

**Performance Agreement for the Chief Financial Officer for the period
01 July 2022 – 30 June 2023.**

RUSTENBURG LOCAL MUNICIPALITY



PERFORMANCE AGREEMENT

MADE AND ENTERED INTO BY AND BETWEEN:

**THE RUSTENBURG LOCAL MUNICIPALITY
REPRESENTED BY**

Mr Sello Victor Makona

in his capacity as the **Municipal Manager** of
Rustenburg Local Municipality
(the "Employer")

and

Mr Gaadise Godfrey Ditsele

in his capacity as the
Chief Financial Officer
of **Rustenburg Local Municipality**
(the "Employee")

(Collectively referred to as the "Parties")

FOR THE PERIOD 01 JULY 2022 – 30 JUNE 2023

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**Performance Agreement for the Chief Financial Officer for the period 01 July 2022
– 30 June 2023**

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Annexure: A Performance Plan

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**Performance Agreement for the Chief Financial Officer for the period 01 July 2022
– 30 June 2023**

PERFORMANCE AGREEMENT

ENTERED INTO BY AND BETWEEN:

The Rustenburg local Municipality represented by **Mr Sello Victor Makona** in his capacity as Municipal Manager (hereinafter referred to as the Employer or Supervisor)

and

Mr Gaadise Godfrey Ditsele in his capacity as the Chief Financial Officer (hereinafter referred to as the Employee).

WHEREBY IT IS AGREED AS FOLLOWS:

1. INTRODUCTION

- 1.1. The Employer has entered into a contract of employment with the Employee in terms of section 57 (1) (a) of the Local Government: Municipal Systems Act 32 of 2000 (“the Systems Act”) for a period ending **01 July 2022 to 30 June 2023**. The Employer and the Employee are hereinafter referred to as “the Parties”.
- 1.2. Section 57 (1) (b) of the Systems Act, read with the Contract of Employment concluded between the parties, requires the parties to conclude an annual Performance Agreement.
- 1.3. The parties wish to ensure that they are clear about the goals to be achieved and secure the commitment of the Employee to a set of outcomes that will secure local government policy goals.
- 1.4. The parties wish to ensure that there is compliance with Sections 57(4A) and 57(5) of the Systems Act.
- 1.5. In the agreement the following terms will have the meaning ascribed thereto:
 - a) **this agreement**- means the performance agreement between the Employer and Employee and the Annexures thereto;
 - b) **the Municipal Manager**- means the Municipal Manager of the Rustenburg Local Municipality appointed in terms Section 54A of the Local Government Municipal Systems Act;
 - c) **the Employee**- means the manager appointed in terms of Section 57 of the Systems Act;
 - d) **the Employer**- means Rustenburg Local Municipality; and
 - e) **the Parties**- means the Employer and Employee.

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2. PURPOSE OF THIS AGREEMENT

The purpose of this Agreement is to –

- 2.1. comply with the provisions of Section 57(1) (b), (4A) and (5) of the Systems Act as well as the Contract of Employment entered into between the parties;
- 2.2. specify objectives and targets defined and agreed with the Employee and to communicate to the Employee the Employer's expectations of the Employee's performance and accountabilities in alignment with the Integrated Development Plan, Service Delivery Budget and Implementation Plan (SDBIP) and the budget of the municipality.
- 2.3. specify accountabilities as set out in the Performance Plan (Annexure A);
- 2.4. monitor and measure performance against set targeted outputs;
- 2.5. use the Performance Agreement and Performance Plan as the basis for assessing the suitability of the Employee for employment and/or to assess whether the Employee has met the performance expectations applicable to his job;
- 2.6. appropriately reward the Employee in accordance with the Employer's performance management policy in the event of outstanding performance; and
- 2.7. give effect to the Employer's commitment to a performance-orientated relationship with the Employee in attaining equitable and improved service delivery.

3. COMMENCEMENT AND DURATION

- 3.1. Notwithstanding the date of signature hereto, this Amended Agreement will commence on the **01 July 2022 to 31 June 2023** where after a new Performance Agreement, Performance Plan and Personal Development Plan shall be concluded between the parties for the next financial year or any portion thereof.
- 3.2. This Agreement will terminate on the termination of the Employee's contract of employment for any reason.
- 3.3. If at any stage during the validity of this Agreement the work environment alters to the extent that the contents of this Agreement are no longer appropriate, the contents must by mutual agreement between the parties, immediately be revised.

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4. PERFORMANCE OBJECTIVES

- 4.1. The Performance Plan (Annexure A) sets out-
- a) the performance objectives and targets that must be met by the Employee; and
 - b) the time frames within which those performance objectives and targets must be met.
- 4.2. The performance objectives and targets reflected in **Annexure A** are set by the Employer in consultation with the Employee and based on the Integrated Development Plan, Budget and Service Delivery, Budget and Implementation Plan of the Employer, and shall include key objectives; key performance indicators; target dates and weightings.
- 4.3. The key objectives describe the main tasks that need to be done. The key performance indicators provide the details of the evidence that must be provided to show that a key objective has been achieved. The target dates describe the timeframe in which the work must be achieved. The weightings show the relative importance of the key objectives to each other.
- 4.4. The Employee's performance will in addition, be measured in terms of contributions to the goals and strategies set out in the Employer's Integrated Development Plan.

5. PERFORMANCE MANAGEMENT SYSTEM

- 5.1. The Employee agrees to participate in the performance management system that the Employer adopts or introduces for the municipality.
- 5.2. The Employee accepts that the purpose of the performance management system will be to provide a comprehensive system with specific performance standards to assist the Employer, management and municipal staff to perform to the standards required.
- 5.3. The Employer will consult the Employee about the specific performance standards that will be included in the performance management system as applicable to the Employee.
- 5.4. The employee undertakes to actively focus towards the promotion and implementation of the Key Performance Areas (KPAs) (including special projects relevant to the employee's responsibilities) within the local government framework.
- 5.5. The criteria upon which the performance of the employee must be assessed consist of two components, both of which must be contained in the performance agreement. The employee must be assessed against both components, with a weighting of 80:20 allocated to the Key Performance Areas (KPAs) and the Core Competency Requirements (CCRs), respectively.

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Each area of assessment will be weighted and will contribute a specific part to the total score. KPAs covering the main areas of work will account for 80% and CCRs will account for 20% of the final assessment.

