



Province of the  
**EASTERN CAPE**  
SOCIAL DEVELOPMENT

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Review Date	21-02-2026

**STANDARD OPERATING PROCEDURE: CONDUCT PMDS HALF YEARLY REVIEW**

<b>TITLE OF SOP</b>	Conduct PMDS half yearly review.
<b>SOP Number</b>	PMDS 3/2
<b>Purpose</b>	To outline step by step process of conducting PMDS half year review sessions and monitoring progress towards achievement of set targets.
<b>Scope</b>	This SOP applies to the Eastern Cape Department of Social Development employees to conduct mid/half yearly reviews.

	<p><b>CMC :</b> Core Management Criteria  <b>DPSA:</b> Department of Public Service and Administration  <b>PMDS :</b> Performance Management and Development System  <b>GAF:</b> Generic Assessment Factor  <b>HOD :</b> Head of Department  <b>HR :</b> Human Resources  <b>HRM:</b> Human Resource Management  <b>KRA :</b> Key Results Area  <b>LRA:</b> Labor Relations Act, 1995  <b>MMS:</b> Middle Management Service  <b>PA:</b> Performance Agreement  <b>PC:</b> Performance Contract  <b>PFMA :</b> Public Finance Management Act, 1999  <b>PM :</b> Performance Management  <b>PMC:</b> Performance Management Committee  <b>PSA :</b> Public Service Act, 1994  <b>PSCBC:</b> Public Service Coordinating Bargaining Council  <b>PSR :</b> Public Service Regulations, 2001  <b>SFA:</b> Standards Framework Agreement  <b>SMS:</b> Senior Management Service  <b>TR:</b> Treasury Regulations, 2001  <b>WSP:</b> Workplace Skills Plan  <b>WA:</b> Workplan Agreement</p>
<b>Performance Indicator</b>	Effective Human Capital Management & Development.

**STEP BY STEP GUIDE**

**CONDUCT PMDS HALF YEARLY REVIEW**

Nr	Task Name	Task Procedure	Responsibility	Time Frames	Systems and Supporting Documentation	Service Standard	
1.	Develop Circular reminder to conduct and submit Half yearly review	<ul style="list-style-type: none"> <li>• Draft A Circular reminder to remind Supervisor / Supervisee to conduct and submit Half yearly review in line with PMDS Policy within stipulated time frames</li> <li>• Submit Draft Circular for verification and Inputs</li> <li>• Submit for HOD to approval</li> <li>• Disseminate Approved Circular to all Officials</li> </ul>	Deputy Director PMDS	Seven (7) Working days	<ul style="list-style-type: none"> <li>• Departmental Implementation Plan</li> <li>• Approved PMDS Circular</li> </ul>	Conduct half yearly performance assessment review by all the Department of Social Development employees within 1 month.	
2.	Implementation of Approved Circular	<ul style="list-style-type: none"> <li>• Implementation of Approved Circular in order for Supervisees to prepare half yearly Review by doing the following:                             <ul style="list-style-type: none"> <li>➢ Refer to a performance agreement.</li> <li>➢ Complete review form.</li> <li>➢ Prepare half yearly report.</li> <li>➢ prepare POE (as per KRA indicators).</li> <li>➢ Do self-assessment and submit to supervisor for one on one assessment.</li> <li>➢ Do Half year review checklist to quality assure the completion of the performance assessment review and sign.</li> </ul> </li> </ul>	Supervisee	Within 7 working days after the end of Semester	<ul style="list-style-type: none"> <li>• Performance agreements</li> <li>• Completed Review Form</li> <li>• Signed Half Yearly report</li> <li>• Organized POE</li> <li>• Signed self-half yearly performance assessment</li> </ul>		
3.	Submit and discuss half year review	Verification: <ul style="list-style-type: none"> <li>• Supervisor verify the documents.                             <ul style="list-style-type: none"> <li>➢ Reschedule the session if there is insufficient documentation.</li> <li>➢ Continue with the session if the verified documentation is sufficient.</li> </ul> </li> </ul>	Supervisor/ Supervisee	Within 30 days following the Semester under review	<ul style="list-style-type: none"> <li>• Self-signed half yearly performance assessment review</li> <li>• Signed Performance Agreement</li> </ul>		

