



Equity Pro's Benefits and Features

Overview

Web-based, with different modules for different levels and sizes of organisations, **Equity Pro** facilitates the planning and managing of the entire EE Goals process, also across large organisations.

Easy-to-use and aligned to the requirements of the EE Act, it further measures EE Goals and current EE Profiles against the dti's B-BBEE MC Targets, handling complicated calculations in the background. Once all relevant data has been imported, achievable and realistic EE Goals can be set in consultation with Management for each Occupational Level – also for Persons with Disabilities. **Equity Pro** helps the user to select a % Black Goal Goals per Occupational Level that is achievable, and once signed off, facilitates their effective management to this end.

Equity Pro's Benefits

- Web-based.
- Makes EE Goal setting and management easy.
- Saves time and reduces EE Act compliance cost.
- Different modules for different levels and sizes of organisations that gives management ownership of EE across groups of companies, their divisions/business units, and their departments.
- Facilitates the importation of monthly Workforce Profile data to present users with 'real time' data that enable the identification of the most underrepresented race and gender group in any Occupational Level that needs to be targeted for appointment when a vacancy arises.
- Facilitates Workforce Planning and Talent Preparation.
- Workforce Profile data, EE Goals, Annual EE Targets and Income Data exportable into EEA2, EEA4, EEA12 and EEA13 Forms.

Some of Equity Pro's Functionality and Features

- Facilitates:
 - The allocation of users' workforce into the correct EEA9 Occupational Levels, where required.

The screenshot displays the Equity Pro software interface. On the left, a spreadsheet titled 'Workforce Profile Template Equity Pro' is visible, with columns for 'Co No', 'Initials/ First Names (Required Field)', 'Surname (Required Field)', 'Race or Foreign Nationality (Required Field)', 'Gender (Required Field)', 'Disability (Y/N) (Required Field)', and 'Position (Required Field)'. On the right, an 'Equity Pro Aggregator' dialog box is open, titled 'About your Grading System'. It contains three radio button options: 'My Job Evaluation grading system is updated and accurate', 'I don't have a grading system and need to use the guidelines in the Equity Pro Manual', and 'I don't have a grading system but have had professional assistance sorting employees into EEA9 levels'. A red note on the right side of the dialog box states: 'Note: changing the grading system will delete previously set grades'. A 'Close' button is located at the bottom right of the dialog box.



- The creation of Sub-Pools within an Occupational Level to cater for different Pools of Suitably Qualified Persons/Job Families/Grades within an Occupational Level, and the setting of different EE Goals (this will typically be required where there are different race and gender profiles to the rest of the level within a Level, necessitating different Black Goals and possibly Gender splits).

Senior Management																				
No. of Subpools:	MALE				FEMALE				FOREIGN NATIONALS		TOTAL		Total Filled Posts	Variances	Budgeted Head Count	% White & FN	% Black	% Black Female	% Female	% DG
	A	C	I	W	A	C	I	W	M	F	M	F								
Start Month Profile:	36	17	48	72	23	5	18	31	9	4	182	81	263	2	265	44.1%	55.9%	17.5%	30.8%	67.7%

- The automatic calculation of % Black, Female, Black Female and D-G Start Month Profile and Goal for each Level.

Senior Management																				
No. of Subpools:	MALE				FEMALE				FOREIGN NATIONALS		TOTAL		Total Filled Posts	Variances	Budgeted Head Count	% White & FN	% Black	% Black Female	% Female	% DG
	A	C	I	W	A	C	I	W	M	F	M	F					% Black	% Black Female	% Female	% DG
Start Month Profile:	36	17	48	72	23	5	18	31	9	4	182	81	263	2	265	44.1%	55.9%	17.5%	30.8%	67.7%

- An automated Workforce Profile Analysis Report

**WORKFORCE QUANTITATIVE ANALYSIS -
ANALYSIS OF WORKFORCE PROFILE BY OCCUPATIONAL LEVEL
AS AT 1 OCTOBER 2017**

Section 19(2) of the EEA requires that a designated employer must include a profile, as prescribed of the designated employer's workforce within each occupational level in order to determine the degree of under-representation of people from designated groups in various occupational levels in that employer's workforce.

The analysis is done separately for each occupational level and for each race and gender intersection in terms of African male, Coloured male, Indian male, White male, African female, Coloured female, Indian female, White female, Foreign National male and Foreign National female. The degree of under representation of the designated groups is determined by taking into account the Economically Active Population as outlined in the EEA8 of these regulations.

