



Western Cape Education Department

The Procedure manual
On
Job
Descriptions
for
Public Service Staff
(levels 1 – 12)

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1. PURPOSE OF THE PROCEDURE MANUAL

The purpose of the procedure manual is to assist line managers with the compiling of job descriptions for the public service staff of the Western Cape Education Department.

2. TERMINOLOGY

- *Code of remuneration (CORE):* This refers to the new remuneration system which replaced the Personnel Administration Standards (PAS). It is a much more flexible system and is helpful in identifying the proposed post requirements.
- *Competencies:* This refers to the blend of knowledge, skills, attributes, etc. that indicate a person's ability to meet the requirements of a particular job.
- *Delegations:* This refers to the devolution of powers, vested in a specific post according to law or other means, which are given to the incumbent so that that person may make decisions, act or dispose of matters at his or her own particular level without having to refer such matter to a higher authority for a decision.
- *Dimension:* This refers to the scope of authority or powers given to the post.

- *Inherent requirements:* This refers to the competencies that (according to evidence) the incumbent of the post needs in order to be able to carry out the job.
- *Job evaluation:* This refers to the systematic process to determine the relative value of a specific post and to bring it in line with all other posts at the institution. The Equate Measuring Instrument is used for this purpose.
- *Public Service Regulations (PSR):* This refers to the Public Service Regulations promulgated in the *Government Gazette* (Regulation Gazette No. 1, Vol. 427 of 5 January 2001, No. 217951).
- *White Paper on Human Resources Management:* This refers to the White Paper promulgated in the *Government Gazette No. 18594, Vol. 390, of 31 December 1997*, with the following purpose: To provide a policy framework that will enable the development of human resources management practices which support an effective and efficient Public Service geared for economic and social transformation.

3. BACKGROUND

According to Part III 1.1 of the Public Service Regulations, 2001, departments must establish job descriptions and job titles for each post and/or group of posts and these must be reviewed regularly. Job descriptions must be based on the main objectives of the post(s), reflect the inherent requirements of each post and include an appropriate emphasis on service delivery.

To enable its services to give the best value for money, a department must make optimum use of its human and other resources to carry out its duties within budget. This involves setting measurable objectives, planning in order to function efficiently, and applying fair labour practices.

In order to create a more integrated approach to service delivery, which emphasises the importance of human resources, the first step is to compile a job description.

In essence a job description is the recording in an orderly way, of the duties, responsibilities, skills and career progress attached to a specific post. Such a job description entails a clear explanation of WHAT has to be done, HOW it has to be done and WHY it has to be done.

4. PURPOSES OF A JOB DESCRIPTION

Job descriptions

- serve as a management aid to enhance efficiency.
- enable new post incumbents to know what is expected of them and how the work has to be done.
- are essential in job evaluation and staff performance management processes.
- can be utilised very successfully when recruiting, selecting and placing staff.
- can be used to determine training needs.
- give valuable information on career planning.

5. ROLE-PLAYERS AND RESPONSIBILITIES

The main role-players in the drafting of job descriptions are the following:

- Supervisors
- Post incumbents
- Management

5.1 Supervisors

- It is the responsibility of each supervisor to compile a job description for each post in his or her component. The supervisor is also responsible for the updating of existing job descriptions.
- If the post is filled, the supervisor must compile the job description in co-operation with the incumbent.
- The supervisor must also ensure that her or his staff is fully informed regarding the correct information and the data that must form part of such a job description.

5.2 Post incumbents

Post incumbents must make sure that they are familiar with the content of their job descriptions and that they clearly understand what is expected of them in terms of their job descriptions.

5.3 Management

The head of the institution or component must ensure that there is an appropriate job description for each post under his or her control.

6. REVIEW OF JOB DESCRIPTIONS

- 6.1 Job descriptions must be reviewed at least once every three years so as to ensure that they remain accurate and applicable.
- 6.2 In cases where the job or work content of a post has changed to such an extent that it will result in a change in the post grading points, the job description in question will have to be adapted so that the post can again be subjected to a job evaluation.

7. JOB DESCRIPTION FORMAT

- 7.1 The most widely used way of collecting job information is by means of informal interviews with the current post incumbent, conducted as follows:
 - 7.1.1 Explain the purpose of the interview.
 - 7.1.2 Keep questions simple but “open”.
 - 7.1.3 Probe further when clarity is lacking.
 - 7.1.4 Focus on the content and requirements of the job and not on the qualities of the incumbent.
 - 7.1.5 Beware of focusing on peripheral aspects of the job.
 - 7.1.6 Verify the information by consulting others who do or supervise the same job.
 - 7.1.7 Record the deliberations.
- 7.2 The details of job descriptions will differ from institution to institution and from post to post. They are determined by the culture within the institution, the key objectives and the output of the institution or department concerned.