- 5.6. The employee's assessment will be based on his or her performance in terms of the outputs/outcomes (performance indicators) identified as per the performance plan which are linked to the KPA's, which constitute 80% of the overall assessment result as per the weightings agreed to between the employer and employee.

KEY PERFORMANCE AREAS	WEIGHTING
Basic Service Delivery	0%
Local Economic Development	0%
Municipal Financial Viability	72%
Municipal Institutional Development and Transformation	28%
Good Governance and Public Participation	0%
Spatial Rationale	0%
Total	100%

- 5.7. In the case of managers directly accountable to the municipal manager, key performance areas related to the functional area of the relevant manager must be subject to negotiation between the municipal manager and the relevant manager.

6. COMPETENCY FRAMEWORK

- 6.1. A person appointed as a senior manager must have the competencies as set out in this framework. Focus must also be placed on the following key factors:
- a) Critical leading competencies that drive the strategic intent and direction of local government;
 - b) Core competencies which senior managers are expected to possess, and which drive the execution of the leading competencies; and
 - c) The eight Batho Pele principles.
- 6.2. The competency framework consists of **six leading competencies** which comprise of twenty (20) driving competencies that communicate what is expected for effective performance in local government.
- 6.3. The competency framework further involves **six core competencies** that act as drivers to ensure that the leading competencies are executed at an optimal level.

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6.4. Competency Framework Structure

6.4.1. The competencies that appear in the competency framework are detailed below:

CRITICAL LEADING COMPETENCIES		
Six (6) Leading Competencies	Twenty (20) driving competencies	Weight
Strategic Direction and Leadership	<ul style="list-style-type: none"> Impact and Influence Institutional Performance Management Strategic Planning and Management Organisational Awareness 	15%
People Management	<ul style="list-style-type: none"> Human Capital Planning and Development Diversity Management Employee Relations Management Negotiation and Dispute Management 	10%
Program and Project Management	<ul style="list-style-type: none"> Program and Project Planning and Implementation Service Delivery Management Program and Project Monitoring and Evaluation 	5%
Financial Management	<ul style="list-style-type: none"> Budget Planning and Execution Financial Strategy and Delivery Financial Reporting and Monitoring 	15%
Change Management	<ul style="list-style-type: none"> Change Vision and Strategy Process Design and Improvement Change Impact Monitoring and Evaluation 	%
Governance Leadership	<ul style="list-style-type: none"> Policy Formulation Risk and Compliance Management Cooperative Governance 	10%
SIX (6) CORE COMPETENCIES		
Moral Competence		5%
Planning and Organising		10%
Analysis and Innovation		5%
Knowledge and Information Management		5%
Communication		5%
Results and Quality Focus		5%
Total		100%

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7. PERFORMANCE ASSESSMENT

- 7.1. The Performance Plan (Annexure A) to this Agreement sets out
 - 7.1.1. The standards and procedures for evaluating the Employee's performance;
and
 - 7.1.2. The intervals for the evaluation of the Employee's performance;
- 7.2. Despite the establishment of agreed intervals for evaluation, the **Employer** may in addition review the **Employee's** performance at any stage while the contract of employment remains in force;
- 7.3. Personal growth and development needs identified during any performance review discussion must be documented in a Personal Development Plan as well as the actions agreed to and implementation must take place within set time frames;
- 7.4. The **Employee's** performance will be measured in terms of contributions to the strategic objectives and strategies set out in the **Employer's** IDP.
- 7.5. The Annual performance appraisal will involve:
 - 7.5.1. Assessment of the achievement of results as outlined in the Performance Plan
 - a) Each KPA should be assessed according to the extent to which the specified standards or performance indicators have been met and with due regard to *ad-hoc* tasks that had to be performed under the KPA
 - b) Values are supplied for KPI's and Activities under each KPA as part of the Institutional Assessment. Based on the Target for an activity or KPI, over or under performance are calculated and converted to the 1-5-point scale automatically. These scores are carried over to the applicable employee's performance plan. During assessment, the employee has a chance to submit evidence of performance for appropriate rating
 - c) The assessment of the performance of the Employee is therefore based on the following rating scale for KPIs and subsequent Leading Competencies and Core Competencies:

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Level	Rating	Terminology	Description
	1 2 3 4 5		
5		Outstanding Performance	Performance far exceeds the standard expected of an employee at this level. The appraisal indicates that the Employee has achieved above fully effective results against all performance criteria and indicators as specified in the PA and Performance Plan and maintained this in all areas of responsibility throughout the year
4		Performance Significantly Above Expectations	Performance is significantly higher than the standard expected in the job. The appraisal indicates that the Employee has achieved above fully effective results against more than half of the performance criteria and indicators and fully achieved al others throughout the year
3		Fully Effective	Performance fully meets the standards expected in all areas of the job. The appraisal indicates that the Employee has fully achieved effective results against all significant performance criteria and indicators as specified in the Performance Agreements and Performance Plan.
2		Not Fully Effective	Performance is below the standard required for the job in key areas. Performance meets some of the standards expected for the job. The review/assessment indicates that the employee has achieved below fully effective results against more than half the key performances criteria and indicators as specified in the Performance Agreements and Performance Plan.
1		Unacceptable Performance	Performance does not meet the standard expected for the job. The review/assessment indicates that the employee has achieved below fully effective results against almost all of the performance criteria and indicators as specified in the Performance Agreements and Performance Plan. The employee has failed to demonstrate the commitment or ability to bring performance up to the level expected in the job despite management efforts to encourage improvement.

- d) The Employee will submit her self-evaluation to the Employer prior to the formal assessment with the Panel; and
- e) An overall score will be calculated based on the total of the individual scores calculated above.

7.5.2. Assessment of the Leading Competencies and Core Competencies:

- a) There is no hierarchical connotation to the structure and all competencies are essential to the role of a senior manager to influence high performance.

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- b) All competencies must therefore be considered as measurable and critical in assessing the level of a senior manager's performance.
- c) The competency framework is underscored by four (4) achievement levels that act as benchmark and minimum requirements for other human capital interventions, which are, recruitment and selection, learning and development, succession and planning, and promotion.

7.5.3. Achievement Levels

7.5.3.1. The achievement levels indicated in the table below serves as a benchmark for the appointments, succession planning and development interventions.

