



Excellence begins with me!

1. INTRODUCTION

This communiqué serves to inform line managers that the 2023 mid-year performance reviews of all Unisa staff are to be finalised by Friday, 18 August 2023. This applies to permanent staff, as well as to fixed-term contract staff who have been appointed for at least twelve consecutive months during 2023.

The mid-year point provides colleagues with an important opportunity to pause and reflect on how they are progressing with their agreed-upon objectives and targets for the year as captured in their unit operational plans and their individual performance agreements. It also enables line managers and staff to plan how efforts should be redirected for the remainder of the year based on new priorities and operational needs.

As part of the mid-year reviews, staff members and their line managers may also wish to review and amend targets in staff members' performance agreements in the light of changed circumstances and priorities. During the year-end assessments, staff members' performance will be assessed against these amended targets.

Any proposed amendments of targets that might impact on the achievement of deliverables in the University's 2023 Annual Performance Plan (APP) should be submitted to the Management Committee for consideration and thereafter to the Unisa Council for approval. The relevant operational plans should also be updated to reflect any amended targets following approval.

The mid-year review process also provides an opportunity to institute improvement initiatives and to look at innovative ways of addressing performance challenges. Improvement initiatives should consider performance information such as student and client satisfaction surveys, quality reviews, risk registers, audit findings, budget spending and so forth.

Most importantly, the mid-year review is an opportunity to acknowledge and celebrate excellence, commitment and going the extra mile.

2. SIGNED 2023 PERFORMANCE AGREEMENTS

Mid-year reviews of P5-P19 staff may only be conducted based on a signed 2023 performance agreement that has been uploaded on Oracle UAM (for P5-P19 staff). Where performance agreements are outstanding, these should be finalised and signed before scheduling the mid-year reviews.

3. MID-YEAR REVIEWS OF MEMBERS OF SENIOR MANAGEMENT AND DIRECTORS

The mid-year reviews of members of Senior Management and Directors / School Directors should be captured on the online IPMS system during August. These staff members will only be able to start capturing their 2023 mid-year reviews once their 2023 performance agreements have been approved on the online IPMS system by their line managers.

4. STAFF MEMBERS ON AQIP

Staff members on AQIP are excluded from participating in the IPMS system for the duration of their AQIP contract. Only staff members who return from their AQIP contract before 30 June 2023, or start their AQIP contract after 30 June, should complete performance agreements for 2023 and be assessed pro-rata for the period that they are back at work.

5. PREPARATORY DOCUMENTS FOR THE MID-YEAR PERFORMANCE REVIEW DISCUSSIONS

5.1. Mid-year review templates

The mid-year review templates for the various categories of P5-P19 staff can be accessed on *e-connect* under “Forms” (click on “Performance Management Templates”) or by accessing the following link <https://staff.unisa.ac.za/sites/intranet/default/Forms/Performance-Management-Templates>.

5.2. Sample agendas

To facilitate constructive and value-adding mid-year performance review discussions, the sample agendas that appear together with the mid-year templates on the intranet can be used during the mid-year review discussions. Staff members can use these agendas to assist in preparing themselves for the review discussions.

5.3. Evidence

In line with paragraph 7.1.3 of the IPMS policy as quoted below, Unisa staff are reminded to submit appropriate records and evidence during their mid-year reviews and year-end assessments to substantiate their self-ratings:

“Line managers and employees should keep appropriate records and evidence, both documentary evidence and incidents, in line with the inherent nature and requirements of the employees’ job, during the performance cycle to substantiate their performance ratings during mid-year reviews and year-end performance assessments.”

It is important to note that evidence is required for all performance ratings and not only for overall ratings of 4.0 and above.

5.4. Motivations for overall ratings of 4.0 and above

As stipulated in the IPMS policy, line managers should acknowledge and encourage high performance in line with UNISA's goal of becoming a high performance university. Where staff members demonstrate exceptional performance, they should therefore be allocated performance ratings which reflect their high performance.

In cases where staff members receive overall ratings of 4.0 and above, the attached motivation form should however be completed to provide the necessary proof of such exceptional performance.

