



INDIVIDUAL PMS POLICY / FRAMEWORK



Bushbuckridge Local Municipality
PMS Policy/Framework

| | |
|---|-------------------------------------|
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| Developed From PMS unit | Signature _____ Date |
| Recommendation : Municipal manager | Signature _____ Date |



TABLE OF CONTENT

| | |
|---|-----------|
| 1. Terms And Definitions | 6 |
| 2. Introduction | 7 |
| 2 Legal Framework..... | 8 |
| 3 Goals Of Ipms..... | 9 |
| 5.1 The Principles Of The Ipms | 10 |
| 5.2 Factors Of Ipms | 10 |
| 6 Role Player And Stakeholders | 11 |
| 6.1 Internal And External Stakeholders | 12 |
| 6.2 The Role Of Pms Unit..... | 14 |
| 6.3 Performance Management Appeals Committee (Task Team)..... | 14 |
| 6.4 The Role Of Directors/ Managers And Supervisors | 15 |
| 7 Organisational And Individual Performance Management Alignment | 15 |
| 7.1 Performance Management Procedures And Guidelines | 16 |
| 7.2 Phase Of Individual Performance | 17 |
| 7.3 Performance Review And Feedback Cycle | 17 |
| 7.4 Development of Performance Plans. | 19 |
| 7.5 Performance Review And Feedback Process | 19 |
| 7.6 Feedback And Coaching..... | 20 |



| | | |
|----------------|---|-----------|
| 7.7 | The Performance Assessment | 21 |
| 8 | Compliance Guidelines: | 22 |
| 8.1 | Responsibility Of Employees | 22 |
| 9 | Scoring..... | 22 |
| 9.1 | Performance Scoring Scheme..... | 23 |
| 9.2 | Eligibility Of Bonus Scheme..... | 24 |
| 9.3 | Termination Of Employment Contract..... | 24 |
| 9.4 | Participation Categories | 24 |
| 9.4.1 | Rating Performance | 25 |
| 9.4.1.1 | Financial/ Monetary Rewards | 25 |
| 9.4.1.2 | Non- Financial Rewards | 27 |
| 9.5 | Calculating Bonus Scheme Payment | 28 |
| 9.6 | Cost Of Living Increase | 29 |
| 9.7 | Recognition Of Best Performance | 29 |
| 9.7.1 | Best Performing Department | 29 |
| 9.7.2 | Best Performing Unit | 30 |
| 9.7.3 | Best Performing Regional | 31 |
| 9.7.4 | Best Performing Employees | 31 |
| 9.8 | Administration | 31 |
| 9.9 | Frequently Asked Questions | 33 |
| 11 | Model Of Choice For Bushbuckridge Local Municipality | 35 |



| | | |
|------|---|----|
| 11.1 | The Balanced Scorecard..... | 35 |
| 11.2 | Resource Management (Budget / Financial) Perspective: | 37 |
| 11.3 | Development Impact (Customer) Perspective: | 38 |
| 11.4 | Service Delivery (Internal) Perspective | 38 |
| 11.5 | Learning And Growth Perspective | 38 |
| 12 | Planning For Performance..... | 39 |
| 12.1 | Identifying Indicators | 39 |
| 12.2 | Setting Performance Targets..... | 40 |
| 12.3 | Monitoring | 40 |
| 13 | Data Collection And Analysis..... | 42 |
| 14 | Reviewing Individual Performance Management Framework | 42 |
| 14.1 | Implementation Of Reviews..... | 43 |
| 14.2 | Reporting On Performance..... | 44 |



1. TERMS AND DEFINITIONS

| TERM | ACRONYM | DEFINITION |
|---|----------------|--|
| BUSHBUCKRIDGE LOCAL MUNICIPALITY | BLM | Municipality of Bushbuckridge under Ehlanzeni regional office |
| IPMS | IPMS | Individual Performance Management System |
| KEY PERFORMANCE AREA | KPA | A key task that an employee performs in order to perform their job, what is also referred as output. |
| KEY PERFORMANCE INDICATOR | KPI | A result that shows that a KPA has been performed. |
| PMS | PMS | Performance Management System |
| OPMS | OPMS | Organisational Performance Management System |
| INPUTS/ACTIVITIES | | Activities that an employee is expected to do in order to produce a KPI. |
| WEIGHTING | W or % | Percentage value of a KPA in relation to other KPA's. |



2. INTRODUCTION

Bushbuckridge Local Municipality is committed to providing a system that each employee's performance can be assessed over a twelve month period, in order to assist management in setting each individual's strategic goals, training and development goals. It will also provide a method of identifying each employee's strengths, and development areas.

Performance appraisal by managers will provide a valuable means of keeping in touch with all their staff members' performance, and will constitute an equitable guide to assist in determining merit reward.

Standards of performance will be established by which work output and results can be measured and evaluated. This is achieved by setting specific performance objectives. Review of these objectives should be done formally at least four times a year but regularly on an informal basis.

PMS is a management tool to manage and measure behaviours that contribute to the municipal, departmental and individual success:

- It recognise levels of actual performance in relation to agreed targets.
- Encourage continuous improvement and efficiency'.
- Identify and act on areas for individual development
- Provide a platform for communication on performance between managers and employees.

BLM in order to achieve its strategic mandate its needs to focus the development of individual performance agreement/ compacts to respond to the following:

- Provide basic infrastructure for the Bushbuckridge community, (Water, Sanitation, Roads , and Electricity)
- Economic Development and job creation



- Service delivery excellence
- Good governance , customer care and Batho Pele mandate
- Promote Tourism as key driver of the municipality

BLM recognises that service delivery is the key desired outcome in enhancing, and ensuring the integrity of the Municipality is kept abreast.

2 LEGAL FRAMEWORK

Municipal Finance Management Act (Act No 56 of 2003)

Municipal System Act (Act No 32 of 2000)

Municipal Structures Act (Act No 117:1998)

Local Government: Performance Management regulations for Municipal Managers and Managers directly Accounting to Municipal Managers, 2006

Local Government: Municipal Planning and Performance Management Regulations, 2001

Labour relation Act (Act 66 of 1995 as amended)

Skills Development Act (Act No of 1998)



3 GOALS OF IPMS

The IPMS is aims to:

- Improve organisational performance through team and individual performance;
- Clarify expectations by ensuring Departmental Service plans are communicated and delegated properly by the Municipal Manager and management team to all levels of employment;
- Develop competencies of individuals/employees ;
- Promote a sound working environment, and relations between managers and employees through development of agreed objectives, provision of feedback, counselling and coaching;
- Provide a tool to manage performance;
- Promote open communication between managers and employees about performance and goals;
- Provide a focus for employee development through the identification of Personal Development Plans discussions about employee's career interests and goals, and the development of specific training and development plans;
- Provide a framework for managers and employees to set and mutually agree on performance expectations for the coming year;
- Assist managers and employees in reviewing progress and in providing performance feedback and coaching;
- Assist managers and employees in appraising performance;
- Allow employees to take active involvement in managing their individual performance;
- Reward managers and employees who perform beyond agreed output;
- Encourage performance orientated culture.
- Incorporate individual performance with skills development



5.1 THE PRINCIPLES OF THE IPMS

Bushbuckridge Performance Management System is driven by the following principles:

Productivity : Individual performance is assessed against the business goals of Bushbuckridge to improve the effectiveness and efficiency of all staff in the organization;

Co-operation: Openness and honesty in communication between managers and staff;

Consistency : A systematic, continuous approach to performance feedback through planning, ongoing coaching and performance Assessments;

Objectivity: Performance plans are assessed against realistic and attainable commitments;

Self-enhancement: Individual self-improvement strategies encouraged through coaching, career development and training activities;

Recognition: Individuals rewarded with positive feedback / coaching to build on strengths;

Development: Performance improvement attained over an agreed time period.

5.2 FACTORS OF IPMS

IPMS is about people performing, whilst ensuring the organisation is sustainable therefore the link between the two is defined in term of levels of responsibility, and the system should:

- Be simple to understand and administered
- Link the strategic objectives of BLM to Individual objectives together for a specific time frame.
- Appraise the behaviours that support the vision and values of the organisation, as well as appraise results.
- Communicate expectations, motivate success and focuses on coaching and development instead of just being a scoring mechanism
- Promotes positive and constructive feedback.