EXECUTIVE / TOP MANAGEMENT

ACTUAL	MALE				FEMALE				FOREIGN NATIONAL		TOTAL
	A	C	I	W	A	C	I	W	MALE	FEMALE	
Columbus Stainless	16.7%	0%	0%	66.7%	16.7%	0%	0%	0%	0%	0%	100%
EAP	42.7%	5.3%	1.7%	4.9%	36.2%	4.4%	1%	3.8%	0%	0%	100%
% GAP	26%	5.3%	1.7%	-61.8%	19.5%	4.4%	1%	3.8%	0%	0%	

The race and gender groups with **positive percentages** in the bottom row of the above table are **under-represented** to the extent of the percentages that appear below each group. These are: **African males, African females**

The race and gender groups with **negative percentages** in the bottom row of the above table are **over-represented** to the extent of the percentages that appear below each group. These are: **White males**



- The setting of realistic and achievable EE Goals in line with the requirements of the EE Act and aligned to B-BBEE Management Control ('MC') Targets using Workforce Planning ('WP') Best Practice principles.

													% Black Goal: 20		Budgeted Head Count												
MALE				FEMALE				FOREIGN NATIONALS		TOTAL		Total Filled Posts	Vacancies	Budgeted Head Count													
A	C	I	W	A	C	I	W	M	F	M	F																
Statistical Data Pool: EAP National 2020																											
Statistical Data Pool %:													43.7%	4.8%	1.8%	5.1%	35.6%	4.1%	1%	3.9%	0%	0%	55.4%	44.6%			
Gender Adjusted Pool %:													63.10%	6.93%	2.60%	7.36%	15.96%	1.84%	0.45%	1.75%	0.00%	0.00%	80%	20			
Start Month Profiles:													0	0	0	13	1	0	0	1	0	0	13	2	15	1	16
Jan 2024 Raw Goal:													2.1	0.2	0.1	9.7	0.5	0.1	0.0	2.3	0.0	0.0	12.1	2.9	15		15
Jan 2024 EE Goal:													2	0	0	10	1	0	0	2	0	0	12	3	15		15
Gap:													2	0	0	-3	0	0	0	1	0	0	-1	1	0		

- The factoring in of the National or applicable Provincial EAP, or other Statistical Data Pool ('SDP') of Suitably Qualified Persons when setting EE Goals.

													% Black Goal: 20		% DG Goal: 40%										
MALE				FEMALE				FOREIGN NATIONALS		TOTAL		Total Filled Posts	Vacancies	Budgeted Head Count	% White & FN	% Black	% Black Female	% Female	% DG						
A	C	I	W	A	C	I	W	M	F	M	F														
Statistical Data Pool: please select																									
Statistical Data Pool %:													0	0	0	0	0	0							
Gender Adjusted Pool %:													0.00%	0.00%	0.00%	74%	26								
Start Month Profiles:													1	0	0	13	2	15	1	16	93.3%	6.7%	6.7%	13.3%	13.4%
Jan 2024 Raw Goal:													0.0	0.0	0.0	0	0	0		15	0%	0%	0%	0%	0%
Jan 2024 EE Goal:													3	0	0	11	4	15		15	80%	20%	6.7%	26.7%	40%
Gap:													2	0	0	-2	2	0							

- The adjustment of the applicable EAP or Statistical Data Pool % Females to accommodate a different (and realistic) % Female Goal.

													% Black Goal: 20		% DG Goal: 40%											
MALE				FEMALE				FOREIGN NATIONALS		TOTAL		Total Filled Posts	Vacancies	Budgeted Head Count	% White & FN	% Black	% Black Female	% Female	% DG							
A	C	I	W	A	C	I	W	M	F	M	F															
Statistical Data Pool: EAP National 2020																										
Statistical Data Pool %:													43.7%	4.8%	1.8%	5.1%	35.6%	4.1%	1%	3.9%	0%	0%	55.4%	44.6%		
Gender Adjusted Pool %:													63.10%	6.93%	2.60%	7.36%	15.96%	1.84%	0.45%	1.75%	0.00%	0.00%	80%	20		

- Step-by-step guide to calculating EE Goals in respect of each individual race and gender group for each Level or Sub-Pool, based on the requirements of the EE Act and EE Best Practice.
- Facilitates factoring in of the following relevant factors in the setting of EE Goals for each Occupational Level or Sub-Pool:
 - The number of existing vacancies.
 - The relevant EAP or other applicable 'Statistical Data Pool'.
 - The % Females targeted.
 - Anticipated growth or shrinkage during the period of the Plan.
 - The applicable B-BBEE MC Target.
 - In respect of each Collective Black, and White and FNs, Group, the following WP variables:



- The number of retirements during the period of the Plan.
- Their expected attrition based on their historical attrition immediately preceding the Plan for a period equal to the length of the Plan.