7.5.3.2. Individuals falling within the Basic range are deemed unsuitable for the role of senior manager, and caution should be applied in promoting and appointing such persons.

7.5.3.3. Individuals that operate in the Superior range are deemed highly competent and demonstrate an exceptional level of practical knowledge, attitude and quality. These individuals should be considered for higher positions, and should be earmarked for leadership programs and succession planning.

Achievement Levels	Description
Basic 1	Applies basic concepts, methods, and understanding of local government operations, but requires supervision and development intervention
Competent 2	Develops and applies more progressive concepts, methods and understanding. Plans and guides the work of others and executes progressive analyses
Advanced 3	Develops and applies complex concepts, methods and understanding. Effectively directs and leads group and executes in-depth analyses
Superior 4	Has a comprehensive understanding of local government operations, critical in shaping strategic direction and change, develops and applies comprehensive concepts and methods.

7.6. Performance Assessment Panel

7.6.1. For purpose of evaluating the annual performance of managers directly accountable to the municipal managers, an evaluation panel constituted of the following persons must be established:

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- a) Municipal Manager;
- b) Chairperson of the Performance Audit Committee (PAC) or the Audit Committee (AC) in the absence of a Performance Audit Committee
- c) Member of the Mayoral or Executive Committee or in respect of a plenary type municipality, another member of Council.
- d) Municipal Manager from another municipality; and
- e) The Manager responsible for Human Resources of the municipality must provide Secretariat services to the evaluation panels.

8. SCHEDULE FOR PERFORMANCE REVIEWS

- 8.1. The performance of each employee in relation to his/her performance agreement must be reviewed on the following dates with the understanding that reviews in the first and third quarter may be verbal if performance is satisfactory:

1st quarter: Not later than end of the second week of October.
2nd quarter: Not later than end of the first week of January.
3rd quarter: Not later than end of the second week of April.
4th quarter and annual review: First week of August

- 8.2. The Employer shall keep a record of the mid-year review and annual assessment meetings
- 8.3. Performance feedback must be based on the Employer's assessment of the Employee's performance.
- 8.4. The Employer will be entitled to review and make reasonable changes to the provisions of **Annexure A** from time to time for operational reasons on agreement between both parties.
- 8.5. The Employer may amend the provisions of Annexure A whenever the performance management system is adopted, implemented and/or amended on agreement with both parties.

9. DEVELOPMENTAL REQUIREMENTS

- 9.1. The Personal Development Plan (PDP) for addressing developmental gaps must form part of the performance agreement and will not be affected by the amendment.

10. OBLIGATION OF THE EMPLOYER

- 10.1. The Employer must –

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- a) Create an enabling environment to facilitate effective performance by the employee;
- b) Provide access to skills development and capacity building opportunities;
- c) Work collaboratively with the Employee to solve problems and generate solutions to common problems that may impact on the performance of the Employee;
- d) On the request of the Employee delegate such powers reasonably required by the Employee to enable him/her to meet the performance objectives and targets established in terms of this Agreement; and
- e) Make available to the Employee such resources as the Employee may reasonably require from time to time to assist him/her to meet the performance objectives and targets established in terms of this Agreement.

11. CONSULTATION

- 11.1. The Employer agrees to consult the Employee timeously where the exercising of the powers will have amongst others –
- a) A direct effect on the performance of any of the Employee's functions;
 - b) Commit the Employee to implement or to give effect to a decision made by the Employer; and
 - c) A substantial financial effect on the Employer.
- 11.2. The Employer agrees to inform the Employee of the outcome of any decisions taken pursuant to the exercise of powers contemplated in clause 11.1 above, as soon as is practicable to enable the Employee to take any necessary action without delay.

12. MANAGEMENT OF EVALUATION OUTCOMES

- 12.1. The evaluation of the Employee's performance will form the basis for rewarding outstanding performance or correcting unacceptable performance.
- 12.2. A performance bonus of 5% to 14% of the all-inclusive annual remuneration package shall be payable to the Employee in recognition of performance, in determining the performance bonus the relevant percentage is based on the overall rating, calculated by using the applicable assessment-rating calculator.

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The performance bonus will be awarded based on the following scheme:

No	Final Score	Per cent Performance Bonus
	Below 130%	0%
1	130.0%	5.0%
2	131.0% -135.0%	6.0%
3	136.0% -140.0%	7.0%
4	141.0% - 145.0%	8.0%
5	146.0% - 149.0%	9.0%
6	150.0% -154.0%	10.0%
7	155.0% - 159.0%	11.0%
8	160.0% - 164.0%	12.0%
9	165.0% - 169.0%	13.0%
10	Above 169%	14.0%

12.3. In the case of unacceptable and/or poor performance, the Employer shall –

- a) provide systematic remedial or developmental support to assist the Employee to improve his or her performance; and
- b) after appropriate performance counselling and having provided the necessary guidance and/ or support as well as reasonable time for improvement in performance, the Employer may consider steps to terminate the contract of employment of the Employee on grounds of unfitness or incapacity to carry out his or her duties.

13. DISPUTE RESOLUTION

13.1. Any disputes about the nature of the employee's performance agreement, whether it relates to key responsibilities, priorities, methods of assessment and/ or salary increment in the agreement, must be mediated by –

- a) In the case of the municipal manager, the MEC for Local Government in the province within thirty (30) days of receipt of a formal dispute from the employee, or any other person designated by the MEC. whose decision shall be final and binding on both parties.

13.2. Any disputes about the outcome of the employee's performance evaluation, must be mediated by –

- a) In the case of managers directly accountable to the municipal manager, a member of the municipal council, provided that such member was not part of the evaluation panel provided for in sub-regulation 27(4)(e), within thirty (30) days of receipt of a formal dispute from the employee; whose decision shall be final and binding on both parties.

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14. GENERAL

- 14.1. The contents of this performance agreement must be made available to the public by the Employer;
- 14.2. Nothing in this agreement diminishes the obligation, duties or accountabilities of the Employee in terms of his or her contract of employment, or the effects of existing or new regulations, circulars, policies, directives or other instruments.

15. SIGNATORIES

Signed at **RUSTENBURG** on this **01st** day of **July 2022**

AS WITNESSES:

1. 
2. 






