

**WORKPLAN TEMPLATE - LPT**

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**WORKPLAN MEMORANDUM OF UNDERSTANDING**

**LIMPOPO PROVINCIAL TREASURY**

**BETWEEN**

**STAFF MEMBER:**

**AND**

**SUPERVISOR:**

**NAME OF OVERSEER:**

**PERIOD OF AGREEMENT: 1 April 2008 TO 31 March 2009**

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**PART A: GENERIC PERFORMANCE AGREEMENT**

**1. EMPLOYEE DETAILS**

Surname :

Full Names :

PERSAL number :

Component :

Location :

Salary level :

Notch (package) :

Occupational classification :

Designation (Rank) :

Appointment date to post :

Nature of appointment : Permanent  / Probation  / Contract  (tick box)

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### 2. VISION AND MISSION

**Vision:** To become a centre of excellence and provide sound financial management and leadership that enhances socio-economic growth and development in Limpopo.

**Mission:** To provide ethical, consultative and people focused services through sound public financial management including attaining and maintaining effective financial resource mobilisation.

### 3. JOB PURPOSE / DETAILS

Describe the purpose of the job (overall focus) as it relates to the Vision and Mission of the Department. *The job purpose can be found on the organisational structure (Organogramme).*

(i)

### 4. REPORTING REQUIREMENTS AND KEY RESPONSIBILITIES

The incumbent shall report to the .supervisor on all parts of this agreement particularly where performance differ from expectations. The incumbent shall:

1. Timeously alert the supervisor of any emerging factors that could preclude the achievement of any performance agreement undertakings, including the contingency measures that she/he proposes to take to ensure the impact of such deviation from the original agreement is minimized.
2. Establish and maintain appropriate internal controls and reporting systems in order to meet performance expectations.
3. Provide written quarterly reports to the supervisor on revision of targets if necessary and progress towards the achievement of key performance areas.

In turn the supervisor shall:

4. Create an enabling environment to facilitate effective performance by the incumbent including providing the necessary equipment and other resources.

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5. Provide access to skills development and capacity building opportunities.
6. Work collaboratively to solve problems and generate solutions to common problems that may be implicating on the performance of the incumbent.
7. Timeously provide the incumbent with communiqués, directives, circulars, resolutions and other executive decisions that will impact on the incumbent's area of work.

### 5. DELEGATIONS

The following authorities and powers of the Senior Manager are herewith delegated to the Manager / Deputy Manager to enable him / her to execute key responsibilities and achieve set objectives:

### 6. DIMENSIONS AND ACCOUNTABILITY

The Manager / Deputy Manager manages an overall staff component of \_\_\_\_\_ and \_\_\_\_\_ (*mention subordinates reporting directly and indirectly to you*)

The Manger / Deputy Manager is directly responsible to the Senior Manager for delivery of the component's activities in the department's strategic goals with regards to:

If applicable: The Manager / Deputy Manager has financial management responsibility for a budget of R000, 000.00 under Programme \_\_\_\_\_ and Allocation Vote \_\_\_\_\_. (*To be completed only if the Manager is directly responsible for a budget*)

### 7. PERFORMANCE PLAN

See APPENDIX A

### 8. COMPETENCY PROFILE

See APPENDIX B

### 9. COMPETENCY BASED INDIVIDUAL DEVELOPMENT PLAN

See APPENDIX C

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### 10. TIMETABLE FOR ASSESSMENTS

Specify the time frame when progress reviews and feedback sessions will take place, as well as the annual evaluation session:

- First quarter: 30 June 2008
- Second quarter: 30 September 2008
- Third quarter: 31 December 2008
- Annual evaluation: 31 March 2009

### 11. PERFORMANCE RECOGNITION AND OUTCOMES

Identify and specify what actions will be taken in recognition of superior performance or to address poor/non-performance:

Commendable and outstanding performance: In line with directives on performance bonuses and pay progression

Marginal and unsatisfactory performance: In line with the departmental performance management system strategy and HRD interventions

### 12. DISPUTE RESOLUTION

- Disputes about the nature of the incumbent's PA, whether it relates to key responsibilities, priorities, and methods of assessment and/or salary increment in this agreement, shall be mediated by:
  - \* The supervisor's supervisor (supervisor one level up)
- If this mediation fails, the dispute-resolution procedures provided by relevant collective agreements will be applicable.

### 13. AMENDMENT OF THE AGREEMENT

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Amendments to the agreement should be in writing and can only be effected after discussion and agreement by both parties i.e. the incumbent and the supervisor. The amendment must be endorsed by the overseer. Signed copies of the amended agreement must be submitted to the PMS unit within 30 days of signature.

**Name of incumbent:** \_\_\_\_\_

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**AND**

**Name of supervisor:** \_\_\_\_\_

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**ENDORSEMENT**

**Name of overseer:** \_\_\_\_\_

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

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**PART B: PERFORMANCE PLAN**

**APPENDIX A: WORKPLAN TYPE OF MEMORANDUM OF UNDERSTANDING ON PERFORMANCE FOR FY: 2008/2009**

Note:

- Ideally, most middle managers and other staff members whose jobs are not repetitive or routine or don't put them in charge of a lot of other staff and resources should use the workplan. Project managers and other staff whose tasks have a specific start and end also use the workplan.
- When completing look at the business plan of your directorate and your job description. Then complete each column below taking a stringent effort to ensure what is intended in the business plans and job description is achieved. The MOU must reflect what you do on a daily basis
- Ideally there should be no more than 5 KRAs although there can be more than one key performance indicator per KRA.
- The KRA as captured below is mandatory for all supervisors who sign memoranda of understanding with subordinates. Note that only officers at level 9 and upwards can sign MOUs in terms of the PMS manual.