		White & FN	Black	Total
% Expected Growth / Shrinkage Rate:	-6 %	New Positions (± Growth & Vacancies): 0		
Expected No. of Additional Posts:	-1	Outgoing Promotions (to next level): 1 1 2		
Average White & FN Attrition Rate:	2.9 %	Vacancies from Attrition: 2 0 2		
Average Black Attrition Rate:	0 %	Retirees: 4 0 4		
		Total New / Available Positions: 8		

- The number of expected promotions into the Level or Sub-Pool over the period of the Plan taking into consideration both the number of positions anticipated to become available based on the % selected Back Goal and the available promotable talent from their Feeder Levels/Sub-Pools.

INCOMING FEEDER LEVELS & SUBPOOLS													TOTAL		PROMOTIONS FROM Incoming Feeders			
Previously Signed Off: Feeder 1 White & FN = 5 / Feeder 1 Black = 3 / Feeder 2 White & FN = 0 / Feeder 2 Black = 0													White & FN	Black	White & FN	Black	Total	
Mid Mngt. Subpool 1 : Attorneys	6	0	4	103	1	0	0	14	0	0	113	15	128	117	11	5	3	8
No feeder specified:	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

- Calculates the resultant number of Positions that will become available during the period of the Plan in the Level or Sub-Pool ('Total New/Available Positions')
- Once a % Black Goal has been selected, automatically calculates the:
 - Individual Goals for each Race and Gender Group according to selected EAP or SDP.

	MALE											FEMALE				FOREIGN NATIONALS		TOTAL		Total Filled Posts	Vacancies	Budgeted Head Count
	A				C				I			W				M	F	M	F			
	A	C	I	W	A	C	I	W	M	F	M	F	M	F								
Statistical Data Pool:	EAP National 2020																					
Statistical Data Pool %:	43.7%	4.8%	1.8%	5.1%	35.6%	4.1%	1%	3.9%	0%	0%	55.4%	44.6%										
Gender Adjusted Pool %:	63.10%	6.93%	2.60%	7.36%	15.96%	1.84%	0.45%	1.75%	0.00%	0.00%	80%	20 %										
Start Month Profile:	0	0	0	13	1	0	0	1	0	0	13	2	15	1	16							
Jan 2024 Raw Goal:	2.1	0.2	0.1	9.7	0.5	0.1	0.0	2.3	0.0	0.0	12.1	2.9	15		15							
Jan 2024 EE Goal:	2	0	0	10	1	0	0	2	0	0	12	3	15		15							
Gap:	2	0	0	-3	0	0	0	1	0	0	-1	1	0									

- The number of Blacks that need to be appointed to replace the number of Blacks that will be lost in the level based on the anticipated Black attrition, retirements and promotions.
- The number of 'new' Black appointments that will need to be made to achieve the selected % Black Goal ('Total Black Gap', based on the % Black Goal).
- The total resultant 'No. of Positions for Blacks'.
- The resultant 'No. of Positions for Whites & FN'.



EQUITY PRO

- The '% Vacancies for Blacks' (in total), in relation the above Total New/Available Positions.

Total Black Gap:	2
Positions from Blacks Leaving this Level:	1
No. of Positions for Blacks:	3
% of Vacancies for Blacks:	37.5 %
No. of Positions for White & FN:	5

- Allows the User to play around between the % Black Goal and % Vacancies for Blacks until Management decides on a % Black Goal that it realistically achievable.
- Facilitates capturing of three EE Goal scenarios for presentation to and approval by Management.

Executive / Top Management														Scenario 1					
Executive / Top Management														Scenario 2					
Executive / Top Management														Scenario 3					
														% Black Goal:	50 %	% DG Goal:	67.4%		
MALE				FEMALE				FOREIGN NATIONALS		TOTAL		Total Filled Posts	Vacancies	Budgeted Head Count	% White & FN	% Black	% Black Female	% Female	% DG
A	C	I	W	A	C	I	W	M	F	M	F								
Statistical Data Pool: EAP National 2020																			
Statistical Data Pool %:																			
43.7%	4.8%	1.8%	5.1%	35.6%	4.1%	1%	3.9%	0%	0%	55.4%	44.6%								
Gender Adjusted Pool %:																			
50.48%	5.55%	2.08%	5.69%	28.74%	3.31%	0.81%	3.15%	0.00%	0.00%	64%	36 %								

- Automatically calculates the B-BBEE MC score for each level in respect of the User's Starting, Current, EE Goal and EE Target Profile against the amended B-BBEE MC Targets and according to its formulae.

