|  |
| --- |
| **INSERT YOUR LOGO HERE** |

**INTEGRATED PERFORMANCE MANAGEMENT**

**GROUP EMPLOYEE RELATIONS**

|  |  |  |
| --- | --- | --- |
| Particulars | **Employee's Personal Details** | **Employee's Supervisor Details** |
| Surname: |  |  |
| Initials: |  |  |
| Personnel Number: |  |  |
| Position: |  |  |
| Department: |  |  |
| Business Unit / Company: |  |  |

**For Office Use Only**

|  |  |
| --- | --- |
| Department: |  |
| Business Unit / Company: |  |
| Job Code: |  |

**Performance Management Cycle**

|  |  |  |  |
| --- | --- | --- | --- |
|  | **[XYZ Company] Performance Management** | Description | Date Scheduled |
| A | Job Description, Development and Review | * For a position which did not exist before (must be submitted with the Headcount Authorization Form); * Job descriptions to be reviewed at least once a year. * When communicating the job responsibilities set out in the job description for the first time, the Performance Plan and Progress Review format may be used. | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| B | Performance Appraisal | * To be conducted with all employees at least once during the financial year. | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| C | Performance Plan & Progress Review | * To be conducted after Performance Appraisal has been conducted. * Development Plans and Progress reviews should be conducted at least once per year, but preferably every six months, if possible. * When communicating the job responsibilities set out in the job description for the first time, the Performance Plan and Progress Review format may be used. | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| D | Career Development | * Should be conducted at least within the first three years of an employee commencing employment with the [XYZ Company] Group. There after, the Career Development Plans must be reviewed regularly, depending on the career development plan for the employee. | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| E | Salary Review | * To be conducted at least once in every financial year, and within a maximum of three months of the usual salary increase month, or any agreed mid-year salary review period. * While salary reviews are in part dependant on an employee's performance, a performance appraisal must be conducted prior to any Salary Review. | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**Guidelines:-**

The [XYZ Company] Integrated Performance Management System comprises the following areas:-

A. Job Description

B. Performance Appraisal

C. Performance Planning and Progress Discussion

D. Career Development

E. Salary Review

**A. Job Description**

Every position within the [XYZ Company] Group must have a completed Job Description prior to the employee commencing his or her employment with the Company. The Job Description must be completed by the Department Manager and submitted to the Business Unit Manager and General Manager: Human Resources for review and approval.

All job descriptions must be reviewed at least once a year by the Departmental Manager and the employee to ensure that the job descriptions correctly reflects the tasks performed by or required of the employee. This will ensure that the job descriptions remain up to date.

1. Compiling the job description

Compile the basic job description format, obtaining input from Human Resources, and previous job incumbents.

1. Reviewing the job description

Once a year, read through the job description, ensuring that the job description correctly reflects the Key Performance Areas and Tasks expected of the employee. Ask the employee for input and suggestions regarding the job description content. Review and discuss any suggestions from the employee, and incorporate suggested content if you agree with it. Ensure that Human Resources has the latest version of any job description.

**B Performance Appraisal**

**Instructions**

1. Before the appraisal discussion

Schedule a time and date with the employee for the performance appraisal meeting.

Ensure that the employee has a copy of the Job Description and Performance Appraisal at least one week before the appraisal discussion.

Furnish the employee with Part B of the documentation on Performance Appraisals, and ask the employee to appraise his or her own performance prior to the performance appraisal. This will ensure that the employee applies his or her mind to the issues which will be discussed at the Performance Appraisal meeting.

Ensure that you are familiar with the performance appraisal documentation, and how it must be completed. Obtain clarity from Human Resources if in any doubt.

1. During the appraisal discussion.

Explain to the employee the purpose of the performance appraisal.

Ensure that you will not be interrupted during the performance appraisal.

Conduct the performance appraisal in a constructive and co-operative manner. Try not to alienate the employee.

Systematically go through each Key Performance Area, and review the employee's past performance. Respond to and document employee input and comments.

Where possible, it is always preferable to obtain the employee's agreement or understanding as to why his or her performance has been evaluated at a certain standard.

Furnish the employee with a completed copy of the Performance Appraisal Form.

1. After the appraisal discussion.

File the appraisal documentation in the employee's personnel file, and furnish the employee with a complete copy of the documentation.