6 ROLE PLAYER AND STAKEHOLDERS

| PROCESS | STRUCTURES FOR CONSULTATION/ ACTIVITIES | RESPONSIBLE PERSONS | TARGET DATE |
|-------------------------|--|--|---|
| Performance Planning | <ul style="list-style-type: none"> • Municipal manager • PMS Task Team • Management • Cascading performance (IDP & SDBIP) | <ul style="list-style-type: none"> • Accounting officer • PMS Manager • Senior managers / directors/unit& regional managers • Union Reps | During the development or review of the SDBIP |
| Performance assessments | <ul style="list-style-type: none"> • Management • Internal Audit • Audit committee • Directors/ managers • PMS Task team | <ul style="list-style-type: none"> • Municipal Manager • MMC`s • Audit committee | July -Sept (October) Oct- Dec(January) Jan- March (April) Apr- Jun (July) |
| Performance Measuring | <ul style="list-style-type: none"> • IDP Structures • PMS Task Team • Mayoral Committee • Management | <ul style="list-style-type: none"> • Ward Councillors • Municipal Manager • PMS Manager | During the development or review of the IDP |

| PROCESS | STRUCTURES FOR CONSULTATION/ROLE | RESPONSIBLE PERSONS | TARGET DATE |
|---------------------------|---|--|-----------------------|
| Performance feedback | <ul style="list-style-type: none"> • Individual employees • PMS Task Team • Management • Local Labour Forum | <ul style="list-style-type: none"> • Supervisors • PMS Manager • PMS Manager • PMS Task team | Continuously |
| Monitoring and evaluation | <ul style="list-style-type: none"> • Annual report • Reports | <ul style="list-style-type: none"> • PMS task team • All employees | After the adoption of |



| | | | |
|-----------------------|---|--|--|
| outcome | | | annual report Continuously |
| Performance Reviewing | <ul style="list-style-type: none"> • POEs • Recommendations • Approval of IPMS reports | <ul style="list-style-type: none"> • Municipal Manager, managers, supervisors and employees • PMS task team • Municipal Council | Quarterly <ul style="list-style-type: none"> • July – Sept. • Oct. – Dec. • Jan. – March • April - June |
| Performance Reporting | <ul style="list-style-type: none"> • PMS task team • Council • Monthly meeting and reports | <ul style="list-style-type: none"> • PMS Manager • Municipal Manager • Directors and unit managers | Monthly and Quarterly and annually <ul style="list-style-type: none"> • July – Sept. • Oct. – Dec. • Jan. – March • April – June |

6.1 INTERNAL AND EXTERNAL STAKEHOLDERS

The following stakeholders and institutional structures, with their roles and responsibilities, were identified as key players to facilitate the development of the municipal performance management system.

| STAKEHOLDER | ROLE, RESPONSIBILITIES AND/OR EXPECTATIONS |
|--|---|
| Minister of Cooperative Governance & Traditional Affairs | In terms of section 48(1) of the Act the Minister must: <ul style="list-style-type: none"> • Annually compile and submit to Parliament a consolidated report of local government performance in respect of the general KPIs. • Publish the report in the Government Gazette |
| MEC for Cooperative Governance & Traditional Affairs | In terms of section 47 of the Local Government: Municipal Systems Act, 2000 <ul style="list-style-type: none"> • The MEC for COGTA must annually compile and submit to the provincial legislature and the Minister of COGTA a consolidated report on the performance of municipalities |



| | |
|---|---|
| | <p>in the province.</p> <ul style="list-style-type: none"> The MEC for COGTA must also publish the report in the Provincial Gazette and submit a copy of the report to the National Council of Provinces |
| Auditor General | In terms of section 45(b) of the Act the AG must annually audit the results of performance measurements in terms of section 41(1)(c) of the Act |
| Communities includes: Civic Organisations; Non-Governmental Organisations (NGOs); Businesses; Community Based Organisations | <ul style="list-style-type: none"> Consultation on the needs and priority issues Consultation in the development of the long term vision for the municipality Influence the choice of indicators and setting of targets Monitor and “audit “performance against commitments Consultation during the review of municipal performance and suggest new indicators and targets |

| STAKEHOLDER | ROLE, RESPONSIBILITIES AND/OR EXPECTATIONS |
|--|---|
| Local Labour Forum | <ul style="list-style-type: none"> Contribute to the strategic direction and developing of long-term vision for the municipality Contribute to the development of the IDP Monitor and audit the performance of the organisation, especially from a labour perspective Participate in the public review of municipal performance |
| Performance Audit Committee | <ul style="list-style-type: none"> Must review quarterly reports Review and recommend on the municipality’s PMS Submit an audit report to the Council at least twice year |
| Social Partners: Public and Private Partners; Service Providers | <ul style="list-style-type: none"> Review the KPIs set which for every municipal entity and service provider with whom the municipality has entered into a service delivery agreement |



6.2 THE ROLE OF PMS UNIT

The Performance Management Unit is the custodian of the Performance management System for all employees, whilst the PMS task team is the custodian of managing the consolidated performance management system.

The PMS Unit in consultation with Municipal Manager has delegated powers by the Executive Mayor to ensure all compliance is adhered to by managers, by consistent intervention with employees to establish the status of implementation.

The PMS will be coordinated and managed by the Manager: Performance Management Unit. He/she will ensure transparency and fairness. He/ She have a supportive and integrative role to play in the implementation of the PMS. His/her role in this respect focus on the following:

- Facilitation and support of the PMS implementation process
- Assist with problem solving when reported or discovered.
- Consolidate quarterly report based on overall progress during the management meetings.
- Design an individual plan of development template.
- Encourage reinforcement of good performance with appropriate reward system
- Train, coach and develop employees

6.3 PERFORMANCE MANAGEMENT APPEALS COMMITTEE (TASK TEAM)

The municipality must have a performance management Task team which will at times serves as an appeal committee. The committee must have representatives from corporate services, Internal Audit, IDP, Organized Labour, Council Representative and



Office of the Municipal Manager which can be represented by PMS unit. Performance Management Appeals Committee will meet quarterly or when there is a need to do so.

The roles and responsibilities of the Performance Management Task Team (Appeals Committee) are as follows:

- Attend to employee's complaints/problems encountered during the quarterly and annual reviews which will be submitted by the Performance Management Unit.
- This committee will have a final say on the complaints/ problems.
- The Committee may require accountability on managers and Directors with regards to performance and assessment reports.
- The committee may refer their decision for disciplinary cases.

6.4 THE ROLE OF DIRECTORS/ MANAGERS AND SUPERVISORS

The following shall be the responsibility of directors, managers and supervisors with regards to performance management. Utilising the PMS process to give ongoing feedback to employees and monitor the assessment process.

- Develop an individual plan in line with the SDBIP and job description.
- Encourage reinforcement of good performance to their subordinate.
- Coach and monitor the performance and personal development of employees.
- Provide enablers of performance to employees (tools of trade).