<b>Performance Plan Weighting: 80%</b>								
<b>Business Unit (component):</b>				<b>Purpose:</b>				
<b>List of Key Outcomes:</b> - Efficient and effective performance management system -				<b>Performance Targets for Each Key Outcome Listed Opposite</b> - Full implementation of the performance management system -				
Key Result Area (KRA)	Management plan reference	Weight of KRA in %	Performance Measurement Information				Means of Verification for Each Target <i>(what evidence will be produced to show that the target has been reached?)</i>	Resources required e.g. human physical and financial.
			Key Performance Indicator (KPI) / <i>(type of/or quantity/quality of inputs to be used; outputs to be delivered)</i>	Baseline measure for each target KPI <i>(what is the state of this quantity/quality of input or output at the start of the financial year)</i>	Targets use a combination of at least two of the indicator types listed below which respectively show what the quantities and/or qualities of: <ul style="list-style-type: none"> <li>• inputs to be used</li> <li>• outputs to be delivered or produced</li> </ul>			
				End of 1 <sup>st</sup> quarter target	End of 2 <sup>nd</sup> quarter target	End of 3 <sup>rd</sup> quarter target	End of year or 4 <sup>th</sup> quarter target	

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1. Implement and manage the performance management system	Job Description		Signed MOU with supervisor and subordinates and ensure that all subordinates sign performance instruments	Signed performance instruments and timely submitted performance review discussions (PRDs)	1 <sup>st</sup> Quarter review (PRD) for all subordinates signed, overseen and submitted to branch moderation committee.	2 <sup>nd</sup> Quarter review (PRD) for all subordinates signed, overseen and submitted to branch moderation committee.	3 <sup>rd</sup> Quarter review (PRD) for all subordinates signed, overseen and submitted to branch moderation committee.	Annual evaluation for all subordinates signed, overseen and submitted to branch moderation committee.	Timely submitted, correctly completed and signed off performance instruments	Human
<b>Total</b>		<b>150%</b>								



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**PART C: COMPETENCY PROFILE**

**APPENDIX B: COMPETENCY PROFILE FOR FY: 2008/2009**

- *In Section 1.0, list all those competences which you possess which are not specific to your job title but rather more to your level of responsibility, e.g. those that are the same for every SMS, manager, practitioner, nurse, engineer, grounds person, etc. These must be agreed on with the supervisor. Ideally a list of five priority generic competences must be listed.*
- *In section 2.0, list all those competences which you possess that qualify you for your current job, e.g. financial manager, PMS officer etc.*
- *In section 3.0, list all those competences which, though not directly related to your current job or level of responsibility, are useful now or in the future, e.g. level of numeracy, general knowledge gained experientially or through training. These just make it possible to achieve more in your workplace or career development.*

INDIVIDUAL COMPETENCY PROFILE		JOB RELATED COMPETENCY PROFILE	
List of own current Competencies	Current level of competency (1 – 3)	Is this competence required for the job	Level of Competency Required for the Job.
<b>1.0 Key Generic Competences</b>			
1.1			
1.2			
1.3			
<i>Sub-Total (where applicable)</i>			
<b>2.0 Job Specific Competences</b>			
2.1			
2.2			
2.3			
<i>Sub-Total (where applicable)</i>			
<b>3.0 Other Competences Deemed Important / Useful for Career and Performance Enhancement</b>			
3.1			

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3.2			
<i>Sub-Total (where applicable)</i>			
<b>GRAND TOTAL (WHERE APPLICABLE)</b>			

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**PART D: COMPETENCY BASED INDIVIDUAL DEVELOPMENT PLAN**

**APPENDIX C: COMPETENCE-BASED INDIVIDUAL DEVELOPMENT PLAN FOR FY: 2008/2009**

<b>OVERALL WEIGHTING OF 20%</b>							
<b>Competence required (from gaps identified in the profiling process above)</b>	<b>For which KRA is this competency required</b>	<b>Weighting in %</b>	<b>Current level of competence (taken from competency profiles)</b>	<b>Target level of competence <i>(select from level 1 - 3 from competency profiles)</i></b>	<b>Timetable for gaining targeted competence</b>	<b>Activities to close competence gaps</b>	<b>Resources Required for this development to take place</b>
<b>1.0 Generic Competences (Description as for 1.0 in ANNEXURE C above)</b>							
1.1							
1.2							
<b>Sub Total</b>						<b>Number of New Generic Competences Targeted =</b>	
<b>2.0 Specific Competences (as described in ANNEXURE C above)</b>							
2.1							
2.2							
2.3							
<b>Sub Total</b>						<b>Number of New Job Specific Competences Targeted =</b>	
<b>3.0 Other Competences (as described above in ANNEXURE C)</b> <i>(Here some of the development targets may be good for individual and organizational career and succession planning)</i>							
3.1							
3.2							
<b>Sub-total</b>							
<b>GRAND TOTAL</b>		<b>150%</b>				<b>Number of New Other Competences Targeted =</b>	

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Name of incumbent: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**AND**

Name of supervisor: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**ENDORSEMENT**

Name of overseer: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_