7.3 The job description format, which has been adopted for post levels 1 to 12 in the WCED, comprises the following (Annexure A):

- A. General information
 - B. Purpose of the job
 - C. Dimensions of the post
 - D. Main objectives (*or key result areas*)
 - E. Delegations
 - F. Work performance profile
 - G. Competency profile
 - H. Career pathing
 - I. Job description agreement
- A. GENERAL INFORMATION

Obtain all relevant records to determine and verify the following details:

Job title

The job title must correspond with the name on the approved organisational structure.

Name of incumbent

If the post is filled, the name of the incumbent must be reflected. If the post is vacant, the word "Vacant" must be used.

PERSAL Number

If applicable, the post incumbent's unique PERSAL number must be included.

Department or component

The organisational unit where the post is situated must be indicated here, e.g. South Peninsula High School or EMDC: West Coast – Winelands.

Location

The geographical location of the post must be indicated here, e.g. Diep River.

Date

The appointment date of the present post incumbent, e.g. 15 January 1995.

Post level

The post level will be determined by means of job evaluation, e.g. Level 7. Alternatively, use the current post level.

Job weight

The job weight of the post will be determined by means of job evaluation, e.g. 205 points.

CORE

The appropriate CORE must be indicated here, e.g. CORE Volume 2, Management and Support Staff.

Reports to

Job title of the post to which the incumbent reports, e.g. Foreman.

Organogram

A schematic representation of the position of the post. The purpose of this representation is to obtain a picture of the position of the post within the department or institution. The lines of authority of the posts must be shown in order to indicate the relative relationship of the post to immediately related posts. Posts that are one level above and one level below the post are indicated. (Refer to Annexure A.)

B. PURPOSE OF THE POST

A brief definition of the post is given in order to obtain an overall description of the role of the post, and an indication as to why the post is necessary within the department or institution. (*Ask the question "Why does the post exist?"*)

C. DIMENSIONS OF THE POST

The following relevant information about the post must be provided:

- Staff expenditure: The total annual costs of subordinate staff for whom the incumbent is responsible. (*Ask these questions: "Is the incumbent responsible for staff? What is the expenditure on those staff?"*)
- Budget: The annual expenditure and income (excluding staff costs) for which the post incumbent is responsible.
- Equipment: The replacement value per unit.

(N.B. Staff expenditure and budget apply mainly to supervisory and managerial posts.)

D. MAIN OBJECTIVES

These are the primary objectives that must be achieved in order to accomplish the purpose of the job. These main objectives are also known as *Key Result Areas (KRAs)*. The main objectives of a post should be worded in such a way that the level of work being performed by the post incumbent can be clearly identified.

1. Steps in the **formulation of main objectives** (Refer to Annexure A.)
 - 1.1 List all tasks related to the accomplishment of the purpose of the post.
 - 1.2 Group the related tasks and, for each grouping, formulate a description of the objective to be achieved.
 - 1.3 There should, preferably, not be more than six main objectives per post.
 - 1.4 The formulation of the main objectives must make allowance for the performance of related tasks that do not occur frequently.
 - 1.5 It is important to include the incumbent's responsibility towards the institution and/or component, such as serving on committees, forums, etc., as contributing to one of the main objectives.
2. The **main objectives** should jointly describe the total scope of the post.
3. List the **job outputs** attached to each main objective. (*Ask the question: "What should the outputs (results) be that would indicate that the objective has been successfully achieved?"*)
4. List the specific **activities** linked to each job output, i.e., the activities which need to be carried out in order to achieve the desired output (result).
5. Indicate the mutually agreed upon **performance measures** against each job output and/or activity, to describe how well the work must be done.

- 5.1 **Target date or frequency** indicates a commitment to a timeframe for completion of an output/ activity.
- 5.2 **Standards** are the criteria (qualitative and quantitative) used to clarify the job outputs or activities of a post. **Qualitative** refers to "how well" and **quantitative** to "how much" or "how many".
- 5.3 Not every job output or activity has a qualitative standard, a quantitative standard and a target date or frequency attached to it. These columns must be completed only where applicable.

