

**PERFORMANCE MANAGEMENT  
POLICY**



**2016/2017**

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# 1 ACRONYMS

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The following table provides a list of acronyms used in the document.

<b>ACRONYMS</b>	<b>Definition</b>
CCR	Core Competency Requirements
EAP	Employee Assistance Program
HRD	Human Resources Department
IDP	Integrated Development Planning
KPA	Key Performance Area
KPI	Key Performance Indicator
MMC	Member of the Mayoral Committee
PDP	Personal Development Plan
PMS	Performance Management System
PSC	Performance Steering Committee
REMCO	Remuneration Committee
SALGA	South African Local Government Association
SARS	South African Revenue Services
SDBIP	Service Delivery and Budget Implementation Plan
GTLM	Greater Taung Local Municipality
TCTC	Total Cost To Company
WSP	Workplace Skills Plan

# 2 TERMONOLOGY

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The following is the key terminology used in the Sedibeng District Municipality's performance management and development policy.

EMPLOYEE	Shall mean any person, excluding an independent contractor, who works for the Municipality and who receives, or is entitled to receive, any remuneration.
SECTION 57 EMPLOYEE	An Employee in terms of Sect. 57 of the Municipal Systems Act 32 of 2000 and with whom the Municipal Manager concluded a fixed term contract.
FINAL ASSESSMENT	Is the final review of objectives, indicators, standards and targets, to determine a performance reward.

GRIEVANCE	Refers to a complaint or concern resulting either from an evaluation outcome or the evaluation process.
IDP	The Integrated Development Plan inclusive of the Service Delivery and Budget implementation Plan (SDBIP).
PERSONAL DEVELOPMENT PLAN	Is a plan that is developed after the formal assessment in July and shows what training and development activities will be planned for the year to assist the employee to be more efficient in his/her current position.
INPUTS	These are resources, competencies, knowledge, skills and behaviour the Employee needs to have, in order to perform a particular job effectively.
MANAGER	A member of staff with staff members within his/her span of control, for whom s/he is directly responsible and to whom such staff member (s) are directly accountable.
MUNICIPALITY	The Greater Taung Local Municipality (GTLM)
EXCO MEMBER	Member of the Executive Committee
OBJECTIVES	The objectives refer to the main activities or key focus area, which make up a persona' job and performance agreement and describe what must be achieved.
OUTPUTS	The outputs describe what needs to be delivered in order to be successful in the job as per the Performance Agreement and Plan.
ONGOING PERFORMANCE FEEDBACK	Ongoing Performance feedback refers to the frequency and quality of performance discussions between the Manager/Supervisor and Employee (over and above the quarterly reviews)
PERFORMANCE AGREEMENT	Refers to the signed documents by both parties (Manager/Supervisor and Employee) that states objectives, performance indicators, standard and target for the Employee with the aim to monitor and measure performance for a particular financial year.
PERFORMANCE INDICATORS	Refers to different types of measures which could include: time, performance against set time frames, response time, quantity, quality, cost or money, maximising income, reducing costs and improvement. It defines how performance and what standards will be measured.
PERFORMANCE TARGET	A performance target is set for each Key Performance Indicator to measure by when and how that specific target should be achieved and it should be SMART (specific, measurable, attainable, realistic, and time related).
PERFORMANCE MANAGEMENT SYSTEM	A policy framework and procedures document, that guides how the Municipality's performance planning, monitoring, measurement, review, reporting and improvement will be managed including defining the role of different role players.
PERFORMANCE MANAGEMENT REVIEW	Refers to the quarterly reviews conducted in the four quarters (made up of a three-month period) of the financial year.
PERFORMANCE MANAGEMENT REPORT	A report to Council by the Performance Management Division to report on the process during the review cycle and to update the Council on

	the reward process.
PERFORMANCE MANAGEMENT REVIEW CYCLE	Refer to Greater Taung Local Municipality's financial year (1 July to 30 June).
PERFORMANCE MANAGEMENT REWARD	A reward allocated to Employees who achieved a certain level of performance and is inclusive of a performance bonus.
SUPERVISOR	See Manager.
WSP (WORK SKILLS PLAN)	The approved plan of the Municipality that shows the planned training and education interventions for the organisation for the particular financial year.

### **3 INTRODUCTION**

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The need to develop and maintain a performance management system in municipalities was first identified during the drafting and approval of the Constitution of the Republic of South Africa, 1996. Chapter 7 deals exclusively with the local sphere of government and, inter alia, lists the objects and developmental duties of municipalities.

Within the framework of the Constitution, the White Paper on Local Government issued in March 1998, established the basis for a new integrated developmental local governmental system which is committed to working with communities to find sustainable ways to meet their social, economic and material needs and improve the quality of their lives. The White Paper states the following:

*“Integrated development planning, budgeting and performance management are powerful tools which can assist municipalities to develop an integrated perspective on development in their area. It will enable them to focus on priorities within an increasingly complex and diverse set of demands. It will enable them to direct resource allocation and institutional systems to a new set of development objectives.”*

Performance management is thus critical to ensure that plans are being implemented, that they have the desired developmental impact and that resources are being used

efficiently to establish and maintain a service-orientated culture of operation. As such performance management and integrated development planning are two sides of the same coin – the Integrated Development Plan (IDP) sets out what a municipality intends to achieve, i.e. what the community can expect and the Performance Management System (PMS) manages, measures and evaluates the extent of achievement thus assisting the community to inspect what it expected.

The broad framework for the establishment of a PMS is described in Chapter 6 of the Local Government: Municipal Systems Act, 32 of 2000 (MSA) which inter alia, requires municipalities to:

- With the involvement of the community, establish a PMS that is commensurate with its resources, best suited to its circumstances and in line with the priorities, objectives, indicators and targets contained in its IDP;
- Promote a culture of performance management among its political structures, political office bearers and councillors and in its administration;
- Administer its affairs in an economical and accountable manner;
- Set appropriate key performance indicators (KPIs) and measurable performance targets with regard to the municipality's development priorities and objectives set out in the IDP in consultation with the community;
- Establish mechanisms to, at least once per year, monitor, measure and review performance in consultation with the community;
- Set up appropriate mechanisms to timeously detect under-performance;
- Conduct an internal audit on performance;
- Submit results of performance measurement for audit by the Auditor-General (AG) annually;
- Include a report on performance as well as the audit report on performance by the AG, in the municipality's annual report required in terms of Section 121 of the Local Government: Municipal Finance Management Act No. 56 of 2003 (MFMA); and
- Publish the annual report for the information of councillors, staff, public and other spheres of government.