BEE	Black Target:	60	Black Female Target:	30	Start Month Profile BEE Points:	1.06	BEE EE Goal Points:	2.27
IMPLICATIONS	Black Weight:	2	Black Female Weight:	1				

- Facilitates calculation of EE Targets for each year of the EE Plan that can be copied into the EE Plan, and each applicable year's EEA2 Report.

Annual Targets

IMPORTANT NOTES!

- Don't export your EEA2 data until you have signed off the Current Profile of the month that you want to report on, otherwise you will export incorrect information!
- The Current Profile month that will be exported is : **July 2016**
- The PWD Current Profile month that will be exported is : **December 2015**

Select the CSV file for your raw data import:

No file chosen

Please select the Annual Target that you wish to export:

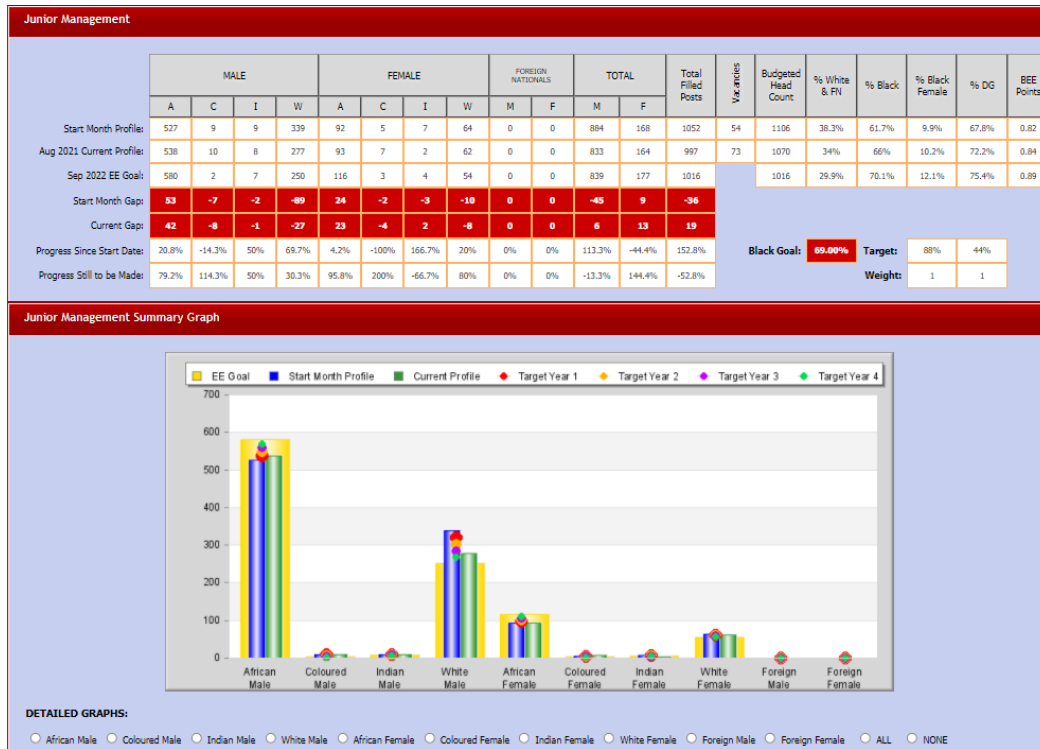
- Year 1 (ending 31 January 2020)
- Year 2 (ending 31 January 2021)
- Year 3 (ending 31 January 2022)
- Year 4 (ending 31 January 2023)



- Automatically calculates the Gap between each individual race and gender group's Current Profile and its EE Goal in respect of each Level and Sub-Pool.

Mid Management																				
	MALE				FEMALE				FOREIGN NATIONALS		TOTAL		Total Filled Posts	Vacancies	Budgeted Head Count	% White & FN	% Black	% Black Female	% HDP	BEE Points
	A	C	I	W	A	C	I	W	M	F	M	F								
Aug 2021 Current Profile:	13	3	7	87	5	0	3	24	0	0	110	32	142	17	159	78.2%	21.8%	5.6%	38.7%	0.57
Sep 2022 EE Goal:	22	3	1	88	10	1	0	31	0	0	114	42	156		156	76.3%	23.7%	7.1%	43.6%	0.82
Current Gap:	9	0	-6	1	5	1	-3	7	0	0	4	10	14							

- This Gap is used to inform appointments and manage the achievement of EE Goals.
- Ensures that the correct race and gender group is targeted for appointment.
- The tracking progress against EE Goals and Targets for each Module in respect of each race and gender group, in each Occupational Level and Sub-Pool, and also for Persons with Disabilities.



