



**REPORT ON THE ROUNDTABLE DISCUSSION ON
THE IMPROPER MANAGEMENT OF THE
PERFORMANCE MANAGEMENT AND
DEVELOPMENT SYSTEM (PMDS) WHICH LEADS TO
GRIEVANCES IN THE PUBLIC SERVICE**

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LIST OF ACRONYMS

CMC	Core Management Criteria
DG	Director-General
DMC	Departmental Moderating Committee
DPSA	Department of Public Service and Administration
EPMDS	Employee Management and Development System
EA	Executive Authority
GAF	Generic Assessment Factor
HOD	Head of Department
HRD	Human Resource Development
HRM	Human Resource Management
KRA	Key Responsibility Area
MC	Moderating Committee
MEC	Member of the Executive Council
MMS	Middle Management Service
MPAT	Management of Performance Assessment Tool
MPSA	Minister for Public Service and Administration
MTEF	Medium Term Expenditure Framework
OSD	Occupational Specific Dispensation
PA	Performance Agreement
PAR	Provisional Assessment Ratings
PDP	Personal Development Plan
PFMA	Public Finance Management Act, 1999
PMDS	Performance Management and Development System
PSA	Public Service Act, 1994
PSC	Public Service Commission
PSCBC	Public Service Coordinating Bargaining Council
PSR	Public Service Regulations, 2001
SMS	Senior Management Service

EXECUTIVE SUMMARY

The Roundtable discussion on the improper management of the Performance Management and Development System (PMDS) which leads to grievances in the Public Service served as a platform for engagement among stakeholders from selected departments and organized labour. Its aim was to identify deficiencies in the management and implementation of the PMDS generally and to share information on better practices. The specific objectives of the Roundtable discussion were outlined as follows:

- To empower departments with knowledge and skills to best deal with performance management related grievances.
- To improve the practical application of PMDS within departments.
- To enhance departmental competencies in dealing with specific scenarios identified by the PSC through incorporating the proposed recommendations made (by the PSC) into internal practices and procedures, thereby also contributing to more efficient management of the internal grievance process.
- To improve departmental performance management policies by clearly identifying the relevant roles of each member involved in the performance management process.
- To inform National Policy and Guideline review on the PMDS moving forward.
- To establish a basis to monitor and evaluate developments regarding the PMDS moving forward.

The discussion focused on the application of sound performance management principles with a view to decrease the number of grievances associated with the PMDS. Some of the key questions dealt with are: What benefits does the PMDS have for employees; and what benefits does the system have for employers?

Participants at the Roundtable discussion stated that if performance management is correctly applied, the benefits for employees would not only be in the form of performance rewards, but would also enhance personal development. As the name suggests, the management and identification of developmental needs is the main reason for performance management. This would ensure the development of human resource capacity. With a development-oriented human resource, which is continuously being improved, the employer will be able to deliver services effectively, efficiently and economically.

Over-emphasis on monetary rewards by employees leads to the lodging of grievances when their monetary expectations are not realized. The consequence is that management functions are challenged. Experience has shown, as also alluded to by the speakers during the Roundtable, that well organised and implemented performance appraisals can improve the turning around of poor performance and encourage good performance.

Although much emphasis has been placed on the responsibilities of various role-players in the implementation of the PMDS, prominence should also be placed on the improvement of individual and institutional performance. Departments should not implement the system for compliance purposes only as this will result in the continuation of an influx of PMDS related

grievances. All role-players should therefore be responsible to ensure the effective implementation of the system.

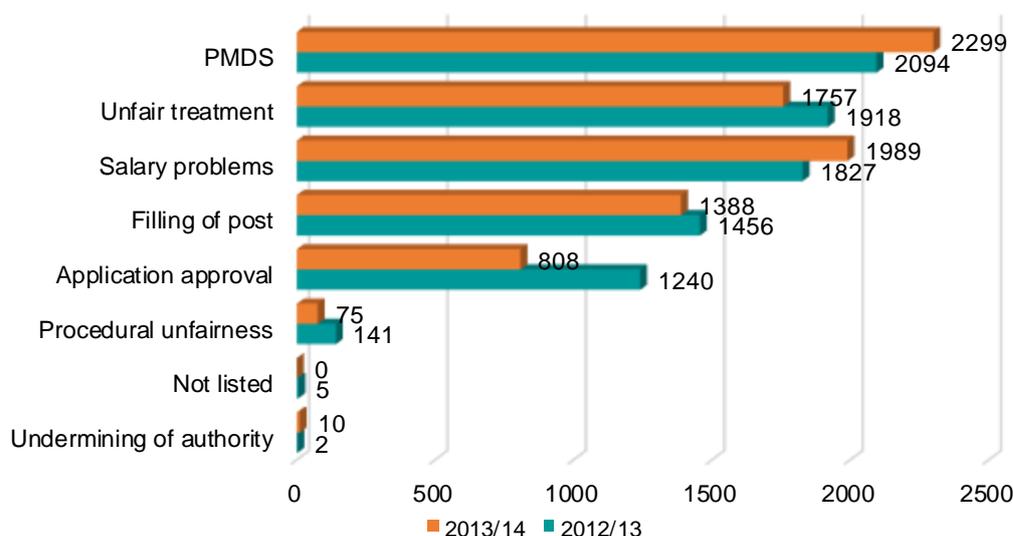
The DPSA has the responsibility to lead and other stakeholders such as organised labour must play a constructive role in ensuring that the PMDS contributes towards the achievement of government's objectives of delivering quality service in a manner that is effective and efficient.

INTRODUCTION AND BACKGROUND

1.1 Background

In terms of section 196 (4)(f)(ii) of the *Constitution of the Republic of South Africa, 1996*, (the Constitution, 1996) the Public Service Commission (PSC) is mandated to investigate grievances of employees in the Public Service concerning official acts or omissions, and recommend appropriate remedies. Based on its handling of the grievances submitted the PSC is able to obtain a clear perspective on the leading causes of grievances amongst employees in the Public Service.

From a statistical perspective for both the 2012/2013 and 2013/2014 financial years, Performance Management was the leading cause of grievances amongst employees in the Public Service, as indicated in the Figure below:



In dealing with grievances that were referred to it for consideration, the PSC made recommendations which, if they were implemented, would assist departments to reduce the number of grievances attributed to flawed performance management and development practices.