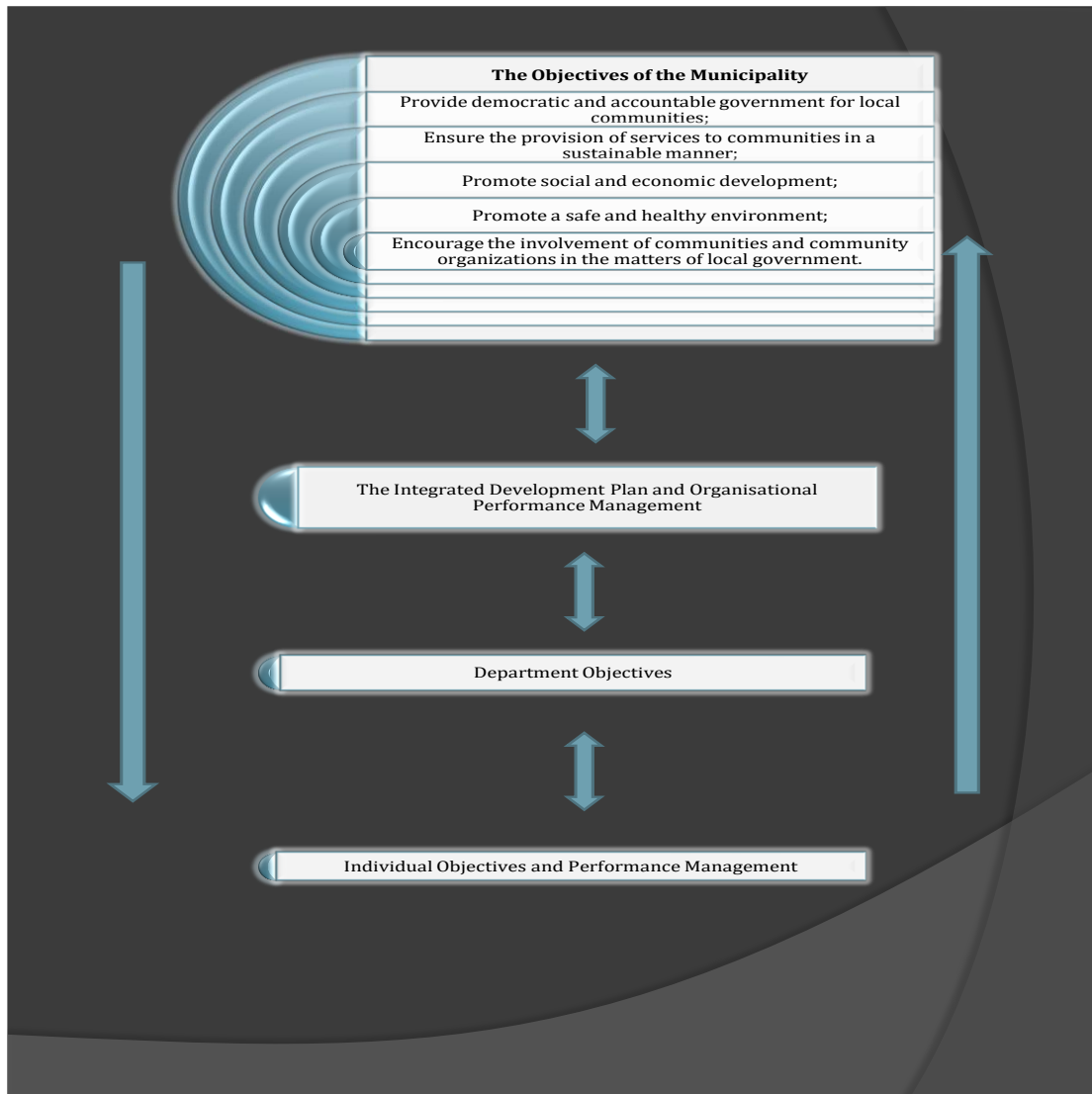
The success of PMS is dependent on managers being competent in communication of the vision and the objective of the municipality in a best way that it allows them to exceed the expectations of level of performance.

7 ORGANISATIONAL AND INDIVIDUAL PERFORMANCE MANAGEMENT ALIGNEMENT

The diagram below illustrates the relationship between organisational performance management and individual performance management. Once Municipal objectives and targets have been set, they must be cascaded down to relevant departments and individuals. In turn, the individuals and departments, by achieving their objectives and



targets contribute towards the organisation achieving the objectives and targets in its integrated development plan (IDP)



7.1 PERFORMANCE MANAGEMENT PROCEDURES AND GUIDELINES

The policy and procedure are focusing on planning and measuring the performance of all employees within the Municipality:

The Performance Management Policy allows managers and staff to assess individual performance against agreed-upon goals; encourages open communication between



managers and individuals on performance; recognizes individuals for their contribution towards achieving Bushbuckridge's goals; promotes skills development through training and development activities and supports individual career interests and development.

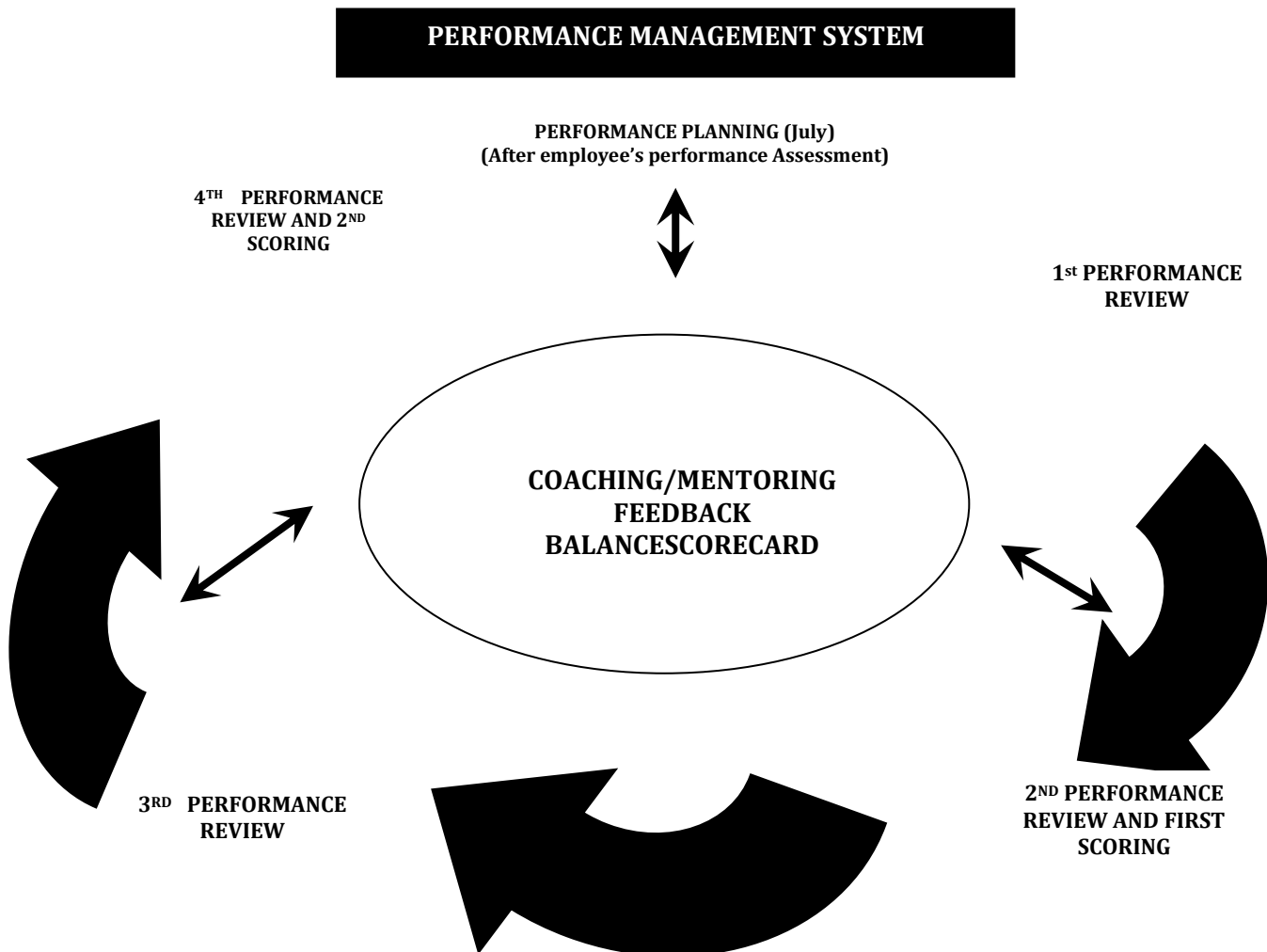
7.2 PHASE OF INDIVIDUAL PERFORMANCE

- **Planning Phase:** This is about identifying individual performance expectations and gaining employees commitment to achieving these expectations in line with the SDBIP and Job descriptions. This phase will be concluded between the employee, supervisor and the head of the divisions must authorise the processing by signing the planning document.
- **Assessment Phase:** This a quarterly performance check of the employee against the agreed annual performance targets.
- **Review Phase:** This is a major assessment stage that checks employee's performance for the cycle and also evaluates change in the organisational environment that has impact to the job of the employee.
- **Coaching Phase:** This is a crucial and underpinning phase that seeks to support the employee in ensuring performance throughout the financial year. Manager must ensure during planning and follow up phase that the employee is clear and is provided with support either work related or social related.
- **Monitoring:** This phase establishes the link between performance and reward, its aim is to direct and re-enforce effective work behaviours by determining and allocating equitable and appropriate rewards to employees
- **Disputes:** All disputes should be submitted in writing to the PMS task team with comments from supervisors and head of sections through the PMS unit.

