



Performance Management Policy

For review by the Executive Committee: by August 2023

1. INTRODUCTION

Squash South Africa (SSA), as a responsible employer, has set out this policy to ensure that expectations and performance of all employees are managed. Ensuring that employees perform, is important for service delivery and productivity as well as for identifying development needs.

2. SCOPE

This policy applies to all full and part-time employees of SSA and is related to his/her performance and is not linked to a possible cost of living increase which is decided at the discretion of the Board.

3. FREQUENCY OF APPRAISAL

- 3.1 The work performance of employees will be formally appraised on an annual basis by the National Manager and appraisals will be discussed with the employee at the time of the appraisal.
- 3.2 The President, on behalf of the Board, will appraise the performance of the National Manager annually.
- 3.3 An informal review of each individual employee performance will be done in the middle of the year.

4. OUTCOMES OF REVIEW

The performance appraisal is designed to:

- 4.1 Improve morale and communication:
 - 4.1.1 By defining the major goals, the achievement of SSA's goals and showing the individual employee how his/her performance relates to these goals.
 - 4.1.2 By providing an opportunity for the employee to assess his/her own performance and to discuss job related challenges and opportunities with his/her manager.
 - 4.1.3 By better understanding the career ambition of employees in line with opportunities,
- 4.2 Promote efficiency: by providing an opportunity for the employee's manager to suggest constructively ways in which the employee may improve his/her performance or prepare himself/herself to assume additional responsibility.
- 4.3 Provide feedback on performance: by recognising exceptional performance and/or identifying areas where performance standards need to be improved.
- 4.4 Identify personal development needs:
 - 4.4.1 By determining areas of performance where specific skill deficiencies exist which can be enhanced with specialised training to add value to SSA as well as to the employee.

- 4.4.2 By assessing a skills gap which may exist between the employee's ambitions and an assessment of the skills required for promotion.
- 4.5 Re-assess current job responsibilities: by reviewing the employee's current job description to determine if there has been significant change in responsibilities or duties which may lead to a re-evaluation of the post and/or of the allocation of responsibilities internally and/or the staff structure.
- 4.6 Support promotion decisions and succession planning: by providing performance data to use as a guide for possible promotion within SSA's plans for the future provided that an open and transparent recruitment process is undertaken, and appointments made based on merit.

5. PROCEDURES

- 5.1 The manager (President or National Manager as the case may be) will be responsible for appraising employee performance and to explain to each employee the process which will be followed.
- 5.2 The manager will confirm the job description is up to date with the employee concerned.
- 5.3 The employee will present to the manager key result areas (what will be achieved by what date with what budget and leading to what outcome) based on the job description and SSA's strategy. This will be the annual performance agreement (APA) which will be signed by both parties.
- 5.4 The APA will be assessed informally in June prior to the formal performance appraisal done by end December each year. The manager may wish to implement informal discussions quarterly to identify any barriers to implementation of targets so that the barrier can be removed, or the target can be amended. This will form part of the overall monitoring and evaluation process of the strategic plan.
- 5.5 The format of the appraisal should be a discussion in a congenial manner with an agreed score being allocated for each key result area (below expectations, as expected or exceeds expectations).
- 5.6 Performance only will be assessed in line with the APA and not competence to do the job. Certain characteristics may be considered in addition to the APA e.g., honesty, innovation, teamwork but these will not form part of the formal appraisal decision.
- 5.7 The discussion will also include an assessment of whether the employee has the skills required to do the job at the required standard and if it is agreed that a skill needs to be developed, and subject to budget availability, SSA will investigate supporting in full or in part further learning and development opportunities specific to the job requirements and providing study leave for this purpose.

- 5.8 The completed APA will be reviewed and signed by the manager and employee once approved.
- 5.9 Should the employee object in any way, this should be noted on the APA with reasons provided.
- 5.10 At completion of the appraisal process, the original of the performance appraisal will be placed on the employee's personal file and a copy given to him/her.

6. EXCEPTIONAL PERFORMANCE

- 6.1 As each employee is expected to perform by doing their job and achieving the agreed KRAs, only exceptional performance exceeding agreed expectations may be recognised.
- 6.2 Where an employee takes on work in addition to their signed APA, this will count towards consideration of exceptional performance.
- 6.3 Any exceptional performance may be recognised by a once-off performance payment paid in December of each year. This will be subject to tax. An employee may elect to have this payment made monthly.

7. PERFORMANCE BELOW EXPECTATIONS

- 7.1 Where an employee's performance is assessed as below expectations, the manager will note this in the APA and explain the reasons for this.
- 7.2 However, poor performance should not be left until the formal appraisal but should be addressed at the time it is identified.
- 7.3 The manager should meet the employee to discuss the poor performance and any reasons therefor and ways to improve performance and an agreed timeframe.
- 7.4 Should the performance not improve within the agreed timeframe, the manager should issue a first written warning where no acceptable reason is provided.
- 7.5 Where performance does not improve following the written warning, the manager may issue a further written warning having met the employee to discuss the issue and reasons for lack of improvement.
- 7.6 Should performance still not improve within the agreed timeframe, the manager shall refer the matter to a disciplinary hearing providing written records of the performance management process followed for consideration.

8. APPEAL

- 8.1 The employee shall have the right to appeal to the Board for a review by a Board member independently.

- 8.2 Such an appeal must be submitted to the President or nominee within seven (7) calendar days of the appraisal process being completed.
- 8.3 The notice of appeal must set out the grounds of appeal i.e., a procedural appeal where the procedure was not followed leading to a perceived flawed assessment.
- 8.4 The Board member appointed will meet the appraiser and the manager either together or separately as the case may be to ensure all relevant facts are considered.
- 8.5 The Board member must submit a final report and recommendations to the Board within one (1) month of the date on which the notice of appeal was received.
- 8.6 The decision by the Board on the appeal will be final and binding.

9. EFFECTIVE DATE

The policy is effective from 18 August 2021 and will be updated every two years.