MR GAADISE GODFREY DITSELE

CHIEF FINANCIAL OFFICER

Signed at RUSTENBURG on this 01 day of July 2022

AS WITNESSES:

1. 
2. 



MR SELLO VICTOR MAKONA
MUNICIPAL MANAGER

RUSTENBURG LOCAL MUNICIPALITY



PERFORMANCE PLAN 2022/2023

FOR

Mr. Gaadise Godfrey Ditsele

Chief Financial Officer

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1. BACKGROUND

This Plan defines the council's expectations of the Chief Financial Officer performance in accordance with the director's performance agreement to which this document is attached. Section 57(5) of the Municipal System Act and the Performance Regulations gazette in Notice No 805, published on 1 August 2006, which provides the performance objectives and targets must be on the key performance indicators set out from time to time in the Municipality's Integrated Development Plan and determined by the Executive Mayor (as represented of Council).

There are of 5 parts to this plan:

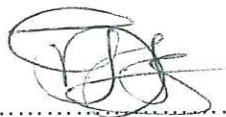
1. A statement about the purpose of the position;
2. Performance review procedure;
3. Top Layer Scorecard detailing Key Performance Areas (KPA's) and their related performance indicators, weightings and target dates;
4. Competency Requirements;
5. Consolidated scorecard (Performance Assessment Calculator).

2. DURATION AND CONDITIONS

- 2.1. The period of this **Performance Plan** is from 01 July 2022 to 30 June 2023.
- 2.2. There are no pre-and/or current Employment conditions attached to this Performance Plan.

Signed and accepted by the,

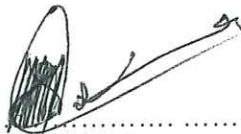
Chief Financial Officer:



Date: 01-07-2022

Signed by the on behalf of Employer by;

Municipal Manager:



Date:

01/07/2022

3. POSITION PURPOSE

The Chief Financial Officer is required to:

- (i) Lead and direct the administration of the Municipality through effective strategies to fulfil the objects of local government provided for in the Constitution, 1996 and any other legislative framework that govern the local government;
- (ii) Creating an environment that defines the purpose and role of local government to involve people in shaping the future of communities.

As the head of the Directorate of the municipality, the Chief Financial Officer is responsible for and performs the following functions:

- (i) Good governance and public participation;
- (ii) Sustainable infrastructure and basic service delivery;
- (iii) Local development;
- (iv) Municipal transformation and organisation development and;
- (v) Municipal financial viability and management.

4. PERFORMANCE REVIEW PROCEDURE

1. A performance review will be held on a quarterly basis with a formal performance review bi-annually in December/January and in June/July after the financial year with the understanding that review in the first and third quarter may be verbal if performance is satisfactory
2. The Municipal Manager may request input from agendas, minutes and "customers" on the Chief Financial Officer's performance throughout the review period. This may be done through discussion or by asking "customers" to complete a rating form to submit to the evaluation panel for consideration. Customers are people who are able to comment on the Chief Financial Officer's performance since they have worked closely with him on some or all aspects of his job.
3. The Chief Financial Officer to prepare for quarterly performance evaluation by providing a brief description of achievements, including the reference to evidence, supporting documentation, (documents, reports and/or resolutions with dates of submission) in the relevant column in section 4 (KPA) score card below). Achievement to be reported on cumulatively)
4. The Chief Financial Officer to provide a rating for himself for the final assessment against the agreed objectives in the column provided in the KPA scorecard.
5. The Chief Financial Officer and Evaluation panel to meet to conduct formal performance rating and agree final scores. It may be necessary to have two meetings i.e give the Chief Financial Officer scores and allow him time to consider them before final agreement. In the event of disagreement, the evaluation panel has the final say with regard to the final score that is given.
6. The evaluation panel to provide ratings of the Chief Financial Officer's performance against agreed objectives as a result of portfolio of evidence and/or comments and customer input.

7. Initially the scoring should be recorded on the scorecard then transferred onto the consolidated score sheet
8. Any reasons for non-compliance should be recorded during the review session by keeping of minutes of the review session.
9. The assessment of the performance of the Chief Financial Officer will be based on the following rating scale for KPA's:

Terminology	Description	Rating Level
Outstanding Performance	Performance far exceeds the standard expected of the Chief Financial Officer at this level. The appraisal indicates that the Chief Financial Officer has achieved above fully effective results against all performance criteria and indicators are specified in the PA and Performance plan and maintained this in all areas of responsibility throughout the year	5
Performance Significantly above expectation	Performance is significantly higher than the standard expected in the job. The appraisal indicates that the Chief Financial Officer has achieved all others through the year	4
Fully Effective	Performance fully meets the standards expected in the job. The appraisal indicates that the Chief Financial Officer has fully achieved effective results against all significant performance criteria and indicators as specified in the PA and Performance Plan.	3
Performance not fully Effective	Performance is below the standard required for the job. Performance meets some of the standards expected for the job. The review/assessment indicates that the Chief Financial Officer has achieved below fully effective results against more than half the key performance criteria and indicators as specified in the PA and Performance Plan	2
Unacceptable Performance	Performance does not meet the standard for the job. The review/assessment indicates that the Chief Financial Officer has achieved below fully effective results against almost all of the performance criteria and indicators as specified in the PA and Performance Plan. The Chief Financial Officer has failed to demonstrate the commitment or ability to bring the performance up to the level of expected in the job despite management efforts to encourage improvement.	1

10. Only those items relevant for the review period in question should be scored
11. The assessment of the performance of the Chief Financial Officer on all Competencies will be based on the rating scale as reflected in section 4 of the performance plan.
12. The Municipal Manager and the Chief Financial Officer to prepare and agree on a personal development plan (PDP) for addressing developmental gaps.
13. The Municipal Manager and the Chief Financial Officer to set new objectives, targets, performance indicators, weighting and dates etc. for the following financial year.
14. Poor work performance will be dealt with in terms of regulation 32 (3) of the Performance gazetted in Notice No 805, Published on 1 August 2006.

5. FUNCTIONAL ALIGNMENT OF THE INDIVIDUAL PERFORMANCE SCORECARD TO THE INTERGRATED DEVELOPMENT PLAN (IDP) OF THE ORGANISATION.

