

**Performance Assist** is an electronic web-based system that facilitates both Organisational and Individual performance. The system has been developed considering the multitude of legislative requirements in South Africa and our best practice lessons learnt working in the public sector over the past 15 years.

Organisational Performance Management focuses on the measurement of the achievement of organisational strategic outcomes included in the IDP and cascaded down to the annual SDBIP. Individual Performance Management focuses on the management of an individual's performance. This is achieved by building an individual Scorecard for each official, using the SMART principles, and measuring the output against the individual's agreed upon performance indicators. The figure below shows how alignment is programmatically achieved with the use of the Action Assist modules included in the Action iT Performance Suite offering.

*KPA = Key Performance Area*

*KPI = Key Performance Indicator*



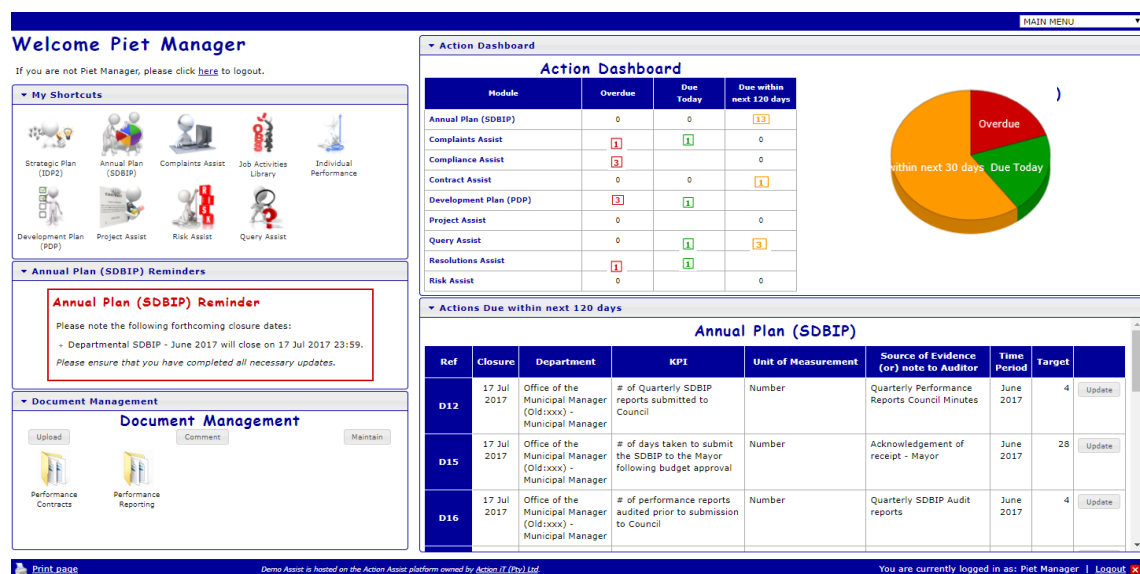
### Modules included in the Performance Assist offering are:

- **IDP Assist\***: to upload performance related information from the IDP to feed the SDBIP and ensure alignment;
- **SDBIP Assist\***: to manage Top Layer and Departmental SDBIP reporting with electronic upload and auditing of the Portfolio of evidence;
- **Individual Indicator Assist\***: to manage and report on Individual KPI's contained in Performance Agreements, but not included in the SDBIP.;
- **Employee Assist\***: for the management of employee data, organigram, job titles, organisational posts, job descriptions, etc.;
- **Organisational Indicator Library\***: a repository that allows for Organisational Indicators to be stored for use in future SDBIP's and/or Performance Agreements;
- **Individual Indicator Library\***: a repository that allows for content of Job Descriptions to be stored as Job KPA's/KPI's for inclusion in future Performance Agreements;
- **Competency Library\***: allows for the storage of competencies as prescribed by COGTA for easy inclusion in Performance Agreements;
- **Individual Performance Assist\***: facilitates electronic evaluation, moderation and reporting of individual performance;
- **PDP Assist\***: for the management and tracking of employees' PDP (Personal Development Plan);
- **mSCOA Library\***: for the validation of municipal financial data imported into the Action Assist system;

\* Packaged as the Performance Suite

Action Assist is an innovative, online, subscription offering which provides municipalities with a secure, encrypted, web-based platform to assist with the management, monitoring and reporting of performance.