In addition to the recommendations made to departments, the PSC also deemed it necessary to host a high level Roundtable discussion on the PMDS, which would serve the purpose of bringing to the fore, deficiencies in the management and implementation of the PMDS generally. The Roundtable discussion served as a platform for engagement between stakeholders with the aim of sharing information on better practices and influencing national policy changes and the issuing of guidelines.

Delegates from selected departments, as well as from organised labour, were invited to join the PSC at the Roundtable discussion held on 30 October 2014, at Environment House, Steve Biko Street, Arcadia, Pretoria. Commissioner M Marais-Martin from the PSC facilitated the session, and delegates were officially welcomed by Commissioner LV Sizani from the PSC.

The PSC made a presentation on the statistical overview of the PMDS related grievances and the reasons cited by employees for their dissatisfaction with the implementation of the PMDS. The reasons included, *inter alia*, that –

- agreed ratings between employees and their immediate supervisors are changed unilaterally by moderating committees;
- additional motivation provided as a result of the Appeal process are not considered;
- departments fail to implement merit-worthy ratings due to financial constraints;
- poor performance is only brought to their attention at the end of the performance assessment cycle;
- workplans are changed during an assessment cycle without following due processes;
- consultation during the assessment stages does not take place;
- managers who are unfamiliar with the employee's functions play an integral role in the assessment processes, and
- bias, prejudice and unfairness towards employees are displayed during the assessment process.

Additionally, the PSC has observed that, apart from the above-mentioned issues, the overall implementation of the PMDS Policy in itself seems to create an unreasonable expectation in that the tool is used more for monetary gain than development-orientation and addressing poor performance. It was also emphasised that the poor implementation of the PMDS policy framework by line managers, but not the tool itself, could be a possible reason for dissatisfaction by employees.

1.2 Mandate of the PSC

The PSC derives its mandate from section 196 of the Constitution, 1996, and the Public Service Commission Act, 1997. In terms of section 196(4) of the Constitution, 1996, the PSC has the mandate to, among others, -

- promote the values and principles governing public administration throughout the Public Service (section 196 (4) (a));
- investigate, monitor and evaluate the organisation and administration, and the personnel practices, of the Public Service (section 196 (4) (b));
- investigate grievances of employees in the Public Service concerning official acts or omissions, and recommend appropriate remedies (section 196 (4) (f) (ii)); and
- advise national and provincial organs of state regarding personnel practices in the Public Service, including those relating to the recruitment, appointment, transfer, discharge and other aspects of the careers of employees in the Public Service (section 196 (4) (f) (iv)).

Section 11(a) of the *Public Service Commission Act*, 1997, provides that the PSC may make rules in respect of investigations, monitoring and evaluation of those matters contained in section 196(4) of the Constitution, 1996. This has, amongst others, led to the promulgation of the Rules for Dealing with the Grievances of Employees in the Public Service as promulgated in the Government Gazette No. 25209 dated 25 July 2003 (the Grievance

Rules, 2003). The PSC has also been monitoring and evaluating the performance management of Senior Managers in the Public Service and has to date produced five reports. These studies have shown that the PMDS has not been implemented effectively at Senior Management level.

1.3 Objectives of the PMDS Roundtable

The purpose of the PMDS Roundtable discussion was to facilitate engagement with stakeholders and to identify deficiencies in the management and implementation of the PMDS generally; to share information on better practices; and make recommendations that would inform national policy changes and the issuing of guidelines.

The specific objectives of the Roundtable discussions were outlined as follows:

- To empower departments with knowledge and skills to best deal with performance management related grievances.
- To improve the practical application of PMDS within departments.
- To enhance departmental competencies in dealing with specific scenarios identified by the PSC through incorporating the proposed recommendations made (by the PSC) into internal practices and procedures, thereby also contributing to more efficient management of the internal grievance process.
- To improve departmental performance management policies by clearly identifying the relevant roles of each member involved in the performance management process.
- To inform National Policy and Guideline review on the PMDS moving forward.
- To establish a basis to monitor and evaluate developments regarding the PMDS moving forward.

1.4 Methodology

The methodology adopted in preparing for the Roundtable discussion was as follows:

- Analysis of secondary data (i.e. grievance cases and other reports).
- Verification of findings and recommendations through interviewing selected investigators and a sample of employees whose grievance cases were dealt with by the PSC.
- Development of PSC brief report to serve as the basis for discussion at the Roundtable.
- Invitation of selected departments to participate and/or make presentations.
- Convening the Roundtable to discuss and deliberate on the overall findings and recommendations made by the PSC and inputs made by other departments.
- Drafting a consolidated report with findings and recommendations.

1.5 Scope of the PMDS Roundtable discussion

The Roundtable discussion was attended by representatives of Human Resource Management and Development (HRM&D) and Labour Relations components within selected

departments. The Departments that were identified by the PSC to attend the Roundtable discussion based on the number of grievances received by the PSC were the following –

- a) Office of the Presidency,
- b) Justice and Correctional Services,
- c) Water Affairs,
- d) Rural Development and Land Reform,
- e) Labour,
- f) Health (Western Cape Provincial Department), and
- g) National Prosecuting Authority.

Delegates from the following departments were selected to attend the Roundtable discussion because no grievances related to PMDS were submitted to the PSC –

- a) Science and Technology,
- b) Trade and Industry,
- c) Transport,
- d) Public Works,
- e) Environmental Affairs,
- f) Higher Education and Training, and
- g) International Relations and Corporation.

Other participants included PSC Commissioners, organised labour and officials from the PSC and Department of Public Service and Administration (DPSA).

1.6 Structure of the Report

The report is divided into 6 sections, inclusive of the introduction and background section. The remainder of the report is structured as follows:

- Section 2 presents the regulatory framework for PMDS.
- Section 3 provides a literature review and sets out practical factors that contribute to PMDS related grievances.
- Section 4 outlines issues and discussions per theme during the Roundtable.
- Section 5 sets out the recommendations that were made during the discussions.
- Section 6 is the conclusion of the report.

2. REGULATORY FRAMEWORK ON PMDS

2.1 Introduction

The regulatory framework for the PMDS is found in legislation, starting from the Constitution of the Republic of South Africa, 1996, which is the supreme law of the country; and other policy documents such as regulations and collective agreements entered into between the employer and organised labour.

