HRBU FORM

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| PERFORMANCE MANAGEMENT REVIEW EXPECTATION BY HEAD OF BUSINESS UNIT(TECHNICAL STAFF) | cid:image005.png@01CACA6F.98A1ED90 | | | | | |
| Name: Position:BACKGROUND This assessment of expectation is put in place specifically to obtain written confirmation of the expected standards of work performance, conduct and attendance being reached during your three (3) months **performance review**. The report is also a valuable tool for ensuring that the communication processes between the acting appointee and his/her supervisor are not overlooked. | | | | | | |
| THE ASSESSMENT **1**. Work Plan attached: (**✓**) **Yes**: ⬜ **No**: ⬜  **2.** Job Competencies The specific functional competencies of the job that the officer is appointed to are incorporated in the Job Description. Generic expectations for the incumbent have already been identified and stated in the letter of offer.  **3**. Performance Rating: Each fortnight, the immediate Supervisor or a Delegate must rate the performance of the officer on performance review against each competency as follows:  5 = (95 – 100 %) Performance exceeds expectations  4 = (75 – 94 %) Performance meets expectations all the time  3 = (50 – 74 %) Performance meets expectations most of the time  2 = ( 0 – 49 %) Performance does not meet expectations  1 = Not Applicable  **4.** Data: Data on attendance and sick leave to be specified | | | | | | |
| KEY AREAS/JOB COMPETENCIES – Responsibilities & Accountabilities | | 1st Month | 2nd Month | | 3rd Month | |
| Week 3 | Week 5 | Week 7 | Week9 | Week 11 |
| Leadership - Score a maximum of 5 points for each Leadership competency / quality described, yielding a maximum overall score for all 7 qualities of 35 points | | | | | | |
| Purpose *(understand purpose & job roles & responsibilities*) | | /5 |  |  |  |  |
| KPI Target (understand company & BU KPIs) | | /5 |  |  |  |  |
| Impact & Influence *(able to gather, train and lead a productive followers)* | | /5 |  |  |  |  |
| Ethics Integrity (*Respects and maintains confidentiality.)* | | /5 |  |  |  |  |
| Empowering others (*commitment & passion to develop others for leadership*) | | /5 |  |  |  |  |
| Communication Skills (*Clear verbal Communication*) | | /5 |  |  |  |  |
| Communication Skills (*Clear & Accurate written Communication*) | | /5 |  |  |  |  |
| Sub-Total Score | | **/35** |  |  |  |  |
| Percentage Rating | |  |  |  |  |  |
| Competency Rating | |  |  |  |  |  |
| **Management** - Score a maximum of 5 points for each Managerial competency described, yielding a maximum overall score for all 7 competencies of 35 points | | | | | | |
| Attendance & Punctuality - *attends to work punctually; on time all the time* | | /5 |  |  |  |  |
| Organises work & time productively - *completes work without being prompted; is self motivated; suggest new ideas or solutions without prompting* | | /5 |  |  |  |  |
| Have Continuous Improvement plans | | /5 |  |  |  |  |
| Training & Development for others (*team members, etc*) | | /5 |  |  |  |  |
| Adaptability/Flexibility / Change Management (*can work well with staff in other BU/Directorates*) | | /5 |  |  |  |  |
| Meets deadlines - *Submit reports on time; all the time* | | /5 |  |  |  |  |
| Maintains/Manages Teamwork | | /5 |  |  |  |  |
| Sub-Total Score | | **/35** |  |  |  |  |
| Percentage Rating | |  |  |  |  |  |
| Competency Rating | |  |  |  |  |  |
| **Personal/Interpersonal** - Score a maximum of 5 points for each personal competency described, yielding a maximum overall score for all 9 competencies of 60 points | | | | | | |
| Provides friendly & helpful customer service to customers | | /5 |  |  |  |  |
| Staff Welfare – staff feel supported | | /5 |  |  |  |  |
| Has the desire and capacity to learn | | /5 |  |  |  |  |
| Exercises good judgement | | /5 |  |  |  |  |
| Abides by Company values and policies | | /5 |  |  |  |  |
| Works well with others | | /5 |  |  |  |  |
| Assists others | | /5 |  |  |  |  |
| Analytical Reasoning / Problem-Solving | | /5 |  |  |  |  |
| Interpersonal understanding | | /5 |  |  |  |  |
| Relationship Building | | /5 |  |  |  |  |
| Number of days sick leave | | /5 |  |  |  |  |
| Number of days late attendance | | /5 |  |  |  |  |
| Sub-Total Score | | **/60** |  |  |  |  |
| Percentage Rating | |  |  |  |  |  |
| Competency Rating | |  |  |  |  |  |

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| **Job Specific Duties:** | Score a maximum of 5 points for each Job Specific Competency as described in the officers JD, yielding a maximum overall score for all accountabilities / competencies of \_\_\_ points | | | | | |
| **-** | |  |  |  |  |  |
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| **Team Management** | |  |  |  |  |  |
| **Relationship Management** | |  |  |  |  |  |
| Sub-Total Score | |  |  |  |  |  |
| Percentage Rating | |  |  |  |  |  |
| Competency Rating | |  |  |  |  |  |

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| I confirm that above matters were discussed with me in person and I agree to commit myself to make improvements in the concerned areas. |
| Staff: Name ………………………….… Signature: …………………… Dated this: / /2013Witness: Name ……………….…………… Signature: …………………… Dated this: / /2013 |

**Overall Rating**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Leadership | /35 |  |  |  |  |
| Management | /35 |  |  |  |  |
| Personal / Interpersonal | /60 |  |  |  |  |
| Job Specific Duties | /65 |  |  |  |  |
| Total Score | **/195** |  |  |  |  |
| Percentage Rating |  |  |  |  |  |
| Competency Rating |  |  |  |  |  |

**Note**

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| --- | --- | --- | --- |
| **Competency Rating** | **Percentage Rating** | **Expected Performance / Outcome** | **Recommendations** |
| 5 | 95 – 100 % | Performance exceeds expectations | Confirm to position |
| 4 | 71 – 94 % | Performance meets expectations all the time | Confirm to position |
| 3 | 50 – 70 % | Performance meets expectations most of the time | Extend Acting Appointment |
| 2 | 0 – 49 % | Performance does not meet expectations | Advertise position |
| 1 | 0 | Not Applicable | Advertise position |

**5**.  **Remedial action plan attached:** (**✓**) **Yes**: ⬜ **No**: ⬜ **Not applicable**: ⬜

## 6. Further Comments:

## …………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………

*Additional comments can and should be provided as an attachment if the headings provided are insufficient.*

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| Recommendation: CONFIRM / EXTEND / ADVERTISE |
| Manager: Name ………………………….… Signature: …………………… Date: / /2013 (Title) Officer Name ……………….……… Signature: …………………… Date: / /2013 Position/ Title |
| The Manager has/has not discussed my performance during my performance review period as described above and I agree/disagree with the recommendation.Officer Name ……………………… Signature: …………………… Date: / /2013 Position/ Title |

*General Manager/Director forwards this form to the CEO for approval by week 11 of the 3-month performance review period. For Team Leader assessments, the Manager forwards the form to the GM / Director by week 11 for approval.*

#### APPROVED / NOT- APPROVED

**Signature:**………………………….. **Date:**………/…………/2013

**Name:**……………………………… **Title:**………../………/2013

*(Approval / Non-Approval must be given before end of week 12 of the 3-month performance review period. Where the Delegate does not approve, he/she must contact the immediate Manager immediately.*

*The Completed Form is to be forwarded with all accompanying documentation to HRM - Performance Management Team.*