



PROJECT NUMBER: 23253 - APPOINTMENT OF A SERVICE PROVIDER FOR PROVISION OF WEB-BASED PERFORMANCE MANAGEMENT SYSTEM FOR ORGANIZATIONAL AND INDIVIDUAL FOR A PERIOD OF 36 (THIRTY – SIX) MONTHS FOR NKANGALA DISTRICT MUNICIPALITY

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SCOPE OF WORK

The scope of work entails the following:

A. ORGANIZATIONAL PERFORMANCE MANAGEMENT SYSTEM (OPMS)

Functional Scope

The OPMS must enable the municipality to effectively plan, monitor, evaluate, audit, and report on organizational performance as per legislative and regulatory requirements.

The service provider will be responsible for:

1. System Implementation & Configuration

- Deployment of a **web-based, real-time, automated performance management system** to manage the monitoring, evaluation and reporting of the **IDP** and **SDBIP**.
- System configuration in line with the **Municipal Systems Act, Municipal Planning and Performance Management Regulations**, and **National Treasury Circulars (MFMA)**.
- Integration with existing institutional systems such as Budgeting, Financial Management, Risk Management, and HR Systems.
- Align OPMS and IPMS performance reporting.

2. Performance Monitoring & Reporting

- Online capturing of performance objectives, KPA, KPIs and JSCs, and project data linked to IDP outcomes.
- Automated generation of **quarterly, mid-year, and annual performance reports**.
- Ability to extract reports in multiple formats (Excel, PDF, Word, etc.).
- Dashboard visualization and colour-coded scoring for progress tracking.

3. Data Management & Audit Functionality



- Uploading of supporting evidence (POEs) without data limitations.
- Detailed **audit logs** and activity trails for all users.
- Functionality for internal auditors and performance units to review, comment and verify data.
- Automated backup of data on a daily basis.
- Data ownership retained by the municipality.

4. Evaluation & Review

- Facilitate the management of **quarterly, mid-year and annual organizational performance evaluations**.
- Allow for **electronic review and commentary** by supervisors, performance units, internal auditors and management committees.

5. System Integration & Linkages

- Integration with **Budget and Expenditure** data, **Risk Management**, and **Individual Performance** data for comprehensive reporting.
- File-to-file interfacing for data extraction and integration into external reporting systems.
- Align OPMS and IPMS performance reporting.

6. User Access & Security

- Secure access management with role-based permissions.
- Compliance with data protection and cybersecurity standards.

7. Training & Support

- Training of Performance Management Teams, Line Managers, Internal Auditors and End Users.
- Ongoing technical support, maintenance, and periodic system upgrades.

8. Additional Functional Requirements

- Automated email alerts and reminders for reporting deadlines.
- Opening and closing of reporting periods (quarterly, mid-year, annual).
- Periodic system reliability and compliance audits by the service provider.
- Continuous improvement and customization to meet evolving municipal performance requirements.



B. INDIVIDUAL PERFORMANCE MANAGEMENT SYSTEM (IPMS)

Functional Scope

The IPMS must facilitate the implementation of a fair, transparent, and automated individual performance management process aligned with the **Municipal Staff Regulations** and **Performance Management Policy Framework** of the Municipality.

The service provider will be responsible for:

1. System Implementation & Configuration

- Implementation of an **automated individual performance management system** for all permanent staff and that of its subsidiary company (excluding interns and learners).
- Alignment with OPMS to ensure that individual KPIs are cascaded from organizational objectives.

2. Performance Agreements & Assessments

- Upload and management of all **signed performance agreements** by 31 August of each financial year.
- Facilitate compilation of **individual performance scorecards** at all staff levels.
- Online capturing and evaluation of performance data by supervisors and employees.
- Automated calculation and consolidation of assessment results.
- Extraction of detailed and summary assessment reports.
- Allow for all level assessments and moderations to be done on the system.

3. Performance Review & Feedback

- Functionality for supervisors, employees, the Performance Management Unit, and Internal Auditors to review, comment and verify performance assessments.
- Secure viewing of results and feedback by employees and supervisors.
- Alignment with the **Municipal Staff Regulations** (Chapter 4) to ensure transparent evaluation and developmental feedback.

4. Training & Support

- Training of all users on IPMS functionalities and municipal performance regulations.
- Ongoing system support, maintenance, and upgrades.

5. Audit, Security & Compliance

- Daily data backups and full audit trails.
- Compliance with the **Protection of Personal Information Act (POPIA)**.
- Data remains the exclusive property of the Municipality.



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NB: ALL EMPLOYEES MUST HAVE ACCESS TO IPMS AND ACCOUNT MUST BE CREATED AS PER THEIR FUNTION INCLUDING NDM SUBSIDIARY COMPANY.

C. SYSTEM INTEGRATION AND LEGISLATIVE ALIGNMENT

Legislative and Regulatory Alignment

Both the OPMS and IPMS must be compliant with:

- The **Municipal Systems Act, 2000 (Act 32 of 2000)**
- The **Municipal Finance Management Act, 2003 (MFMA)**
- The **Municipal Planning and Performance Management Regulations, 2001**
- The **Municipal Staff Regulations, 2021**
- The **Protection of Personal Information Act, 2013 (POPIA)**
- The **National Treasury Framework for Managing Programme Performance Information (FMPPI).**

D. SYSTEM MAINTENANCE AND SUPPORT

Service Provider Responsibilities

- Daily data backups and recovery procedures.
- 24/7 technical support with defined Service Level Agreement (SLA).
- Quarterly system updates and performance audits.
- Periodic security reviews and compliance assessments.
- User support desk for troubleshooting and feedback.
- Appoint full-time staff to be stationed at NDM office during the entire period.

E. OWNERSHIP AND DATA PROTECTION

Data Ownership

All system data, configurations, and reports remain the property of the Municipality and may **not** be shared with any third party without written consent