The purpose of this policy is to provide a link between the legislative framework and the operational institutionalization thereof in the Municipality. It provides a governance tool

for the Council which, with the support of all role-players, will be the legitimate driving force for the implementation of performance management in an organization-specific manner and the devolvement of the system to include all levels of staff and all employees while ensuring that the Municipality remains accountable to its community.

The vision of the Greater Taung Local Municipality is to be a: -

***A PROSPEROUS COMMUNITY THAT IS SOCIALLY, CULTURALLY AND ECONOMICALLY SUSTAINABLE***

***“MORAFE O O ATLEGILENG O O BOTSALANO O O IPELANG KA SETSO LE MORUO O O TSEPAMENG”***

***‘N WELVARENDE GEMEENSAP WAT SOSIAAL, KULTUREEL EN EKONOMIES VOLHOUBAAR IS***

In order for GTLM to effectively achieve this mission and, therefore, live its vision, it must ensure that a well-planned strategy is implemented. This strategy is called the Integrated Development Plan (IDP). Implementation of the IDP must be monitored regularly to ensure that the Municipality delivers on what it has planned. This is done through the Performance Management System (PMS). GTLM depends on the performance of each and every employee in order to succeed in attaining its objectives and meet its performance targets. Accordingly, the management of performance involves the entire administration.

### ***Legislative and Regulatory Framework***

This policy framework is in accordance with applicable legislation and any relevant guidelines from the South African Local Government Association (SALGA), the most important of which are the following:

1. ***The Constitution of the Republic of South Africa, Act No. 108 of 1996*** stipulates in section 195 (b) that “efficient, economic and effective use of resources must be promoted”. It further states in section 195 (h) that “good human resource management and career development practices, to maximize human potential, must be cultivated”.
2. Chapter 6 of the ***Local Government: Municipal Systems Act, Act No. 32 of 2000 (MSA)*** places specific emphasis on performance management. Section 38



obliges Municipalities, especially as employers, to implement a PMS that is in line with the priorities, objectives, indicators and targets contained in its IDP. Section 57 of this Act makes the employment of the Municipal Manager and Managers directly accountable to him/her subject to the conclusion of a separate performance agreement with the Municipality as soon as possible after initial appointment and annually thereafter before the end of July of each year. Section 67 of the Act regards the monitoring, measuring and evaluating of performance of staff as a platform to develop human resources and to hold municipal staff accountable to serve the public efficiently and effectively.

3. ***The Local Government: Municipal Planning and Performance Management Regulations No. R. 796*** published in *Government Gazette No. 22605* dated 24 August 2001 stipulates in more detail what is expected from municipalities in implementing its PMS, inter alia, requiring this policy to clarify all processes and the roles and responsibilities of each role-player, including the local community, in the functioning of the system. It also regulates the establishment, composition and functioning of a Performance Audit Committee.
4. The ***Local Government: Municipal Finance Management Act, Act No. 56 of 2003 (MFMA)*** requires a service delivery and budget implementation plan (SDBIP) based on specific targets and performance indicators derived from the IDP thus linking the IDP, the PMS and the budget. In terms of Section 72 of the Act, the accounting officer of a municipality must submit a mid-year budget and performance assessment of the Municipality to, inter alia, National Treasury before 31 January of each year. Section 165 of the Act requires the existence of an internal audit unit which, inter alia, advises the Municipal Manager and reports to an Audit Committee on the implementation of an internal audit plan including performance management. Section 166 requires the establishment of an independent Audit Committee to advise the political and administrative executive on, amongst others, matters pertaining to performance management and performance evaluation.
5. The ***Skills Development Act, Act 97 of 1998*** is also an essential part of the legislative framework for this Policy but in an indirect manner. The Act aims to develop the skills of the South African workforce to improve the quality of life of workers and their prospects of work and perceives skills development as

contributing to the improvement of performance and productivity in the workplace as well as the competitiveness of employers. The Act and specifically the Workplace Skills Plan provides a valuable vehicle for the training of staff.

6. The ***Local Government: Disciplinary Regulations for Senior Managers, 2010*** contained in Government Notice No. 344 of 21 April 2011 contains a disciplinary code for senior managers who are defined as the Municipal Manager and Managers reporting directly to the Municipal Manager. It also deals with substandard performance and the procedures to be followed in addressing such performance.

In addition performance management in the public service is guided by the following:

- Public Service Act 1994;
- Public Service Regulations 2001;
- Resolutions of the Public Service Co-ordinating Bargaining Council;
- Treasury Regulations 2001;
- Public Finance Management Act, 1999;
- Basic Conditions of Employment Act, 1997;
- Labour Relations Act, 1995; and
- All other Acts and Policies which are supportive of Employer/Employee relations

For purposes of this policy, the senior managers concerned are called “Directors”.

The combined effect of the above Acts and Regulations obliges the Council to establish and implement a PMS with the dual purpose of improving the performance of its staff to deliver effective and efficient services based on the IDP and to develop human resources. This will be accomplished by using the PMS to identify the training and development needs of employees and to implement policies and programmes to address those needs, all with the aim of improving the productivity of the Municipality.

This policy is, accordingly, based on legislative requirements and must be implemented to ensure compliance.

## **4 PURPOSE OF THE DOCUMENT**

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This document represents a policy on performance management and development for the Greater Taung Local Municipality. Furthermore it provides procedures for managing, monitoring and evaluating performance in the municipality at both organisational and individual level. This policy shall be used within the municipality to develop, review, monitor and conclude performance agreements and manage performance of all Employees as per the strategic objectives of the Greater Taung Local Municipality derived from the following key strategic documents:

- Integrated Development Plan (IDP);
- Service Delivery and Budget Implementation Plan (SDBIP); and
- National, Provincial and Local Government strategic priorities.

