

Performance Plan

Senior Manager: Finance and Corporate Services

- 1 -



The Performance Plan sets out:

- a) Key Performance Areas that the employee should focus on, performance objectives, key performance indicators and targets that must be met within a specific timeframe; and
- b) The Competencies required from employees prescribed in the Regulations on the appointment and conditions of employment of senior managers, R21 of 2014.

Performance should be evaluated:

- a) Quarterly of which the annual evaluation must be done by the panel as constituted in paragraph 6.11 of the agreement;
- b) Performance should be assessed on a scale of 1 – 5 as outlined in paragraphs 6.9 – 6.10 of the agreement;
- c) In the instance where an indicator does not have a target or is not applicable due to valid reason or where the performance could not be delivered for a valid reason outside of the control of employee, the indicator will not be evaluated, the weighting will be cancelled and the score total will be re-calculated to calculate the final score;
- d) The employee must submit his/her assessment of his/her own performance to the employer three days prior to the assessment date.






KEY PERFORMANCE INDICATORS

The key performance areas, the performance objectives, key performance indicators and targets that must be met within the agreed timeframe are described below. The assessment of these performance indicators will account for **eighty percent** of the total employee assessment score.

Ref No	National KPA	Key Performance Indicator (KPI)	Unit of Measurement	Targets				Weight
				Q1	Q2	Q3	Q4	
SDBIP Graph	Municipal Transformation and Institutional Development	Manage and achieve 90% of the KPI's of the sub-directorate: Human Resources	90% of the KPI's of the sub directorate have been met as per Ignite Dashboard report	90%	90%	90%	90%	1
SDBIP Graph	Municipal Transformation and Institutional Development	Manage and achieve 90% of the KPI's of the sub-directorate: Administration	90% of the KPI's of the sub directorate have been met as per Ignite Dashboard report	90%	90%	90%	90%	1
SDBIP Graph	Municipal Transformation and Institutional Development	Manage and achieve 90% of the KPI's of the sub-directorate: Budget and Treasury Office	90% of the KPI's of the sub directorate have been met as per Ignite Dashboard report	90%	90%	90%	90%	2
SDBIP Graph	Municipal Transformation and Institutional Development	Manage and achieve 90% of the KPI's of the sub-directorate: SCM	90% of the KPI's of the sub directorate have been met as per Ignite Dashboard report	90%	90%	90%	90%	2
TL17	Basic Service Delivery	The percentage of the municipal capital budget actually spent on capital projects by 30 June 2020 (Actual amount spent on capital projects /Total amount budgeted for capital projects)X100	{Actual amount spent on capital projects /Total amount budgeted for capital projects}X100 by 30 June 2020	0	30%	60%	90%	2
TL18	Municipal Transformation and Institutional Development	Percentage of people from employment equity target groups that will be appointed in the three highest levels of management during the 2019/20 financial year in compliance with the municipality's approved employment equity plan	% of people that will be appointed in the three highest levels of management in compliance with a municipality's approved employment equity plan	0	0	0	66%	2
TL19	Municipal Transformation and Institutional Development	Percentage of municipality's personnel budget actually spent on implementing its workplace skills plan by 30 June 2020 ((Total Actual Training Expenditure/ Total personnel Budget)x100))	(Total expenditure on training/total personnel budget)/100	0	0	0	0.01%	3