Review and discuss those areas identified as Development Areas [D] as areas which must be addressed in the Development Plan Form [Part D Section 2). Where an employee's performance is substantially below standard, discuss with Human Resources what disciplinary avenues are open to you, and what procedures must be followed.

**C. Performance Planning and Progress Discussion**

This is a worksheet/planning document to be used throughout the performance management cycle. Every year the work unit's objectives for the performance period and the individual's job description should be reviewed before completing the work plan. For each job responsibility or project, the supervisor and employee should determine one or more planned activities and expected outcomes. Expected outcomes are quantitative measures or qualitative statements which define expectations. At the annual performance appraisal meeting, both individuals should comment on whether the expected outcomes have been achieved.

These forms may be used when communicating an employee's job description for the first time.

**D. Career Planning**

This is a planning document for individual development purposes. Every year the supervisor and the employee should meet to review the knowledge and skills that they have identified as necessary to meet job or department requirements and to further self-development. They should identify below the individual's learning goals/objectives for the year ahead and the specific, planned activity to achieve each goal. At the annual performance appraisal meeting, this Development Plan should be reviewed by both individuals and the actual outcomes should be identified. Both the supervisor and the employee should then indicate whether or not each learning goal or objective has been achieved.

The Career planning document consists of two sections, Section 1 - Career Options open to the employee, and Section 2 - Development Plan Forms which set out the employee's development tasks necessary to achieve the Career Options identified in Section 1.

**E. Salary Review**

Salary Increases are a consequence of a number of different factors, varying from the Groups financial performance, budgetary constraints, and the employee's own performance over the previous financial year. When giving increases, it is imperative to discuss all the factors which impact on an employee's salary increase. Salary increases must be communicated to employees in an objective, non-threatening manner.

**A** **Job Description**

# **Name :** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# **Designation :** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Job Code :** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   
(The Job Code is obtained from Human Resources)

**Department :** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Supervisor / Manager :** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Main purpose of the job :** Describe in one or two sentences the main purpose of the job.\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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|  |  |  |  |
| --- | --- | --- | --- |
| **Key result area** | **Performance Indicators** | **Main activities** | **Personal profile** |
| 1. Identify the Key Result Areas, that is, what are the final outcomes of the job. Typically there should not be more than 4 or 5 Key Result Areas for each job. | * Identify the performance indicators, that is, the method of measurement which will be used to evaluate whether the employee has achieved the Key Result Areas. | * Specify the specific activities the employee is required to fulfill for each Key Result Area identified in the first column. | * Identify the personality profiles / dimensions required of the employee to be able to fulfill the Key Result Areas. A list of typical dimensions may be obtained from Human Resources. |

NB: Whilst this job description represents a summary of the most important job tasks expected of you, it does not in any way delineate your responsibilities to properly perform your job function. By the very nature of our business, which is of a dynamic and competitive nature, the pro-active management and administration of your job is essential.

**General Duties:-**

In addition to the above:-

1. You may be required to perform all reasonable duties assigned to you or related or incidental to the proper completion of your job tasks;
2. During a work colleagues leave of absence from the company or during month end or peak business periods, you may be required to perform other job tasks upon reasonable request from your manager.

I confirm that the above-mentioned job description has been explained to me and that I fully understand and accept the job tasks specified herein. I further confirm that should I believe that I am uncertain as to any job tasks required of me, or that I am unable to meet any job expectations set out herein, I will communicate such to my supervisor without delay.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

EMPLOYEE SIGNATURE DATE

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

EMPLOYEE'S SUPERVISOR DATE

**Job Description Administration:- (for office use only)**

Job Description compiled on : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Review date for Job description : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
*(job description content itself is periodically reviewed, to ensure that the job description correctly reflects the job tasks - as the business and job functions change or increase - as well as ensuring that the job descriptions are up to date, especially with new recruits. Review dates are usually annual or bi-annual or when a job incumbent has tendered his / her resignation and are then performed during the employee's notice period. This greatly assist in the induction process for the next new employee.)*