### **4.1 Main Objectives**

The objectives of the performance management and policy and system of the GTLM can be summarised as follows:

- To link the IDP to departmental teams and individual performance;
- To fulfil all applicable national, provincial and local government legislative requirements on performance management and development;
- To improve the organisational performance by improving team and individual performance;
- To clarify expectations of what teams and individuals are required to achieve;
- To develop the skills, competencies and abilities of individuals within the organisation;
- To develop a sound working relationship between Managers/Supervisors and Employees through the development of agreed objectives, the provision of feedback, mentoring and coaching;
- To identify and reward staff who render exceptional performance;

- To identify staff who render unsatisfactory performance and provide appropriate remedial action;
- To provide a mechanism for identifying and linking training and development needs to performance management;
- To ensure that staff is actively involved in managing their own performance; and
- To instil a performance-oriented culture throughout the organisation.

## **4.2 Benefits for Employees**

Employees will derive specific benefits from a PMS in that it would:

- Provide better insight into a job and clarify the duties and responsibilities associated therewith;
- Enable employees to determine where they fit into the municipal structure and contribute to the achievement of the development objectives of the Municipality as per the IDP;
- Assist employees to discover their own strengths, to recognize their weaknesses and to develop their knowledge, skills and attitudes in order to overcome these and develop their full potential;
- Enhance individual career development through informed decision-making and focused training; and
- Enable employees to make full use of the opportunities presented by the implementation of employment equity.

## **4.3 Advantages for the Municipality**

Performance management will assist the Municipality as a service delivery institution and as the employer to:

- Provide employees with accurate information on how it views the job and the expectations associated with it;
- Continuously reassess structural functionality and enable effective organisational alignment with objectives and strategies;
- Evaluate the job analysis information and rectify faulty aspects thereof;

- Understand the role, duties and responsibilities of employees;
- Identify shortcomings in employment practices, procedures and policies;
- Delegate unambiguous and realistic responsibilities to employees;
- Assess the adequacy or inadequacy of resources available to employees;
- Identify and address training and development needs in a focused and structured manner so as to make use of the opportunities provided by the Skills Development Act;
- Develop the human resources of the Municipality; and
- Provide services in an efficient, effective and economic manner.

## **5 PRINCIPLES UNDERLYING PERFORMANCE APPRAISALS**

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In recognizing that the implementation of the PMS may create uncertainties and thus necessitate pre-clarified norms and values, the Council and all role-players involved with the system commit themselves to the following principles:

- The PMS will be a corrective system and not a punitive system;
- The PMS is based on ethical and operational principles that serve to ensure that the system is fair, equitable and achieves performance management as well as human resources development;
- All employees of the Municipality will, subject to legislation, be treated equally by the PMS. The Local Labour Forum [LLF] or such other employer/employee representative structure, e.g. a sub-committee of the LLF that may be tasked with it, will be entitled to oversee the implementation/devolvement of the PMS;
- The guidelines used to design the system, implement it and reach conclusions and judgments about performance will be objective, balanced and will apply to all employees;
- The appraisal system will be based on the job analysis of each job and be linked to the goals of the Council. The job performance and not the individual will be assessed;
- Individual performance appraisals of all levels of staff will be treated confidentially;

- The performance objectives to be achieved by individual employees will be mutually agreed to by the employee to be appraised [the appraisee] and the person responsible for the appraisal [the appraiser]. As such it will be transparent to all employees and the objectives will be reasonable, realistic and measurable;
- Performance interviews will focus on open and honest discussion thus providing an employee with the opportunity to voice concerns and problems without fear of victimization or discrimination;
- Employees will receive continuous feedback on the results of their performance appraisals in a constructive manner that focuses on counselling rather than criticism. Feedback will provide employees with an objective appraisal of the current situation and will be linked to appropriate steps to improve performance, including training and coaching objectives. Based on such feedback, realistic time frames will be set for regular measurement of performance on the specific steps mutually agreed upon by the appraiser and appraisee;
- All aspects of performance appraisals will be done in a written form that will be open to scrutiny by the Council as the employer in the event of a situation arising that makes this necessary

## **6 ACCOUNTABILITY FOR THE PERFORMANCE MANAGEMENT SYSTEM**

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The Municipal Systems Act places the responsibility on the Council to adopt the Performance Management System, while holding the Mayor responsible for the development and management of the system. The Executive Mayor of the GTLM delegates the responsibility for the development and management of the Performance Management System to the Municipal Manager. The Municipality's Directors are then, in turn, responsible for executing the performance management system in their respective departments in accordance with this Policy.

Despite the fact that the Executive Mayor has delegated duties to the Municipal Manager with regard to the development and management of the performance management

system, the Executive Mayor and ultimately, the Council, is the principal oversight body to ensure that the system is implemented in accordance with legislative requirements and this Policy and, as such, he/she must ensure that any deviation from the system is monitored and addressed.

The **Executive Mayor** must, in terms of section 53 of the Municipal Finance Management Act perform the following functions relating the SDBIP (see below) and performance management contracts:

- Ensure that the municipality's service delivery and budget implementation plan is approved by him / her within 28 days after the approval of the budget;
- Ensure that the annual performance agreements as required in terms of section 57 (1) (b) of the Municipal Systems Act for the Municipal Manager and all Senior Managers comply with this Act in order to promote sound financial management and are linked to the measurable performance objectives approved with the budget and to the service delivery and budget implementation plan.

The **Executive Mayor** must promptly report to the Council and the MEC for local government, any delay in the tabling of an annual budget, the approval of the service delivery and budget implementation plan or the signing of the prescribed annual performance agreements.

The **Executive Mayor** must, further, ensure that the performance agreements of the Municipal Manager, Senior Managers and any other categories of officials as may be prescribed, are made public no later than 14 days after the approval of the Municipality's service delivery and budget implementation plan. Copies of such performance agreements must be submitted to the Council and the MEC for local government.

The **Municipal Manager** must keep the Council informed about the transformation, development, implementation and review of the performance management system. Public participation must remain encouraged through the communication of performance

information and the process of developing the system must be transparent, simple and realistic, fair and objective and developmental.