2.2 Regulatory provisions governing Performance Management in the Public Service

2.2.1 The Constitution of the Republic of South Africa, 1996¹

The Constitution, 1996, provides that public administration must be development-oriented and accountable. Good human-resource management and career-development practices, to maximise human potential, must be cultivated.² Provincial governments are responsible for the recruitment, appointment, promotion, transfer and dismissal of members of the public service in their administrations within a framework of uniform norms and standards applying to the public service.³

2.2.2 Public Service Act (PSA), 1994, as amended⁴

Performance management related issues are dealt with in section 3 of the Public Service Act, 1994, as amended. According to this section, the Minister for the Public Service and Administration (MPSA) is responsible for establishing norms and standards relating to the conditions of service and other employment practices for employees. Employment practices include employee performance management systems and human resource practices. In particular, section 3(2) states that the MPSA shall give effect to sub-section (1) by making regulations, determinations and directives, and by performing any other acts provided for in this Act.

2.2.3 Public Service Regulations (PSR), 2001, as amended⁵

Chapter 1, Part VIII deals extensively with the management of performance in the public service below the level of senior management. It sets requirements that must be met in the development of performance management systems.

Chapter 4, Part III/B.3 and B.4 states that the MPSA may issue directives on performance management and development for members of the senior management service (SMS), and may issue separate directives on performance management and development for heads of department.

¹ The Constitution of the Republic of South Africa, 1996

² Section 195 (1) (c); (f) and (h) of the Constitution

³ Section 197 (4) of the Constitution, 1996

⁴ Public Service Act, 1994, as amended. Department of Public Service and Administration. Republic of South Africa.

⁵ Public Service Regulations, 2001, as amended. Department of Public Service and Administration. Republic of South Africa.

2.2.4 SMS Handbook, 2003, as amended⁶

Chapter 4 of the Handbook describes the process and requirements of performance management and development for members of the SMS. Chapter 4, Part III provides that the MPSA may issue directives on performance management for senior managers. In as far as national heads of department (HoDs) are concerned, this chapter should be applied in conjunction with the system for the evaluation of HoDs, issued by the Public Service Commission. The same applies to provincial administrations that have adopted the national HoD evaluation system for their provincial HoDs.

Departments must establish their own departmental PMDS policy and must integrate the provisions of Chapter 4 of the SMS Handbook in their departmental policy on performance management and development and ensure that there are linkages between the performance measures that apply to SMS members and non-management employees. At the provincial level, there is a need to co-ordinate the integration of this Chapter into provincial/departmental policy/policies. Such an integrated policy should illustrate how the SMS performance management system is linked to the departmental/provincial system for levels 1 to 12.

2.2.5 The HRM White Paper, 1997 (Government Gazette 2011 of 1997)⁷

The purpose of the White Paper was to provide a policy framework that would facilitate the development of human resource management practices, which support an effective and efficient Public Service that is geared for economic and social transformation.

According to the White Paper, the performance assessment process identifies strengths and weaknesses, and the interventions which are needed to deal with challenges, including the employee's future training needs and other developmental interventions such as career counseling, coaching and mentoring. Recognising and rewarding employees who perform exceptionally well, and whose skills are particularly valued as important. Where performance has not matched the requirements in the work plan, the assessment, both written and verbal, should be focused on identifying the reasons for this and on reaching mutual agreement on the steps to be taken to effect improvement. The steps may include interventions such as career counseling, mentoring, retraining, developmental opportunities and re-deployment. If the desired improvement cannot be effected, dismissal on grounds of inefficiency can be considered, as the last resort.

2.2.6 DPSA Framework on Employee Performance Management and Development System (EPMDS), April 2007 (amended and simplified version of the Integrated PMDS)

The EPMDS provides a standardized framework for employee performance on salary levels 1 to 12 in a department. While it shares similarities and must be linked with the SMS PMDS,

⁶ Senior Management Service Handbook, 2003. Department of Public Service and Administration. Republic of South Africa.

⁷ White Paper on Human Resource Management in the Public Service, Government Gazette No. 13594 of 31 December 1997, Department of Public Service and Administration. Republic of South Africa.

it is a distinct policy framework and system.

2.2.7 PSCBC Resolution 1 of 2003⁸

The Resolution provides a disciplinary procedure for the public service and outlines acts that are considered serious misconduct warranting formal handling. Amongst the list of misdemeanours, performing poorly or inadequately for reasons other than incapacity is cited as a transgression.

2.2.8 PSCBC Resolution 10 of 1999

Paragraph 4 of the resolution outlines a procedure in respect of poor performance. It provides clear steps in managing employees who perform poorly.

2.3 Summary

The regulatory framework provides clear guidance on how performance should be managed. Procedures and processes have been developed to address the performance management of SMS members and employees at lower levels.

⁸ Disciplinary Code and Procedures for the Public Service as contained in Resolution 1 of 2003

3. LITERATURE REVIEW AND PERSPECTIVES FROM PRACTICE

3.1 Understanding the PMDS

Managing performance in an organisation has always been regarded as the 'Achilles heel' of human resource management where employees frequently complain about the system or approaches used by managers to manage, measure and evaluate performance⁹. Performance management, as an area of human resource management, has been identified as one of the areas that need more attention. Within the realm of Strategic Human Resource Management (SHRM), performance management is regarded as a strategic function within departments. This implies that the role of HR cannot end with recruitment and selection of employees.

A holistic approach to performance management processes includes the following: performance planning, performance coaching and mentoring, performance measurement, performance feedback and documentation, and performance evaluation and appraisal. It is important to note that the performance management system should be informed by the goals and objectives of the Department.

Within the context of performance management, coaching and mentoring should be done as often as possible, usually in an informal way so that instant feedback could be provided. The benefit of this approach is that problems regarding performance are identified early and dealt with as and when they arise. If not dealt with promptly, it becomes difficult to effectively deal with problems that happened several months ago, as the cause of the problem or the problem itself might have been overtaken by events. It is also important to ensure that performance targets or objectives are realistic and achievable. Unachievable targets have a high propensity of demoralising staff as well as negatively affecting the efforts to achieve them. There is, therefore, a need for a well thought plan with clear targets because it is true that *'if you do not plan, you plan to fail.'*¹⁰

Performance management should be used as a strategic tool, not a compliance mechanism only. One of the main purposes of a performance management system is that it enables managers to evaluate and measure individual performance and productivity by, amongst others, clarifying the roles, responsibilities and expectations.¹¹ If roles, responsibilities and expectations are clarified, it becomes easier to manage employees' performance because everyone would be well informed about what is expected of them. This will also strengthen communication and feedback between managers and employees.