**STEP BY STEP GUIDE**

**CONDUCT PMDS HALF YEARLY REVIEW**

Nr	Task Name	Task Procedure	Responsibility	Time Frames	Systems and Supporting Documentation	Service Standard
		<ul style="list-style-type: none"> <li>• Supervisee presents achievement and non-achievements justifying self-assessment rating.</li> <li>• Supervisor to verify Half year review checklist to quality assure the completion of the performance assessment review and sign.</li> </ul> <p>Discussion:</p> <ul style="list-style-type: none"> <li>• Discuss and agree/disagree on performing rating.                             <ul style="list-style-type: none"> <li>➢ Refer to PMDS Policy in the case of Disagreement. Both parties sign half year review form with comments.</li> <li>➢ Refer to PMDS Policy in case of Management of poor performance assessment.</li> <li>➢ Supervisor rate the employee as per agreed upon rating in the case of agreement. Both parties sign annual assessment form.</li> </ul> </li> <li>• Supervisor transfer half year review assessment ratings to PMDS calculator and both parties sign.</li> </ul>			<ul style="list-style-type: none"> <li>• Self-signed Half yearly report</li> <li>• Signed half yearly performance assessment review by both parties</li> <li>• Signed half yearly performance assessment checklist by both parties</li> <li>• Signed Half yearly report by both parties</li> <li>• Signed PMDS calculator print out by both parties</li> </ul>	
4.	Submit review forms to PMDS Unit/HR	<ul style="list-style-type: none"> <li>• Collate signed Half year reviews.</li> <li>• Sign the covering letter with list of submitted half yearly reviews for submission to PMDS Unit/HR.</li> <li>• Submit to PMDS unit/HR.</li> </ul>	Responsible Supervisor / Manager	7 days	<ul style="list-style-type: none"> <li>• Signed Half Year Review performance assessment review by both parties                             <ul style="list-style-type: none"> <li>➢ Signed Performance Agreement</li> </ul> </li> </ul>	

**STEP BY STEP GUIDE**

**CONDUCT PMDS HALF YEARLY REVIEW**

Nr	Task Name	Task Procedure	Responsibility	Time Frames	Systems and Supporting Documentation	Service Standard
					<ul style="list-style-type: none"> <li>➤ Signed half yearly performance assessment checklist by both parties</li> <li>➤ Signed Half yearly report by both parties</li> <li>➤ Signed PMDS calculator print-out by both parties</li> <li>• Submission register</li> </ul>	
5.	Capture Half yearly reviews on Persal	<ul style="list-style-type: none"> <li>• Verify that half year review form is dated and signed by both parties.</li> <li>• PMDS Unit/ HR to verify Half year review checklist to quality assure the completion of the performance assessment review and sign.</li> <li>• Capture half year review form for credible data.</li> <li>• File a copy and send the original to the registry for filling.</li> </ul>	PMDS / HR Practitioners	30 days	<ul style="list-style-type: none"> <li>• Signed Half Year Review</li> <li>• Persal Report</li> </ul>	

## LEGISLATION REFERENCES: ACTS OF PARLIAMENT, WHITE PAPERS & REGULATIONS

TYPE OF REFERENCE	REFERENCE DESCRIPTION OR DOCUMENT DESCRIPTION
<b>The Constitution, 1996</b>	Section 195. Basic values and principles governing public administration.-states that (l) Public administration must be governed by the democratic values and principles enshrined in the Constitution, including the following principles : (h) Good human-resource management and career-development practices, to maximize human potential, must be cultivated.
<b>The Public Service Act, 1994</b>	Section 7 states that the An executive authority has all those powers and duties necessary for- ,(b) the recruitment, appointment, performance management, transfer, dismissal and other career incidents of employees of that department, including any other matter which relates to such employees in their individual capacities, and such powers and duties shall be exercised or performed by the executive authority in accordance with this Act.
<b>The Labour Relations Act, 1995</b>	To provide simple procedures for the resolution of labour disputes through statutory conciliation, mediation and arbitration (for which purpose the Commission for Conciliation, Mediation and Arbitration is established), and through independent alternative dispute resolution services accredited for that purpose;
<b>The Skills Development Act, 1998</b>	Section 2 states the purposes of the Skills Development Act as follows: a) to develop the skills of the South African workforce- (I) to improve the quality of life of workers, their prospects of work and labour mobility; (II) to improve productivity in the workplace and the competitiveness of employers; (III) to promote self-employment; and (IV) to improve the delivery of social services; b) to increase the levels of investment in education and training in the labour market and to improve the return on that investment; c) to encourage employers- (I) to use the workplace as an active learning environment; (II) to provide employees with the opportunities to acquire new skills; (III) to provide opportunities for new entrants to the labour market to gain work experience; and (IV) to employ persons who find it difficult to be employed; d) to encourage workers to participate in learning programmes; e) to improve the employment prospects of persons previously disadvantaged by unfair discrimination and to redress those disadvantages through training and education; f) to ensure the quality of learning in and for the workplace
<b>The Basic Conditions of Employment Act, 1997</b>	The Basic Conditions of Employment Act 75 of 1997 intends to give effect to the right to fair labour practices referred to in section 23(1) of the Constitution by establishing and making provision for the regulation of basic conditions of employment.
<b>The Employment Equity Act, 1998</b>	Affirmative action section 15 (1) (c) states that making reasonable accommodation for people from designated groups in order to ensure that they enjoy equal opportunities and are equitably represented in the workforce of a designated employer;