7.3 PERFORMANCE REVIEW AND FEEDBACK CYCLE



The below diagram highlights the performance review and feedback cycle.



Performance of employee's assessment should be submitted to IPMS sub unit on the quarterly basis, the IPMS sub unit will consolidate and report to the PMS task in order to monitor the effectiveness of IPMS.

The below time frame should be adhered to all employees of BLM.

Period

Activity



| | |
|------------------|--|
| September | 1 st Performance Review |
| December | 2 nd Performance Review and 1 st scoring |
| March | 3 rd Performance Assessment |
| June | 4 th Performance Review and 2 nd scoring |

7.4 DEVELOPMENT OF PERFORMANCE PLANS.

When developing performance plans, managers and employees should:

- Set realistic and attainable commitments/deliverables that are relevant to the job, division operational plans, and the business goals of Bushbuckridge ;
- Ensure that key commitments are measurable and specific;
- Define any resources that are needed to attain a particular goal or expectation;
- Mutually agree on all aspects of the Performance Plan;
- Incorporate changes in key commitments/key deliverables that occur during the performance cycle.

7.5 PERFORMANCE REVIEW AND FEEDBACK PROCESS

- An employees should first prepare for assessment by conducting and self-assessment and ensure availability of POES to present the performance feedback to his/ her supervisors.
- The two parties conduct performance assessment by comparing the signed contract with the presented performance evidence.
- The two parties then hold a review meeting to discuss the performance status of the employee so far by comparing the expected performance with the actual performance.



- They agree on what the performance rating for each and every KPA.
- The two parties will sign for the mutual agreement reached for each KPA.
- NB: If there is a disagreement, then they will not sign for that particular KPA. The comment will also specify that fact;
- There will be a space for any comment that is relevant to that particular KPA;
- The employee's development progress will be checked against the development plan;
- A rating will be assigned to every Key Development Area;
- A comment will be written for every Key Development Area the two parties will decide upon an action plan to correct or improve the situation where necessary;
- The Final Performance Rating / Score will be updated and calculated automatically as KPAs ratings are entered;
- The scores assigned to each KPA as well as the Final Score should be recorded on the score sheet or the performance plan, which records the employee's performance progress;
- There will be another space for the final comment on the Review Process for both the Manager and the Employee. NB: If one does not have a comment, one may not write a comment;
- At the end of the process both the manager and the employee will sign and there will be spaces for head of the division to witness the signatures of the two parties.

7.6 FEEDBACK AND COACHING

Ongoing feedback and coaching should occur throughout the performance



management cycle as follows:

- Be carried out in an objective and supportive manner and provide an opportunity for the employee to listen and respond;
- Be based on agreed upon performance expectations that are clearly recognisable and defined;
- Provide an opportunity for managers and employees to share concerns, discuss expectations and agree on appropriate action;
- Recognise individual achievements and success through positive feedback;
- Provide an opportunity for managers and employees to discuss performance or work issues that require corrective action;
- Provide an opportunity to discuss resource issues that may have an impact on an employee successfully reaching a particular goal or expectation.

7.7 THE PERFORMANCE ASSESSMENT

Performance assessment should:

- Measure performance against the key commitments and indicators in the performance plan;
- Provide a fair and objective assessment of any anticipated results that were not achieved and include suggestions as to how they could be achieved;
- Performance management process shall apply as follows:
- The two parties (employer and employee) conclude performance planning targets separately, compared or discussed the targets and final the plan together by signing the planning document.
- During performance review and assessment, the two parties then hold performance review quarterly and a final Assessment meeting to discuss agree on the performance status of the employee for the year



by comparing the expected performance with the actual performance.

- They agree on what the performance rating for each and every KPA is.
- The two parties will sign for the mutual agreement reached for each KPA.

NB: If there is a disagreement, then they will not sign for that particular KPA. The comment will also specify that fact and be submitted to the PMS unit which will then submit to the PMS task Team.

8 COMPLIANCE GUIDELINES:

The PMS unit will guide the compliance process on the quarterly basis and when it is required.

8.1 Responsibility of employees

- Collaborates with the manager/ supervisor in developing the performance plan and in identifying training needs and developmental goals;
- Performs to the best of his or her ability in order to attain agreed upon performance goals;
- Involves herself/himself in two-way performance feedback/coaching with manager;
- Provides comments and feedback to the manager throughout the cycle including during the performance Assessment;
- Takes corrective action to improve performance where necessary.

9 SCORING

A rating scale of 1-5 is chosen to measure the achievement success of each Key Performance Area which includes all specific objectives within the KPA. Each objective should be rated (assessed); however, a final score must be calculated as for the entire KPA



| Level | Terminology | Description | Rating | | | | |
|-------|--|---|--------|----|----|----|----|
| | | | 1. | 2. | 3. | 4. | 5. |
| 5 | Outstanding performance | 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 Performance Compact and maintained this in all areas of responsibility throughout the year. | | | | | |
| 4 | Performance significantly above expectations | 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 | Fully effective | 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 Performance Compact. | | | | | |
| 2 | Not fully effective | 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 Performance Compact. | | | | | |
| 1 | Unacceptable performance | Performance does not meet the standard expected for the job. The review/assessment indicates that the 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. | | | | | |

9.1 Performance scoring scheme

The purpose of the scheme is to ensure that performance of employees is recognised and rewarded at two levels within Bushbuckridge Local Municipality:

- Through the award of an annual bonus
- Through the payment of salary pay scale progression
- Through recognition of best performers and awarding certificates
- These awards are based on performance as measured against the performance management system.
- The purpose of the Performance Reward Scheme (PRS) is to motivate employees towards the successful implementation of strategies, and to increase overall organisational motivation and efficiency.
- The PRS is designed to reward superior performance. The same scheme framework applies to all participants and requires meeting pre- set targets, as



defined in the performance agreement/ compact. The PRS is designed to be flexible and adaptive to the changing needs of Bushbuckridge Local Municipality.

9.2 Eligibility of Bonus Scheme

The following employees are eligible for participation in the PRS (i.e. both the bonus scheme and salary pay scale progression / scheme:

Permanent employees and fixed term contract employee, However employees starting during the financial year will only be eligible on a pro-rata basis, from date of employment. Only employees still employ with Bushbuckridge Local Municipality as at the end of the financial year will be eligible.

Employees promoted from Junior to Seniority level during the year will be eligible on both levels on a pro- rata basis.

9.3 TERMINATION OF EMPLOYMENT CONTRACT

- Encase of termination of employment contract during the financial year, the employee will not participate on the performance outcome be in monetary of non-financial benefits.
- If the contract of employment can be terminated after the end of the finance year has ended the employee should still benefits.

9.4 PARTICIPATION CATEGORIES

Participants are divided into categories based on their level and role within the organisation. Each participation category is assigned a target bonus award also referred to as a “Bonus Scheme Base”. This is calculated as a percentage of annual total packages.

The base is reflected as follows:

| Employees | Minimum reward | Maximum reward |
|-----------------|----------------|----------------|
| None section 56 | 1,5 % | 12% |



| | | |
|-----------|----|-----|
| Contracts | 1% | 10% |
| | | |
| | | |

9.4.1 RATING PERFORMANCE

Performance is measured against a performance plan i.e. previously established and agreed performance targets. A performance score is calculated according to key performance indicators. Should the target have been met within the required time deadline, 100% of the weighting score is earned, indicating a “YES” (3+) for performance achieved. Should the target not have been met, 0% (3-) of the weighting score is earned, indicating a “NO” for performance achieved.

Performance scores are added together to give an overall performance score. The amount of the bonus is determined by the total performance score, according to the bonus scheme base.

