

SECTION C: EDUCATION, TRAINING AND DEVELOPMENT POLICIES

26. APPOINTMENT IN AN ACTING CAPACITY POLICY

The Municipal Manager will advise the Consultants regarding the development of the Acting Capacity Policy.

- x Restriction of levels in an acting capacity shall be Level 1 and 2 or where there is a legal obligation.
- x Acting for the purposes of Employee Development (possible succession planning?)

27. PERFORMANCE MANAGEMENT POLICY

OBJECTIVE

The objective of this policy is to ensure an overall consistent approach to performance management in the Municipality with a view to increasing

- Productivity;
- Quality; and
- Viability of the Municipality.

Performance Management is the process whereby the superior and the subordinate jointly -

- Identify their common goals;
- Define each individual's major areas of responsibility in terms of the results expected; and
- Use these measures and guidelines for operating the work unit and assessing the contribution of each of its members.

POLICY

In line with the Municipal System's Act the Municipality is committed to a performance management system that is fair, objective and focused on the service delivery.

Therefore, top management expects all managers and supervisors to tackle performance management as an integral part of their activities and responsibilities.

The policy intends to -

- Focus on the employee's current position in the Municipality and what is expected of him in that position; and
- Develop an understanding between the supervisor and subordinate on the latter's job assignments and goals for improvement and development.

The details of how the Performance Management System works are addressed extensively in Performance Management Policy.

The purpose of performance management is to -

- x Measure employees' performance in a fair and objective manner;
- x Reconcile and realise the goals of the Municipality and the individual;
- x Identify training and development needs; and
- x Appraise potential.

Principles

Performance -

- x Is linked to the set objectives of the individual and those of the overall organisation and;
- x Must be reviewed regularly against the goals set and feedback must be given.

The supervisor is responsible for -

- x Coaching subordinates; and
- x Stimulating further development with a view to continuously enhancing performance.

Note

- x Performance appraisal is transparent (in other words individuals must have access to all performance information relating to them) and is a confidential matter between the supervisor and subordinate.
- x Performance decisions are based on consensus between the supervisor and subordinate.

How does the system work?

The performance management system is based on key performance areas of individual positions and the achievement of the objectives of the individual personnel. These objectives are linked directly to the departmental plans.

Elements of the system

The system comprises the following elements:

- x Performance planning
- x Performance development
- x Performance appraisal and feedback

Performance planning	<ul style="list-style-type: none">x Identifying an employee's unique contribution to the business objectives through a process of role identificationx Identifying key performance areasx Setting objectives that include measuring criteria and action plans to achieve the objectives. <p>Important The incumbent and the head participate in the process and agree on the objectives and criteria. The output of this section is a written document with KPA's, objectives and criteria per position.</p>
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<p>Performance development</p>	<ul style="list-style-type: none"> x Coaching an employee to achieve objectives x A training and development plan addressing gaps in the achievement of objectives x Regular feedback sessions between superior and subordinate <p>Important</p> <ul style="list-style-type: none"> x This process usually takes place between the head and individual incumbents. x The outputs are an agreed development plan and a contract between the head and incumbent on his Coaching relationship
<p>Performance appraisal and feedback</p>	<ul style="list-style-type: none"> x Done every fourth month in terms of the identified objectives and criteria. x Inputs must also be obtained from other managers involved <p>Important</p> <ul style="list-style-type: none"> x This appraisal is then discussed with the subordinate x Both parties must be satisfied with the appraisal. <p>Note</p> <ul style="list-style-type: none"> x The final appraisal occurs annually and takes into account the other appraisals.

Development plan

The development plan must be adjusted according to the inputs of the appraisal.

28. TRAINING AND DEVELOPMENT POLICY

OBJECTIVE

The objective of this policy is to promote education and training in the organisation. To empower all employees especially people from all designated groups as per the Skills Development Act, Employment Equity Act, and the Basic Conditions of Employment Act.

POLICY

The types of training courses and the development thereof will be determined by the Municipality. All education and training will be needs-based from the municipality's point of view. Employees are encouraged to become involved in their personal development, to manage their own careers by indicating to their supervisors their training needs requirement.

The Municipality recognises that its human assets are its most vital resource and is therefore committed to ensuring that all employees receive appropriate education and training:

- To enable to meet the requirement of their present jobs.
- To cater for personal development and the attainment of national qualification
- To enable them to make the most of their ability.

Employees are encouraged to take advantage of all development opportunities that are available to them.

- The Human Resources Manager will assume overall responsibility for:
 - a) Implementation of this policy.
 - b) Co-ordinating all training and learning activities throughout the organisation.

Every departmental head is responsible for the training and development of his or her staff.

Whilst recognising the need for individual training and development, management wish to emphasise that education and training should be tailored to contribute to achieving the goals of the organisation. As a rule, only SETA accredited service providers will be appointed by the municipality.

In addition to training to enable employees to become competent at their jobs, the organisation will pay particular attention to specific training and learning arising from internal or external pressure of the business, i.e. legislation e.g. labour laws.

The Municipality believes that its employees should be empowered through training and education to become better South African citizens for the good of the country as well as the Municipality.

28.1 EMPLOYEE TRAINING AND EDUCATION POLICY

OBJECTIVE

The objective of this policy is to define the types of training that are applicable in order to achieve above mentioned training and development objectives of the Municipality.

POLICY

The three types of training and education are: -

- a) Internal staff training programmes
- b) Municipality sponsored external training programmes
- c) External institution courses for tertiary education for employees

It is expected that a Human Resources Manager will be empowered to manage, co-ordinate and budget for all training and education within the Municipality.