The Integrated Development Plan (IDP) 2022/2023 of the Rustenburg Local Municipality is aligned to the prescribed National Key Performance Areas, viz:

- 1) Basic Service delivery and Infrastructure Development;
- 2) Local Economic Development;
- 3) Municipal Financial Viability and Management;
- 4) Good Governance and Public Participation;
- 5) Municipal Institutional Development and Transformation; and
- 6) Spatial Rationale.

All Directorates within the Municipality are accountable for the successful fulfilment of the IDP's specific programmes as espoused under each of the above National Key Performance Areas.

6. KEY PERFORMANCE AREA SCORECARD

6.1 Key Performance Area (KPA 3): Municipal Financial Viability and Management

Key Focus Area	Strategies	Area/ Locality (Ward/ Area)	KPI No:	Key Performance Indicator (KPI)	POE	Baseline 2021/22	2022/23 Annual Target	Annual Budget 2022/23 R'000	2022/23 Performance Targets per Quarter				2023/24 Annual Target	Weighting	
									Q1	Q2	Q3	Q4			
Strategic Goal	Municipal Strategic Objective: Promote Financial Compliance														
GOAL 11: City of sustainable and efficient resource management	Implementation of mSCOA compliant financial management system	Municipal Wide	BTO 1	Procurement of the mSCOA financial system	Advert. Bid committee minutes Appointment letter Service Level Agreement	Procurement of the mSCOA financial system	Appointment of credible service provider to implement mSCOA financial system by 30 June 2023	R25m	Advertise of the Bid	finalize procurement process and appoint service provider	Implementation plan	Implementation plan	100%	4	
GOAL 11: City of sustainable and efficient resource management	Revenue billing	Municipal Wide	BTO 2	Percentage of Meter Readings performed to ensure complete and accurate billing.	Meter reading report	90% meter reading on a monthly basis	75% meter reading on a monthly basis	R6 million	meter reading on a monthly basis	meter reading on a monthly basis	meter reading on a monthly basis	meter reading on a monthly basis	95%	4	
GOAL 11: City of sustainable and efficient resource management	Compliance with Supply Chain Management laws and regulations.	Municipal Wide	BTO 3	Conclude investigation of reported Unauthorized expenditure in the prior years.	Signed off Unauthorized expenditure investigation plan Signed off BTO investigation report by CFO	None	Unauthorized expenditure investigated as per signed off plan	R1 b	Unauthorized expenditure investigation on plan and initiate investigation on	Unauthorized expenditure investigation progress report as per signed off plan	Unauthorized expenditure investigation progress report as per signed off plan	Unauthorized expenditure investigation progress report as per signed off plan	Unauthorized expenditure investigation progress report as per signed off plan	4	
GOAL 11: City of sustainable and efficient resource management	Compliance with Supply Chain Management laws and regulations.	Municipal Wide	BTO 4	Conclude investigation of reported Irregular expenditure in the prior years.	Signed off Irregular expenditure investigation plan Signed off BTO investigation report by CFO	None	Irregular expenditure investigated as per signed off plan	R1 b	Irregular expenditure investigation on plan and initiate investigation on	Irregular expenditure investigation progress report as per signed off plan	Irregular expenditure investigation progress report as per signed off plan	Irregular expenditure investigation progress report as per signed off plan	Irregular expenditure investigation progress report as per signed off plan	4	
GOAL 11: City of	Compliance with Supply	Municipal Wide	BTO 5	Conclude investigation of	Signed off Fruitless	None	Fruitless Wasteful	R1 b	Fruitless Wasteful	Fruitless Wasteful	Fruitless Wasteful	Fruitless Wasteful	Fruitless Wasteful	4	

Key Focus Area	Strategies	Area/ Locality (Ward/ Area)	KPI No:	Key Performance Indicator (KPI)	POE	Baseline 2021/22	2022/23 Annual Target	Annual Budget 2022/23 R'000	2022/23 Performance Targets per Quarter				2023/24 Annual Target	Weighting
									Q1	Q2	Q3	Q4		
Strategic Goal	Chain Management laws and regulations.			reported Fruitless Wasteful expenditure in the prior years.	Wasteful expenditure investigation plan Signed of investigation report by CFO	12 section 71 reports	expenditure investigated as per signed off plan		expenditure investigation on plan signed off and initiate investigation on	expenditure investigation progress report as per signed off plan	expenditure investigation progress report as per signed off plan	expenditure investigation progress report as per signed off plan	expenditure investigation progress report as per signed off plan	
GOAL 11: City of sustainable and efficient resource management	Compliance with laws and regulations	Municipal Wide	BTO 6	Section 71 reports submitted to the Mayor within legislated time.	C Schedule & Submission register or any proof of submission (e-g email, etc)	12 section 71 reports	Late submission section 71 reports: 11		3	3	3	3	12	5
GOAL 11: City of sustainable and efficient resource management	Compliance with laws and regulations	Municipal Wide	BTO 7	Number of section 72 reports submitted within legislated timeframe to the Mayor	Report and proof of submission (register or email)	1	1		n/a	n/a	1	n/a	1	5
GOAL 11: City of sustainable and efficient resource management	Compliance with laws and regulations	Municipal Wide	BTO 8	Number of section 52 reports submitted to the Mayor within legislated time	C Schedule & Submission register or any proof of submission (e-g email, etc)	4	Late submission of section 52 reports: 3		1	1	1	1	3	4
GOAL 11: City of sustainable and efficient resource management	Compliance with laws and regulations	Municipal Wide	BTO 9	Draft MTREF budget submitted by 31 March 2023 to Mayor	Submission or Register email & Copy of budget	2022/23 Draft MTREF budget submitted to Mayor	2023/24 Draft MTREF budget submitted to Mayor	R000	n/a	n/a	2023/24 Draft MTREF budget submitted to Mayor	n/a	2024/25 DRAFT MTREF budget submitted to Mayor	5
GOAL 11: City of sustainable and efficient resource management	Compliance with laws and regulations	Municipal Wide	BTO 10	Final MTREF budget submitted by 31 May 2023 to Mayor	Submission or Register email & Copy of budget	2022/23 Final MTREF budget submitted to Mayor	2023/24 Final MTREF budget submitted to Mayor	R000	n/a	n/a	n/a	2023/24 MTREF budget submitted to Mayor	2024/25 DRAFT MTREF budget submitted to Mayor	5