There are legal ramifications for the management of poor performance. This relate to instances where there is poor record keeping of performance records and outcomes¹². Departments may be exposed to grievances and disputes, and in some instances litigation, where confidentiality of performance management documents is breached.

⁹ Fraser, R (2007). "Developing an Effective Performance Management System" House Mark Social Housing Services Corporation June 2007

¹⁰ MacMillan, A, (2014.) "Importance of Performance Management Process and Best Practices to Optimise Monitoring

¹¹ Pulakos, E.D. (2004), "Performance Management: A Roadmap for Developing, implementing and Evaluating Performance Management Systems" Society for Human Resource Management Foundation

¹² Jaaskelainen, A and Laihonon, H. (2013), "Overcoming the specific performance measurement challenges of knowledge-intensive organisations" *International Journal of Productivity and Performance Management* Vol. 62 No. 4, pp. 350-363

There is a distinction between performance management and performance appraisal. Performance appraisals involve evaluating past performance based on agreed targets and standards whereas performance management is about managing performance as it happens to ensure that performance is in line with the set targets and standards.¹³ Employees would generally regard performance management and performance appraisal as a '*waste of time*' if they are unable to understand the basis of performance management and appraisal.

It is noted that, if managers concentrate on performance appraisal only, they automatically fail to identify and deal with performance problems in a timely manner. In this regard, performance appraisal does not provide an opportunity for the provision of constant feedback, and thereby make necessary adjustments on performance planning when the conditions dictate. Through proper performance management, managers are able to detect opportunities and threats as they arise. This is not the case with performance appraisals, which are usually conducted once or twice a year whereas performance management is conducted on a daily/weekly basis.

Managers regard performance appraisal or assessment as an unpleasant task and there is usually a degree of suspicion from the side of those being assessed. Consequently, the results of a performance assessment process, especially in instances where performance is not managed on a continuous basis, are frequently questioned and challenged. Performance management is therefore critical in ensuring the credibility of performance assessment processes and in reducing the number of grievances that are lodged within Departments and with the PSC directly by employees.

3.2 Contributing factors to high levels of grievances

The PSC engaged with selected departments, viz. Human Settlements, Agriculture, Forestry and Fisheries, Telecommunication and Postal Services, and Justice and Correctional Services to solicit information that will contribute towards preparations for the Roundtable discussion and the compilation of this report. It was realised that many of the processes that must be complied with and should be in place prior to the assessment process are not always in existence. As such, implementation of the PMDS often leads to high volumes of grievances. The following were identified as contributing factors for the high level of PMDS related grievances:

3.2.1 Poorly formulated performance agreements

Ineffective performance management of senior management has a ripple effect on the manner in which performance is managed at lower levels throughout the department. This is symptomatic of the following:

- Performance agreements place emphasis on activities and outputs rather than outcomes. This suggests that well-thought through key performance areas (KPAs), "smart" standards and outcomes are not addressed prior to the signing of performance agreements. There is a lack of sufficient performance standards

¹³ Rasey, M. (u.d), "What is Performance Appraisal?" <http://www.ehow.com> accessed on 26 June 2014

attached to KPA's and inconsistencies exist in the manner that performance criteria are formulated.

- Some of the performance agreements are finalised beyond the relevant financial year, thus raising concerns about their value as accountability mechanisms. Finalisation of performance agreement within stipulated timeframes is a requirement in accordance with the SMS Handbook and the PMDS framework. Performance agreements are supposed to translate departmental strategic plans into specific deliverables for employees and unless each employee enters into such an agreement with the employer, accountability for implementation becomes compromised and training interventions will not be adequately aligned to developmental needs identified through the performance management process. In addition, without signed performance agreements, individual and organizational developmental needs will not be clearly articulated.

3.2.2 Ineffective performance management

Employees from the sampled departments stated that performance is not managed on an ongoing basis and quarterly or bi-annual assessments do not take place as often as required. In instances where performance is reviewed, this is done haphazardly or takes place because of challenges that require urgent intervention.

Backlogs occur due to non-compliance with prescribed timeframes for concluding performance assessments.

The implementation or non-implementation of Personal Development Plans (PDPs) and their impact on the ability of employees to achieve set targets is not addressed.

3.2.3 Policy-related weaknesses

- Some departments do not have detailed performance management policies in place and in some instances departmental policies are not aligned to the public service PMDS framework.
- The PMDS is not implemented in a holistic manner, but in most instances utilised for compliance purposes only.
- Terms of reference for moderating committees are not clearly outlined in many departmental policies and there is no clarity on how disagreements on performance management and assessments should be dealt with.
- Departmental policies do not make separate provision for OSD performance assessments, hence the existing framework, which does not cater for the OSD framework is utilized and contested, specifically notch increments. Departments also reported that it is difficult to define levels or criteria for performance as performance standards are not being formulated separately. Departments with high numbers of OSD employees reported that they are particularly challenged with budgets, where

sometimes the allocations are not sufficient given that the OSD framework makes provision for employees to progress with one or two notches at a time. This means departments reach the 1.5% allocation for bonuses which was initially set prior to the introduction of the OSD framework.

- Performance management is sometimes viewed as a function of HRM instead of an integral part of responsibilities of all line function managers.
- Departmental policies do not outline consequences for non-adherence with the finalization of PAs and assessments.

3.2.4 Training and interpretation

Employees, managers and moderating committees are not adequately trained on the implementation of the PMDS. This contributes to varied understanding, interpretation and application. As a result, managers fail to make the system work. Supervisors and moderating committees seem to have different standards, hence moderating committees sometimes question agreed standards with supervisors.

Sometimes supervisors are subjective, hence they assess employee performance based on relationships and personality traits instead of performance against set standards and targets.

Employees approach the system with a 'culture of entitlement for merit awards', thus resulting in employees being mostly concerned with the final outcome of the assessment and whether it results in personal gain rather than whether positive progress was made towards achieving of organisational goals.

There is improper planning and implementation of the 1.5% budget allocation, which can be addressed through training on implementation of PMDS.

