-type: none"> • ETD development strategy • Documentary evidence of regular reporting to HR • Defined competencies, qualifications and functional ability documents prepared for the positions involved in the organisation development programmes such as the Skills Development initiatives • Interviews with key stakeholders • Human capital reports – progression through organisation • Succession plans • Talent management plans • Talent pods • Bursary / graduate development programmes 	<ul style="list-style-type: none"> • HR management team • Key stakeholders, including Union Representatives • Learning & Development Manager • Talent Manager • Staff

EMPLOYMENT EQUITY (EE) AND DIVERSITY (INCLUSION) MANAGEMENT⁷

Employment Equity Management and Diversity Management permeate throughout the HRM System. Achievement of employment equity informs the organisational and HR strategies, gives direction to Talent Management and Workforce Planning, constitutes one of the risks to be managed in HR Risk Management and requires the application of good practice throughout the HR Value Chain. True employment equity cannot be achieved without good diversity management practices.

No	ELEMENTS	TYPE OF EVIDENCE	LIKELY SOURCE OF EVIDENCE
7.1	<p>To develop and implement an Employment Equity Management policy and procedures. Within this policy and procedures where the following expected aspects will be included:</p> <ul style="list-style-type: none"> • Employment Equity Management and Diversity Management permeate throughout the HRM processes and systems, • The achievement of employment equity goals that informs and guides the organisation and HR strategies; • Talent Management, Workforce Planning, HR Risk Management and HR Value Chain; • Actions to develop an engaged competent workforce, equitably represented by all previously disadvantaged groups in all occupational categories and levels; • The achievement of social justice and organisational objectives; • The Code of Good Practice; • Specific diagnoses and interventions to decrease perceptions of dominance by one group's culture and an organisational culture which is not comfortable for others. • Discipline and grievance procedures referring to issues such as prevalence of sexual harassment and verbal intimidation through the unnecessary use of gender, culture, religion and race references indicate a lack of inclusion in the organisation's culture, either generally or within certain sections of the organisation. 	<ul style="list-style-type: none"> • Top management evidence indicating lead, direction, visibility, support and being a role model within the organisational strategy • Administration system to manage evidence • Documents, including evidence of EE application within professional and management levels and conducting of perception climate surveys • Discussions • EE related business plans & models • EE progress reports • Communication strategy within the organisation • Inclusion of accountability and support clauses within employment contracts • Inclusion of EE within performance management and remuneration practices. • Implementation approach which builds appropriate pipelines. • Employment Equity Plans • Organisation awareness strategy • Strategies to address aspects which may lead to unethical conduct and create unfairness and inequities within the organisation. • Approved organisational structure • Approved risk management strategy • Sensitizing evidence • Evidence of available funding to ensure implementation • Impact studies • BBBEE Strategy / Plans 	<ul style="list-style-type: none"> • CEO/ Head of Organisation • Head of HR • Key stakeholder • Focused groups • Line managers • OD specialists such as IOP • Employment Equity Manager/ Specialist • Transformation Director • Employment Equity Committee

⁷ Definition: The systematic application of HR Management processes towards attaining and retaining a state of employment equity whilst developing a competent workforce to achieve social justice and organisational objectives in an organisation where diverse employees are highly engaged because they feel valued, respected, supported and treated as insiders within the organisation. A state of employment equity has been reached when all previously disadvantaged groups are equitably represented in all occupational categories and levels in the workforce sustainably over time.

No	ELEMENTS	TYPE OF EVIDENCE	LIKELY SOURCE OF EVIDENCE
7.2	The development and implementation of a step-by-step approach to address EE and Diversity / Inclusion Management strategy.	<p>Evidence to prove actual steps are:</p> <ul style="list-style-type: none"> • Analysis reports indicating internal as well as external findings and actions to address identified gaps • Planning to develop a responsive workforce at all levels. This includes the provision of Talent Management reports, organisational climate strategies, resources and capacity plans • Implementation, monitoring and evaluation reports to indicate EE strategy achieved in partnership with all key stakeholders • Diversity awareness workshops and training • Diversity management, on-boarding/ induction training initiatives, employee engagement platforms, team building and workshops • Inclusion evidence to ensure prove of inclusive and empowering work environment. 	<ul style="list-style-type: none"> • CEO/ Head of Organisation • Head of HR • Key stakeholder • Focused groups • Line managers • OD specialists such as IOP • Employment Equity Manager • Diversity Manager • Employment Equity Committee

