


PERFORMANCE EVALUATION POLICY

Policy Owner:	Bottle Buhle Brands (Pty) Ltd		
Effective Date:			
Version:	Version 1		
Authorised by:	CEO		25/10/2023
		Signature	Date
Note:	Bottle Buhle Brands (Pty) Ltd (hereinafter referred to as Bottle Buhle Brands) reserves the right to amend the contents of this policy as and when required. The policy currently in effect will apply to all employees regardless of the policy that applied at the time of employment.		

1. Scope/objective of the policy

- 1.1 Performance appraisal is the process used to evaluate the performance of employees within the organisation. It is the process used to determine the standard of an employee's performance in relation to the duties, tasks and responsibilities associated with their position.
- 1.2 Bottle Buhle Brands believes that performance appraisal is an important component of supporting staff in their work, ensuring accountability for work performed and identifying the professional development needs of staff.
- 1.3 Bottle Buhle Brands is committed to ensuring that all staff:
 - have a clear understanding of the work they are required to complete;
 - are clear about the organisation's expectations and requirements of their work performance;
 - are provided with adequate direction and support in their work;
 - perform their role to the best of their abilities; and
 - are accountable for the quality and outcomes of their work.
- 1.4 To meet these aims, all staff in Bottle Buhle Brands will take part in a formal, structured review process.

2. Definitions

- 2.1 **“Competencies”** means observable and measurable behaviour, knowledge, skills, abilities, and other characteristics that contribute to individual success on the job and in the organisation.
- 2.2 **“Goal”** means a measurable outcome or result that needs to be achieved. Goals should include the results of the behaviour being measured, the measurement criteria, and the level of performance expected.
- 2.3 **“Individual development plan”** means an action plan that identifies goals, projects, and activities which contribute to the Employee’s continual development within the organisation.

3. Legal principles

The following legislation is applicable to this policy:

- 3.1 Employment Equity Act 1998;
- 3.2 Code of Good Practice on Integration of Employment Equity into Human Resources Policies and Procedures;
- 3.3 Skills Development Act 1998; and
- 3.4 Skills Development Levies Act 1999, updated in 2005.

4. Policy

- 4.1 Individual performance appraisal is thus based on the following:
 - 4.1.1 Execution of tasks/duties associated with the position according to the job description.
 - 4.1.2 Execution of tasks/duties associated with the position according to Bottle Buhle Brands’ core values for good performance as listed above.
- 4.3 Bottle Buhle Brands makes use of an informal performance appraisal system, these appraisals are/will be:
 - 4.3.1 Short and to the point.
 - 4.3.2 Relaxed and open.
 - 4.3.3 Discussion based.
 - 4.3.4 Provide clear feedback on the employee’s performance to date.

- 4.3.5 Identify barriers to effective performance.
- 4.3.6 Provide opportunities for the Manager to act as a mentor and/or coach.
- 4.3.7 Lead to the development of training needs analysis/skills development plan.

5. Procedure

5.1 Performance review:

- 5.1.1 The performance review will be conducted by the staff member's direct manager/supervisor, and it is their responsibility to schedule the review at a mutually convenient time.
- 5.1.2 Employees will meet with their manager/supervisor for a formal performance appraisal session.
- 5.1.3 Formal review sessions will be held in a location that provides privacy.
- 5.1.4 Appraisal sessions will be structured to enable the Employee and manager/supervisor to:
 - discuss the desired performance outcomes.
 - review the Employee's progress against work plans or agreed tasks.
 - discuss any issues of concern or impediments experienced in performing duties.
 - discuss strategies or actions for achieving desired outcomes.
 - set priorities for the coming period.
 - identify any professional development/training needs.
 - discuss any support/assistance that the Employee requires from the Employer to reach the required outcomes.

5.2 Timing

- 5.2.1 The first performance review will occur within the first three (3) months after appointment, then every six or 12 months thereafter. More frequent reviews may be held as agreed between the staff member and the manager/supervisor.

5.3 Review process

5.3.1 The staff member completes a self-appraisal. A staff member may choose to include a peer review component in their assessment, and, in this instance, the Line Manager arranges for other assessment input to be gathered.

5.3.2 The completed self-appraisal (and, if applicable, peer review input) are made available to the Line Manager (and, if applicable, the employee) at least one to three days prior to the review meeting.

5.3.3 The Line Manager prepares their own assessment comments for the review meeting.

5.3.4 The Employee and the Line Manager meet to discuss the findings, performance, future goals, and development needs. The discussion includes opportunities for both parties to clarify and explain their comments.

5.3.5 The outcome is documented and agreed actions included into relevant work plans.

5.5 Review discussion - the manager/supervisor will address the following in the discussion with the Employee:

5.5.1. Review work goals: Review the statement of duties and any other documentation about the role, ensuring that the position description reflects the current duties of the role.

5.5.2. Review performance: Review progress against documented work goals. Review assessment information provided by the Employee, the Line Manager, and any others, identifying areas of strength and achievement and areas for improvement. Review impediments to work performance and factors impacting on the person's job performance and satisfaction.

5.5.3. Identify action:

- Identify any training and development needs, focussing on areas that could be improved or where outstanding performance could enable the employee to play a mentoring and support role with other staff.
- Identify any resourcing or support required.
- Identify any other action.

5.5.4. Agree on goals for the next twelve months

- Review the organisation's strategic plans and the team's objectives or service plan.
- Establish work goals which are closely related to the job role and the outcomes required in the objectives.
- Agree how the goals will be measured and reported.
- Identify any training and development needs necessary for the employee to achieve the goals.
- Where performance is satisfactory or above satisfactory, identify any incentives, rewards, or recognition appropriate to acknowledge the achievement of goals.

5.6 Documentation

5.6.1 A record of the main discussion points and agreed actions is written at the meeting or immediately thereafter using the Performance Appraisal Feedback Form by the Line Manager.

5.6.2 The record of discussion is reviewed by both the staff member and Line Manager, corrections or changes made, and a final version signed by both parties.

5.6.3 Documentation of the review should be completed within 2 weeks of the review meeting.

5.6.4 The record is kept on a confidential personnel file with access limited to the staff member, the Line Manager, unless both agree to another person having access.

5.6.5 The record is used as reference for the implementation of the agreed actions and for consideration of progress at the next review.

6. Managing poor performance

If, as the result of a performance review, performance problems are identified, the manager/supervisor will implement the following steps:

6.1. Follow up review meeting: A second performance review meeting will be held at an agreed date to:

- Identify and agree on reasons for non-achievement of goals.

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- Discuss a plan of action to address the reasons.
- Identify any further training and development needs necessary for the staff member to achieve the goals.
- Put in place a monthly review to provide ongoing support to the staff member.
- Where performance does still not meet expectations, initiate formal counselling.

6.2. Counselling and/or disciplinary action may be instituted according to Bottle Buhle Brands' disciplinary policy.

7. Related policies and procedures

7.1 Disciplinary policy.

7.2 Training & development policy.

8. Related documents

8.1 Performance Appraisal Feedback Form