4. ISSUES AND DISCUSSIONS PER THEME DURING THE ROUNDTABLE DISCUSSION

4.1 Introduction

An understanding of the rationale behind the PMDS, as well as the proper implementation thereof would assist in improving both individual and organisational performance. In view of this, the theme for the PMDS Roundtable was “*Towards a Better Management of the PDMS in the Public Service*”. The discussions and presentations were centered around the following:

- PMDS in the Public Service: Origins and Rationale.
- An overview of issues identified during PSC consideration of PMDS grievances.
-
- A Practitioners view of PMDS in the Public Service.
- Challenges identified for the implementation of the PMDS.
- Recommendations.

4.2 PMDS in the Public Service: Origins and Rationale

4.2.1 Background and purpose of the PMDS

Mr Geeva Pillay, Chief Director: Human Resources Planning, Performance and Practices from the Department of Public Service and Administration (DPSA) made a presentation on the background and purpose of the PMDS. According to Mr Pillay, the PMDS was introduced as a result of the following developments:

- a) Following amendments to the *Public Service Act*, 1994 and the White Paper on Human Resource Management, 1997, the promulgation of the Public Service Regulations, 1999, paved the way for the “new public service management framework” which was implemented on 1 July 1999. In accordance with this framework, executive authorities of departments were granted extensive powers to deal with HR management of their departments. The HR powers related to appointment and other career incidents of public servants, including performance management.
- b) Performance management for senior managers commenced with a system of performance agreements when the PSCBC adopted Resolution 13 of 1998. This resolution also resulted in 2nd and 3rd notches no longer being applicable to senior managers.

PSCBC Resolution 13, read with DPSA Circular of May 1998, set the basis for Performance Agreements (PAs), assessment timeframes, annual salary increases and performance bonuses for senior managers who had signed performance agreements. This was supplemented by DPSA Circular 2 of May 1999 in terms of which each national department and provincial administration had to develop its own performance assessment system to

justify and implement performance bonuses and salary increases for senior managers. These own systems had to be in place by 31 March 2000. By 2000, in terms of the legal framework for performance management at the time, all departments had to develop and implement their own performance assessment systems for senior managers.

The vast majority of departments were unable to develop such systems for senior managers by March 2000. The result was that salary increases and cash bonuses could not be granted to senior managers. The Public Service Regulations were, therefore, amended in 2001 to provide for the MPSA to issue a directive on a PMDS for SMS members and for HoDs. Due to regulatory constraints, the same change could not be made for the PMDS for employees on salary levels 1 to 12, and Chapter 1 Part VIII of the PS Regulations still determines that each EA must determine and implement a PMDS for employees on levels 1 to 12 in her/his department.

In 2000, Cabinet requested the Public Service Commission to develop a framework for evaluating the performance of heads of department (HODs). The PSC conducted extensive international research and this resulted in the evaluation framework for HoDs in South Africa. Cabinet approved the framework and it was first introduced in the 2000/2001 financial year. It was initially compulsory only for National HoDs and those provincial administrations that adopted the system for their Provincial HoDs. At the end of 2002, Cabinet extended the Framework to include all Provincial HoDs and it is now mandatory for HoDs in all national and provincial departments. With effect from 1 April 2002, the Framework for the Evaluation of HoDs is implemented in line with the SMS PMDS.

Cabinet decided that from 1 April 2013 the oversight and facilitation of HoD PMDS be located in the Presidency. In February 2014, Cabinet resolved that the Minister for Public Service and Administration (MPSA) may approve a deviation from the evaluation process of HoDs for all outstanding cycles prior to and including 2012/2013. This deviation removed the role played by the PSC. Cabinet also approved that the PSC introduce measures to facilitate the evaluation of HoDs for the 2013/2014 cycle and that the PSC will continue to receive and process performance agreements of HoDs, pending the finalisation of the review of the PMDS for HoDs.

4.2.2 Historical overview of PMDS policy framework

As part of the initiative to establish the SMS dispensation, the DPSA in 1999 embarked on a review of performance management for senior managers. As departments were unable to develop their own performance assessment systems for senior managers by March 2000, the PSR, 2001 were amended in 2001 and the following provisions were included:

“B.3 The Minister may issue directives on performance management and development for members of the SMS.

B.4 The Minister may issue separate directives on performance management and development for heads of departments” (PSR 2001: Chapter 4 Part III/B.3 and B.4).

The SMS dispensation was introduced on 1 January 2001. The MPSA consequently issued the SMS PMDS as Chapter 4 of the SMS Handbook, a standardized and compulsory system with effect from 1 April 2002.

The departmental / provincial PMDS for levels 1 to 12 had to be in place by 1 April 2001. National and provincial departments faced major challenges to develop their own PMDS, or mostly contracted consultants. This also resulted in significant differences between departmental PMDS and their implementation e.g. with regard to incentives in the same province.

Provincial Administrations gradually decided in terms of section 125(2)(d) of the Constitution, 1996, to adopt uniform provincial PMDS for employees on levels 1 to 12 in all departments in a province. According to section 125(2)(d) of the Constitution, 1996:

“The Premier exercises the executive authority, together with the other members of the executive council, by developing and implementing provincial policy.”

By 2007 each of the nine provinces had a common provincial PMDS for departments in that particular provincial administration. Five of the nine provinces have adopted PMD systems relatively closely resembling the EPMDS.

The original IPMDS (2003)

In 2001 and 2003 the DPSA conducted surveys on progress with the implementation of the PMDS in departments and provinces. These surveys showed that many departments were not implementing a functional PMDS. In 2003 the DPSA developed the *voluntary* IPMDS to facilitate the implementation of the Incentive Policy Framework (Pay Progression and bonuses) (levels 1 to 12) in departments without a PMDS. The purpose of the IPMDS was to provide a framework for an employee performance management system (1 –12), for employees appointed in terms of the PSA, 1994. It soon proved to be too complicated for departments that had not yet succeeded in developing their own systems, and because the conditions for sound performance management were absent.