Key Focus Area	Strategies	Area/ Locality (Ward/ Area)	KPI No:	Key Performance Indicator (KPI)	POE	Baseline 2021/22	2022/23 Annual Target	Annual Budget 2022/23 R'000	2022/23 Performance Targets per Quarter				2023/24 Annual Target	Weighting
									Q1	Q2	Q3	Q4		
Strategic Goal														
GOAL 11: City of sustainable and efficient resource management	Compliance with laws and regulations	Municipal Wide	BTO 11	Adjustments to budget submitted to Council by end of February 2023	Council agenda Submission register or email	2021/22 Adjustment budget submitted to Council	2022/23 Adjustment budget submitted to Council	R000	n/a	n/a	Adjustment budget submitted by end of February 2023	n/a	Adjustment budget submitted by end of February 2024	4
Municipal Strategic Objective: Enhance Revenue/ Promote Financial Sustainability														
GOAL 11: City of sustainable and efficient resource management	Revenue collection	Municipal Wide	BTO 12	Percentage collection of revenue billed	Signed off (CFO) calculation from 3 months C Schedules.	80%	90%	R8,6m	75%	80%	85%	90%	90%	4
GOAL 11: City of sustainable and efficient resource management	Payment of creditors within the statutory timelines.	Municipal Wide	BTO 13	Percentage of payments made to service providers who submitted complete forms within 30 days of invoice submission	Signed off (CFO) calculation from monthly creditors listing of invoices received and processed	95 days	95% within 30 Days	None	95% within 30 Days	95% within 30 Days	95% within 30 Days	95% within 30 Days	100% within 30 Days	4
GOAL 11: City of sustainable and efficient resource management	Achieve positive financial ratios	Municipal Wide	BTO 14	Achieved Improved financial current ratio	Signed off (CFO) calculation from 3 months C Schedules.	0,7:1	1.8: 1	None	1.2: 1	1.4: 1	1.6: 1	1.8: 1	2:1	4
GOAL 11: City of sustainable and efficient resource management	Achieve positive financial ratios	Municipal Wide	BTO 15	Achieve improved financial cost coverage of the municipality	Signed off (CFO) calculation from 3 months C Schedules	0.9	1.5 month	None	1 month	1.5 month	1.5 month	1.5 month	2 months	4
Service Delivery: Sustainable Livelihoods and resilient	Provision for water supply and increase the revenue base	All Wards	BTO 16	Percentage of the municipality's allocated budget spent on	Free Basic Services Report	100%	100%	R1 million	25%	50%	75%	100%	100%	4

Key Focus Area	Strategies	Area/ Locality (Ward/ Area)	KPI No:	Key Performance Indicator (KPI)	POE	Baseline 2021/22	2022/23 Annual Target	Annual Budget 2022/23 R'000	2022/23 Performance Targets per Quarter				2023/24 Annual Target	Weighting
									Q1	Q2	Q3	Q4		
Infrastructure				indigent relief for free basic services										
GOAL 11: City of sustainable and efficient resource management	Expenditure management	Municipal Wide	BTO 17	Percentage on expenditure on overtime not exceeding approved budget by 30 June 2021	Budget versus actual report	100% or less	110%		25% or less	50% or less	75% or less	100% or less	100% or less	4
Total weight						72								

6.2. Key Performance Area 4: Drive optimal municipal institutional development, transformation, and capacity building

Key Focus Area	Strategies	Area/ Locality (Ward/ Area)	KPI No:	Key Performance Indicator (KPI)	POE	Baseline 2021/22	2022/23 Annual Target	Annual Budget 2022/23 R'000	2022/23 Performance Targets				2023/24 Annual Target	Weighting	
									Q1	Q2	Q3	Q4			
Municipality strategic objective: Achieve operational efficiency															
GOAL 11: City of sustainable and efficient resource management	Sustaining clean administration	Municipal Wide	BTO 18	Audit opinion expressed by the Auditor General	Audit Report	Qualified audit opinion	Qualified audit opinion	R6 million	N/A	N/A	N/A	Unqualified audit opinion	Unqualified audit opinion	4	
GOAL 11: City of sustainable and efficient resource management	Compliance with laws and regulations	Municipal Wide	BTO 19	Annual Financial Statements (AFS) of RLM and Consolidated AFS of 2021/22 submitted to AGSA for audit by 31 August 2022 and 30 September 2022 respectively	Acknowledgment of receipt by AGSA	2x set of Annual financial statements of 2021/22 submitted to AGSA	2x set of Annual financial statements of submitted to AGSA	R000	n/a	2x set of Annual financial statements of 2021/22 submitted to AGSA	n/a	n/a	2x set of Annual financial statements submitted to AGSA	4	
GOAL 9: An Efficient, Effective and Well-Governed City	Ensure functionality of Municipal governance structures	Municipal Wide	BTO 20	Quarterly performance assessment of DCFO (x 1) and Unit Managers (x 4)	Performance agreements and quarterly performance assessment report	5 Performance agreements and 20 performance assessment report	5 X performance agreements and assessment of unit managers	R000	5X Performance Agreement finalized and performance assessment	5 X 2 nd quarter performance report	5 X 3 rd quarter performance report	5 X 4 th quarter performance report	n/a	4	
GOAL 9: An Efficient, Effective and Well-Governed City	Ensure functionality of Municipal governance structures	Municipal	BTO 21	Percentage of council resolution responded to in the 2022/23	Progress on council resolution responded to as per	80% of council resolutions responded to on time	80% of council resolutions responded to on time	R000	80%	80%	80%	80%	90%	3	

Key Focus Area Strategic Goal	Strategies	Area/ Locality (Ward/ Area)	KPI No:	Key Performance Indicator (KPI)	POE	Baseline 2021/22	2022/23 Annual Target	Annual Budget 2022/23 R'000	2022/23 Performance Targets				2023/24 Annual Target	Weighting
									Q1	Q2	Q3	Q4		
City				financial year.	register									
GOAL 9: An Efficient, Effective and Well-Governed City	Ensure functionality of Municipal governance structures	Wide	22	% of Directorate's PAAP implemented by 30 June 2023	Monthly PAAP report.	80% of all actions targeted for 2021/22	80% of all actions targeted for 2022/23	R000	80%	80%	80%	80%	90%	4
GOAL 9: An Efficient, Effective and Well-Governed City	Ensure functionality of Municipal governance structures	Municipal wide	23	% of Directorate's Risk mitigated by 30 June 2023	Operational Risk Register Monthly risk mitigation report.	90% risk mitigation	100 risk mitigation	R000	90%	90%	90%	90%	95%	3
GOAL 9: An Efficient, Effective and Well-Governed City	Inculcate a culture of quality performance	Municipal wide	24	Number of Directorate's contracts monitored by 30 June 2023		New	Quarterly progress report on contracts monitored							3
Goal 4: A city of excellence	Drive optimal municipal institutional development, transformation and capacity building		25	Date of Submission of consolidated 2023/2024 procurement plan to the MM by 30 April 2023	Directorate Procurement Plan		30 April 2023				30 April 2023			3
Total weight						28								

