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Terms of Reference for the Development of a Performance Management System and Balanced Scorecard

1. Introduction

CCARDESA has recently revised its long-term strategy and mid-term operational plans and approved a new organogram, increasing the total positions from 23 to 34. The positions have been graded and evaluated following the development of job descriptions and consequently approval of the job grading and evaluation policy. To ensure the successful execution of the strategic plan, there is a need to cascade the strategy and develop a robust Performance Management System (PMS). This PMS will also necessitate a revision of the existing performance management policy. Additionally, a Balanced Scorecard (BSC) approach will be developed to align organizational performance with strategic objectives, ensuring a structured and measurable execution framework.

2. Objectives

The primary objective of this assignment is to develop and implement a comprehensive Performance Management System that aligns with the newly revised strategic direction, operational plans, and organizational structure. Specifically, the assignment will:

- Establish a performance management framework that cascades strategic objectives across all levels of the organization.

Member States:

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Comoros	Madagascar	Namibia	Zambia
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All correspondence should be addressed to the Executive Director

- Develop key performance indicators (KPIs) for all positions starting with the Executive Director, followed by Directors, Coordinators, Managers, Officers, Assistant Officers, and support staff (e.g., secretarial and clerical positions).
- Develop and implement a Balanced Scorecard framework that integrates financial, stakeholder, internal processes, and learning & growth perspectives.
- Revise the current performance management policy to reflect the new strategy and organogram.
- Provide a roadmap for the implementation and sustainability of the PMS and BSC.

3. Scope of Work

The consultant or team undertaking this assignment will be required to:

- Review the revised long-term strategy and mid-term operational plans.
- Analyze the new organogram and job descriptions to ensure alignment with the performance management framework.
- Undertake a current situation assessment that will be used as a basis for the development of the Human Resources Strategy;
- Develop a suitable Human Resources/ Talent Strategy and Scorecard that will enhance CCARDESA's ability to meet its mandate and strategic objectives;
- Develop an implementation plan with clearly defined objectives, measures, targets, and deadlines.
- Develop a comprehensive Human Resources/ Talent Strategy and other suitable strategies to enhance attraction and retention of staff.
- Develop a cascading performance management framework that translates strategic goals into departmental and individual performance indicators.
- Define Key Performance Indicators (KPIs) and performance appraisal criteria for all positions within the organization.
- Development of a system which reward performance and is able to identify areas of improvement and training/coaching. (Designing the performance reward incentive scheme its rules and calculation formula. It should also be able to cater for either a group incentive scheme or an individual scheme)
- Develop a structured performance review and feedback process.

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- Design and implement a Balanced Scorecard framework to measure performance across strategic objectives.
- Propose tools and templates for performance tracking and evaluation.
- Revise the performance management policy to align with the new framework.
- Conduct training sessions to orient employees on the new PMS and BSC the management team, appraisees and performance validation committee.
- Provide training materials and equipment for the whole programme.
- Provide recommendations for continuous monitoring and improvement of the PMS and BSC.

4. Deliverables

The key deliverables for this assignment include:

1. A detailed work plan outlining the methodology, timelines, and key milestones.
2. A performance management framework document.
3. A set of defined Key Performance Indicators (KPIs) for all job levels, starting with and prioritizing that of the Executive Director and respective draft performance contracts
4. A Balanced Scorecard framework tailored to the organization.
5. A revised performance management policy.
6. Templates and tools for performance monitoring and evaluation.
7. Training and capacity-building sessions for employees.
8. A final report with recommendations for implementation and sustainability.
9. CCARDESA Human Resources strategy

5. Methodology

The consultant will use a participatory approach, ensuring input from key stakeholders, including management and employees, through interviews, workshops,

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and focus group discussions. Benchmarking against industry best practices will also be conducted to ensure relevance and effectiveness.

6. Duration and Timeline The assignment is expected to take approximately 22 days from the date of contract signing. A detailed timeline will be agreed upon at the inception phase.

7. Required Expertise and Qualifications

The consultant or team should possess the following:

- Extensive experience in developing and implementing performance management systems and Balanced Scorecards.
- Expertise in human resource management and organizational development.
- Knowledge of strategic planning, KPI development, and Balanced Scorecard methodology.
- Strong facilitation and training skills.
- Familiarity with performance management tools and software.

8. Reporting and Accountability

The consultant will report to the Executive Director and will work closely with relevant heads departments/units throughout the assignment.

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