The simplified EPMDS (2005)

The DPSA revised the IPMDS, and in August 2005 issued a simplified version – the EPMDS – as a guide or a framework for departments without a functional PMDS for levels 1 to 12, and which they may choose to adopt and adapt. The EPMDS was simplified by making it more practical. It was linked to the SMS PMDS approach and terminology, and the DPSA PMDS for salary levels 1 – 12 was then based on the EPMDS framework. The scoring methodology was changed so that a “3” (fully effective) on the five-point rating scale translated to 100% (and not 60% as previously). This change was then also adopted for the SMS PMDS. Moderation was made compulsory, while the roles of moderating bodies and other “assessment” and quality assurance committees and an appeal panel were clarified.

Reviewing the PMDS

Since the introduction of the New Public Service Management Framework in 1999, many developments and events have resulted in a need to review employee performance management systems. Implementation of the PMDS in the Public Service has generally not lived up to expectations as a management tool to improve service delivery.

The changed context of performance management, including the shift from output to outcomes based performance management, and PAs and Delivery Agreements for executive authorities. Greater emphasis is on organisational performance and the development of the Management Performance Assessment Tool (MPAT) by the Department of Planning Monitoring and Evaluation (DPME) in the Presidency. The establishment of the DPME and Cabinet’s approval of the transfer of the function to oversee and facilitate HoD evaluation from the PSC to the Presidency assisted by the DPME justifies the needs to review the PMDS.

The introduction of Occupation Specific Dispensations led to questions around performance management and appraisal tools for those employees in OSDs. This issue has remained unresolved and requires further attention.

Cognizant of all these changes, the employers has made an undertaking in PSCBC Resolution 1 of 2012 to “*review the current PMDS and table its proposal to the PSCBC for consultation by 31 July 2013.*” The review is still in progress.

4.3 An overview of issues identified during PSC consideration of PMDS grievances

Ms Rashika Bosch, Director: Complaints, Investigative Research and Advisory Services, from the Office of the PSC made a presentation providing an overview of issues identified during PSC consideration of PMDS related grievances, and set out some examples of cases referred to the PSC with a few recommendations that were made by the PSC.

The PSC has observed that despite systems being put in place to manage performance, implementation of the PMDS remains a major cause of grievances in the public service. This is primarily because key aspects of performance management are neglected or not properly implemented. The OPSC highlighted areas of concern in order to encourage strategic

discussions and development of solutions to ensure the effective implementation of the PMDS and reduction of grievances.

The factors contributing towards PMDS challenges and grievances were organised into three categories as follows:

4.3.1 Challenges caused by the employer

Inconsistencies exist in the manner that performance standards are formulated by the employer. Investigations have revealed that the PMDS is sometimes utilised for compliance purposes only instead of setting standards, monitoring performance and performance improvement. Often performance standards are not specific and measurable and in some instances relationships are assessed instead of actual performance. Managers fail to take responsibility for performance management and view it as the function of HRM units. To this end, performance is not monitored and discussed with employees on a continuous basis.

The PSC has also observed that unclear terms of reference for moderation committees contribute towards the high volume of grievances. Due to poorly defined performance standards, departments struggle to implement performance management within the 1.5% budget allocation. This often results in the 'unilateral reduction' of employees scores by Moderation Committees in an attempt to stay within budget. In addition, departments experience difficulties in managing the performance assessment of employees in terms of the OSD framework.

If during the course of its investigation into a grievance relating to PMDS the PSC finds that one of the factors listed above, such as reduction of scores, is evident, the *grievance* of the employee is likely to be *substantiated*. This is in line with the PMDS since the assessment of employee performance should not be determined by budget availability or financial resources, but by weighing actual performance against set performance targets. Other instances where grievances are found to be substantiated relate to introduction of specific targets, which were not agreed when the performance agreements and workplans were signed.

4.3.2 Challenges caused by the employee

Employees contribute to their own assessment related grievances in that they provide insufficient motivation to warrant allocated scores. There is also a lack of cooperation with managers/supervisors when performance agreements and appraisals are supposed to be discussed and agreed. There appears to be a culture of entitlement amongst employees. This manifests itself in the opinion that if an employee receives merit awards consistently, the employee has an expectation that he or she will automatically qualify for merit awards in subsequent performance cycles. Some employees do not request guidance relating to their performance during the course of the year or refuse to cooperate with supervisors when weaknesses are identified and remedial mechanisms are proposed. There is also a lack of understanding of the PMDS policy among employees, especially the rating system, as illustrated by the perception that a score of 3 is not regarded as 'fully effective' by many employees.

Should the PSC find during an investigation into a grievance relating to PMDS that the grievance is as the result of challenges created by the employee, the grievance is likely to be *unsubstantiated*.

4.3.3 Challenges caused by both the employer and employee

There are instances where grievances are caused by both parties. For example, there is no evidence that the employee has provided adequate motivation to justify a higher score and the supervisor agrees with the employee without the supporting motivation. There are also instances where a grievance is caused by lack of cooperation by the employee, but the supervisor does not take disciplinary action. Another instance is where the supervisor and employee do not agree on the contents of the performance agreement or appraisal and the dispute remains unresolved for a long period until the employee lodges a grievance.

It has also been observed that performance reviews are not done quarterly or bi-annually, but only once a year. In this regard, both the employer and the employee are blameworthy as it would be expected from either the employer or the employee to make enquiries relating to the reviews. There is also evidence that in some instances both parties do not have a thorough understanding of the PMDS. The onus rests on both parties to seek training as performance management is the responsibility of both parties.

When dealing with such cases, the grievance is likely to be *partially substantiated*, depending on the context and supporting information provided.

4.3.4 Examples of recommendations made by the PSC in respect of identified problems

4.3.4.1 Non-compliance with PMDS Policy

Nature of grievance	Recommendations
In a case where an employee was not assessed for several years	The PSC recommends that the department should ensure that assessments take place annually and should review their performance assessment and improvement system. All staff including supervisors should be capacitated to assist them with the understanding and effective implementation of the performance assessment and improvement system. Such an intervention should allow all role players to have an understanding of their respective roles in implementing the PMDS.
Unilateral lowering of scores by supervisors	The PSC recommends that employees and supervisors should reach agreement on scores before presentation to the Moderation Committee; and where there is disagreement, the PMDS policy should provide guidance on further steps to be taken to resolve the dispute. Such steps can include mediation by a third party.
Moderating Committee / Department lowering the assessment scores of employees without providing reasons or	The PSC recommends that employees should be afforded the opportunity to present additional motivation in support of their scores, and/or be provided with reasons for the lowering of the scores.

because the 1.5% budget allocation would be exceeded	In respect of the 1.5% budgetary requirement, the PSC would recommend that the initial performance assessment results be upheld and alternative incentives should be considered.
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4.3.4.2 Responsibilities of managers and employees

The PSC has often recommended to departments that performance management must be improved through the joint efforts of managers, employees and support components. Managers should lead by example by creating a culture of positive performance management, which will contribute to the achievement of goals.