**B** **Appraisal of Past Performance**

**Section 1 Appraisal of Key Performance Areas**

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| No  \_\_\_\_ | Weight  ……. % | Key Performance Area | Overall Rating | | | | | | | | | |
| 1 | | 2 | 3 | 4 | 5 | 6 | 7 | 8 | |
| Performing below the required standard | | Generally performing to most of the required standards | | Performing at the fully competent level | | Surpassing most of the required standards | | Surpassing all the required standards | |
| Guidelines:- | | Describe the KPA:- | 1. What needs to be accomplished: 2. How it is to be accomplished: 3. Why this KPA is necessary and important: | | | | | | | | | |
| Guidelines:-  Identify areas of under performance and provide specific examples.  Determine whether the under performance is due to a lack of knowledge, skill or behaviour. Identify whether it is a possible Development Area [D], or whether the employee has the requisite knowledge or skill [S]. | | Specify specific tasks or behaviours in job description which is below the required standard (where possible give examples). | | Specify Acceptable Performance Criteria | | | | | | | | Strength [S] or Development Area [D] |
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| Employee Comments on measurement of KPA:- | | | | | | | | | |  |

**Section 1 Appraisal of Key Performance Areas Page \_\_\_ of \_\_\_\_\_\_ Additional Work Sheets**

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| No  \_\_\_\_ | Weight  ……. % | Key Performance Area | Overall Rating | | | | | | | | | |
| 1 | | 2 | 3 | 4 | 5 | 6 | 7 | 8 | |
| Performing below the required standard | | Generally performing to most of the required standards | | Performing at the fully competent level | | Surpassing most of the required standards | | Surpassing all the required standards | |
| Guidelines:- | | Describe the KPA:- | 1. What needs to be accomplished: 2. How it is to be accomplished: 3. Why this KPA is necessary and important: | | | | | | | | | |
| Guidelines:-  Identify areas of under performance and provide specific examples.  Determine whether the under performance is due to a lack of knowledge, skill or behaviour. Identify whether it is a possible Development Area [D], or whether the employee has the requisite knowledge or skill [S]. | | Specify specific tasks or behaviours in job description which is below the required standard (where possible give examples). | | Specify Acceptable Performance Criteria | | | | | | | | Strength [S] or Development Area [D] |
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| Employee Comments on measurement of KPA:- | | | | | | | | | |  |

**Section 1 Appraisal of Key Performance Areas Page \_\_\_ of \_\_\_\_\_\_ Additional Work Sheets**

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| No  \_\_\_\_ | Weight  ……. % | Key Performance Area | Overall Rating | | | | | | | | | |
| 1 | | 2 | 3 | 4 | 5 | 6 | 7 | 8 | |
| Performing below the required standard | | Generally performing to most of the required standards | | Performing at the fully competent level | | Surpassing most of the required standards | | Surpassing all the required standards | |
| Guidelines:- | | Describe the KPA:- | 1. What needs to be accomplished: 2. How it is to be accomplished: 3. Why this KPA is necessary and important: | | | | | | | | | |
| Guidelines:-  Identify areas of under performance and provide specific examples.  Determine whether the under performance is due to a lack of knowledge, skill or behaviour. Identify whether it is a possible Development Area [D], or whether the employee has the requisite knowledge or skill [S]. | | Specify specific tasks or behaviours in job description which is below the required standard (where possible give examples). | | Specify Acceptable Performance Criteria | | | | | | | | Strength [S] or Development Area [D] |
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| Employee Comments on measurement of KPA:- | | | | | | | | | |  |

**Section 1 Appraisal of Key Performance Areas Page \_\_\_ of \_\_\_\_\_\_ Additional Work Sheets**

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| No  \_\_\_\_ | Weight  ……. % | Key Performance Area | Overall Rating | | | | | | | | | |
| 1 | | 2 | 3 | 4 | 5 | 6 | 7 | 8 | |
| Performing below the required standard | | Generally performing to most of the required standards | | Performing at the fully competent level | | Surpassing most of the required standards | | Surpassing all the required standards | |
| Guidelines:- | | Describe the KPA:- | 1. What needs to be accomplished: 2. How it is to be accomplished: 3. Why this KPA is necessary and important: | | | | | | | | | |
| Guidelines:-  Identify areas of under performance and provide specific examples.  Determine whether the under performance is due to a lack of knowledge, skill or behaviour. Identify whether it is a possible Development Area [D], or whether the employee has the requisite knowledge or skill [S]. | | Specify specific tasks or behaviours in job description which is below the required standard (where possible give examples). | | Specify Acceptable Performance Criteria | | | | | | | | Strength [S] or Development Area [D] |
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| Employee Comments on measurement of KPA:- | | | | | | | | | |  |