5. COMPETENCY REQUIREMENTS

5.1. Competency Description: CORE MANAGERIAL COMPETENCIES

Cluster	Leading Competencies	Weight
Competency Name	Strategic Direction and Leadership	15
Competency Definition	Provide and direct a vision for the institution, and inspire and deploy others to deliver on the strategic institutional mandate	
ACHIEVEMENT LEVELS - ADVANCED		
<ul style="list-style-type: none"> Evaluate all activities to determine value and alignment to strategic intent Display in-depth knowledge and understanding of strategic planning Align strategy and goals across all functional areas Actively define performance measures to monitor the progress and effectiveness of the institution Consistently challenge strategic plans to ensure relevance Understand institutional structures and political factors, and the consequences of actions Empower others to follow strategic direction and deal with complex situations Guide the institution through complex and ambiguous concern Use understanding of power relationships and dynamic tensions among key players to frame communications and develop strategies, positions and alliances 		

Cluster	Leading Competencies	Weight
Competency Name	People Management	10
Competency Definition	Effectively manage, inspire and encourage people, respect diversity, optimise talent and build nature relationships in order to achieve institutional objectives	
ACHIEVEMENT LEVELS		
<ul style="list-style-type: none"> Identify ineffective team and work processes and recommend remedial interventions Recognize and reward effective and desired behaviour Provide mentoring and guidance to others in order to increase personal effectiveness Identify development and learning needs within the team Build a work environment conducive to sharing, innovation, ethical behaviour and professionalism Inspire a culture of performance excellence by giving positive and constructive feedback to the team Achieve agreement or consensus in adversarial environments Lead and unite diverse teams across divisions to achieve institutional objectives 		

Cluster	Leading Competencies	Weight
Competency Name	Program and Project Management	5
Competency Definition	Able to understand program and project management methodology; plan, manage, monitor and evaluate specific activities in order to deliver on set objectives	
	ACHIEVEMENT LEVELS - ADVANCED	
	<ul style="list-style-type: none"> Manage multiple programs and balance priorities and conflicts according to institutional goals Apply effective risk management strategies through impact assessment and resource requirements Modify project scope and budget when required without compromising the quality and objectives of the project Involve top-level authorities and relevant stakeholders in seeking project buy-in Identify and apply contemporary project management methodology Influence and motivate project team to deliver exceptional results Monitor policy implementation and apply procedures to manage risks 	

Cluster	Leading Competencies	Weight
Competency Name	Financial Management	15
Competency Definition	Able to compile, and manage budgets, control cash flow, institute financial risk management and administer procurement processes in accordance with recognized financial practices. Further to ensure that all financial transactions are managed in an ethical manner	
	ACHIEVEMENT LEVELS - ADVANCED	
	<ul style="list-style-type: none"> Take active ownership of planning, budgeting, and forecast processes and provides credible answers to queries within own responsibility Prepare budgets that are aligned to the strategic objectives of the institution Address complex budgeting and financial management concerns Put systems and processes in place to enhance the quality and integrity of financial management practices Advise on policies and procedures regarding asset control Promote National Treasury's regulatory framework for Financial Management 	

Cluster	Leading Competencies	Weight
Competency Name	Change Leadership	10
Competency Definition	Able to direct and initiate institutional transformation on all levels in order to successfully drive and implement new initiatives and deliver professional and quality services to the community	
ACHIEVEMENT LEVELS - ADVANCED		
<ul style="list-style-type: none"> • Actively monitor change impact and results and convey progress to relevant stakeholders • Secure buy-in and sponsorship for change initiatives • Continuously evaluate change strategy and design and introduce new approaches to enhance the institution's effectiveness • Build and nurture relationships with various stakeholders to establish strategic alliance in facilitating change • Take the lead in impactful change programs • Benchmark change interventions against best change practices • Understand the impact and psychology of change, and put remedial interventions in place to facilitate effective transformation • Take calculated risk and seek new ideas from best practice scenarios, and identify the potential for implementation 		

Cluster	Leading Competencies	Weight
Competency Name	Governance Leadership	10
Competency Definition	Able to promote, direct and apply professionalism in managing risk and compliance requirements and apply a thorough understanding of governance practices and obligations. Further, able to direct the conceptualization of relevant policies and enhance cooperative governance relationships	
ACHIEVEMENT LEVELS - ADVANCED		
<ul style="list-style-type: none"> • Able to link risk initiatives into key institutional objectives and drivers • Identify, analyses and measure risk, create valid risk forecast, and map risk profiles • Apply risk control methodology and approaches to prevent and reduce risk that impede on the achievement of institutional objectives • Demonstrate a thorough understanding of risk retention plans • Identify an implement comprehensive risk management systems and processes • Implement and monitor and formulation of policies, identify and analyses constraints and challenges with implementations and provide recommendations for improvement 		

200

5.2. Competency Description: CORE OCCUPATIONAL COMPETENCIES

Cluster	Core Competencies	Weight
Competency Name	Moral Competence	5
Competency Definition	Able to identify moral triggers, apply reasoning that promotes honesty and integrity and consistently display behaviour that reflects moral competence	
	ACHIEVEMENT LEVELS - ADVANCED	
	<ul style="list-style-type: none"> Identify, develop, and apply measures of self-correction Able to gain trust and respect through aligning actions with commitments Make proposals and recommendation that are transparent and gain the approval of relevant stakeholders Present values, beliefs and ideas that are congruent with the institution's rules and regulations Take an active stance against corruption and dishonesty when noted Actively promote the value of the institution to internal and external stakeholders Able to work in unity with a team and not seek personal gain Apply universal moral principles consistently to achieve moral decisions 	