WORKPLACE LEARNING TO SUPPORT A LEARNING CULTURE⁸

Workplace Learning as a practice falls within the Learning and Development element of the HRM system. However, there is a systemic interaction with most of the other elements of the system, at a strategic and at an HR architecture level. Learning should motivate. Self Determination Theory is one of the most prominent current theories of motivation, and holds that autonomy, competence and relatedness are key intrinsic human needs. The application of good workplace learning practices can address the fulfilment of these three basic human needs, thereby aligning organisational needs with those of employees.

No	ELEMENTS	TYPE OF EVIDENCE	LIKELY SOURCE OF EVIDENCE
8.1	To identify and involve managers in conscious learning and development focus areas in an enabled, supported and integrated manner for the learning to support the organisation.	<ul style="list-style-type: none"> • Documentary L&D support evidence to prove workplace transformation • Reports to confirm workplace learning environment • Feedback proving individual employees are self-directed learners • Performance management reports • Formal training including demand-led interventions (coaching, performance support & learning events) • Workplace 'ETD champions' • Online-learning opportunities • Internal messaging (Yammer, Twitter, WhatsApp, Facebook, LinkedIn, etc) • Experts providing critical guidance • CPD 	<ul style="list-style-type: none"> • CEO/ Head of Organisation • Head of HR • Key stakeholders • Talent Manager • IT manager • Learning and Development Manager • Skills Development Facilitator
8.2	To develop a workplace learning practice culture for : <ul style="list-style-type: none"> • The novice • The practitioner, and • The expert 	<ul style="list-style-type: none"> • Organisational strategy which includes clear development pathways • Organisational ETD operational plan supporting participation in organisational processes • Evidence of alternative talent systems • Improvement projects and interventions • Succession planning policies & flowcharts • Performance help centre • Targeted learning events • Continuous improvement processes • Integrated learning with business processes and events • Participation in learning circles • Team-based work processes • Team members' development reports • Evidence of learning network • Participation in external bodies and associations • Refined organisational practices • Performance gaps between practitioners and experts are small • Influence evidence on profession, industry, and regulatory environment • Updates on profession or field of work interest. • Learning journals 	<ul style="list-style-type: none"> • CEO/ Head of Organisation • Other Senior practitioners • Head of HR • HRD manager or practitioners • Line managers

⁸ Definition: Workplace learning is learning which occurs while in the normal working situation, it is purposeful and enables a person to develop as an individual, as a team member and as a person outside work. Workplace Learning embodies the learning culture concept whereby : Learning = Working and Working = Learning. "Work" is physical and mental engagement directed towards the accomplishment of something. "Workplaces" can be anything from hierarchical, physical places to virtual, networked environments where work gets done. "Learning" is any change in awareness, attitude or behaviour through a combination of experience, social interaction, instruction and study. The range of "Learning" can extend from defined to undefined and from structured to unstructured. Workplace learning tends to fall in the area of undefined and unstructured learning where social interaction and experience dominate.