A. IN-HOUSE TRAINING PROGRAMMES

The Municipality shall from time to time organise programmes for training of employees. Such programmes shall either be for the whole Municipality, departments or individuals as appropriate.

The costs of such programmes will be borne by the Municipality and no agreements are required between the Municipality and the employees. Managers may approach the Skills Development Facilitator to suggest appropriate programmes to be incorporated into the overall training and education curriculum.

B. MUNICIPALITY SPONSORED EXTERNAL TRAINING PROGRAMMES

The Municipality shall from time to time organise programmes for training of employees by external educational institutes/consultants.

Such institutions/consultants shall be chosen at the discretion of the Municipality having fairly evaluated the competencies and appropriateness of the institution/consultant and the costs of the programmes. Such programmes should be for the whole Municipality, departments or all employees as appropriate.

The costs of the programmes will be borne by the Municipality and no agreements are required between the Municipality and the students. Managers may approach the Skills Development Facilitator to suggest appropriate programmes to be incorporated into the overall training and education curriculum.

C. EXTERNAL INSTITUTION COURSES FOR INDIVIDUALS

Such courses shall be concluded where: -

1. An employee approaches a Manager for consideration of a course;
2. A Manager suggests to an employee their participation in a course; or
3. The Municipality requires an employee to attend a course.

Such courses will be concluded under two different categories:

- a) As a bursary in terms of the Bursary Agreement or,
- b) As a loan to the student in terms of the Student Loan Policy.

28.2 BURSARY & STUDY LOAN POLICY

A. GUIDELINES

The objective of this policy is to: -

- o To encourage career development of employees through further education.
- o Self-development activities are encouraged provided that they are along the lines regarded as beneficial to the Municipality by management.
- o The Municipality would provide financial assistance to employees who wish to improve themselves through formal courses of study.
- o Employees will qualify for one study loan or bursary per course of study. There will not be simultaneous bursary / study loan payments (employees will have to successfully complete a course before applying for new loan or bursary).
- o To ensure that, as a rule, only SETA and/or registered professional body are to offer training.

B. DEFINITION OF BURSARY

- o A bursary is given to an employee when a specific course of study is considered by the Municipality to be beneficial to the employee's career development plan. Studies are fully paid for by the Municipality.

C. PRINCIPLES - BURSARY

- A bursary will only be granted after a development discussion between the employee and his/her Manager.
- The Municipal Manager must approve a bursary.
- A bursary can only be given for a qualification and institution considered by the Municipality as reputable.
- A bursary can only be given for a qualification considered by the Municipality to be applicable to both the Municipality's business interests as well as the employee's development.
- The Municipality is in a financial position to be able to offer a bursary.
- Financial assistance will cover:
 - Tuition fees.
 - Registration fees.

- A maximum of 100% per annum will be paid directly to the institution. Excluding books

- An employee who has been granted a Bursary must sign an agreement with the Municipality stating that he/she will remain in the Municipality's employment for a period of **one** year after successful completion of the course.

- In the event the employee leaves the Municipality's employ before the expiry of the agreed period, the employee must pay back an amount in proportion to the unexpired remainder of the period. The employee must sign a bursary agreement.

- If a Bursar fails one or more courses, he/she will either:
 - i) Repeat the course at his/her own expense, or
 - ii) Refund the bursary to the Municipality if he/she is unable to complete the course, or
 - iii) Continue with the course at his/her own expense.

- If Council sends an employee on a full-time course, the employee has no obligation to refund the Municipality.

D. STUDY LEAVE FOR A BURSAR

- The Municipality will grant the Bursar study leave for attendance or projects that must be complied with as part of the course.
- A total of two days per examination will be granted. One day will be for preparation and the second day will be for writing the examination.

E. DEFINITION OF STUDY LOAN

- A study loan is granted to an employee who wishes to further his/her studies in a field that may not be in line with their field of employment. A loan is given to the employee to pay for his/her studies and not where such studies, at the discretion of the Municipality, are considered not to be essential for the requirements of the employee's position, but where the Municipality is satisfied that both the employee and the Municipality will benefit from the employee undertaking the studies.

F. PRINCIPLES – STUDY LOAN

- Deductions will commence from the next pay period from the date of approval.
- The Municipality will assess each study loan application to see if it is in line with its business interests.
- The employee must register with a reputable and recognised institution. The Human Resources Department will assist in establishing the recognition and reputation of the institution.
- The employee will not receive any gratuity or payment for successfully completing the course.
- Employees will be expected to present admission letters and registration forms outlining courses and costs of the Diploma/Degree to be studied.
- The Municipality will make out a cheque in favour of the institution up to a maximum reasonable amount required.
- The Municipality will consider granting an additional loan for the purchasing of books.
- An employee will sign a study loan contract with the Municipality.
- The loan will be repaid by the employee over a maximum period of 6 (six) Months.

G. LEAVE FOR STUDY LOAN SCHEME:

- An employee who is not a Bursar and who studies part-time or by means of correspondence in a field applicable to the Municipality and who, as a result of his/her studies, is required to be absent from his/her place of work, shall apply for annual leave if the xxx days that are granted by the Municipality have been exhausted. A leave form requesting such vacation and special leave must be submitted to the HR department.
- The Municipality will grant employees xxx days for each examination written one day for preparation and the second for the actual examination sitting.

H. PROGRESS REPORTS

A progress report shall be completed annually whereby the HR department in conjunction with the relevant department evaluates the progress of all Bursars.

According to the evaluation certain actions may be recommended including the following:

- The continuation of the bursary upon successful completion of the course requirements for the year
- The withdrawal of the bursary upon failure of a course
- The conversion of a study loan to a bursary upon successful completion of the course