Main objectives <i>(Main area of work to be performed. What do you want to achieve ultimately?)</i>	Job outputs <i>(What should the result be that indicates that the main objectives have been achieved successfully?)</i>	Activities: <i>(Specific activities, which need to be carried out in order to achieve the desired output.)</i>	Performance Measures	
			Target Date/ Frequency: <i>(Indicates a commitment to a timeframe for completion of output/activity)</i>	Standards: <i>(Qualitative and/or quantitative)</i>

6. List all **authorising** documents applicable to the scope of the specific post.
- 6.1 All posts are regulated in terms of "Authorisation" by the Code of Remuneration (CORE) which replaces the guidelines of the Personnel Administrative Standards (PAS).

- 6.2 In addition, at educational institutions the responsibilities or duties of, for example, General Assistants and Foremen are mostly regulated by the Occupational Health and Safety Act and the school's safety plan. Other legislation, policies, guidelines and WCED directives (circulars) issued should also be consulted as references.

E. DELEGATIONS

This section is mainly applicable to supervisory and managerial posts. It indicates the delegated authority (powers) vested in the incumbent and the various subsections attached to each incumbent. Where the post incumbent has no delegated authority it should be indicated as "None".

The following questions may be asked:

1. What is the delegated authority attached to the post? For example, the incumbent can approve appointments in the WCED.
2. Is the incumbent responsible for managing a budget?
3. Does the incumbent have signing powers in terms of documents that may be signed on behalf of management? For example, GG-Transport.
4. Does the incumbent have decision-making powers within a meeting or forum which have been delegated by the department or institution or component?
5. Does the incumbent have financial authority? For example, the authority to approve the purchasing of stationery.

F. WORK PERFORMANCE PROFILE

The work performance profile must include the following:

1. The main clients to whom a service is rendered. (The frequency of interaction with clients and their expectations must be included.)
2. Indicators to measure performance and to determine whether outputs have been achieved.

G. COMPETENCY PROFILE

This section deals with the post incumbent's ability to meet the requirements of the specific post and should cover the following areas:

- Job knowledge and skills: Specific skill requirements set by the working environment must be indicated, e.g. ability to negotiate and numeracy skills
- Personal attributes: Attitude, understanding and behaviour: What type of character, motivation, etc. must the incumbent have?
- Learning fields: The subject or work area in which learning is required.

JOB KNOWLEDGE/ SKILLS	PERSONAL ATTRIBUTES	LEARNING FIELDS
<ul style="list-style-type: none"> • Knowledge • Skills 	<ul style="list-style-type: none"> • Attitudes • Understanding • Behaviour 	<ul style="list-style-type: none"> • Work area in which learning is required.

H. CAREER PATHING

The individual (post incumbent) must determine his or her own career path based on the principle of open competition.

The following information is necessary:

- The nature of the work at the next higher level
- The requirements for promotion to the next higher level

e.g. Current post:	Cleaner
Next higher post:	Foreman
Nature of work:	Supervises the cleaning of the school building, amenities and grounds. Provides training to subordinates.
Promotion prospects :	Subject to availability of posts and recruitment and selection processes.

I. JOB DESCRIPTION AGREEMENT

1. Supervisors must ensure that subordinates have a clear understanding of what is expected of them in terms of the job description. After the supervisor has compiled the job description in conjunction with the incumbent, both parties must sign the agreement.

2. However, should any of the parties not concur with the content of the agreement, the supervisor or manager on the next highest level must attempt to resolve the matter.
3. If the matter remains unresolved, the formal grievance procedure may be used. (The parties should agree to apply the procedures for dealing with grievances of Public Service Staff as stipulated in Circular 0230/2003, dated 28 November 2003.)

J. EXAMPLES OF JOB DESCRIPTION FORMATS

A pro forma job description (Annexure A) and an example of a completed job description for an Administration Clerk (Annexure B) are attached as examples to help line managers or supervisors develop job descriptions for the post(s) in their component or institution.