The **Senior Performance Management Systems Manager** assists the Municipal Manager with the Performance Management System and is specifically responsible for the following:

- Ensuring the implementation of and compliance with all legal aspects of the system;
- Facilitating further development and refinement of the Performance Management System and as the need arises;
- Continuously supporting the Council with implementation, assessment, review, monitoring and reporting on performance management within the Municipality as an institution, its Section 57 employees, entities and service providers;
- The provision of assistance to both people managers and employees alike with regard to the interpretation of this Policy, the tools used within the system and the application of performance management in general;
- Monitoring of implementation of the system to ensure fairness and correct application;
- Research on the strategic progress of the Municipality and reporting on the achievement or otherwise of objectives and strategies.

**The Role of Human Resources in Performance Management:**

- To provide advice and act where needed as an interface and between personal development planning and career / succession planning;
- To provide assistance with regard to linking details recorded on personal development plans and the workplace skills plan / group training initiatives;
- To guide standardization with respect to ensuring that a performance plan accurately reflects an employee's level and role in accordance with the post he/she occupies;



- To deal with inaccuracies between an employee's performance plan and the applicable job description;
- To guide managers dealing with incidences of poor performance and to lead the formal process in this regard in accordance with prescribed disciplinary processes, unless otherwise provided in this Policy.

#### **The Role of the Manager/Supervisor in Performance Management:**

- To use the performance management process to coach and lead employees. This involves giving ongoing feedback to employees and assessing their performance;
- To set objectives with employees in such a way that continuous improvement is encouraged;
- To monitor employees' performance against the set objectives;
- To use recognition and compensation to reinforce good performance;
- To manage poor performance appropriately;
- To discuss and advise on future performance goals and to reflect upon previous goals.

#### **The Role of the Employee in Performance Management:**

- To suggest challenging but realistic indicators which support the goals of the Municipality;
- To take responsibility for the standard of performance by trying to improve and develop;
- To develop and implement action plans in order to achieve objectives;
- To ask the manager for information, help or advice to assist in meeting objectives;
- To ask for feedback from others, including the manager for self-performance monitoring;

- To make suggestions on how performance can be improved;
- To keep the manager informed about progress in relation to original objectives.

**The Role of the Community (Local Municipalities):**

- To assist in the planning for the PMS and creation of indicators through the input into the Analysis phase of the IDP and also in the discussions regarding priority of targets; and
- To review the GTLM Annual Report and monitor organizational performance during the year.

## **7 EMPLOYEES INCLUDED IN THE PERFORMANCE SYSTEM**

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The performance management and development system shall apply to all Employees employed by Greater Taung Local Municipality. This includes employees employed on a:

- Permanent basis; or
- Fixed term contract basis (for the duration in the employ of the municipality)

**There are two categories of Employees in the municipality.**

**These include the following:**

- Section 57 Employees: (managers directly accountable to the municipal manager) and the Municipal Manager; and
- Non – section 57 Employees:
  - Managers;
  - Contractors/Project Managers/Consultants; and
  - General Staff.

All categories shall sign performance agreements with the municipality. In this respect the following in principle shall apply:

- The Mayor shall conclude the performance agreement of the Municipal Manager;

- The Municipal Manager shall conclude the performance agreements of all Executive Directors;
- The Directors shall conclude the performance agreements of all Managers/Assistant Managers; and
- Managers/Assistant Managers shall conclude the performance agreements of all staff under their direct management.

## 8 PERFORMANCE MANAGEMENT CYCLE

The cycle of performance management System in a financial year is illustrated by the table below:

Performance Management and Development Cycle													
Performance Management Process		JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN
1	IDP, budget and SDIM is approved by Council.				✓							✓	✓
2	Finalise Performance Agreements on basis of approved IDP and budget	✓											
3	Monitor Performance Agreements			✓			✓			✓			✓
4	Quarterly Review Performance			✓			✓			✓			✓
5	Recognise and/or Reward Performance			✓					✓				
6	Formal Feedback to Council											✓	

### 8.1 Planning Phase: May to July

At the beginning of the performance management development cycle is planning. This stage involves the following key tasks:

- The Management Committee translate objectives, as contained in the approved IDP, into the annual Service Delivery and Budget Implementation Plan (SDBIP),

showing the annual targets, key indicators, and baselines. Such SDBIP shall be submitted to the Mayor for approval.

- The Director and team of Managers translate deliverables as contained in the Top Layer Service Delivery and Budget Implementation Plan into the Departmental SDBIPs, showing quarterly targets.
- The Line Manager/Supervisor shall schedule meetings with each Employee to agree on individual performance objectives, indicators, performance targets guided by the SDBIP in terms of the IDP;
- The Line Manager and Employee shall conclude a performance agreement and plan for the financial year based on the indicators set out in the department's SDBIP. Both parties shall sign the performance agreement.
- All individual performance agreements for the department shall be submitted to the Performance Management Manager/Coordinator for quality check before being submitted to the Human Resources Department for record keeping.

### **8.1.1 Performance Agreements**

All performance agreements and plans shall be:

- Developed for each Employee on an annual basis;
- Developed by the immediate Manager/Supervisor of the Employee, in consultation with such Employee for input and approval by a Director;
- Agreed upon between the relevant Manager/Supervisor and Employee; and
- Signed and dated by the relevant Manager/Supervisor and Employee, once agreement has been reached.

Signing a performance agreement and plan the Employee agrees to the following:

- Fully committing to the successful delivery of all outputs and outcomes in the performance agreement;
- Attending all training and development interventions and procedures as required; and
- Keeping and maintaining records of all outcomes/outputs achieved.

In signing the performance agreement the Manager/Supervisor commits to the following:

- Managing the Employee's performance in full compliance with all directives governing performance management;
- Providing a conducive work environment in order for Employees to carry out their tasks; and
- Providing regular feedback and/or encouragement by means of both formal and informal communication.

All Employees and Managers/Supervisors shall conclude and sign the following annually:

- Performance Agreement;
- Individual Performance Plan; and
- Personal Development Plan.

