

Kareeberg Municipality

**Performance
Reviews Report
Senior Managers
Final 2016/17
18 September 2017**



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INTRODUCTION

The Municipal Systems Act, 2000 (Act 32 of 2000) prescribes that the municipality must enter into a performance based agreement with all s56 and s57-employees and that performance agreements must be formally reviewed twice per annum. The performance agreements therefore establish the performance relationship between the employer and the employee and require that the performance of the employee needs to be evaluated at least twice per annum.

The evaluations for the 1st semester of the 2016/17 financial year were done on 27 March 2017.

The Top Layer SDBIP was adjusted in June 2017 and therefore the Annexure A's of the applicable directors had to be adjusted accordingly.

The evaluations reported on in this report focussed on the final-year performance of the senior management for the 2016/17 financial year. The evaluations focussed on the actual work delivered in terms of the Annexure A of the performance agreement for the financial year ending 30 June 2017.

The performance of the following managers was evaluated:

- ≈ Albertus van Schalkwyk: Chief Operational Manager;
- ≈ Calla van Zyl: Head: Corporate Services; and
- ≈ Willem de Bruin: Municipal Manager.

ASSESSMENT PANEL

For purposes of evaluating the performance of the employees, an evaluation panel constituted of the following persons was established:–

- ≈ Cllr N van Wyk, Mayor;
- ≈ Mr W de Bruin, Municipal Manager;
- ≈ Cllr G Saal;
- ≈ Me Z Andreas; ward committee member of ward 2; and
- ≈ Mr I Visser; Municipal Manager of Emthanjeni Municipality.

The chairperson of the Audit Committee was invited, but unfortunately was not able to attend.

The role of the panel members can be summarised as follows:

- ≈ The municipal manager was the primary evaluator of the performance of the senior managers;
- ≈ The councillor was the secondary evaluator of the performance of the senior managers;

- ≈ The Mayor was the primary evaluator of the performance of the Municipal Manager;
- ≈ The Municipal Manager from Emthanjeni Municipality observed the evaluation process and added value with regard to benchmarking from own experiences; and
- ≈ The member of the ward committee represents the local community and is a member of the performance evaluation panel for the Municipal Manager to observe the evaluation process in order to respond to any possible questions of the community and also to provide feedback to them on the completeness and objectivity of the evaluation process.

EVALUATION PROCESS

The SDBIP final 2016/17 results and the evaluation forms with the CCR scores as were determined during the mid-year evaluation of 2016/17 were distributed to the members of the committee beforehand. Each employee prepared himself for evaluation purposes. Before the commencement of the evaluations sessions, the panel was briefed on the legislative requirements regarding senior manager performance and agreed on the process that will be followed.

During the evaluation for each employee:

- ≈ The Municipal Manager welcomed the members and the employee.
- ≈ The panel was introduced and the role of panel members confirmed.
- ≈ As part of the approach to this evaluation, it was explained that the evaluation will focus on the actual work delivered in terms of Annexure A of the performance agreement for the period ending June 2017. The content and weighting of these indicators (KPI’s) and the respective key performance areas (KPA) are documented in the Annexure A of each agreement.
- ≈ The scoring was done in terms of evidence provided and with mutual agreement of all parties present.
- ≈ The scoring was based on the following rating scale for operational KPI’s:

Rating	Level	Description
5	<i>Outstanding Performance</i>	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	<i>Performed significantly above expectations</i>	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	<i>Fully effective</i>	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

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Rating	Level	Description
		performance criteria and indicators as specified in the PA and Performance Plan.
2	<i>Performance not fully effective</i>	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	<i>Unacceptable performance</i>	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.

≈ The scoring was based on the following rating scale for the CCR's:

Rating	Level	Description
1	Poor	Do not apply the basic concepts and methods to proof a basic understanding of local government operations and requires extensive supervision and development interventions.
2	Basic	Applies basic concepts, methods, and understanding of local government operations, but requires supervision and development intervention.
3	Competent	Develops and applies more progressive concepts, methods and understanding. Plans and guides the work of others and executes progressive analysis.
4	Advanced	Develops and applies complex concepts, methods and understanding. Effectively directs and leads a group and executes in-depth analysis.
5	Superior	Has a comprehensive understanding of local government operations, critical in strategic shaping strategic direction and change, develops and applies comprehensive concepts and methods.

≈ The approach was as follows:

- ~ Feedback on performance by the employee per KPI.
- ~ Questions from the panel
- ~ Discussion by the panel members
- ~ Scoring determined by mutual agreement

ASSESSMENT OUTCOMES

The outcome of the final Performance Assessments is documented on the attached score sheets. The final scores were derived from the score allocated to each key performance indicator by the primary assessor as indicated above, multiplied by the weight allocated to the respective indicator / group of indicators. All the final scores for each KPI and CCR are added together and the total represents the overall rating and the outcome of the performance appraisal.

The feedback for each of the employees evaluated is as indicated in the attached score sheets for the following employees:

- ≈ W De Bruin: Final score: **67.50%**. According to paragraph 11.3 of the signed performance agreement, a performance bonus of **5%** of total package should be paid once the draft annual report for 16/17 has been tables to council, as prescribed.by section 8 (1) of Regulation 805.
- ≈ A van Schalkwyk: **71.30%**. According to paragraph 11.3 of the signed performance agreement, a performance bonus of **9%** of total package should be paid once the draft annual report for 16/17 has been tables to council, as prescribed.by section 8 (1) of Regulation 805.
- ≈ C van Zyl: **66.09%**. According to paragraph 11.3 of the signed performance agreement, a performance bonus of **5%** of total package should be paid once the draft annual report for 16/17 has been tables to council, as prescribed.by section 8 (1) of Regulation 805.

CONCLUSION

1. The individuals must ensure that sufficient POE is available for audit purposes of all the actual results.
2. In terms of section 34(3) of regulation GNR 805 of 1 August 2006 a copy of the performance assessment results of the municipal manager must be submitted to the MEC responsible for local government in the relevant province as well as the national minister responsible for local government, within fourteen (14) days after the conclusion of the assessment.