Based on the Bonus Scheme Base, the range of earning as a percentage of annual salary (Total Package) is shown in the table below: the below table will be utilised to determine the performance bonus of non-section s6 employees

BLM may opt to rewards its employees using the following processes which is linked to Local Government: Municipal Planning Performance Management Regulations, 2001 and Municipal performance regulation for Municipal Managers and Managers directly accountable to Municipal Manager, 2006. (Performance Regulation system).

9.4.1.1 FINANCIAL/ MONITORY REWARDS



Municipal Employees Including Managers:

| Post Level | Ration Results | Bonus Amount | Pay Progression |
|---|----------------|------------------------|--------------------|
| Other employees including Managers | 150% and above | 12% of Annual Salary | 1% pay progression |
| | 139-149% | 10% of Annual Salary | 1% pay progression |
| | 135-138% | 5% of Annual Salary | 1% pay progression |
| | 130-134% | 3.5 % of Annual Salary | 1% pay progression |
| | 111-129% | 3% annual salary | 1% pay progression |
| | 101-110 | 2.% annual salary | 1% pay progression |
| | 100% | 1% annual salary | 1% pay progression |
| | Below 100% | 0% Bonus | 0% pay progression |
| | | | |

CONTRACT EMPLOYEES

| Post Level | Ration Results | Bonus Amount | Pay Progression |
|---|----------------|------------------------|--------------------|
| Other employees including Managers | 150% and above | 10 % of Annual Salary | 0% pay progression |
| | 139-149% | 9 % of Annual Salary | 0% pay progression |
| | 135-138% | 3 % of Annual Salary | 0% pay progression |
| | 130-134% | 2.5 % of Annual Salary | 0% pay progression |
| | 111-129% | 1.5% annual salary | 0% pay progression |
| | 101-110 | 1.% annual salary | 0% pay progression |
| | 100% | 0% Bonus | 0% pay progression |
| | Below 100% | 0% Bonus | 0% pay progression |



9.4.1.2 Non- financial rewards

None Financial Performance rewards may be introduced to all employees on the bases of the municipality having insufficient budget to cover for monetary reward: however the 1% salary increase should not cease.

Possible Non-Financial Performance rewards:

| RESULTS OF SCORES | BENEFITS |
|--------------------------|---|
| 139-150% | Employee is granted 8 “free” leave days which cannot be cashed. |
| 135-138% | Employee is granted 6 “free” leave days which cannot be cashed. |
| 130-134% | Employee is granted 4 leave days which cannot be cashed. |
| 111-129% | Employee is granted 3 leave days which cannot be cashed |
| 101-110 | Employee is granted 2 leave days which cannot be cashed |
| 100% | 0 leave days |
| Below % | Compulsory counselling |

NB: leave forms must still be completed accompanied by a letter of free leave awards signed by the municipal manager for accountability and staff management.



9.5 CALCULATING BONUS SCHEME PAYMENT

The below calculator will determined the assessment results:

Other Levels with variable Task (extended functions)

| Name: General Worker | | | | | | | |
|-----------------------------|-------------|------------|------------|-----------------------------|-------------|------------|-------------|
| Year: Financial Year | | | | | | | |
| Main Task | Weight | Rating | Score | Variable Task | Weight | Rating | Score |
| Column1 | Column2 | Column 3 | Column 4 | Column5 | Column 6 | Column 7 | Column 8 |
| 1 | 9% | 5 | 0.45 | 1 | 20% | 5 | 1 |
| 2 | 9% | 5 | 0.45 | 2 | 20% | 5 | 1 |
| 3 | 9% | 5 | 0.45 | 3 | 20% | 5 | 1 |
| 4 | 9% | 5 | 0.45 | 4 | 20% | 5 | 1 |
| 5 | 9% | 5 | 0.45 | 5 | 20% | 5 | 1 |
| 6 | 9% | 5 | 0.45 | | 100% | 5.0 | 100 |
| 7 | 9% | 5 | 0.45 | Variable Task Weight | | | 20% |
| 8 | 9% | 5 | 0.45 | Variable Task Score | | | 20% |
| 9 | 9% | 5 | 0.45 | | | | 100% |
| 10 | 2% | 5 | 0.1 | | | | |
| 11 | 2% | 5 | 0.1 | | | | |
| 12 | 2% | 5 | 0.1 | | | | |
| 13 | 2% | 5 | 0.1 | | | | |
| 14 | 2% | 5 | 0.1 | | | | |
| 15 | 3% | 5 | 0.15 | | | | |
| 16 | 3% | 5 | 0.15 | | | | |
| 17 | 3% | 5 | 0.15 | | | | |
| | 100% | 5.0 | 100 | | | | |
| KPA | | | 80% | | | | |
| KPA SCORE | | | 80% | | | | |
| FINAL SCORE | | | 100 | | | | |

Other Levels without variable Task

| Name: General Worker | | | |
|-----------------------------|---------|---------|---------|
| Year: Financial Year | | | |
| Main Task | Weight | Rating | Score |
| Column1 | Column2 | Column3 | Column4 |
| 1 | 9% | 5 | 0.45 |
| 2 | 9% | 5 | 0.45 |
| 3 | 9% | 5 | 0.45 |
| 4 | 9% | 5 | 0.45 |
| 5 | 9% | 5 | 0.45 |
| 6 | 9% | 5 | 0.45 |



| | | | |
|--------------------|-------------|------------|-------------|
| 7 | 9% | 5 | 0.45 |
| 8 | 9% | 5 | 0.45 |
| 9 | 9% | 5 | 0.45 |
| 10 | 2% | 5 | 0.1 |
| 11 | 2% | 5 | 0.1 |
| 12 | 2% | 5 | 0.1 |
| 13 | 2% | 5 | 0.1 |
| 14 | 2% | 5 | 0.1 |
| 15 | 3% | 5 | 0.15 |
| 16 | 3% | 5 | 0.15 |
| 17 | 3% | 5 | 0.15 |
| | 100% | 5.0 | 100 |
| KPA | | | 100% |
| KPA SCORE | | | 100% |
| FINAL SCORE | | | 100 |

9.6 COST OF LIVING INCREASE

Employees will receive cost of living increment (CPIX) as determined by SALGABC and the performance achievement from fully effective and above will receive the salary increment of 1%.

9.7 Recognition of best performance

This section is meant to encourage performance by recognising best performing departments, best performing unit and best performing employees

9.7.1 Best performing department

| Requirement | Checklist | Recommended | Approval |
|---|-----------|-------------------|---------------|
| Strategic Capability | √ | Municipal manager | PMS task team |
| Programme and Project Management | √ | Municipal manager | PMS task team |
| Financial Management | √ | Municipal manager | PMS task team |
| Change Management | √ | Municipal manager | PMS task team |
| Knowledge Management | √ | Municipal manager | PMS task team |
| Service Delivery Innovation | √ | Municipal manager | PMS task team |
| Problem Solving and Analytical Thinking | √ | Municipal manager | PMS task team |
| People and Diversity Management | √ | Municipal manager | PMS task team |
| Client Orientation and Customer focus | √ | Municipal manager | PMS task team |
| Communication | √ | Municipal manager | PMS task team |



| | | | |
|---|---|-------------------|---------------|
| Accountability and Ethical Conduct | √ | Municipal manager | PMS task team |
| Policy Conceptualisation and Implementation | √ | Municipal manager | PMS task team |
| Media Skills | √ | Municipal manager | PMS task team |
| Advanced Negotiation Skills | √ | Municipal manager | PMS task team |
| Advanced Influencing Skills | √ | Municipal manager | PMS task team |
| Partnership and Stakeholder Relations | √ | Municipal manager | PMS task team |
| Supply Chain Management | √ | Municipal manager | PMS task team |

9.7.2 Best performing unit

| Requirement | Checklist | Recommended | Approval |
|---|-----------|-------------|---------------|
| Strategic Direction and Leadership | √ | Director | PMS task team |
| People Management | √ | Director | PMS task team |
| Program and Project Management | √ | Director | PMS task team |
| Financial Management: <ul style="list-style-type: none"> • SCM Bidding Committees • Clean Audit outcome | √ | Director | PMS task team |
| Change Leadership | √ | Director | PMS task team |
| Governance Leadership | √ | Director | PMS task team |
| Strategic Direction and Leadership | √ | Director | PMS task team |
| | √ | Director | PMS task team |
| Moral Competence | √ | Director | PMS task team |
| Planning and Organising | √ | Director | PMS task team |
| Analysis and Innovation | √ | Director | PMS task team |
| Knowledge and Information Management | √ | Director | PMS task team |
| Communication | √ | Director | PMS task team |
| Results and Quality Focus | √ | Director | PMS task team |
| Professional | √ | Director | PMS task team |
| | √ | Director | PMS task team |
| | | | |