**Section 2 Overall Key Performance**

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Key Performance Area** | **Employee** | | | **Appraiser** | | | **Co-Appraiser (if applicable)** | | | **Consensus** | | |
|  | Weight | Rating | Score | Weight | Rating | Score | Weight | Rating | Score | Weight | Rating | Score |
|  | % | x | = | % | x | = | % | x | = | % | x | = |
|  | % | x | = | % | x | = | % | x | = | % | x | = |
|  | % | x | = | % | x | = | % | x | = | % | x | = |
|  | % | x | = | % | x | = | % | x | = | % | x | = |
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|  | % | x | = | % | x | = | % | x | = | % | x | = |
|  | % | x | = | % | x | = | % | x | = | % | x | = |
|  | % | x | = | % | x | = | % | x | = | % | x | = |
|  | % | x | = | % | x | = | % | x | = | % | x | = |
| TOTAL | 100 % |  | = | 100 % |  | = | 100 % |  | = | 100 % |  | = |

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| --- | --- | --- | --- | --- | --- | --- | --- |
| **Overall Rating** | | | | | | | |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| Performing below the required standard | Generally performing to most of the required standards | | Performing at the fully competent level | | Surpassing most of the required standards | | Surpassing all the required standards |

Note: If performance is below standard, please ensure that you implement performance counseling, using the Discussion Summaries contained in Section 5.1 of the Human Resources Manual. This will ensure that you adhere to the requirements set out in the Labour Relations Act 66 of 1995 as amended, as well as the Code of Good Practice

**Section 3 Commentary**

|  |  |  |
| --- | --- | --- |
| Employee Comments: | | |
|  | | |
|  | | |
| Name: | Signature: | Date: |

|  |  |  |
| --- | --- | --- |
| Appraiser Comments: | | |
|  | | |
|  | | |
| Name: | Signature: | Date: |

|  |  |  |
| --- | --- | --- |
| Co-Appraiser Comments: | | |
|  | | |
|  | | |
| Name: | Signature: | Date: |

Appraisal Documentation Submitted to General Manager: Human Resources

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| --- | --- | --- |
|  | | |
|  | | |
|  | | |
| Name: | Signature: | Date: |

**C** **Performance Planning and Progress Discussion**

This is a worksheet/planning document to be used throughout the performance management cycle. Every year the work unit's objectives for the performance period and the individual's job description should be reviewed before completing the work plan. For each job responsibility or project, the supervisor and employee should determine one or more planned activities and expected outcomes. Expected outcomes are quantitative measures or qualitative statements which define expectations. At the annual performance appraisal meeting, both individuals should comment on whether the expected outcomes have been achieved.

**Section 1 PRIORITIES FOR NEXT \_\_\_\_\_ Weeks / Months**

**Job responsibility/project:**

|  |  |  |  |
| --- | --- | --- | --- |
| Planned activity: | Expected outcome(s): | Agreed Deadlines: | Comments (midyear & annual) re: progress and/or actual outcome: |
|  |  |  |  |
|  |  |  |  |

**Job responsibility/project:**

|  |  |  |  |
| --- | --- | --- | --- |
| Planned activity: | Expected outcome(s): | Agreed Deadlines: | Comments (midyear & annual) re: progress and/or actual outcome: |
|  |  |  |  |
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**Job responsibility/project:**

|  |  |  |  |
| --- | --- | --- | --- |
| Planned activity: | Expected outcome(s): | Agreed Deadlines: | Comments (midyear & annual) re: progress and/or actual outcome: |
|  |  |  |  |
|  |  |  |  |

**Job responsibility/project:**

|  |  |  |  |
| --- | --- | --- | --- |
| Planned activity: | Expected outcome(s): | Agreed Deadlines: | Comments (midyear & annual) re: progress and/or actual outcome: |
|  |  |  |  |
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**Section 2 Commentary**

Employee:

Comments:

|  |  |  |
| --- | --- | --- |
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| Name: | Signature: | Date: |

Appraiser

Comments:

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|  | | |
|  | | |
| Name: | Signature: | Date: |

Co-Appraiser

Comments:

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|  | | |
|  | | |
|  | | |
| Name: | Signature: | Date: |

**D** **Career Planning**

This is a planning document for individual development purposes. Every year the supervisor and the employee should meet to review the knowledge and skills that they have identified as necessary to meet job or department requirements and to further self-development. They should identify below the individual's learning goals/objectives for the year ahead and the specific, planned activity to achieve each goal. At the annual performance appraisal meeting, this Development Plan should be reviewed by both individuals and the actual outcomes should be identified. Both the supervisor and the employee should then indicate whether or not each learning goal or objective has been achieved.