### **8.1.2 Measuring**

There are two basic criteria against which Employees shall be measured:

- **KPAs/JDKPAs:** these describe exactly what the Employee is expected to achieve during the year. Performance indicators for each KPA must be provided detailing the evidence that will be used to assess whether or not an Employee has achieved the objective. KPAs identify what needs to be done.
- **Core Competency Requirements:** these describe the skills, knowledge and behaviours the Employee is required to demonstrate in order to achieve the objectives. Core competencies, particularly the behaviours, identify how the work needs to be done.

Below is a list of potential requirements for CCRs: that can be used for all employees including Section 57 Employees broken down into managerial and occupational competencies.

No	Core Competency Requirements (Inputs)	Weighting
<b>Core Managerial Competencies (CMCs)</b>		
1.	Strategic Capability and Leadership	
2.	Programme and Project Management	
3.	Financial Management	
4.	Change Management	
5.	Knowledge Management	
6	Service Delivery Innovation	
7	Problem Solving and Analysis	
8	People Management and Empowerment	
9	Client Orientation and Customer Focus	
10	Communication	
11	Honesty and Integrity	
<b>Core Occupational Competencies (COCs)</b>		
1.	Competence in Self-Management	
2	Interpretation of and implementation within the legislative an national policy frameworks	
3.	Knowledge of Performance Management and Reporting	
4.	Competence in policy conceptualisation, analysis and implementation	
5	Knowledge of more than one functional municipal field / discipline	
6.	Skills in Mediation	
7	Skills in Governance	
8.	Competence as required by other national line sector departments	
9.	Exceptional and dynamic creativity to improve the functioning of the municipality	
10.	Time Management (delivers services on time)	
11.	Creative thinking (uses innovation when delivering a service)	
12.	Communication (effectively utilises new knowledge)	
13	Application of knowledge (effectively communicates)	
14.	Dissemination of knowledge (shares expertise)	
15.	Relationship with colleagues (work closely and in harmony with colleagues)	

The allocation of performance ratings shall be made according to the following rating scale:

Level	Terminology	Description
5	<b>Outstanding performance</b>	Performance far exceeds the standard expected of an employee at this level. The appraisal indicates that the Employee has achieved above fully effective results against all performance criteria and indicators as specified in the PA and Performance plan and maintained this in all areas of responsibility throughout the year.
4	<b>Performance significantly above expectations</b>	Performance is significantly higher than the standard expected in the job. The appraisal indicates that the Employee has achieved above fully effective results against more than half of the performance criteria and indicators and fully achieved all others throughout the year.
3	<b>Fully effective</b>	Performance fully meets the standards expected in all areas of the job. The appraisal indicates that the Employee has fully achieved effective results against all significant performance criteria and indicators as specified in the PA and Performance Plan.
2	<b>Not fully effective</b>	Performance is below the standard required for the job in key areas. Performance meets some of the standards expected for the job. The review/assessment indicates that the employee has achieved below fully effective results against more than half the key performance criteria and indicators as specified in the PA and Performance Plan.
1	<b>Unacceptable performance</b>	Performance does not meet the standard expected for the job. The review/assessment indicates that they employee has achieved below fully effective results against almost all of the performance criteria and indicators as specified in the PA and Performance Plan. The employee has failed to demonstrate the commitment or ability to bring performance up to the level expected in the job despite management efforts to encourage improvement.

*(Find attached as annexure A to this policy, a template for a performance agreement for section 57 Employees and annexure B for non-section 57 Employees)*

### **8.1.3 Weighting**

The total of weightings on the Performance Plan shall weight up to 100 points. The purpose of the weighting is to indicate key focus areas to Employees. Some objectives may have higher weighting than others as a result of their impact for instance to service delivery.

The criterion upon which the performance shall be reviewed consists of the following two components as contained in the Performance Plan.

- Key Performance Areas (KPAs) i.e. key objectives or outputs; and
- Core Competency Requirements (CCRs) i.e. knowledge, skills and behaviours or inputs.

Key performance areas and core competency requirements will be scored separately to make up 100 points and then weighted to calculate the final score.

**In the case of employees (Section 57 Employees) the following weighting shall apply:**

- KPA or outputs covering the main areas of work account for 80%; and
- CCRs will account for 20% of the final assessment.

**In the case of all other Employees the following allocation shall apply:**

- Job Description KPAs or outputs covering the main areas of work will account for 70%; and
- CCRs will account for 30% of the final assessment.

**Organisational level:**

- PMS Unit shall prepare and consolidate all Departmental SDBIPs into one organisational SDBIP for the GTLM and submit to Municipal Manager for approval.

## **8.2 Monitoring Phase: Monthly starting in July**

**Individual level:** Monitoring refers to ongoing performance feedback throughout the financial year. A Manager/Supervisor shall hold informal ad hoc “one-on-one” meeting with an Employee to:

- Provide strategic guidance for alignment of work to department’s SDBIP and municipality’s IDP;
- Provide positive feedback to Employee to motivate and encourage good performance;
- Sustain or improve performance;



- Manager/Supervisor identify and support Employees in need of EAP and consult HR Unit in this regards;
- Ensure good understanding between the Manager/Supervisor and Employee of work completed, in progress and not started. This eliminates the element of “surprise” during formal reviews; and
- Provide Employee with an opportunity to request assistance where necessary.

Employees shall keep records (minutes) of all informal progress meetings for their own developmental use.

**Organisational level:** Managers, Directors shall compile monthly performance reports for the Municipal Manager to report on their overall directorate’s actual performance against planned performance in their SDBIP (business plans).

### **8.3 Reviewing Phase: October, January, April and July**

**Individual level:** Performance reviews provide an opportunity to review performance against all set objectives to date prior to year – end review, thus minimising surprises during final assessment and enabling corrective action to be taken during the year.

They also assist to recognise strength and determine how to improve or enhance weaknesses. There shall be four formal performance reviews/assessments for the financial year. These shall be formally recorded in the individual performance reviews.