TYPE OF REFERENCE	REFERENCE DESCRIPTION OR DOCUMENT DESCRIPTION
<b>The Public Finance Management Act, 1999</b>	The object of this Act is to secure transparency, accountability, and sound management of the revenue, expenditure, assets and liabilities of the institutions to which this Act applies.
<b>The Promotion of Administrative Justice Act, 2000</b>	To give effect to the right to administrative action that is lawful, reasonable and procedurally fair and to the right to written reasons for administrative action as contemplated in section 33 of the Constitution of the Republic of South Africa, 1996; and to provide for matters incidental thereto.
<b>Public Service Regulations, 2016</b>	Section 71 states that systems for performance management and development states that (1) An executive authority shall approve and implement a system for the performance management of employees, other than employees who are members of the SMS, in his or her department. Section 72. Performance agreements and assessments. (1) states that An employee shall enter into a performance agreement or an agreement of similar nature within three calendar months of his or her date of appointment and thereafter within two months of the beginning of each financial year. This agreement may be reviewed from time to time.
<b>Treasury Regulations, 2001</b>	Section 8.1 Responsibility of the accounting officer [Section 76(4)(b) of the PFMA] 8.1.1 states that the accounting officer of an institution must ensure that internal procedures and internal control measures are in place for payment approval and processing. Section 8.2 Approval of expenditure [Section 38(1)(f) and 76(4)(b) of the PFMA] 8.2.1 states that an official of an institution may not spend or commit public money except with the approval (either in writing or by duly authorised electronic means) of the accounting officer or a properly delegated or authorised officer.
<b>Human Resource Management, 1997</b>	Section 5.9 performance management 5.9.1 states that the success of the Public Service in delivering its operational and developmental goals depends primarily on the efficiency and effectiveness with which employees carry out their duties. Managing performance is therefore a key human resource management tool to ensure that: <ul style="list-style-type: none"> <li>● Employees know what is expected of them.</li> <li>● Managers know whether the employee's performance is delivering the required objectives.</li> <li>● Poor performance is identified and improved.</li> <li>● Good performance is recognized and rewarded.</li> </ul>
<b>Transforming public service delivery, 1997</b>	Performance management procedures must in future include assessment of the performance of individual staff in contributing to improving service to the public.
<b>Public Service Training and Education, 1998</b>	5.7.3 Personal Development Plans 5.7.3.1 In order to ensure a needs-based approach to the training and education, personal development plans will be drawn up, where feasible and appropriate, for all members of staff. These will be designed to identify the needs of staff and measures to achieve them, within the context of the individual's overall career progression, as well as within the context of the organisational objectives and priorities of the department or province concerned
<b>Affirmative Action in the Public Service, 1998</b>	Section 3.10 Implementation of and demonstrable support for the organisation's affirmative action policies must be included in each employee's performance assessment criteria.

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TYPE OF REFERENCE	REFERENCE DESCRIPTION OR DOCUMENT DESCRIPTION
<b>PSCBC Resolution 13 of 1998 (Performance Agreements)</b>	Purpose This agreement sets the framework for senior managers to agree to individual performance agreements that shall determine their annual increments.
<b>PSCBC Resolution 3 of 1999 (Performance related financial rewards and incentives)</b>	REMUNERATIVE ALLOWANCES AND BENEFITS Noting that the employer and the trade unions wish to enter into the agreement that regulates remuneration, allowances and benefits. The current dispensation on merit bonuses and other forms of recognition of outstanding performance, innovations or achievements shall remain in force until the parties negotiate, in line with the requirements of the Labour Relations Act of 1995, a new agreement on the topic.
<b>PSCBC Resolution 7 of 2000 (rank/leg promotions &amp; pay progression system)</b>	To establish processes to develop new, more equitable benefits, career paths and pay progression for all employees in the public service.
<b>PSCBC Resolution 9 of 2000 (performance agreements, SMS)</b>	To extend Resolution No. 13 of 1998 that sets the framework for managers to agree to individual performance agreements. As such this agreement does not seek to diminish any existing rights of senior managers.
<b>PSCBC Resolution 2 of 1999 (disciplinary code)</b>	The purpose of this Code and Procedures is: 1.4 to promote acceptable conduct;
<b>PSCBC Resolution 10 of 1999 (incapacity code)</b>	The purpose of this code and procedures is to: 1.1 assist employees overcome poor performance, 1.2 promote efficient and effective performance, 1.3 avert and correct inadequate performance, 1.6 give reasonable assistance to employees who are incapable of performing in accordance with the needs of their jobs



**RISKS**

<b>Risk Name</b>	<b>Risk Description</b>	<b>Probability (H/M/L)</b>	<b>Impact (H / M / L)</b>	<b>Control Description</b>	<b>System / Manual</b>
Non compliance	Non compliance of officials in submission leads to no credible data.	M	M	Constant Reminder to all Department Officials by PMDS unit.	Manual
Non alignment with Operational Plans	Non alignment performance contract with Operational Plans results to inadequate management of performance.	M	M	Constant Reminder to all Department Officials by PMDS unit.	Manual

**AUTHORIZATION:**

Designation:	Name:	Comments	Signature:	Date:
Director: HRM&D	X.J. Moloti	_____		13/02/2023
Recommended by: Acting CIO	M.E Gazi	Recommended		14/2/2023
Chief Director: Corporate Services	P.Mwanda -Tali	Recommended		19/02/2023
Recommended by: DDG	N.Z.G Yokwana	Recommended as requested		20/02/2023
Approved by: HOD	M. Machedemba	Approved		21/02/2023
Distribution and Use of SOP	ALL DEPARTMENTAL OFFICIALS			

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