**Section 1 Career Options**

Career Options could be:

1. Staying in the current job, learning and acquiring additional experience.
2. Staying in the current job for at least another year, developing and improving performance.
3. Lateral movement into another job function to acquire a broader range of skills, knowledge and expertise.
4. Lateral movement into another job function more suited to the knowledge and profile of the job holder.
5. Promotion to a more senior job

Overall Performance Rating (from previous Performance Appraisal)

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Overall Rating** | | | | | | | |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| Performing below the required standard | Generally performing to most of the required standards | | Performing at the fully competent level | | Surpassing most of the required standards | | Surpassing all the required standards |

|  |  |  |  |
| --- | --- | --- | --- |
| Describe the option which best suits the employee from the perspective of the: | Employee | Appraiser | Co-Appraiser (if applicable) |
|  | Motivation | Motivation | Motivation |

**Section 2 Development Plan Form**

Before choosing the development initiatives, go back to:-

1. The Development Areas identified in the Employee's Appraisal [Part B];
2. The Career Options for the Employee in Section 1 of Part D above;
3. The Performance Planning and Progress Discussion in Part C.

**Guidelines:-**

Do not select more than four training courses per annum

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Learning Goals / Objectives | Skill, Knowledge or Behaviour Deficiency | Development Initiatives (training, mentoring, coaching, guidance or instruction). Identify specific training programmes or courses. | Time | Review Date |
|  |  |  |  |  |
|  |  |  |  |  |
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**Section 3 Commentary**

Employee:

Comments:

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|  | | |
|  | | |
| Name: | Signature: | Date: |

Appraiser

Comments:

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|  | | |
|  | | |
| Name: | Signature: | Date: |

Co-Appraiser

Comments:

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|  | | |
|  | | |
|  | | |
|  | | |
| Name: | Signature: | Date: |

**E** **Salary Review**

**Introduction**

**Salary Increases are a consequence of a number of different factors, varying from the Groups financial performance, budgetary constraints, and the employee's own performance over the previous financial year. When giving increases, it is imperative to discuss all the factors which impact on an employee's salary increase. Salary increases must be communicated to employees in an objective, non-threatening manner.**

**Section 1 Factors impacting on Salary Review**

Review those factors which have an impact on general and specific salary increases for the current financial year

|  |  |
| --- | --- |
| Factor | Specify |
| Business Factors   * National Economy * Inflation |  |
| [XYZ Company] Group Factors   * Past Performance * Business Constraints * Group Focus * Group Mandate |  |
| Business Unit   * Financial Performance * Future Prospects * Mandate |  |
| Employee   * KPA Rating * Market Rating * Employee Expectation |  |

**Section 2 Salary Increase**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Current Total Salary Package | Salary Increase | Revised Salary Package |
|  |  |  |  |
| Payment in Cash |  |  |  |
| *[pre-enter other items]* |  |  |  |
|  |  |  |  |
| **Employee Benefits** |  |  |  |
| Medical Aid |  |  |  |
| Pension Fund |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Allowances** |  |  |  |
| Car |  |  |  |
| Cellular |  |  |  |
| Entertainment |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Total** |  |  |  |
| Percentage Increase |  |  |  |
|  |  |  |  |

**Section 3 Commentary**

Employee:

Comments:

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|  | | |
|  | | |
|  | | |
| Name: | Signature: | Date: |

Appraiser

Comments:

|  |  |  |
| --- | --- | --- |
| Next review date if different from usual Salary Review Date:- | | |
| Reason: | | |
| General Comments: | | |
|  | | |
| Name: | Signature: | Date: |

Co-Appraiser

Comments:

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| Name: | Signature: | Date: |