The performance reviewing process shall involve the following key tasks:

- Manager/Supervisor request Employee to prepare for formal appraisal by scoring him/herself against the agreed objectives.
- Manager/Supervisor prepares scores of the Employee’s performance against agreed objectives;
- Manager/Supervisor and Employee meet to conduct formal performance appraisal and agree on final scores. Where an Employee and Manager/Supervisor disagree on the score, the Manager/Supervisor’s decision is final;
- Employee provide documented evidence of results achieved;

- During the final performance review, Manager/Supervisor and Employee prepare and agree on Employee's personal development plan;
- Both parties sign the performance appraisal and submit to Human Resource Department for record keeping.
- All performance appraisals, conducted quarterly shall be captured and stored centrally and copies given to Employee and Manager/Supervisors ;and
- No unauthorised parties may have access to the evaluation results of an employee, without the written permission of the official concerned.

**Organisational level:** The following performance reports need to be prepared:

- Director and/or Manager/Supervisor compile a department's quarterly performance report per department, and submit on or before the 15<sup>th</sup> after the end of each quarter to PMS Unit with all relevant evidence. These shall be audited and tabled before relevant Committees;
- Half-yearly performance report for whole of municipality which shall be tabled before Council. It shall be audited and tabled before relevant Committees;
- Annual Report for whole of municipality which shall be tabled before all relevant Committees (Audit Committee, MPAC, EXCO and Council), and finally shared with the general public.

## **8.4 Rewarding / Corrective Phase: June**

**Individual level:** Outstanding performance will be encouraged in the municipality through, among other things reward and/or recognition.

The final assessment phase is the fourth performance review of the quarterly review process. After the final assessment, all scores including the three quarterly assessments are added up to calculate the final performance score of the Employee for the financial year.

In ensuring that the performance results derived are consistent, fair and objective, the **Performance Steering Committee** shall moderate performance results. The committee will do this by sampling performance results of Employees with the highest and lowest performance scores in each department and where necessary request **motivation** from

the Manager/Supervisor for the scores allocated. This way the committee will ensure that a level of fairness is achieved.

This stage of performance management determines what reward and recognition should be given to an individual Employee, department or collective for outstanding work performed during the financial year. It also determines what corrective actions should be taken in cases of non-performance.

All Section 57 Employees who are on a performance based fixed term contract and who have entered into a Performance Agreements will receive an annual performance bonuses and salary increments based on their performance against their objectives i.e. if they achieve a certain score in the final assessment at the end of the year.

For purposes of evaluating the annual performance of the Municipal Manager, an evaluation panel constituted of the following persons must be established -

- Executive Mayor or Mayor;
- Chairperson of the performance audit committee or the audit committee in the absence of a performance audit committee;
- Member of the mayoral or executive committee;
- Mayor and/or Municipal Manager from another municipality; and

For purpose of evaluating the annual performance of managers directly accountable to the municipal managers, an evaluation panel constituted to the following persons must be established-

- Chairperson of the performance audit committee or the audit committee in the absence of a performance audit committee;
- Member of EXCO
- Municipal Manager or his/her nominee from another municipality who is not lower than the person being evaluated.

#### **8.4.1 Performance Bonuses (Section 57 Employees)**

Performance bonuses shall be calculated as a percentage of the employee's basic salary. New Employees who join the municipality during the financial year will be allowed

the same opportunity as other Employees when determining eligibility for performance bonuses if they have been employed for longer than six months. However they should be paid on a pro rata basis from date of employment.

In the event that salary has been changed, the bonus must be paid as a percentage of the specific annual salary that he/she would have earned.

In terms of section 32 (2) of the Performance Management Regulations for Municipal Managers and Managers reporting directly to Municipal Managers, 2006 a financial performance bonus may be awarded to the Municipal Manager and Directors for “outstanding” performance in accordance with the under-mentioned scale.

The following rating scale will be used to determine the payment of performance bonuses which will be a percentage of the annual remuneration package of the Employee.

Below is a table for illustration:

The table below illustrate the threshold upon which a performance bonus shall be payable:

<b>Table for Bonus Calculations</b>		
<b>Score Notch</b>		<b>Bonus</b>
130%	133%	5%
134%	137%	6%
138%	141%	7%
142%	145%	8%
146%	149%	9%
150%	153%	10%
152%	153%	11%
158%	161%	12%
162%	165%	13%
166%	167%	14%

<b>Payment of Performance Bonuses</b>			
<b>Scale</b>	<b>Score</b>	<b>Definition</b>	<b>Bonus</b>
1	0 - 65	Unacceptable Performance	No bonus
2	66 - 99	Not Fully Effective	No bonus
3	100 - 129	Fully Effective	No bonus
4	130 - 149	Significantly Above Expectations	5 -9 %
5	150 -158	Outstanding Performance	10 -14%

Performance bonus shall be paid only to Section 56 Managers depending on the availability of the budget and on performance that is significantly above expectations.

In the case of employees below section 56, the Performance Steering Committee shall recommend to the Municipal Manager that performance bonuses be paid upon the following criteria: Non-monetary reward.

#### **8.4.2 Performance Recognition**

All Employees with outstanding performance based on their performance results will be recognised by the municipality for their contribution. There are three types of non – cash rewards, this includes:

- **Informal award** – these are spontaneous and can be implemented with minimal planning and effort e.g. calling an Employee into the office and thanking him/her for the job well done.
- **Achievement award** – these are tailored to reward specific achievements or behaviours desired most in the municipality e.g. long service award.
- **Formal award** – the municipality has a formal recognition programme used to formally acknowledge in public significant contributions by individuals and teams e.g. annual Mayoral awards for excellence.

As part of formally recognising and encourage excellent performance in the municipality annual “Mayoral Award on outstanding performance” will be instituted. This award shall be given to the best performer in a financial year i.e. one Employee declared an “Employee of the Year”.

The nature of other awards may include:

(a). **Informal awards:**

- Write a “thank you” card or put “thank you” note on the Employee’s desk;
- Publish Employee’s achievement on the notice board or internal newsletter; and
- Get a senior member of the management team to call the Employee and thank him/her for the job well done.

(b). **Achievement award** – not linked to the performance management system but may be used as creative additional way to encourage and recognise high performance:

- Employee of the Month;
- Most Improved Employee; and
- Manager/Supervisor of the Month.