Action Assist facilitates the user experience through the dashboard landing page. Users can update all their assigned actions through a 3-Click process. An illustrative User dashboard is shown below:



Module	Overdue	Due Today	Due within next 120 days
Annual Plan (SDBIP)	0	0	13
Complaints Assist	1	1	0
Compliance Assist	5	0	0
Contract Assist	0	0	1
Development Plan (PDP)	3	1	0
Project Assist	0	0	0
Query Assist	0	1	3
Resolutions Assist	1	1	0
Risk Assist	0	0	0

Ref	Closure	Department	KPI	Unit of Measurement	Source of Evidence (or) note to Auditor	Time Period	Target	
D12	17 Jul 2017	Office of the Municipal Manager (Old:xxx) - Municipal Manager	# of Quarterly SDBIP reports submitted to Council	Number	Quarterly Performance Reports Council Minutes	June 2017	4	Update
D15	17 Jul 2017	Office of the Municipal Manager (Old:xxx) - Municipal Manager	# of days taken to submit the SDBIP to the Mayor following budget approval	Number	Acknowledgement of receipt - Mayor	June 2017	28	Update
D16	17 Jul 2017	Office of the Municipal Manager (Old:xxx) - Municipal Manager	# of performance reports audited prior to submission to Council	Number	Quarterly SDBIP Audit reports	June 2017	4	Update

## The HOTTEST features of Action Assist include:

- Each user has their own Dashboard displaying the module information applicable to them;
- Action dashboards which monitor and track the completion of actions assigned to users;
- A secure, independent, encrypted database that can be accessed via the Internet;
- A subscription based offering, i.e. no capital acquisition costs are incurred;
- Clearly assigned responsibility and accountability through defined user access;
- Functionality for the attachment (upload) of documents;
- Ability for subscribers to apply their own methodology / user experience requirements;
- All databases run the same version of the software at all times allowing for easy subscriber support and software functionality upgrades and enhancements;
- Daily progressive backups that facilitate improved business continuity practices;
- System generated user, security and backup reports (logs);
- Automated logging of all activities in detailed activity logs (audit trails);
- Automated reminder notifications can be scheduled;
- Integration with other electronic systems to provide a seamless user experience;
- Availability of an Online HelpDesk and System Support;
- Availability of Online Manuals;
- Compliance with relevant legislations and regulations; and
- The municipality remains in control of the use of the software and the data stored on their database.

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## Modules:



**The Municipal Staff Regulations require that the following competencies be incorporated in the municipal performance management and development system:**



- **Management Competency** is the ability to inspire others in working towards a common goal, set direction, to coach and to mentor.
- **Personal Competency** is the individual's attitude, energy, bias to action and tenacity towards the job.
- **Public Service Orientation Competency** is the ability and orientation to interact with others in a positive and constructive manner to deliver services.
- **Professional / Functional Competency** is the functional skills that an individual needs to deal with the complexities and challenges of the job.
- **Knowledge, Qualifications and Experience** is the talent that an individual brings to the job.













**The key features of Performance Assist includes:**

- Integrated electronic performance management system which allows the municipality to manage and report on Organisation and Individual Performance in real-time;
- Ability to define the Organisational Organigram as required by the Municipal Staff Regulations;
- Alignment between the IDP, SDBIP and Individual Performance Agreements;
- Access to the integrated Organisational Indicator, Individual Indicator and Competency Libraries;
- Ability to manage the IDP (Integrated Development Plan);
- Ability to manage the Top Layer and Departmental SDBIP's (Service Delivery Budget Implementation Plan);
- Ability to build Organisational Posts, Job Descriptions, and Individual Performance Scorecards;
- Ability to manage the performance evaluation process for all levels of officials (including teams);
- Ability to manage PDP's (Personal Development Plans);
- Ability to produce various dashboards and reports;
- Seamless financial integration as required by mSCOA;
- Automated / Scheduled closure of time periods with system generated reminders;
- Various types of calculation methods to measure indicators;
- Ability to capture performance comments and recommended actions if a performance target was not achieved;
- Functionality to attach electronic Proof of Evidence;
- Audit functionality for the checking / validation of performance information;
- Compliance with the required regulations applicable in the Republic of South Africa (see below); and
- Functionality to allow for own customisation and easy scalability.