No	ELEMENTS	TYPE OF EVIDENCE	LIKELY SOURCE OF EVIDENCE
8.3	To focus and create processes on the development of workplace learning practices that take into account the level of maturity of the organisation in terms of learning and development approaches. The approach to combining formal knowledge (acquired through traditional education and training) with workplace learning should recognise that formal knowledge can constrain constructive workplace learning because it suggests that there is a perfect recipe or solution.	<ul style="list-style-type: none"> • Emergent learning culture reports⁹ • Evolving learning culture reports¹⁰ • Transcending learning culture reports¹¹ • Change, productivity and job performance reports • Structured informal learning processes and technique feedback reports • Formal knowledge evaluation reports 	<ul style="list-style-type: none"> • CEO/ Head of Organisation • Other Senior practitioners • Head of HR • HRD manager or practitioners • Line managers • Key stakeholders
8.4	To create an annual review and update strategy to ensure development plans closing ETD gaps, the provision of a consolidated ETD practices / interventions linked with succession plan which will include important aspects such as the Employment Equity, turnover risks, retention strategies and monitoring of succession implementation.	<ul style="list-style-type: none"> • Individual development plans • Organisation design plans • Department & consolidated succession plans • Retention plans • Talent and succession reviews • Learning and Development reviews/ evaluation reports 	<ul style="list-style-type: none"> • Head of HR • HR management team • Key stakeholders • Head of Learning and Development • Skills Development Facilitator

9 L&D practices recognise the importance of workplace learning and adapt traditional L&D practices to surface and improve current workplace learning activities.

10 L&D practices focus on improving individual and organisational capability through social collaboration and L&D practitioners facilitate access to and sharing of relevant information within work activities.

11 Learning evolves and becomes an integral part of business and its strategy and processes. L&D practices are focused on performance consulting – finding ways to enable and support improvement and innovation.

HR Strategy Template for 2018

Strategic HRM is a systematic approach to developing and implementing HRM strategies, policies and plans aligned to the strategy of the organisation that enable the organisation to achieve its objectives (SABPP, 2013). The purpose of this HR strategy template is to assist HR Directors and HR Managers to align their HR strategy to the national strategic HR Management Standard Element.

According to the SABPP Strategic HR Standard Element you will go through 7 phases or steps (consisting of 9 building blocks) to develop a Strategic HR Plan for your organisation meeting the standard. But before that your management team members need to have a clear idea of the objectives you need to achieve. Using the table below to start this strategic journey and then follow the 7 steps as your roll-out the strategic HRM standard process.

REVIEW THE OBJECTIVES OF STRATEGIC HRM FOR YOUR ORGANISATION

No	OBJECTIVES OF STANDARD	NOTES RELEVANT TO YOUR ORGANISATION
1	To ensure the HR Strategy is derived from and aligned to the organisation's objectives in consultation with key organisational stakeholders.	To what extent is your HR strategy derived from the business strategy? Have you consulted key organisational stakeholders?
2	To analyse the internal and external socio-economic, political and technological environment and provide proactive people-related business objectives.	Have you done a proper internal and external analysis? Do you have proactive people-related business objectives?
3	To provide strategic direction and measurements for strategic innovation and sustainable people practices.	Is there clear HR strategic direction and measurements? What is the role and position of HR to contribute to strategic innovation & sustainable people practices?
4	To provide a framework for the employment value proposition of the organisation	From a strategic perspective, why would people want to work for your organisation? Is the EVP clearly articulated and is it attractive?
5	To establish a framework for the HR element of the organisation's governance, risk and compliance (GRC) policies, practices and procedures which balance the needs of all stakeholders.	What is the role and position of HR from a GRC perspective? Have you developed a clear framework for HR GRC? Does the framework address and balance stakeholder needs?
6	To determine an appropriate HR structure, allocate tasks and monitor the development of HR competence to deliver HR strategic objectives	Do you have an appropriate HR structure and task allocation? How do you monitor the development of HR competence to deliver strategic objectives?

7 STEPS IN MEETING THE NATIONAL STRATEGIC HRM STANDARD OF SABPP

Step 1: Translate Overall Strategic Intent of the Organisation into HR Strategy

No	Key ISSUES/QUESTIONS	ANSWERS/OPPORTUNITIES FOR ACTION
1	Read the business strategy. What is the essence of the business strategy?	
2	What are the key drivers behind the business strategy?	
3	What are the main business objectives?	
4	What are the main priorities of the business strategy?	
5	What role can HR play to enhance business strategy?	
6	Have you scanned the external environment for issues/trends?	Factors: Political Economic Social Technology Environment Legal
7	What are the important internal factors impacting on HR?	
8	What are the different HR scenarios and alternatives for HR strategies which address HR related risks and opportunities of each business priority?	
9	How will HR support the achievement of strategic objectives? Indicate programmes, initiatives, systems, methods linked to HR value chain.	