9.7.3 Best performing regional

| Requirement | Checklist | Recommended | Approval |
|--------------------------------------|-----------|-------------------|---------------|
| Punctuality | √ | Municipal Manager | PMS task team |
| Cleanness | √ | Municipal Manager | PMS task team |
| Human relation skills | √ | Municipal Manager | PMS task team |
| Moral Competence | √ | Municipal Manager | PMS task team |
| Planning and Organising | √ | Municipal Manager | PMS task team |
| Analysis and Innovation | √ | Municipal Manager | PMS task team |
| Knowledge and Information Management | √ | Municipal Manager | PMS task team |
| Communication | √ | Municipal Manager | PMS task team |
| Results and Quality Focus | √ | Municipal Manager | PMS task team |
| Professional | √ | Municipal Manager | PMS task team |
| | √ | Municipal Manager | PMS task team |
| | √ | Municipal Manager | PMS task team |

9.7.4 Best performing employees

| Requirement | Checklist | Recommended | Approval |
|------------------------------------|-----------|-------------|---------------|
| Punctuality | √ | Manager | PMS task team |
| Properly dressing | √ | Manager | PMS task team |
| Human relation skills | √ | Manager | PMS task team |
| Professional in his daily dealings | √ | Manager | PMS task team |
| Customer care skills | √ | Manager | PMS task team |
| Knowledgeable | √ | Manager | PMS task team |
| | √ | Manager | PMS task team |
| | √ | Manager | PMS task team |
| | √ | Manager | PMS task team |
| | √ | Manager | PMS task team |
| | √ | Manager | PMS task team |
| | √ | Manager | PMS task team |

9.8 ADMINISTRATION

The final decision regarding the amount to be allocated as a bonus will be at the sole discretion of Council.

In the event of an employees' services being terminated as a result of retrenchments, death or retirement including approved early retirement and ill health early retirement, they will be entitled to bonus scheme participation up to the last day of employment i.e.



a pro-rata performance score will be calculated, with a corresponding pro-rata bonus payment, for other reasons of termination an employee ceases to participate in the bonus scheme and will have no claim on any pro-rata bonus scheme points, which may be in the process of accruing during the year under review.

In the event of resignations, an employee ceases to participate in the bonus scheme and will have no claim on any pro-rata bonus scheme points which may be in the process of accruing during the year under review. Employees must be in the employment of the Municipality at the time that the bonus scheme awards are calculated, even if the resignation is effective after the end of the financial year. This can only be waived by the Executive Mayor subject to presentations being made on an individual case basis, by the Manager concerned.

Annual packages must be pro-rated in the event of interim increases awarded to Managers, promotions, transfers between regions and appointments during the financial year i.e. from lower Level employees promoted to a higher Level position during the year will be eligible on both levels on a pro-rata basis.

The Performance Reward Scheme does not form part of the conditions of employment for employees. It is variable pay on top of guaranteed pay and may change substantially from year to year.

The Performance Reward Scheme is operative at the discretion of the Municipality, and the Municipality reserves the right to amend or withdraw the scheme at any stage. The Municipality's intention of withdrawal of the scheme will be communicated to all participants' 3 months in advance.

Since awards in terms of the Performance Reward Scheme are not guaranteed and do not form part of employees' annual compensation package, participation in the PRS can, at the sole discretion of the Executive Mayor, and in exceptional cases (usually relating to performance and misconduct), be terminated.

The Performance Reward Scheme will be reviewed on an annual basis or when there is a need by the Executive Mayor.



9.9 FREQUENTLY ASKED QUESTIONS

How is individual performance recognised?

It is directly linked to the annual compensation review i.e. annual award of a bonus, up to a maximum of 12% of annual salary.

- **When would I receive no bonus?**

If your performance score is less than 100%, you are not eligible for a bonus.

- **When would I receive a full 12% of my annual salary as a bonus?**

When your performance score is higher than 150%, you are eligible for a bonus equal to 12% of your annual salary.

- **How often are targets set?**

Key Objectives are set in month one of the new financial year i.e. they are set for a full year, along with Key Performance Indicators and reviewed on the quarterly basis.

- **What if the bonus scheme is not effective?**

The scheme will be reviewed on an annual basis by Council.

- **When are bonuses calculated?**

At the end of the financial year, after the adoption of the annual report for the year in question.

- **How will I know how I am progressing toward my target?**

A mid-year performance review will be conducted to measure progress, and will be added to the annual performance to determine the payment of bonuses.

- **What happens if I am retrenched over the period of the bonus Scheme?**



In the event of an employees' services being terminated as a result of retrenchments, death or retirement including approved early retirement and ill health early retirement, they will be entitled to bonus scheme participation only for the financial year they were still employed. For other reasons of termination like dismissal, an employee ceases to participate in the bonus scheme and will have no claim on any pro-rata bonus scheme points, which may be in the process of accruing during the year under review.

- **What happens to my bonus payment if I resign?**

In the event of resignations, an employee ceases to participate in the bonus scheme and will have no claim on any pro-rata bonus scheme points which may be in the process of accruing during the year under review. Employees must be in the employment of the Municipality at the time that the bonus scheme awards are calculated, the performance bonus will only be effective if the employee participated for the whole financial year.

- **What happens if my job dimensions change during the period of the bonus scheme?**

Annual packages must be pro-rated in the event of interim increases awarded to Managers, promotions, transfers between regions and appointments during the financial year i.e. Level 3 employees promoted to a Level 2 position during the year will be eligible on both levels on a pro-rata basis.

- **What if I join the Municipality after the incentive scheme has been introduced?**

Employees starting during the financial year will only be eligible on a pro-rata basis, from date of employment, for the bonus. Only employees still in employ with Bushbuckridge Municipality as at the end of the financial year will be eligible.

- **What if I do not meet the minimum score?**



You will not be eligible for a performance bonus if your score is less than 100%.

10 DISPUTE AND DISAGREEMENT RESOLUTION PROCESS

- It is imperative to understand what is meant by dispute so that the appropriate measures of intervention can be determined. A dispute can be regarded as a disagreement between parties with varying ideas or viewpoints. The two parties should attempt to resolve the disagreements during the Performance Management Process and if not the matters should be referred to the head of the unit/ division or section in writing who will attempt to solve and if not solved a formal grievance should be logged and submitted to the Municipal Manager through the PMS unit who will then refer it to the PMS task team to be finalised.

