

## ANNEXURE B: GUIDE TO THE PERFORMANCE WORK PLAN

### GUIDE TO THE WORKPLAN

One of the most challenging aspects of performance management is agreeing on the nature, content and detail of the actual performance agreement. In the performance agreement this is captured largely in the workplan. A major problem in performance management is the wide diversity words and terms used to describe aspects related to performance management and assessment. This EPMDS attempts to standardise terminology to promote a common understanding of those issues that should be included in the workplan and to unpack key result areas and outputs. A further complication is the wide diversity of jobs. Most workplans are therefore unique, while there may be similarities within job categories with a more routine content. The drafting of a workplan and agreement thereon between the supervisor and employee is therefore of prime importance in the performance process.

The definition of the terms is critical as they are also used as basis for the assessment at the end of the cycle. Performance assessment or measurement is hard and complex. An effective system of performance assessment will require years of consistent, incremental work to achieve. Acceptance of the performance management and assessment process is essential to the success of the legitimacy of the performance management system.

The following terms are used with the meaning as indicated:

**WORKPLAN:** In the EPMDS a workplan is described as a document which is part of the performance agreement and which contains key result areas (KRAs), associated outputs and their performance standards and resource requirements. An example of the template is attached.

**OUTPUT:** An output is a concrete achievement (i.e. a product such as a passport, an action such as a presentation or immunization, or a service such as processing an application) that contributes to the achievement of a Key Result Area.

**PERFORMANCE STANDARD:** Performance standards are mutually agreed criteria to describe how well work must be done in terms of quantity and/or quality and timeliness, to clarify the outputs and related activities of a job by describing what the required result should be. In this EPMDS performance standards are divided into indicators and the time factor.

**PERFORMANCE INDICATOR:** An indicator is a type of information used to gauge the extent to which an output has been achieved (policy developed, presentation delivered, service rendered)

**TIME:** The time factor is used to determine whether the activities were completed or progress made, as agreed in the pursuit of the output (e.g. policy to be completed by 31 October 2004)

**RESOURCE REQUIREMENTS:** The resource requirements in this format refer to human resources (who will be specifically involved in delivering the output) and financial resources (the budget set aside for delivering the output).

Attached are two examples of a workplan template, reflecting the above meaning of the terminology in a user friendly format.

**EXAMPLE 1: Workplan**

<b>KEY RESULT AREA 1:</b> Assistance and advice to departments on employee performance management							
<b>OUTPUT:</b> Render timely, correct and authoritative assistance and advice to departments on employee performance management							
KEY ACTIVITIES	PERFORMANCE STANDARDS				RESOURCE REQUIREMENTS		
	Indicators	Time (completed by)				Human resources	Financial resources
		Q 1	Q 2	Q 3	Q 4		

## EXAMPLE 2: Workplan

<b>Directorate Performance Management KEY RESULT AREA 1: Policy development and research</b>		<b>Strategic objective:</b> To develop at a national level policies, systems and guidelines pertaining to employee performance management for employees on salary levels 1 to 12 and to facilitate and ensure implementation in national and provincial departments in the Public Service through research, interventions, assistance and advice, and monitoring and evaluation.						
<b>Measurable objective</b>	<b>Outputs</b>	<b>Indicator</b>	<b>Activities per quarter</b>				<b>Resource requirements</b>	
			<b>Qtr 1</b>	<b>Qtr 2</b>	<b>Qtr 3</b>	<b>Qtr 4</b>	<b>Budget</b>	<b>HR resources</b>
To conduct and provide research and inputs for policy development, projects and assignments relating to employee performance management.	Research for policy development in employee performance management - <ul style="list-style-type: none"> <li>• Conduct research on systems &amp; practices and consult with clients</li> <li>• Provide inputs for policy &amp; system development and implementation</li> </ul>	<ul style="list-style-type: none"> <li>• Relevant and applicable research results on policy development for PM provided for public service stakeholders.</li> <li>• Regular consultation with clients.</li> </ul>	Ongoing research  Workshop in KZN	Ongoing research  Workshop in Free State	Ongoing research  Workshop in Gauteng	Ongoing research  National workshop	Normal MTEF budget	D: PM & subdirectorate. 1
Develop/amend policies on PM	Review and redraft EPMDS, and obtain approval for Circular.	EPMDS reviewed and amended, and distributed for use in departments.	Review complete	Draft changes	Changes approved	EPMDS sent out	Normal MTEF budget	D: PM & subdirectorate. 1
	Review and redraft PSR 1/VIII on non-SMS employee performance management, and obtain MPSA approval for publication.	PSR 1/VIII reviewed, redrafted and approved in line with amendments to PS Act.	Start review	Consult legal services	Consult clients	Complete draft	Normal MTEF budget	D: PM & subdirectorate. 1