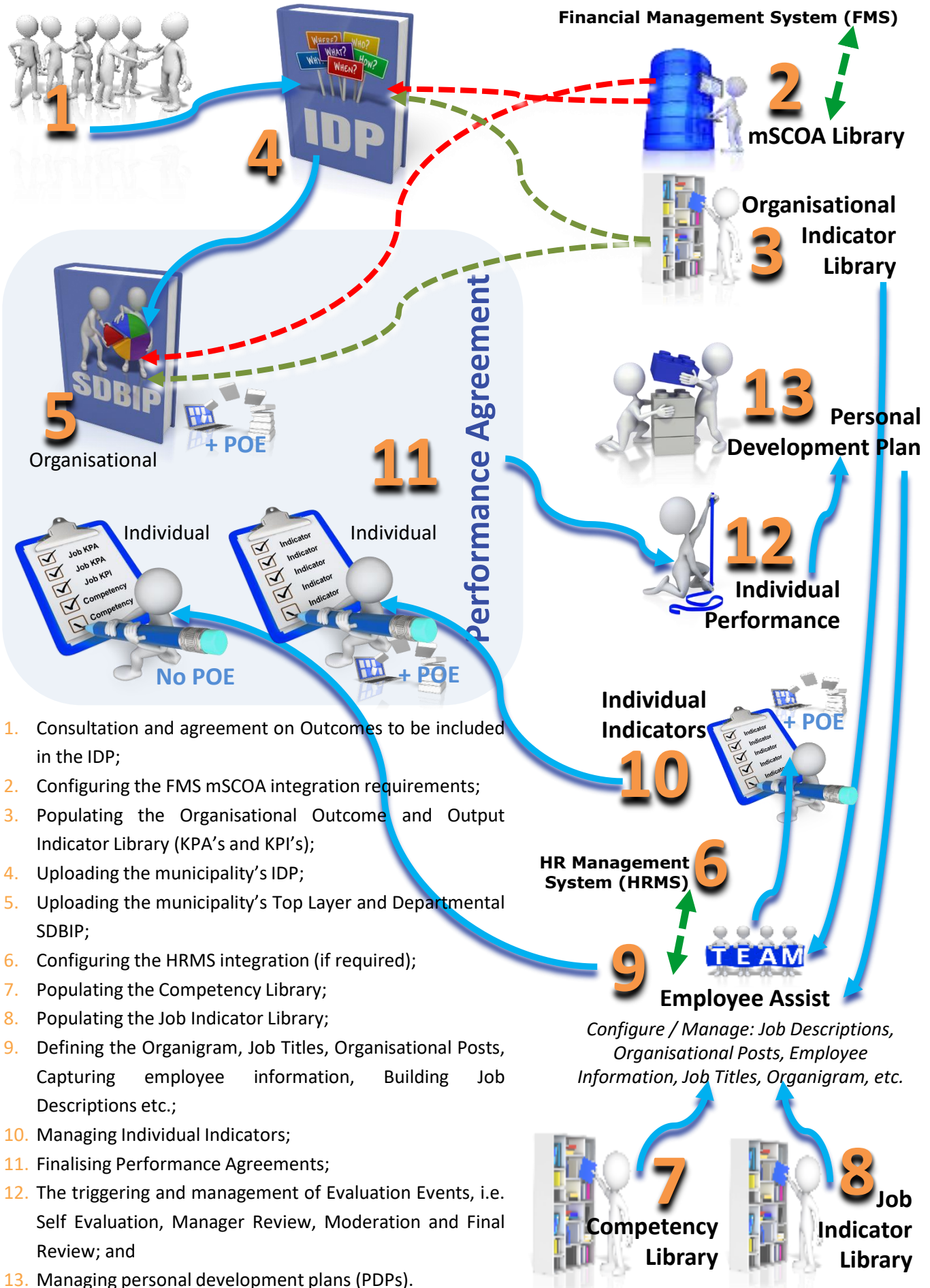
**Legislation to consider includes:**

Municipal Systems Act NO.32 OF 2000; Municipal Staff Regulations NO.890 ; Guidelines for the Implementation of the Municipal Staff Regulations No.891 ; Municipal Financial Management Act NO.56 of 2002; MFMA Circular No.88; Performance Regulations for Municipal Managers and Directors (Reg 805).

**Key Risks to consider when implementing Reg 890 include:**

 Insufficient budget to comply	 No Job Descriptions
 Person(s) blocking implementation	 Compliance Deadlines not met
 No Union / Stakeholder Support	 Available Funds not effectively prioritised
 Insufficient Skills to implement	 Consultant Dependency
 Organisational Structure Not defined	 Non-Compliance with Legislation
 No integration with other systems	 Indicators are not SMART

# Performance Assist Process Overview



1. Consultation and agreement on Outcomes to be included in the IDP;
2. Configuring the FMS mSCOA integration requirements;
3. Populating the Organisational Outcome and Output Indicator Library (KPA's and KPI's);
4. Uploading the municipality's IDP;
5. Uploading the municipality's Top Layer and Departmental SDBIP;
6. Configuring the HRMS integration (if required);
7. Populating the Competency Library;
8. Populating the Job Indicator Library;
9. Defining the Organigram, Job Titles, Organisational Posts, Capturing employee information, Building Job Descriptions etc.;
10. Managing Individual Indicators;
11. Finalising Performance Agreements;
12. The triggering and management of Evaluation Events, i.e. Self Evaluation, Manager Review, Moderation and Final Review; and
13. Managing personal development plans (PDPs).