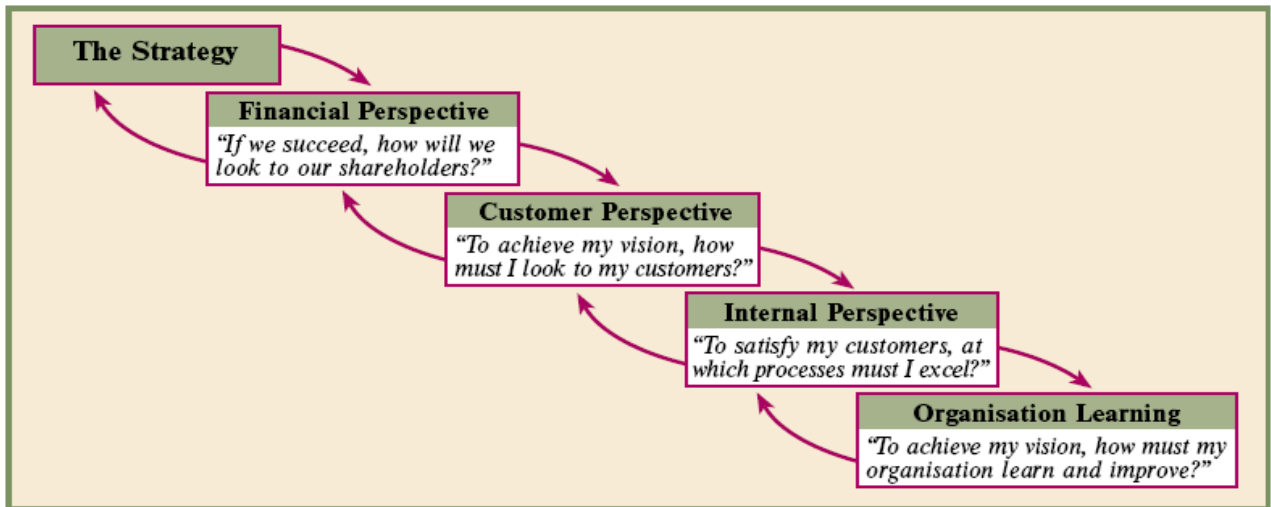
11 MODEL OF CHOICE FOR BUSHBUCKRIDGE LOCAL MUNICIPALITY

11.1 The Balanced Scorecard

The Balanced Scorecard ensures that there is balance in the set of measures being compiled. Ideally, all sets of measures should be tested for balance against the Balance Scorecard, but as it is slightly more complex to apply it is suggested that it only be applied by those municipalities that have gained some experience in performance management. Consequently, it is felt that its most effective application would be in resourced municipalities that are most likely to be urban or semi-urban.

The structure of a traditional Balanced Scorecard is depicted schematically below:

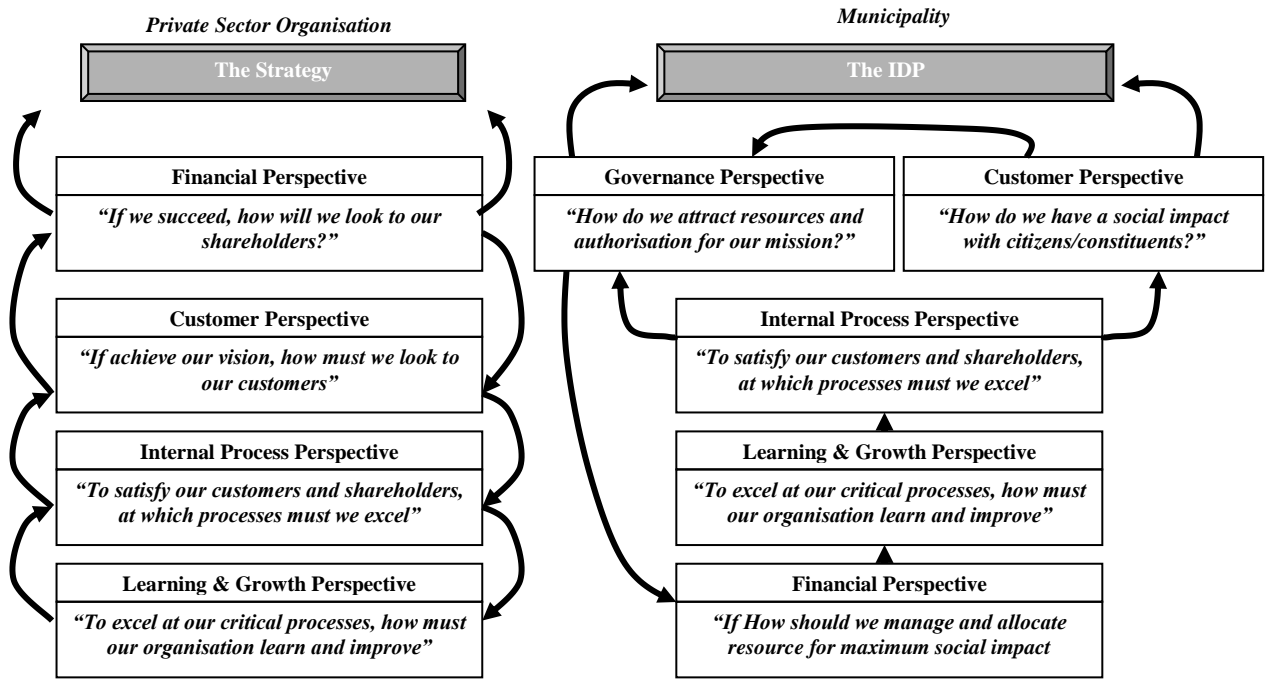
TRADITIONAL STRUCTURE OF THE BALANCED SCORECARD PERSPECTIVES



The traditional Balanced Scorecard as set out above works on the cause-and-effect assumption that improving the ability of the organisation to learn and grow and improving internal business processes will ensure that the customer receives a better end product thereby increasing the value and profitability of the organisation. Public organisations, like municipalities, are not, however, focused primarily on profitability but rather the expectations and well-being of the communities that they serve, as well as their stakeholders.



• **BALANCED SCORECARD ADAPTED FOR BUSHBUCKRIDGE LOCAL MUNICIPALITY**



11.2 Resource Management (Budget / financial) perspective:

KPIs and objectives related to finances and the budget – money issues. This perspective focuses on the performance of the municipality with respect to the management of its resources:

- Financial resources
- Human resources
- Information resources
- Organizational infrastructure



11.3 Development Impact (Customer) perspective:

KPIs and objectives related to meeting the needs of the communities, including residents and ratepayers. In this perspective, the municipality assesses whether the desired development impact in the municipal area is being achieved. The perspective constitutes development priorities and indicators that tell whether development outcomes are being achieved. The development priorities and indicators often lie within the shared accountability of the municipality, other spheres of government and civil society. The measurement of development outcomes is useful in telling whether the policies and strategies of the municipality are having the desired development impact.

11.4 Service Delivery (Internal) perspective

KPIs and objectives related to internal processes such as how long it takes to deal with a rezoning application. This perspective looks at how the municipality is performing with respect to the delivery of services and products. It relates to the output of the municipality as a whole.

11.5 Learning and growth perspective

KPIs and objectives related to staff training and capacity building.

The Balanced Scorecard described above will be applied at Municipal and Departmental levels. Each of these levels will have a scorecard that outlines how their performance will be measured.

The Municipal Scorecard provides an overall picture of performance for the municipality as a whole, reflecting performance on strategic priorities. The Departmental Scorecards capture and provide a comprehensive picture of the performance of each defined services as outlined in the Departmental Service Plans. They consist of objectives, indicators and targets derived from the service plans and service strategies. They simplify all regular reporting from departments to the municipal Manager.



12 PLANNING FOR PERFORMANCE

The planning process for individual targets will follow the process of organisational performance planning process.

12.1 IDENTIFYING INDICATORS

The Municipal Systems Act requires local government to measure performance on outputs and outcomes, and the Municipal Performance Management Regulations (2001) require municipalities to set KPI's relating to inputs, outputs and outcomes. It is however also useful to measure processes. The activities and processes identified in the IDP to achieve objectives therefore need to be looked at as well as the resources earmarked to achieve the objectives.

KPI's need to be set for all administrative units and employees in the municipality and every municipality entity and service provider with whom the municipality has entered into a service delivery agreement. It may be tempting to set indicators that easily lend themselves to measurement, but this must be avoided and the incorporation of national government's General Key Performance Indicators (listed below) must be ensured. The municipality should however start on a small scale using output / quantity indicators before moving on to more complex indicators as the capacity of the municipality and the public develops.



12.2 SETTING PERFORMANCE TARGETS

The Municipal Performance Management Regulations (2001) require municipalities to set performance targets for each KPI identified, for each financial year. Performance targets may be defined as the goals / milestones / planned levels of performance that the municipality sets for each indicator identified. They are typically expressed in terms of quantity or time.

The following should be taken into consideration when setting performance targets to:

- Be practical and realistic
- Measure the efficiency, effectiveness, quality and impact of the performance of the municipality, administrative component, structure, body or person for whom a target has been set;
- Be commensurate with available resources.
- Be commensurate with the municipality's capacity;
- Be consistent with the municipality's development priorities, objectives and strategies set out in its integrated development plan; and take into account applicable minimum national standards, but in the case of the rendering of a municipal service, may not be below applicable national standards.
- In setting performance targets, the municipality must first identify baseline measurements per indicator, i.e. the measurement of the indicator at the start of the measurement period, noting the date on which the measurement was relevant. Targets can then be identified for each indicator.