All employees should have adequate information on their job content through concise job descriptions and performance agreements. Regular monitoring of performance quality and feedback should be given. This can be done through brief and structured written feedback with discussions mainly reserved for those areas where major disagreements exist. Where performance weaknesses are identified, these should be addressed immediately by establishing the underlying causes and performance improvement plans should be implemented and monitored. In addition, managers must be realistic in their measurement of performance and not put moderating committees in a position where they must readjust ratings to actual levels of performance. By applying these processes and principles, management can ensure that when it is time for performance assessment, those that report to them would have been fully involved and cognisant of their actual performance.

The responsibility of employees and employers to ensure the effective implementation of performance management should be encouraged in an attempt to minimise or avoid grievances. Employees must take ownership and charge of their performance management, and if they are unsure of their performance objectives and standards, they should take the initiative to seek clarity from supervisors/managers. It is important for employees to be made aware of their obligations and to take care not to feel entitled to cash rewards. The development of a positive approach to the performance management system should be inculcated.

4.3.4.3 Role of support services

The PSC noted that Human Resource Management (HRM) and Labour Relations (LR) sections of departments are invaluable in ensuring the implementation of the PMDS. Implementation should encompass the prevention and addressing of disputes at an early stage. HRM and LR sections should ensure that a performance management framework is developed and implemented, that timeframes are communicated to all employees including managers and that all are familiar with the rationale, objectives, principles and procedures of the system. They should also ensure and facilitate the compiling of performance contracts and bi-annual assessments, monitor the outcome of reviews and implementation of PDPs. Their role is further to assist managers and employees in the compilation of measurable standards and indicators. With the promotion of labour peace as one of their core functions, LR sections should monitor and check whether employees are aware of their rights and obligations in terms of the performance management system, and identify possible risk

factors. It is crucial that they assist in the resolution of grievances relating to assessment with the inclusion of the HRM section and report grievance trends to their HODs.

4.4 A Practitioner's view on PMDS in the Public Service

4.4.1 Problem areas/challenges that lead to PMDS related grievances

Ms Cynthia Maponya, Director: Performance Management from the Department of Telecommunications and Postal Services made a presentation on the challenges related to performance management in the public service.

She indicated that the challenges related to PMDS implementation include the following:

- (a) Poor planning, which manifests itself in the lack of alignment between performance agreements and strategic plans of departments, lack of alignment between departmental commitment or targets and human plus financial resources, and the lack of alignment between organizational objectives and employee's personal development plans.
- (b) Poor implementation of the PMDS systems, including non-compliance with timeframes, failure to monitor and review performance on a regular basis, and lack of feedback to employees.
- (c) Inflated performance scores for employee by supervisors, mainly to avoid conflict, reduction of scores by moderating committees without consulting with the employee and supervisor, and ratings that are influenced by emotions, relationship and other arbitrary characteristics such as personality traits.
- (d) Non-standardization in the implementation of the *Bell Curve as illustrated by the 'unilateral' reduction of scores by moderating committees or decisions to reward employees who achieve extremely higher scores.*
- (e) Different interpretations of section 13 of the 2012 DPSA Directive which deals with accelerated pay progression.
- (f) Unclear terms of reference for Moderating Committees and establishment of few or many levels of moderation in different departments.

4.4.2 The positive effects of implementing the PMDS

Ms Lexi Manamela, Director: Performance Management from the Department of Agriculture, Forestry and Fisheries (DAFF) provided insights on best practices and how the department managed to keep performance related grievances low.

Ms Manamela indicated that one of the strategies employed by the DAFF was to inculcate a culture of performance management within the organization, where the PMDS serves as an instrument to manage individual and organizational performance, and not just a system the Department had to comply with. The PMDS is seen as a vehicle to increase organizational effectiveness by obtaining better performance from people, getting them to work well together, improving organizational processes such as the formulation and implementation of

strategy, the achievement of high quality and levels of customer service and facilitating change.

Whilst change is not an easy thing to go through, the burden or responsibility for coping with change effectively remains with management and the individual employee. She stated that in most instances “employees do not want to change, as they are comfortable with doing the same things”. Therefore, continuous advocacy and consistency is necessary. According to Ms Manamela the PMDS works if it is embraced as part of a culture of employee inclusion, involvement and participation, rather than the traditional command, control and compliance paradigm. The PMDS can contribute to high performance in environments that value and support achievement, growth and learning; which call for behaviours that focus on employee empowerment, learning and development.

Inculcating the PMDS culture within the DAFF provides the organization with the following benefits:

- (a) It helps to align work with the right people; delegates tasks according to people’s strengths and interests.
- (b) It ensures that employees have the skills and resources to get things done.
- (c) It provides staff with coaching, training, and opportunities for growth to improve their skills.
- (d) It promotes on-going and constructive feedback on employee performance and progress in light of expectations and goals.
- (e) It ensures timeous discussions and performance reviews.
- (f) Employees know what is expected of them and they are held accountable.
- (g) It rewards and recognizes hard work and results.
- (h) It addresses performance challenges promptly and corrects poor performance.
- (i) It creates strong team work and collaboration between employees and units.
- (j) It provides a mechanism to treat all staff fairly and consistently.

The system also contributes towards giving employees a sense of direction and something to aim for. It provides an improved preparation for the review process and provides employees with opportunities to discuss problems with their managers. The six-monthly review formalizes and pulls together everything else and creates room to re-align targets and resources where necessary.

4.5 Discussions and Identified Challenges

The recurring issue that was raised throughout the discussion was that the objective of the PMDS was lost to monetary gain, hence the system is manipulated for personal gain. Employees view performance management as a monetary award system and not as a performance development system, and this results in dissatisfaction when bonuses are not awarded. Implementation of the system of compliance purpose results in lack of alignment between organizational strategic objectives and employee performance agreements and personal development plans.