Cluster	Core Competencies	Weight
Competency Name	Planning and Organising	10
Competency Definition	Able to plan, prioritise and organise information and resources effectively to ensure the quality of service delivery and build efficient contingency plans to manage risk	
	ACHIEVEMENT LEVELS - ADVANCED	
	<ul style="list-style-type: none"> Able to define institutional objectives, develop comprehensive plans, integrate and coordinate activities, and assign appropriate resources for successful implementation Identify in advance stages and actions to complete tasks and projects Schedule realistic timelines, objectives and milestones for tasks and projects Produce clear, detailed and comprehensive plans to achieve institutional objectives Identify possible risk factors and design and implement appropriate contingency plans Adapt plans considering changing circumstances Prioritise tasks and projects according to their relevant urgency and importance 	

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Cluster	Core Competencies	Weight
Competency Name	Analysis and Innovation	5
Competency Definition	Able to critically analyse information, challenges and trends to establish and implement fact-based solutions that are innovative to improve institutional processes in order to achieve key strategic objectives	
ACHIEVEMENT LEVELS - ADVANCED		
<ul style="list-style-type: none"> Coaches team members on analytical and innovative approaches and techniques Engage with appropriate individuals in analysing and resolving complex problems Identify solutions on various areas in the institution Formulate and implement new ideas throughout the institution Able to gain approval and buy in for proposed interventions from relevant stakeholders Identify trends and best practices in process and service delivery and propose institutional application Continuously engage in research to identify client needs 		

Cluster	Core Competencies	Weight
Competency Name	Knowledge and Information Management	5
Competency Definition	Able to Promote the generation and sharing of knowledge and information through various processes and media, in order to enhance the collective knowledge base of local government	
ACHIEVEMENT LEVELS - ADVANCED		
<ul style="list-style-type: none"> Effectively predict future information and knowledge management requirements and systems Develop standards and processes to meet future knowledge management needs Share and promote best-practice knowledge management across various institutions Establish accurate measures and monitoring systems for knowledge and information management Create a culture conducive of learning and knowledge sharing Hold regular knowledge and information sharing sessions to elicit new ideas and share best practice approaches 		

Cluster	Core Competencies	Weight
Competency Name	Communication	5
Competency Definition	Able to share information, knowledge and ideas in a clear, focused and concise manner appropriate for the audience in order to effectively convey, persuade and influence stakeholders to achieve the desired outcome	
ACHIEVEMENT LEVELS - ADVANCED		
<ul style="list-style-type: none"> Effectively communicate high-risk and sensitive matters to relevant stakeholders Develop a well-defined communication strategy Balance political perspectives with institutional needs when communicating viewpoints on complex issues Able to effectively direct negotiations around complex matters and arrive at a win-win situation that promotes Batho Pele principles Market and promote the institution to external stakeholders and seek to enhance a positive image of the institution Able to communicate with the media with high levels of moral competence and discipline 		

Cluster	Core Competencies	Weight
Competency Name	Results and Quality Focus	5
Competency Definition	Able to maintain high quality standards, focus on achieving results and objectives while consistently striving to exceed expectations and encourage others to meet quality standards, Further, to actively monitor and measure results and quality against identified objectives	
ACHIEVEMENT LEVELS - ADVANCED		
<ul style="list-style-type: none"> Consistently verify own standards and outcomes to ensure quality output Focus on the end result and avoids being distracted Demonstrate a determined and committed approach to achieving results and quality standards Follow task and projects through to completion Set challenging goals and objectives to self and team and display commitment to achieving expectations Maintain a focus on quality outputs when placed under pressure Establishing institutional systems for managing and assigning work, defining responsibilities, tracking, monitoring and measuring success, evaluating and valuing the work of the institution 		

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6. CONSOLIDATED SCORESHEET (PERFORMANCE ASSESSMENT CALCULATOR): DIRECTOR: TECHNICAL AND INFRASTRUCTURE SERVICES

In terms of Regulations 805 of 2006, the Employee will be scored on a ratio of 80% for Key Performance Areas (KPA) and 20% for Core Competency Requirements (CCRs) It is also required that the KPAs relevant to the Employees Functions also be weighted in terms of importance out of a total of 100%, contributing to the 80% contribution to KPAs. It is also necessary to allocate weighting amongst KPI's and Projects where applicable. A Summary of total weightings are indicated below.

Key Performance Areas (KPAs)	KPA Weightings	Assess Weightings	Weighted Score	Panel Score
Basic Service and Infrastructure Development	0			
Municipal Institutional Development and Transformation	0			
Local Economic Development (LED)	0			
Municipal Financial Viability and Management	80			
Good Governance and Public Participation	20			
Spatial Rationale	0			
Total KPAs = (KPAs Weighted Score/100%) x 80%	100			
Total Core Competency Requirements (CCRs) = (CCRs Weighted Score/100%) x 20%	100			
TOTAL WEITGHTED SCORE (KPAs + CCRs)				
TOTAL WEITGHTED SCORE CONVERTED TO % = (TOTAL WEIGHTED SCORE/3) x 100%				

N.B. The consolidated Performance Evaluation Results will be attached separately in the assessment report for the incumbent.



ANNEXURE B

PERSONAL DEVELOPMENT ACTION PLAN AFTER THE PERFORMANCE REVIEWS

After concluding the performance reviews for the Director: Budget and treasury Office, the outcome of the performance reviews influences the amendment of the Personal Development Action Plan. The personal growth and the development needs identified during the performance review session must be documented in the revised Personal Development Plan to accommodate the new needs as identified during the performance review discussions. The new Personal Development Plan shall amongst others include the actions agreed to and the implementation must take place within the set time frames. Below is the Personal Development Plan Action Plan.

Skills Performance Gap	Outcomes Expected	Suggested Training / Development	Suggested Mode of Delivery	Suggested Time Frames	Support Person
None					

SIGNATURES

SIGNED AND ACCEPTED ON BEHALF OF COUNCIL	SIGNED AND ACCEPTED BY THE EMPLOYEE
NAME: MR. SELLO VICTOR MAKONA	NAME: MR. GAADISE GODFREY DITSELE
SIGNATURE: 	SIGNATURE: 
DATE: 01/07/2022	DATE: 01-07-2022