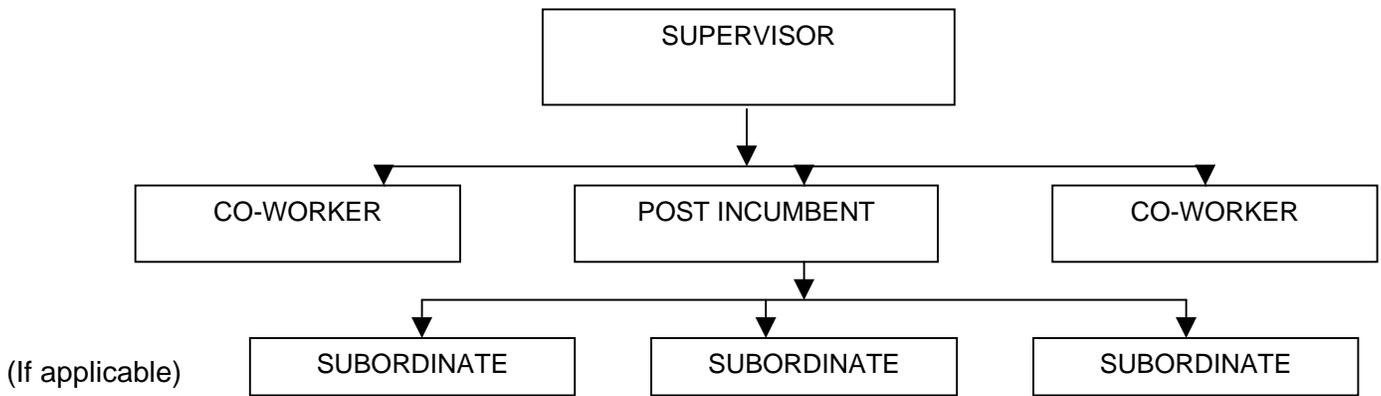
WESTERN CAPE EDUCATION DEPARTMENT

JOB DESCRIPTION

A. GENERAL INFORMATION

(Refer to paragraph 7.3 A of the manual.)

ORGANOGRAM:



B. JOB PURPOSE

(Refer to paragraph 7.3 B of the manual.)

C. DIMENSIONS OF POST

(Refer to paragraph 7.3 C of the manual.)

- Staff expenses : None
- Budget : None
- Equipment

Equipment	Replacement Value

D. MAIN OBJECTIVES

(Refer to paragraph 7.3 D of the manual.)

Main objectives <i>(Main area of work to be performed. What do you want to achieve ultimately?)</i>	Job Outputs: <i>(What should the result be that indicates that the main objectives have been achieved successfully?)</i>	Activities: <i>(Specific activities, which need to be carried out in order to achieve the desired output.)</i>	Performance Measures	
			Target Date/ Frequency: <i>(Indicates a commitment to a timeframe for completion of output/activity)</i>	Standards: <i>(Qualitative and/or quantitative)</i>

Authorisation

E. DELEGATIONS

(Refer to paragraph 7.3 E of the manual.)

F. WORK PERFORMANCE PROFILE

(Refer to paragraph 7.3 F of the manual.)

G. COMPETENCY PROFILE

(Refer to paragraph 7.3 G of the manual.)

Job Knowledge and Skills	Personal Attributes	Learning Fields

H. CAREER PATHING

(Refer to paragraph 7.3 H of the manual.)

The individual (post incumbent) must determine his/her own career path based on the principle of open competition.

Progression to next post is subject to requirements for promotion.

I. JOB DESCRIPTION AGREEMENT

(Refer to paragraph 7.3 I of the manual.)

We, the undersigned, hereby agree to the content of this job description, which was arrived at through consultation and which is valid for the period

..... to

.....

Signature of post incumbent

Date:

.....

Signature of Supervisor/Head

Date:

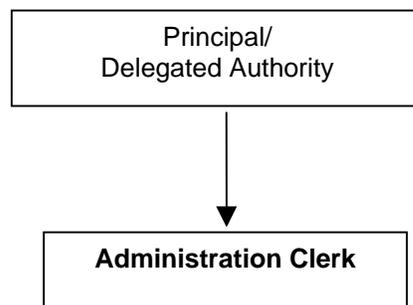


WESTERN CAPE EDUCATION DEPARTMENT

JOB DESCRIPTION

A. GENERAL INFORMATION

Job title : Administration Clerk (Public Ordinary or ELSEN School)
Name :
Persal number :
Dept/Component :
Location :
Date :
Post level :
Job weight :
Core : Administrative line function and support personnel
Reports to: : Principal/Delegated Authority
Organogram :



B. JOB PURPOSE

To render an efficient and effective administrative support service to the school and the principal's office.