- Captures all above signed off WP variables and Net Growth in each Module for each Level or Sub-Pool.

The First Group Inc : Workforce Planning & Talent Preparation			
Mid Management Subpool 2: Non-Engineers in MM			
Section:	Summary		
Summary of Position Numbers			
	White & FN	Black	Total
New Positions (Start Month Vacancies = Additional Posts)			0
Vacancies from Attrition	22	1	23
Retires	4	1	5
Expected Promotions to Next Level	0	0	0
Totals	26	2	28



- Facilitates the recording and tracking of talent preparation for each resultant position anticipated to become vacant or created during the period of the plan in each Occupational Level or Sub-Pool, in each Branch Module, and across each Division and the Group.

Senior Management

Section: Retirees Division: SOU0057 / Parks Branch: SOU0060 / Frontier Region

Position	First Name	Surname	Race	Gender	Division	Branch	Department	Retirement Date
			African	<input type="radio"/> M <input type="radio"/> F	SOU0057 / Parks	SOU0060 / Frontier Region		

Selection Criteria: Race: African Gender: M F Internal or External: I E ***** Calculated Position *****

The First Group Inc : Workforce Planning & Talent Preparation

Mid Management Subpool 2: Non-Engineers in MM

Section: Retirees

Accounts Manager

Position	First Name	Surname	Race	Gender	Department	Retirement Date
Accounts Manager	Brandon	Davis	White	<input type="radio"/> M <input type="radio"/> F	Finance	31 Aug 2024

Selection Criteria: Race: African Gender: M F Internal or External: I E **Remove Position** **Add Candidate**

Administration Manager

Position	First Name	Surname	Race	Gender	Department	Retirement Date
Administration Manager	Coenie	Groenewald	White	<input type="radio"/> M <input type="radio"/> F	Admin	25 Mar 2021

Selection Criteria: Race: African Gender: M F Internal or External: I E **Remove Position** **Add Candidate**

Potential Candidate: Bongand Ntuzi

First Name: Bongand Surname: Ntuzi Race: African Gender: M F **Remove**

Current Level: Junior Current Position: Administration Supervisor Soft Skill Match %: 70 New Pos Prep included in PDP? 100%

Name of Mentor: Coenie Groenewald Name of Coach: Jackson Dlamini

Progress in Roll Out of Position Preparation PDP	Assessment of Readiness for Position
%	Date
25	1 Dec 2020
40	1 Dec 2020

Preparation Start Date: 1 Oct 2020 Required Preparation (Months): 6

Potential Candidate: Veronica Hthenbu

First Name: Veronica Surname: Hthenbu Race: African Gender: M F **Remove**

Current Level: Junior Current Position: Administrator Soft Skill Match %: 80 New Pos Prep included in PDP? 100%

Name of Mentor: Coenie Groenewald Name of Coach: Jackson Dlamini

Progress in Roll Out of Position Preparation PDP	Assessment of Readiness for Position
%	Date
33	1 Dec 2020
53	1 Dec 2020

Preparation Start Date: 1 Sept 2020 Required Preparation (Months): 6

- B-BBEE Monitoring Tool tracking progress against yearly B-BBEE MC Targets.

The First Group Inc

Monitoring of BEE Management Control Score Aggregates

	Executive / Top Management Points	EE Points	Total Points	Total Possible Points
Apr 2017 Start Month Profile:	2.48	5.34	7.82	13
CLI00001 / Trial Division2:	2.69	6.34	9.03	13
TRY00002 / Trial Division:	2.39	5.17	7.56	13
Sep 2018 Current Profile:	2.48	5.9	8.38	13
CLI00001 / Trial Division2:	0	0	0	13
TRY00002 / Trial Division:	2.4	5.92	8.32	13
Apr 2018 Targets:	2.8	6.8	9.6	13
CLI00001 / Trial Division2:	2.83	7.75	10.58	13
TRY00002 / Trial Division:	2.83	6.77	9.6	13
Mar 2019 EE Goal:	2.92	7.89	10.81	13
CLI00001 / Trial Division2:	2.78	6.93	9.71	13
TRY00002 / Trial Division:	2.98	7.84	10.82	13