<https://staff.unisa.ac.za/static/intranet/Content/Forms/Performance%20Management%20Templates/MotivationOverallRating4AndAbove.doc>

5.5. Analysis of performance problems for overall ratings below 3.0

In line with paragraph 7.8 of the IPMS policy, underperformance should be dealt with proactively as soon as it occurs. This includes a proper diagnosis of the actual causes of the underperformance and instituting appropriate corrective measures such as training, mentoring, clarification of standards and other support systems.

Where a staff member receives a rating below 3.0 during the mid-year review, the attached "Analysis of performance problems" form should be completed and attached on UAM together with the mid-year review form.

<https://staff.unisa.ac.za/static/intranet/Content/Forms/Performance%20Management%20Templates/AnalysisPerformanceChallengesOverallRatingsBelow3.doc>

The direct line managers should also immediately embark on a performance improvement process with the relevant staff member, in collaboration with the Performance Management Division and the Employee Relations Section.

6. CONTACT PERSONS

Please feel free to contact members of the Performance Management Division indicated on the attached list should you need assistance.

<https://staff.unisa.ac.za/static/intranet/Content/Forms/Performance%20Management%20Templates/IPMS%20consultants%20and%20organisational%20units%20for%20which%20they%20are%20responsible.docx>

7. 2023 PERFORMANCE MANAGEMENT CALENDAR

The 2023 performance management calendar is provided below to enable line managers and individual staff members to plan their performance management and development activities and initiatives.

Performance Phase	Actions	Due date	Responsible persons
Performance contracting	<p>Line managers and staff prepare draft performance agreements and meet one-on-one to discuss and finalise and sign the agreements.</p> <p>Line managers upload the signed agreements in PDF format on Oracle UAM</p>	February - 17 March 2023	Line managers and incumbents
Continuous performance feedback, coaching, monitoring and development	<p>Staff request feedback from their line managers and stakeholders on a regular basis.</p> <p>Line managers provide regular feedback to staff on implementing their agreements and monitor the achievement of deliverables through appropriate mechanisms</p>	Ongoing	Line managers and incumbents
Mid-year reviews	<p>Staff members prepare their self-assessments and evidence and submit to their line managers ahead of their mid-year reviews.</p> <p>Line managers schedule one-on-one mid-year review discussions with each staff member reporting directly to them and finalise and sign the mid-year reviews.</p> <p>Line managers upload the signed mid-year reviews in PDF format on Oracle UAM.</p>	1 July – 18 August 2023	Line managers and incumbents
Mid-year moderation	<p>College, Support Department, Portfolio and Institutional moderation committees meet to moderate the mid-year reviews of staff in their responsibility area.</p>	21 August – 15 September 2023	Line managers and moderation committees

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Continuous performance feedback, monitoring and development	<p>Staff request feedback from their line managers and stakeholders on a regular basis.</p> <p>Line managers provide regular feedback to staff on implementing their agreements and monitor the achievement of deliverables through appropriate mechanisms</p>	Ongoing	Line managers and incumbents
Year-end assessments	<p>Staff members prepare their self-assessments and evidence and submit to their line managers ahead of their year-end assessments.</p> <p>Line managers schedule one-on-one mid-year review discussions with each staff member reporting directly to them and finalise and sign the mid-year reviews.</p> <p>Line managers upload the signed year-end assessments in PDF format on Oracle UAM.</p>	2 January – 26 January 2024	Line managers and incumbents
Year-end moderation	College, Support Department, Portfolio and Institutional moderation committees meet to moderate the year-end assessments of staff in their responsibility area.	29 January – 3 February 2024	Line managers and moderation committees

8. CONCLUSION

The Integrated Performance Management System (IPMS) entails a constructive approach that will assist employees in achieving their performance expectations and contributing to the University's overall success through a process of monitoring, review and improvement. Continuous learning and professional growth and development should always underpin performance management.

We trust that the mid-year reviews will be conducted in this spirit of continuous learning and development to support Unisa in being a high-performance university.

PC Dlamini 29/06/2023

Dr PC Dlamini

Acting Executive Director: Human Resources