C. DIMENSIONS OF POST

- Staff expenses : None
- Budget : None
- Equipment

Equipment	Replacement Value
Personal computer and printer	
Telephone system	
Fax machine	
Intercom system	
Photocopying machine	
*Laminating and binding machine	
*High speed electrical binder (Risograph)	
*Scanner	
Colour printer	
Audio-visual equipment	

D. MAIN OBJECTIVES

- Secretarial duties
- Assist the principal with financial matters
- Diverse administrative functions

Authorisation

- WCED circulars/policies
- Public Service Act/Regulations
- Any other applicable legislation/regulations
- School Safety Plan
- Public Service Code of Conduct
- Code of Remuneration (CORE)
- School Policies
- Etc.

Main objectives: (Main area of work to be performed. What do you want to achieve ultimately?)	Job Outputs: (What should the result be that indicates that the main objectives have been achieved successfully?)	Activities: (Specific activities, which need to be carried out in order to achieve the desired output.)	Performance Measures	
			Target Date/Frequency: (Indicates a commitment to a timeframe for completion of output/activity)	Standards: (Qualitative and/or quantitative)
Secretarial duties.	Effective administration of the principal's office and the reception area.	<ul style="list-style-type: none"> • Answering and making telephone calls on behalf of the principal, and referral of calls appropriately. • Receiving and sending faxes. • Receiving and sending e-mails. • Keeping a telephone register in respect of long distance and cellular phone calls. • Maintaining the principal's diary. • Arranging engagements/ meetings. • Gathering and processing information as requested by the principal and offices of the WCED. • Maintaining a filing system for records of correspondence, manuals, expenditure, inventory, etc. • Typing for the principal and other departments of the school. • Typing of examination papers. • Acting as secretary in forums and meetings. • Controlling diverse documentation for completion and checking for accuracy. 	<ul style="list-style-type: none"> • Daily. • Quarterly. • Daily. • Daily. 	
Assist the principal with financial matters.	Procurement of goods.	<ul style="list-style-type: none"> • Obtaining 3 quotations. • Receiving approval from principal/ governing body before placing order. • Ordering of provisions, stationery, school and hostel equipment. 	<ul style="list-style-type: none"> • Weekly. • Daily. • Daily. 	

	Efficient general accounting practices.	<ul style="list-style-type: none"> • Checking all accounts against invoices (stationery, school needs, fuel, etc.) • Presenting cheques for signature. • Dispatching cheques. • Entering all charges in the fees ledger. • Preparing and typing accounts. • Checking on payments and sending out reminders when parents slip-up on payments. • Receiving money and issuing receipts for the following: <ul style="list-style-type: none"> ✓ School fees ✓ Fund-raising ✓ Music fees ✓ Computer fees ✓ Cafeteria ✓ Sport clothes ✓ Rental of equipment/ buildings ✓ Extra curricular activities • Receipting and banking all monies in appropriate accounts. • Entering receipt and expenditure. • Handling of petty cash. • Ensuring adequate receipt books and vouchers. 	<ul style="list-style-type: none"> • Daily. • Daily. • Daily. • Daily. • Daily. • Continuously • Daily • Daily. • Daily. • Daily • Monthly 	
	Preparation of financial statements.	<ul style="list-style-type: none"> • Collation of Income & Expenditure Statement for presentation to the Governing Body. • Preparing monthly statements. 	<ul style="list-style-type: none"> • Monthly • Monthly. 	
	Payment of contract and governing body personnel.	<ul style="list-style-type: none"> • Distributing I.R.P.5 Tax Certificates issued by the WCED <ul style="list-style-type: none"> ✓ Distributing of I.R.P. 5 certificates in orderly manner ✓ Checking addresses for staff members no longer at the school ✓ Keeping record of all annual salaries and wages for tax calculation purposes • Administering salaries of personnel paid by Governing body <ul style="list-style-type: none"> ✓ Calculation and issuing of cheques, ✓ Unemployment Insurance Fund 	<ul style="list-style-type: none"> • Monthly. • Monthly. 	