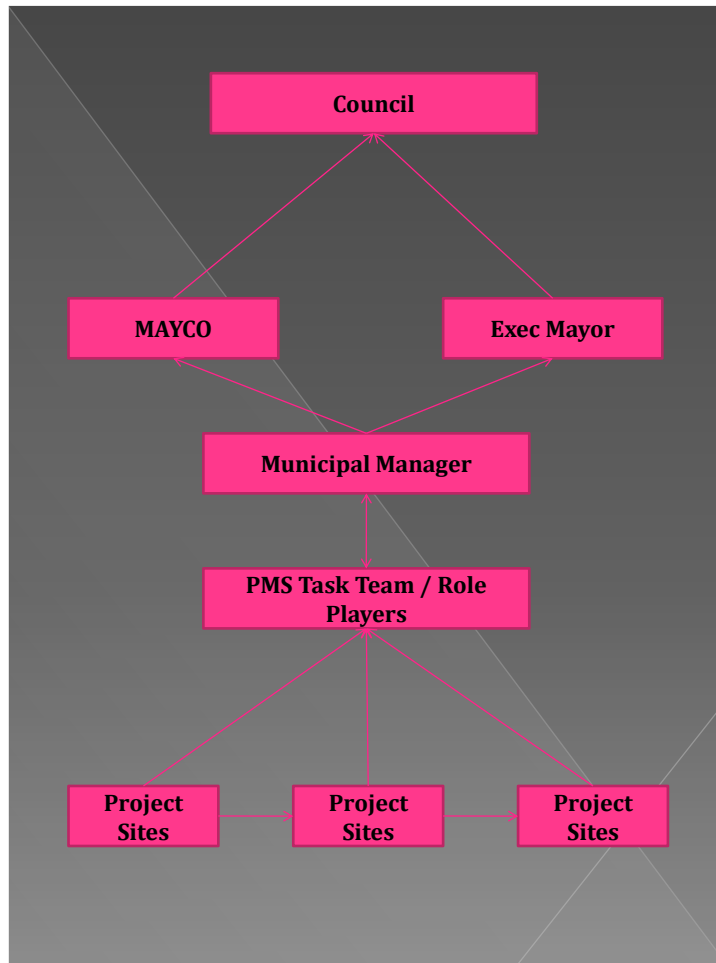
12.3 MONITORING

Performance monitoring is an on-going process. A performance-monitoring process should be assigned to all managers, directors and supervisors to facilitate the identification of role players in performance monitoring and measurement and the allocation of specific tasks in the gathering of data and the submission of reports.



The Municipal Manager has assigned responsibility to monitor progress of implementation of the Performance Management system to the PMS Manager and PMS task team.

Figure below illustrates the Performance Monitoring Framework



In undertaking performance monitoring processes, the following need to be determined and provided for: The data that must be collected in order to assess performance. The methods that must be employed in the collection, storage, verification and analysis of that data. The processes and formats that must be used in compiling reports on that data. The approaches that need to be adopted to enable early detection of poor performance. Corrective measures that will be employed when poor performance has been detected. Mechanisms to compare current performance with baseline indicators



and performance during the previous financial year. Monitoring report for individual performance should be submitted to Council once a year.

13 DATA COLLECTION AND ANALYSIS

To provide data for the different service scorecards, annual satisfaction surveys may be undertaken amongst internal stakeholders/ employees, employee satisfaction surveys may be conducted annually. Surveys are however not the only instruments available in performance measurements and reviews. Other tools are discussed in the Performance Review section of the framework.

The analysis phase in the performance measurement and review process entails making sense of the measurements. It requires an interpretation of the measurements to determine whether targets have been met or exceeded and to project whether future targets will be met. It also involves an analysis of the reasons behind good or poor performance and the recommendation of corrective action where necessary. Where targets have been exceeded, key factors that contributed to the success should be shared for organizational learning.

14 REVIEWING INDIVIDUAL PERFORMANCE MANAGEMENT FRAMEWORK

Review Approach

After measuring performance, a review needs to be undertaken to assess whether the municipality is exceeding, meeting or not meeting its performance targets. There are a number of ways in which performance reviews can be undertaken:

First

Baseline indicators can be used to assess whether the municipality's performance has improve or declined as compared from the previous year



Second

Benchmarking exercise can be conducted where the performance of the municipality is reviewed relative to that of other, similar municipalities, public sector agencies and private sector organizations.

Third

The municipality's performance can be reviewed in terms of the perceptions of the people it is serving across a range of services. This may be done through a customer survey or some form of community feedback mechanism.

This review approach is in line with the Best Value Review Framework illustrated below. The framework calls for the municipality to challenge the current level of performance, compare it to others, consult with customers, and find ways of competing with others who provide the best value in delivering the same services.

14.1 IMPLEMENTATION OF REVIEWS

Co-ordination

The co-ordination of the performance review process requires a multi-disciplinary team, representative of the municipality and its key processes. The performance management team set up earlier in the performance management process will need to be augmented to include departmental representatives.

Reviews conducted by Supervisors

Supervisors should review the performance of employees reporting directly to them. Their approach should be informed by the type of employee performance adopted by the municipality.



Departmental Reviews

Departments should review their performance monthly, using their service scorecards. The review should, while not restricted to, at least cover all the organisational priorities relevant to their sectors and functions. Decision-makers should be immediately warned of any emerging failures to service delivery so that they can intervene if necessary. It is important that departments use these reviews as an opportunity for reflection on their goals and programmes and to determine whether these are being achieved. Minutes of these reviews should be forwarded to the performance management team. Changes in indicators and targets may be proposed but can only be approved by the relevant portfolio committee, in consultation with the IDP manager and Performance Management manager.

Council or Portfolio Committees

These committees need to manage the performance of sectors and functions respective to their portfolio. While it is important that they at least review performance of organisational priorities that lie within their portfolio, it is advisable that they review additional sectoral priorities determined by them. In order to build the role played by standing or portfolio committees, while ensuring their role remains strategic and not operational, it is recommended that they review performance as often as monthly.

14.2 REPORTING ON PERFORMANCE

Reporting on performance must be done in terms of the relevant provision of the Municipal Systems Act (2000), section 46. Reporting entails taking the priorities of the municipalities, its performance objectives, indicators, targets, measurements and analysis, and presenting this information in a simple, accessible, relevant and useful format to various target groups.



Some of the reporting requirements and processes have been covered in section 5.6.2 of the framework.

10 REPORTING FACILITATES ACCOUNTABILITY AS FOLLOWS:

Mayoral Committee to Council

Administration to the Mayoral Committee of the Mayor

Line / Functional / Sectoral Management to Management and Portfolio / Standing Committees

Employees to the organization

It is essential to ensure that the same annual reporting format is used for all target groups to prevent confusion and facilitate a common understanding of performance reports.

11 TEMPLATES AND LEVELS LINKED TO INDIVIDUAL PMS

The following checklist is useful for ensuring good quality planning and reporting:

| POSITION | TEMPLATE | Duration for assessments |
|---|--|--|
| All line managers All regional managers, All unit managers, | Performance compact Template for line managers | Review quarterly and assessed twice per year |
| Officers and senior officers , | General Performance compact Template | Review quarterly and assessed twice per year |
| Clerks , senior clerks and secretaries | General Performance compact Template | Review quarterly and assessed twice per year |
| Typist/ switchboard operators | General Performance compact Template | Review quarterly and assessed twice per year |
| Messengers and printers | General Performance compact Template | Review quarterly and assessed twice per year |
| Drivers and Meter readers | General Performance compact Template | Review quarterly and assessed twice per year |
| General and | Operational performance | Reviewed daily and |



| | | |
|------------------------------|--|--|
| operational workers | compact template | assessed twice per year |
| Cleaners and senior cleaners | Operational performance compact template | Reviewed daily and assessed twice per year |

12 DOCUMENTS LINKED TO IPMS POLICY

Performance Template
 Performance Development Plan
 Job descriptions and SDBIP

13 SOURCES

South African Local Government Association – SALGA (Mpumalanga)
 BLM OPMS
 EDM
 Capricorn District Municipality