Step 2: Position the Strategic HR Agenda as an Integral Part of Strategic Decision-Making, Goals and Operational Plans

No	Key ISSUES/QUESTIONS	ANSWERS/OPPORTUNITIES FOR ACTION
1	To what extent is the HR contribution to business strategy proactive or reactive?	
2	Are there HR related problems or constraints that could impact on the achievement of business objectives?	
3	What strategy formulation structures are in place, and what is the role and/or representation of HR for optimum influence/contribution?	
4	Are operational plans for all parts of the organisation reviewed for alignment with HR strategy?	
5	Are operation executives held accountable for implementation of HR strategy aligned to their operations/ business plans?	
6	What are the key items of the strategic HR agenda?	

Step 3: Allocate HR Resources and Build Capability to Implement the HR Mandate

No	Key ISSUES/QUESTIONS	ANSWERS/OPPORTUNITIES FOR ACTION
1	Has the HR structure being reviewed for effective delivery of the strategy and plan?	
2	Is an appropriate budget submitted to the Board to implement the HR mandate?	
3	Have you reviewed the current skills of HR staff against the requirements of the HR strategy and plan?	
4	Do you have a clear plan to address HR skills gaps and to implement plans to up-skill staff?	
5	Does each member of the HR team have a performance agreement and a development plan aligned to the HR strategy and plan?	
6	Are you allocating sufficient resources to implement the HR mandate?	

Step 4: Provide the Contextual Foundation for the Development of HR Policies, Plans, Practices and Procedures

No	Key ISSUES/QUESTIONS	ANSWERS/OPPORTUNITIES FOR ACTION
1	Are HR policies positioned as important pillars of organisation culture and performance?	
2	Do HR policies bring consistency to management decisions affecting employees?	
3	Are HR policies aligned within the organisation's business context, to laws, regulations and other compliance requirements?	
4	Do you have a defined process to deal with exceptions so that consistency is not undermined?	
5	Are HR policies, plans, practices and procedures aligned to the HR strategy?	
6	Do you regularly review HR policies, practices and procedures to check alignment? Do you consult with management and employees?	
7	Do you have a defined process to prepare policy drafts by consulting with all key stakeholders and to approve policy?	
8	Are policies affecting organisational strategy approved at Board/Executive Management level?	

Step 5: Allocate Accountability and Responsibilities for the Execution of HR Strategy

No	Key ISSUES/QUESTIONS	ANSWERS/OPPORTUNITIES FOR ACTION
1	Are different role-players (senior, middle managers, communication specialists, risk managers, HR etc.) responsible for the execution of HR strategy?	
2	Is it 100% clear who is responsible for what?	
3	Are performance agreements throughout the organisation aligned with the agreed HR strategy and plan?	

Step 6: Ensure the Execution of the Strategy is Measured and Monitored within the Governance Framework of the Organisation

No	Key ISSUES/QUESTIONS	ANSWERS/OPPORTUNITIES FOR ACTION
1	Is the process for monitoring the HR business plan included in processes for following up on implementation of HR strategy and business plans?	
2	Have you agreed on appropriate measures for tracking the effectiveness of HR strategy and agreed at the time of approval of HR strategy?	
3	Does the governance system provide effective oversight over HR risks, structures, accountabilities, performance, alignment of employees to strategy, organisation culture and the quality of HR service delivery?	

Step 7: Drive Continuous Improvement and Sustainability of HR Strategy Through Planned Reviews and Integrated Reporting

No	Key ISSUES/QUESTIONS	ANSWERS/OPPORTUNITIES FOR ACTION
1	Does the executive review process of the organisation include a review of the effectiveness of the HR strategy?	
2	Does the executive review include both qualitative and quantitative measures?	
3	Does formal and public disclosure and/or reporting of the organisation include topics of strategic HR importance?	
4	Are areas for improvement documented and action plans implemented?	



SABPP™

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PEOPLE PRACTICES

Setting HR standards

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