		<p>calculations and paying over to the State.</p> <ul style="list-style-type: none"> ✓ S.I.T.E. and P.A.Y.E. deductions and paying over to the Receiver of Revenue ✓ Compiling of wage sheets ✓ Calculation of pro-rata bonuses ✓ Drawing of wages and making up of wage packets ✓ Calculation of retrospective increases when additional funds are made available ✓ Application for withdrawals from the Pension Fund <ul style="list-style-type: none"> • Distributing I.R.P. 5 and issue I.T. 3 Tax Certificates to staff paid by the governing body. • Managing all other tax-related affairs. 	<ul style="list-style-type: none"> • Monthly. • Monthly. 	
Diverse administrative functions.	Provision of support.	<ul style="list-style-type: none"> • Making logistical arrangements for meetings/events, etc. • Issuing stationery to educators. • Assisting with school functions and activities. • Assisting with fund-raising initiatives at the school. • Liaising with business communities/parents/ etc. with regard to fund-raising. • Arranging for repairs to equipment etc. • Assisting with arrangements for sport meetings and for the preparation of meals for officials and educators. • Leasing out the school's facilities. • Controlling the Inventory • Handling all learners' administration. 	<ul style="list-style-type: none"> • Weekly. • Weekly. • Weekly. • Weekly. • Weekly. • Monthly • Daily • Quarterly • Annually 	
	Administration of personnel related matters	<ul style="list-style-type: none"> • Assisting with the placement of adverts for vacant posts. • Requesting Unemployment cards for employees. • Keeping leave register for staff in employ of governing body. 	<ul style="list-style-type: none"> • Occasionally • Occasionally. • Daily 	

ANNEXURE B

	Provide learner support.	<ul style="list-style-type: none"> • Making appointments for learners with doctors, dentists, hospitals etc. • Dispatching hearing aid equipment for repair and distributing when returned.(ELSEN) • Making phone calls for pupils in cases where the learner is disabled. (ELSEN) 	<ul style="list-style-type: none"> • Daily • Monthly • Occasionally 	
	Provide support during examinations.	<ul style="list-style-type: none"> • Dispatching entry forms and examination scripts to the various examiners by registered mail or courier. 	<ul style="list-style-type: none"> • Annually 	
	Administration of Feeding Scheme.	<ul style="list-style-type: none"> • Receiving food supplies. • Keeping inventory of food supplies. • Distributing of food as necessary. • Ordering supplies. • Keeping duty register of chefs/volunteers. • Submitting monthly reports to the Peninsula/other feeding schemes. 	<ul style="list-style-type: none"> • Daily/Weekly. • Daily. • Weekly. • Monthly. • Monthly. • Monthly. 	
	Administration of transport matters.	<ul style="list-style-type: none"> • Liaising between school and parents when arranging transport (bus late or involved in an accident) • Arranging transport for school outings. • Arranging transport to clinics, hospitals. 	<ul style="list-style-type: none"> • Occasionally. • Occasionally. • Occasionally. 	
	Provision of First Aid.	<ul style="list-style-type: none"> • Administering First Aid to learners in cases of minor injuries. • Keeping First Aid inventory and ensuring that there are sufficient supplies in first aid kit. 	<ul style="list-style-type: none"> • Occasionally • Occasionally. 	

E. DELEGATIONS

None

F. WORK PERFORMANCE PROFILE**1. Main clients and frequency of interaction**

- The principal : Daily
- The school staff : Daily
- The learners : Daily
- The school governing body : Monthly
- The public/community : Daily
- The parents : Daily

Clients' expectations

- Rendering of an efficient and effective service at all times
- Professionalism
- Loyalty
- Ability to work independently

2. Indicators

- Feedback or complaints on duties performed
- Feedback or complaints from clients
- Audit reports
- WCED 043 quarterly reports
- Annual financial statements
- Feedback from supervisor

G. COMPETENCY PROFILE

Job Knowledge and Skills	Personal Attributes	Learning Fields
<ul style="list-style-type: none"> • Computer literacy • Ability to perform routine tasks • Interpersonal skills • Ability to file • Ability to operate fax and photocopy machine • Verbal communication skills for the helpful and polite communication of information • Written communication skills for the writing of memos, letters, notes, and reports • Team-player skills 	<ul style="list-style-type: none"> • Maintains confidentiality • Positive and co-operative attitude • Responsible • Reliable • Polite • Helpful • Honest • Loyal • Motivated 	<ul style="list-style-type: none"> • Financial administration • Personnel administration • MS Office • Etc.

H. CAREER PATHING

The individual (post incumbent) must determine his/her own career path based on the principle of open competition.

Progression to next post is subject to

- Availability of post (advertised).
- Satisfactory work performance.
- Conforming to the applicable recruitment and selection criteria.

Requirements to be met for promotion

Subject to the requirements as advertised and the post incumbent's career choice.

I. JOB DESCRIPTION AGREEMENT

We, the undersigned, hereby agree to the content of this job description, which was arrived at through consultation and which is valid for the period
to

.....

Signature of post incumbent

Date:

.....

Signature of Supervisor/Head

Date: