**Annexure A**

**PERFORMANCE AGREEMENT**

**EMS: OFFICE-BASED**

**ENTERED INTO BY AND BETWEEN**

I……………………………………………………………………………… (Full Name)

As the……………………………………………………………………………… (Position) of the……………….………………………………………………………………… (Department) (***Herein referred to as the Employee***).

**AND**

The………………………………………………………………………………… (Department)

Herein represented by…………………………………………………………… (Full Name)

In her/his capacity as……………………………………………………………… (Position of the…………………………………………………………………………………… (Department).

(***Herein referred to as the Employer***).

**WHEREBY IT IS AGREED AS FOLLOWS:**

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| 1. **PURPOSE** |

* 1. The purpose of entering into this agreement is to communicate to the employee the performance expectations of the employer.
  2. The performance agreement and accompanying work plan shall be used as the basis for assessing the suitably (during probation only) of the Employee and to assess whether the Employee has met the performance expectations applicable to his/her job.
  3. Should any disagreement arise between the Employer and the Employee in respect of matters regulated by this agreement, the process outlined in paragraph 7.5 of the EMS PMDS should be followed.

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| 1. **VALIDITY OF THE AGREEMENT** |

* 1. The agreement will be valid for the period 1 April 2 …….. to 31 March 2 …….
  2. The content of the agreement may be revised at any time during the above mentioned period to determine the applicability of the matters agreed upon, especially where changes are significant.
  3. If at any time during the validity of this agreement the work environment of the employee changes (whether as a result of Government or Management decisions or otherwise), to the extent that the contents of this agreement are no longer appropriate, the contents shall immediately be revised.

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| 1. **JOB DETAILS** |

|  |  |
| --- | --- |
| 3.1 Province |  |
| 3.2 District |  |
| 3.3 Persal Number |  |
| 3.4 Component |  |
| 3.5 Unit |  |
| 3.6 Post/ Designation |  |
| 3.7 Salary Level |  |
| 3.8 Salary Notch |  |
| 3.9 Occupational Classification |  |

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| 1. **JOB PURPOSE** |

Briefly describe the purpose of the job (overall focus) as it relates to the Vision and Mission of the Department. Capture the overall accountability that the employee has in relation to his/her position as an office based educator.

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| 1. **REPORTING REQUIREMENTS/LINES & ASSESSMENT LINES** |

* 1. The Employee shall report to the …………………………….. (Job title in Department) as her/his supervisor on all parts of this agreement. The Employee shall:
* Timeously alert the supervisor of any emerging factors that could preclude the achievement of any performance agreement undertakings, including the contingency measures that she/he proposes to take to ensure the impact of such deviation from the original agreement is minimized.
* Establish and maintain appropriate internal controls and reporting systems in order to meet performance expectations
* Discuss and thereafter document for the record and future use any revision of targets as may be necessary as well as progress made towards the achievement of performance agreement measures.
  1. In turn the supervisor shall:
* Meet the employee to provide feedback on performance and to identify areas for development at least four times during a performance cycle.
* Create an enabling environment to facilitate effective performance by the Employee.
* Facilitate access to skills development and capacity building opportunities.
* Work collaboratively with the employee to solve problems that may be impacting on the performance of the employee and generate solutions to common problems within the department, that may be impacting on the performance of the Employee.

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| 1. **PERFORMANCE ASSESSMENT FRAMEWORK** |

Performance will be assessed according to the information contained in the Work Plan and the Core Management Criteria (CMC) framework.

* 1. The KRAs and CMCs during the period of this agreement shall be set out in the table below.
  2. The Employee undertakes to focus and to actively work towards the promotion and implementation of the KRAs within the framework of the laws and regulations governing the Education Sector. The specific duties/ outputs required under each of the KRAs are outlined in the attached work plan.

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| **Key Result Areas (KRAs)** | **Weight** |
| 1. |  |
| 2. |  |
| 3. |  |
| 4. |  |
| 5. |  |
| 6. |  |
| 7. |  |
| 8. |  |
| **TOTAL** | **100%** |

**NOTE: Minimum weighting of a KRA = 5%**

**Maximum Weighting of a KRA = 20%**

**Weighting of KRAs must total 100%**

The Employee’s assessment will be based on her/his performance in relation to the duties/outputs outlined in the attached Work Plan as well as the CMCs listed below.

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| **Core Management Criteria (CMCs)** | **Weight** |
| 1. Job Knowledge and application | 20% |
| 1. Leadership abilities | 20% |
| 1. Interpersonal relationships | 10% |
| 1. Communication | \* |
| 1. Service to stakeholders | 10% |
| 1. Acceptance of responsibility | \* |
| 7. conceptual and analytical skills | \* |
| **Total** | **100%** |

**NOTE:**

**Minimum weighting of a CMC = 5%**

**Maximum Weighting of a CMC = 20%**

**Weighting for CMCs 4, 6 and 7 to be jointly decided between employee and supervisor. Weighting of 7 CMCs must total 100%**

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| 1. **CONDITIONS OF PERFORMANCE** |

The Employer shall provide the Employee with the necessary resources and leadership to perform in terms of this agreement. Resources requirements should be outlined in the Work Plans of individual Employees.

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| 1. **PERFORMANCE ASSESSMENT** |

The assessment of an Employee shall be based on her/his performance in relation to the KRAs and CMCs and performance indicators, as set out in this Performance Agreement and attached Work plan.

The performance of the employee in respect of all individual KRAs and all individual CMCs will be assessed using a 5-point scale, i.e.:

|  |  |
| --- | --- |
| **5** | **EXCELLENT PERFORMANCE** |
| **4** | **GOOD PERFORMANCE** |
| **3** | **COMPETENT** |
| **2** | **PERFORMANCE NEEDS TO IMPROVE** |
| **1** | **UNSATISFACTORY PERFORMANCE** |

The total KRAs and the total CMCs scores are combined to produce an overall performance percentage score with percentage ranges that coincide with the above 5point assessment scale.

Employees: KRAs shall contribute 70% and CMCs 30% of the final assessment.

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| 1. **FEEDBACK** |

Performance feedback shall be in writing during the Mid-Year Review and Annual Performance Assessment, based on the supervisor’s assessment of the employee’s performance in relation to the KRAs and CMCs and standards outlined in this performance agreement and taking into account the Employee’s/ self-assessment.

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| 1. **DEVELOPMENTAL REQUIREMENTS** |

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| 10.1 | The Employer and Employee agree that the following are the Employee’s key development needs in relation to his/her current job and envisaged career path in the Education sector. Please forward the completed form PDP to the Skills Development Facilitator (as it is a requirement for the approval of training). |

\*Only itemize development areas below

………………………………………………………………………………………………………

………………………………………………………………………………………………………

………………………………………………………………………………………………………

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* 1. In so far as the above training needs coincide with the Employer’s requirements and taking into account financial realities, the Employer undertakes to expose the Employee to development in these areas. The developmental needs of the Employee shall be reviewed as part of the September Review and the annual assessment of performance. Details of courses, conferences, etc. to be attended shall as far as possible be included in the Employee’s PDP.

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| 1. **TIMETABLE AND RECORDS OF REVIEW DISCUSSION AND ANNUAL PERFORMANCE** |

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| --- | --- |
| 11.1 First Quarter Review (Informal) | July |
| 11.2 Mid-Year Review (Formal) | October |
| 11.3 Third Quarter Review (Informal) | January |
| 11.4 Annual Assessment (Formal) | April |

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| 1. **MANAGEMENT OF POOR PERFORMANCE OUTCOMES** |

The supervisor and employee will identify and develop interventions together to address poor and non-performance at feedback sessions, or any time during the performance cycle.

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| 1. **DISAGREEMENTS AND GRIEVIENCES** |

13.1 Should any disagreement arise between the Employer and the Employee in respect of matters regulated by this agreement, the process outlined in paragraph 7.5 of the EMS PMDS should be followed.

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| **14. AMENDMENT OF AGREEMENT** |

Amendments to the agreement shall be in writing and can only be effected after discussion and agreement by both parties.

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| 1. **SIGNATURES OF PARTIES TO THE AGREEMENT** |

The contents of this document have been discussed and agreed with the Employee concerned.

Name of Employee: ………………………………………………………………………………

Signature: ……………………………………………………………….Date: ………………….

AND

Name of supervisor………………………………………………………………………………

Signature:………………………………………………………………..Date:………………….