There was also a suggestion that performance agreements (PAs) should be amended to be outcomes based rather than activity and output based. There were also suggestions that the system must be reviewed such that individual performance can be linked with organizational performance. However, it was indicated that the Management of Performance Assessment Tool (MPAT) is not necessarily the most suitable tool to use when linking individual and organizational performance because it looks at selected key performance areas and Indicators at a higher level.

The following were also raised as challenges impacting on the implementation of the PMDS:

- There are no consequences for managers who abdicate their performance management responsibilities to HR units and for employees who do not comply with basic requirements such as entering into a performance agreement with the employer on or before a specific date.
- Departments/managers do not address poor performance in a consistent and persistent manner.
- Delays in the signing of performance agreements by HODs have an impact on the organization. However, it was agreed that this should have no effect on the operations of the rest of the department since the signed strategic plan and workplan are the key guiding documents for the rest of the organization.
- The disjuncture between policy imperatives and training as well as capacity has a major contribution towards some of the existing challenges.

PMDS Budget management

Given that focus has shifted more towards monetary rewards, even the budget allocated for acknowledging above satisfactory and satisfactory performance seem to be too little, and the practice to request executive authorities for approval to exceed the prescribed budget for cash bonuses and pay progression is no longer an exception, but has become a normal practice. If approval to exceed the allocated budget is not granted, then employees' scores are reduced in order to remain within the budget. Implementation of the OSD was raised as another factor contributing to the need for an increased budget to acknowledge satisfactory and above satisfactory performance.

5. RECOMMENDATIONS

The recommendations emanating from the session, which are aimed at fostering the improved implementation of the PMDS, were endorsed by the roundtable as follows:

5.1 Overall implementation of the system

- The focus of the PMDS should be to manage performance and improve organizational performance. Training should be provided to employees to cultivate an understanding that performance bonuses are not an entitlement. This should be coupled with training on change management to assist in changing the attitude of using the system for monetary gain.
- The PMDS should be utilized to measure productivity and motivate employees who excel. Employees' performance agreements should be aligned with departmental strategic and operational plans and programmes should be put in place to improve the performance of under-performers.
- Clear performance standards should be set when performance agreements are developed. If necessary, employees and supervisors should be trained on how to set performance standards and targets and where possible, previous and current performance, if of acceptable levels, should serve as the baseline upon which higher standards can be set.
- More attention should be given to the implementation of PDPs. Employee development should be based on identified needs for individual improvements which should be in line with the area on which the employee is serving. Care should be taken to develop the skills needed to reach the set goals for the organization and for developing employees.
- When poor performance is identified it should be dealt with without delay and in terms of the Incapacity Code for poor performance.
- Exemplary leadership is critical throughout the process, starting from planning, implementation, monitoring, assessments and reviews.
- Departments should engage with each other to share best practices and strategies to address challenges.
- All departments must ensure that managers and supervisors are trained on PMDS. This will result in departments applying the PMDS in a transparent, fair and equitable way. Departments must endeavor to empower employees to understand the purpose of the PMDS and link it to development initiatives.
- Departments to enforce disciplinary action for non-compliance, and the DPSA to develop a monitoring tool for both members of SMS and non SMS in this regard.

5.2 Role clarification and policy alignment

- There should be an alignment of departmental PMDS policies with the DPSA Framework and Strategic Plans of departments.
- Roles and responsibilities of different levels of evaluation (including moderation) should be clearly stipulated vis-à-vis the levels of supervisors/employee at the beginning of the performance cycle.
- Moderating Committees should comply with Chapter 4 of SMS Handbook when dealing with the performance assessment of SMS members.

5.3 HR responsibility

- HR section to form part of the strategic planning sessions so that they can provide solutions for some of the existing challenges and should engage with departments that have best practices.
- HR should be a strategic partner in the organization rather than an administrative support partner. They should ensure that PAs and workplans are aligned to the strategic plan of the organization, and performance assessment documents are aligned or talk to the PAs and workplans and personal development plans or performance improvement plans are implemented.

5.4 Line function management

- Line function managers must assume full responsibility for the implementation of the system instead of abdicating their responsibility to HR and/or moderating committees.
- Managers must be realistic in their measurement of performance and should not place moderating committees in the position where they must readjust ratings to actual levels of performance.

5.5 Budget allocations and reward mechanisms

- There should be a delinking of the PMDS from the Incentive Policy Framework. A comprehensive reward system is proposed and employees who display an improvement in their performance would be recognised through such reward system.
- Formal and informal rewards should be used to recognise the employees' performance. The non-monetary rewards may include a "Thank you note" or "Employee of the month" or "Employee of the year" or "Attending overseas conferences" or "Having lunch with the DG or Minister" or "Presenting a paper at management meeting, conferences or workshop", to name but a few. A policy in this regard should be developed.

- If Departments exceed their 1.5% budget allocation, alternative provisions should be made, e.g. reduction of percentage of the award across the board. This should be discussed and agreed with organised labour.

5.6 Review of the PMDS

The DPSA to revise Chapter 4 of SMS Handbook as well as PMDS for HoDs to ensure that there is a clear link between the PAs of HODs and work plan and the departmental strategic plan, annual performance plan (APP) and AG's report.

6. CONCLUSION

Employees in most instances are aggrieved about their scores and raise concerns for not receiving performance bonuses. However, an analysis of the employees' job descriptions would at times reveal that there was no clear measurable standard set for how the task under a particular key result area (KRA) is to be performed and how achievement of particular outputs would be measured. This provides a gap for employees to misuse the system by allocating maximum scores under different KRAs, which are ultimately lowered by either supervisors or Moderating Committees.

Any conversation on performance management and development must be based on an integrative and iterative approach, devoid of such an approach minor gaps are exploited by employees and resulting grievances. When dealing with assessment one must clearly delineate processes of non-compliance to curb grievances or poor performance. One can talk corrective, development and progressive interventions but when it is non-compliance, it is proper to talk about punitive measures.

Although much emphasis has been placed on the responsibilities of various role-players in the implementation of the PMDS, prominence should also be placed on the improvement of individual and institutional performance. Departments should not implement the system for compliance purposes only as this will result in the continuation of an influx of PMDS related grievances. All role-players should therefore be responsible to ensure the effective implementation of the system.

The DPSA has the responsibility to lead and other stakeholders such as organised labour must play a constructive role in ensuring that the PMDS contributes towards the achievement of government's objectives of delivering quality service in a manner that is effective and efficient.