(c). **Formal award** – linked to the performance management scoring at the end of the financial year:

- Gift
- Trophy;
- Sabbatical leave;
- Vacation leave days; and
- Certificate for excellent performance.

## **9 ROLES AND RESPONSIBILITIES IN PERFORMANCE MANAGEMENT**

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### **9.1 Management (Manager / Supervisor)**

All Managers/Supervisors with Employees under their direct management will have the following responsibilities:

- Communicate the big picture of the SDM's overall and department goals to Employees, and show the relationship between their jobs and the success of the municipality;
- Assist Employees establish realistic objectives that are linked to their department's business plans and ultimately the municipality's IDP and other related strategies;
- Ensure timely completion and submission of Employee's performance agreements, plans and reviews. This task shall be included in the Managers/Supervisors performance plans and reviewed as part of the quarterly review process.

- Ensure timely completion and submission of units, departments and directorates monthly, quarterly and annual reports to the Office of the Municipal Manager. This task shall be included in the Managers/Supervisors (Managers, Directors, Executive Directors and Municipal Manager) performance plans and reviewed as part of the quarterly review process
- Utilise the Employee Assistance Program (EAP) where necessary to provide necessary support to Employees to achieve their objectives and performance standards;
- Identify competency levels (skills, knowledge and behaviours) needed by the Employee to achieve the objectives and performance standards that have been set;
- Ensure comprehensive and effective communication and adherence to the Policy within their department;
- Ensure consistent and objective application of the performance management policy;
- Resolve differences and potential grievances resulting from performance reviews, wherever possible and as speedily as possible, otherwise refer such matter to the Performance Steering Committee;
- Use the Performance Management Process to give ongoing feedback to Employees and assess performance on a continuous basis;
- Reinforce good performance with appropriate recognition, dealing appropriately with performance deficiencies;
- Identify Employee development needs and work with Human Resources Department to implement specific development plans to address such needs,
- Ensure that all Employees under direct management attend training to implement their development plans, and
- Recommend rewards in terms of this policy.

## **9.2 Employees (Staff Members)**

All Employees of the municipality who are subjected to the performance management and development system have the following responsibilities:

- To support the GTLM's strategic objectives, departmental as well as own individual performance objectives;

- To take ownership of the performance management and development system;
- To request for feedback from Manager/Supervisor to monitor own performance;
- To give feedback to the Manager/Supervisor on progress with regard to their performance on a regular basis;
- To review own progress according to the performance agreement;
- Keep Manager/Supervisor informed of any problems or potential problems that may affect their ability to achieve some or all their performance objectives;
- To continuously improve their performance;
- To bring to Manager/Supervisor's attention, significant other outcomes that were delivered during this period and which may not be contained in the performance agreement, where applicable. This includes all other performance which the Employee regards as being outstanding and provide motivation thereof;
- To give input on appropriate action to be taken on areas of performance, which the supervisor has identified as not being satisfactory;
- To make contributions for the improvement of the performance management system; and
- To collect documented evidence of outcomes achieved.

## **9.3 Human Resource Department**

### **9.3.1 Training**

The Human Resources Division (HRD) has a responsibility to ensure that:

- All training requirements identified in the monitoring and reviewing phases of performance management are streamlined and included in the municipality's workplace skills plan;
- Training courses are budgeted for, arranged and communicated to all Employees in the municipality;
- Employee assistance is provided through the Employee Assistance Program to help Employees resolve personal problems that may adversely impact their work performance, conduct, health and well-being; and
- All employees are trained on the performance management and development system.



### **9.3.2 Human Resource Administration**

The HRD is also tasked with keeping all the performance management records. These include:

- Employment Contracts;
- Performance Agreements; and
- Performance Assessments.
- Quarterly reviews; and Annual review (appraisals).

### **9.4 Performance Management Unit**

The PM Manager/ Coordinator shall also be responsible for the following:

- Administer and implement the performance management policy;
- Provide creative and educational material to Employees to constantly keep them aware of the importance as well as legislative mandate of performance management in the municipality;
- Ensure that the performance management system assist the institution achieve its developmental objectives, as contained in the IDP, and other key sector plans;
- Annually review the performance management system policy;
- Manage and arrange all meetings of the Performance Steering Committee; and
- Develop and maintain training material for all staff and conduct training on a regular basis and to all new employees.

**NB:** The responsibility for ensuring that Employee's performance is managed remains the responsibility of the Manager/Supervisor of the Employee.

### **9.5 Internal Audit**

In terms of the Municipal Systems Act, 2000 and in accordance with the Performance Management Regulations, (Chapter 3, Regulation 14), the municipality will implement mechanisms, systems and processes for auditing the results of performance

measurements as part of the internal auditing processes. The internal audit on performance management includes the following:

- Ensure the functionality of the municipality's performance management and development system;
- Whether the municipality's performance management and development system complies with the Act;
- The extent to which the municipality's performance measurements are reliable in measuring performance of municipalities against key performance indicators set by the municipality referred to in **Section 26(c) of the Municipal Systems Act, (Act no. 32 of 2000)** as well as General Key Performance Indicators referred to in **Section 43 of the Municipal Systems Act (Act no 32 of 2000)**;
- On a continuous basis (quarterly and annually) audit the performance measurements of the municipality; and
- Submit quarterly reports on their audits to the Municipal Manager and the Performance Steering Committee.

## **9.6 Labour Unions**

The participation of the unions is critical to the acceptance and success of performance management and development system. The roles of the unions are to:

- Give input into the performance management and development system;
- Observe and monitor the implementation of the system;
- Educate and sensitise their members to support the system;
- Represent their employees in the event of grievances arising from the implementation of the performance management and development system; and
- Be represented in the Performance Steering Committee.

## **9.7 Performance Steering Committee**

The performance steering committee shall be responsible for the overall strategic working of the performance management system in the municipality. It should perform the following specific functions: Operate as a moderating body to ensure consistency and integrity is maintained in the annual performance review process of individuals and departments/clusters. The committee will do this by sampling performance results of Employees with the highest and lowest performance scores in each department and where necessary request motivation from the Manager/Supervisor for the scores allocated. This way the committee will ensure that a level of fairness is achieved.

