

The minimum requirements for appointment are:

i. Educational qualifications

Office-based educators must have at least a recognised three (3) year qualification (REQV 13) which must include appropriate training as a teacher in order to qualify for appointment as an educator.

The educator's actual experience as well as appropriate experience is taken into account for purposes of appointment in post levels 2 and higher.

ii. Experience

The minimum requirements in respect of experience for appointment as an office-based educator are as follows:

| Post Level | Designation | Minimum experience required (years) |
|------------|-----------------------------------|-------------------------------------|
| 2 | Senior Education Specialist | 3 |
| 3 | First Education Specialist | 5 |
| 4 | Deputy Chief Education Specialist | 7 |
| 5 | Chief Education Specialist | 8 |

(2) (a) What performance management system is utilised to track the performance of office-based educators, (b) what are the (i) details of the system, including how it is administered, and (ii) key performance areas that are measured and (c) what are the consequences of (i) exceptional performance and (ii) inadequate performance in terms of this performance management system;

(2)(a) The performance management system that is utilised to track the performance of office-based educators is the Performance Management and Development Scheme (PMDS) for office-based educators. The PMDS is implemented in terms of the ELRC Collective Agreement No. 3 of 2002. The purpose of the PMDS is to evaluate performance, to identify an individual's developmental needs and to develop plans to address those needs.

(b)(i) The PMDS for office-based educators operates on an annual cycle from 1 April to 31 March and is directly linked with the corporate planning cycle. The administration of PMDS involves the following key processes:

- Development of work plans;
- Discussion and agreement on work plan and capabilities between office based educator and his/her immediate supervisor;
- Ongoing review and feedback;
- Quarterly reviews;
- Annual Performance Appraisal;
- Personal Development Plan; and
- Upward feedback.

Moderation occurs at 3 different levels also forms an integral part of the PMDS process as follows:

- The first level moderation ensures that the work plan accurately and fairly reflects the requirements of the job;
- The second level moderation occurs when the performance is being rated; and
- The third level moderation occurs when the Central Moderation Committee in the province reviews the spread of rating across the Department.

(b)(ii) A staff member (i.e. office-based educators) and his or her immediate supervisor develop a Work Plan which forms the basis for performance appraisal. The work plan describes what the staff member is going to achieve and consists of:

- Key Objectives;
- Action Strategies; and
- Performance Indicators.

Staff members are also assessed against their capabilities for their posts. The Supervisor and staff member must have a thorough discussion of each of the Capabilities at the beginning of the assessment period. This discussion should relate the Capabilities to the realities of the job and discussion should centre on real -life examples of what the Capabilities measure.

Capabilities are important in terms of developing the kind of positive, effective work culture embodied in the Department's Values. The Capabilities are:

| Capability Number | Description |
|-------------------|----------------------------------|
| 1 | Job performance |
| 2 | Job Knowledge and Application |
| 3 | Interpersonal Relations |
| 4 | Communication |
| 5 | Client Service |
| 6 | Equity |
| 7 | Operational Leadership Abilities |
| 8 | Visionary leadership abilities |
| 9 | Conceptual and Analytical Skills |

The capabilities need to reflect the staff members' levels and responsibilities. As a general rule:

- Capabilities 1-5 apply to all staff; and
- Capabilities 1-9 apply to all supervisors up to Level 5.

Performance against each key objective in the work plan as well as the capabilities is assessed on a 5 point rating scale as follows:

| Rating | Description |
|--------|--------------|
| 5 | Outstanding |
| 4 | Very Good |
| 3 | Good |
| 2 | Acceptable |
| 1 | Unacceptable |

- (c)(i) Office-based educators are rewarded for exceptional performance by receiving pay progression and other measures (e.g. merit awards) that require a certain level of performance.
- (ii) If the performance of an office-based educator is unacceptable, the supervisor provides feedback and counseling on an ongoing basis.

When underperformance persists and the office-based educator is not performing according to the required standards, the supervisor and the educator jointly identify his/her developmental needs and agree on a Performance Improvement Plan. The educator, through the PMDS process subsequently receives training to enhance performance.

3. **Whether a database of office-based educators and their profiles is maintained; if not, (a) why not and (b) when will such a database be (i) established and (ii) functional; if so, (aa) how is the database maintained and (bb) for what purposes is the database used?**

All the data that is required on office-based educators in terms of human resource management and administration, including their profiles, can be obtained from the PERSAL system. Provincial Education Departments (PED) do not maintain a separate database for office-based educators.

- (aa) Details of office-based educators are captured and maintained on PERSAL.
- (bb) Information on PERSAL is primarily used for human resource management and administration. Information on human resource development needs as identified through the PMDS process is maintained in the human resource sections at PED Head Offices or districts where such functions are delegated to districts.