Preside on matters relating to appeals lodged by staff where no agreement is reached between an evaluator and evaluatee on final performance scoring and recommend appropriate action to resolve the matter.

The Municipal Manager after consultation with Mayor shall appoint the Performance Steering Committee on an annual basis. The following members are recommended to form part of the committee:

- Director (Corporate Services);
- Human Resources Manager;
- Performance Management Manager/Coordinator;
- Integrated Development Plan Manager;
- Internal Audit Manager; and
- One other manager appointed by Municipal Manager
- Labour representative
- Legal Advisor.

A quorum of 60 % plus one of any members of the Performance Steering Committee shall apply.

## **10 PERFORMANCE MANAGEMENT, TRAINING AND DEVELOPMENT**

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All Managers/Supervisors including Councillors are required to attend the following training to ensure that they fully understand the performance management and development system and that they have the necessary skills to effectively manage performance within their departments.

**Performance Management System and Training:** This is a training course designed to explain how the GTLM's Performance Management System operates. The course covers the following aspects of the performance management cycle:

- Planning performance and setting objectives at the beginning of the performance management cycle.
- Monitoring
- Reviewing
- Rewarding/ Corrective Action

**Coaching:** Managers/Supervisors receive training on coaching skills to effectively manage performance throughout the performance management cycle. This includes the following:

- Giving positive feedback when required,
- Reviewing Employee's progress against the objectives
- Managing poor performance;
- Providing day to day support, strategic direction and input to Employee's performance.
- Drawing up effective development plans and rewarding good performance appropriately.

All Managers/Supervisors should be encouraged to attend the above mentioned training to ensure effective implementation and management of performance in the municipality. In the case of new managers/supervisors joining the municipality in the future, the courses should be presented as part of the induction programme.

All Employees will have Personal Development Plans (PDPs) as part of the performance agreements which will be completed at the end of the annual individual performance reviews. The PDP is an important tool to identify training and development gaps in order to develop an effective workplace skills plan for the municipality. The PDP will contain the following key information:

- Skill or performance gap identified;
- Desired outcome;
- Recommended training and/or development activity;
- Mode of delivering training and/or development;
- Target dates for training and/or development;
- Work opportunity to be created or development area identified; and
- Mentor to provide support in a specific work area.

The PDPs will assist in the development of the individual's ability in their current jobs as well as enable them build new capabilities to carry out higher level tasks. Furthermore the PDPs will provide the Managers/Supervisors and Employees with an opportunity to jointly identify training and development needs in order to improve Employee performance. Managers/Supervisors should consider the following training and development interventions when developing a PDP with their staff:

- **On-the-job training:** This involves structured training in which the subject matter expert within the department/unit works with the Employee to build that Employee's skill level;
- **Mentoring:** This involves identifying a senior person within the department or organisation who will act as a teacher, role model, trusted advisor, challenger, encourager and counsellor;

- **Research:** This requires the Employee to conduct research in a particular area in order to develop knowledge in that area;
- Part time or block study;
- Involvement in specific projects or tasks relevant to the identified skill or performance gap; and
- Secondment to another section/department to deepen understanding of work flow.

## **11 APPEAL PROCEDURES**

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- Employees have a right to bring a union representative to the review meeting should they decide to do so. The union representative will be tasked with monitoring and ensuring that the policy is applied fairly to the Employee.
- In a case where no amicable agreement is reached on the final scores between the Manager/Supervisor and Employee at the end of the performance appraisal review meeting, a neutral Manager/Supervisor at the level higher than the Employee will be assigned by the Performance Steering Committee to resolve the matter amicably. The Manager/Supervisor shall listen to both sides of the story and suggest a solution.
- Should the matter not be resolved the Employee has a right to follow the normal grievance procedure. If a solution is not reached within five working days, the matter can be referred to the Performance Steering Committee to propose a solution.
- If the Employee or Manager/Supervisor does not agree with the proposed solution of the Performance Steering Committee, they can appeal to the Municipal Manager.
- If the solution proposed by the Municipal Manager is not acceptable, the Employee and/or Manager/Supervisor has a right to follow the normal grievance procedure.

## **12 MANAGING POOR PERFORMANCE**

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Employees who perform poorly on their annual performance review shall be assisted by the municipality to improve their performance through the development of the PDPs referred to above. The PDP is an improvement plan that sought to improve the performance of an Employee and is implemented in the following annual performance cycle.

In a case where an Employee consistently performs poorly even though an improvement plan is put in place, such Employee shall be warned officially by the municipality through the Performance Steering Committee of the poor performance. Should the Employee continue performing poorly in the following annual performance cycle for the second time, the municipality shall take appropriate action. This includes:

- Demotion to lower level of responsibility; or
- Dismissal.

In summary the following steps will be followed when dealing with poor performance in the municipality:

- Establish whether the Employee is failing to meet the required standard of performance;
- Assist the Employee in the form of training, mentoring, coaching, etc. required to render satisfactory service and give him/her a fair opportunity to improve;
- Provide for a fair disciplinary hearing if performance fails to improve;
- Where dismissal is considered, the following shall be taken into consideration:
  - Did the Employee fail to meet the standard?
  - Was the Employee aware or should he/she have been aware of the required performance standard?
  - Was the Employee given a fair opportunity to meet the required standard? and
  - Is dismissal the appropriate sanction?

**NB:** The intention of the municipality shall always be to seek improvement in the performance of the Employee.

## **13 APPLICABLE DOCUMENTATION**

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The following documentation shall be used as per this policy:

1. Integrated Development Plan (IDP) and the Service Delivery & Budget Implementation Plan (SDBIP) – for reference
2. Performance Agreement – To be completed annually at the beginning of the municipality's financial year or Employee's contract of employment with the municipality
3. Performance Plan – To be completed annually as part of the Performance Agreement to outline the department or individual performance plan (expectations) for the financial year.
4. Performance Review – To be completed during quarterly performance reviews; and
5. Personal Development Plan (PDP) – To be completed annually during the final review.