Annexure A 2019/20

Ref No	National KPA	Key Performance Indicator (KPI)	Unit of Measurement	Q1	Q2	Q3	Q4	Weight
TL20	Municipal Financial Viability and Management	Financial viability measured in terms of the municipality's ability to meet its service debt obligations at 30 June 2020 {Debt to Revenue (Short Term Borrowing + Bank Overdraft + Short Term Lease + Long Term Borrowing + Long Term Lease) / Total Operating Revenue - Operating Conditional Grant}	% Debt coverage as at 30 June 2020	0	0	0	1%	2
TL21	Municipal Financial Viability and Management	Financial viability measured in % in terms of the total amount of outstanding service debtors in comparison with total revenue received for services at 30 June 2020 {Net Service debtors to revenue - (Total outstanding service debtors minus provision for bad debt)/ (revenue received for services) x100}	% outstanding service debtors at 30 June 2020	0	0	0	14%	3
TL22	Municipal Financial Viability and Management	Financial viability measured in terms of the available cash to cover fixed operating expenditure at 30 June 2020 {Cost coverage ((Cash and Cash Equivalents - Unspent Conditional Grants - Overdraft) + Short Term Investment) / Monthly Fixed Operational Expenditure excluding (Depreciation, Amortisation, and Provision for Bad Debts, Impairment and Loss on Disposal of Assets))}	Cost coverage ratio as at 30 June 2020	0	0	0	0.6	2
TL23	Municipal Transformation and Institutional Development	Limit vacancy rate to 20% of funded post by 30 June 2020 {(Number of funded posts vacant divided by budgeted funded posts)x100}	(Number of funded posts vacant divided by budgeted funded posts)x100	0	0	0	20%	2
TL24	Municipal Transformation and Institutional Development	Review the Workplace Skills Plan and submit plan to the LGSETA by 30 April 2020	Workplace Skills Plan submitted to LGSETA by 30 April 2020	0	0	0	1	4
TL25	Municipal Transformation and Institutional Development	90% of the ICT capital budget spent by 30 June 2020 {(Actual capital expenditure on the project divided by the total approved capital budget for the project)x100}	% of the ICT capital budget spent by 30 June 2020	0	30%	60%	90%	4

Annexure A 2019/20

Ref No	National KPA	Key Performance Indicator (KPI)	Unit of Measurement	Targets				Weight
				Q1	Q2	Q3	Q4	
TL26	Basic Service Delivery	90% spent of the budget to purchase five vehicles and 1 tractor by 30 June 2020 ((Actual capital expenditure divided by the total approved capital budget)x100)	Percentage of budget spent by 30 June 2020	0	30%	60%	90%	4
D29	Good Governance and Public Participation	Liaise with line managers quarterly and submit minutes of the meeting to the MM	Number of meetings with line managers	1	1	1	1	2
D30	Municipal Financial Viability and Management	Revise and submit all budget related policies to Council for approval with the draft budget by the end of March	Number of policies submitted	0	0	4	0	4
D31	Municipal Financial Viability and Management	Report to Council on outstanding debt of Councilors and officials	Number of reports	1	1	1	1	4
D32	Municipal Financial Viability and Management	Develop and review identified (asset management) SOP by 30 June	SOP developed and/or reviewed by 30 June	0	0	0	4	4
D33	Good Governance and Public Participation	Development of an action plan to address all the issues raised in the management letter of the Auditor General by 31 January	Approved action plan by 31 January	0	0	1	0	4
D38	Municipal Transformation and Institutional Development	Report quarterly to council on progress made with the implementation of council resolutions	Number of reports submitted to Council	1	1	1	1	2
D47	Municipal Financial Viability and Management	Prepare the mid year budget and performance report of sec72 of the MfMA and submit to the Mayor by the 25th of January	Report submitted to Council by the end of January	0	0	1	0	4
D48	Municipal Financial Viability and Management	Prepare and submit the annual adjustment budget to Council for approval by the end of February	Adjustment budget submitted to Council by the end of February	0	0	1	0	4
D49	Municipal Financial Viability and Management	Prepare and submit the draft annual budget to Council for approval by the end of March	Draft Annual Budget submitted by the end of March	0	0	1	0	4
D50	Municipal Financial Viability and Management	Prepare and submit the final annual budget to Council for approval by the end of May	Final Annual Budget submitted by the end of May	0	0	0	1	4

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Annexure A 2019/20

Ref No	National KPA	Key Performance Indicator (KPI)	Unit of Measurement	Targets				Weight
				Q1	Q2	Q3	Q4	
D51	Municipal Financial Viability and Management	Prepare and submit to the Mayor the monthly reports on revenue and expenditure in terms of sec 71 of the MFMA by the 10th working day of the next month	Number of reports submitted	3	3	3	3	2
ADD	Basic Service Delivery	Submit Back to Basics information monthly within five working days upon receipt of request to the Office of the Municipal Manager	Number of Back to Basics inputs submitted within five working days upon receipt of request	3	3	3	3	2
ADD	Good Governance and Public Participation	Submit information required for quarterly questionnaires within five working days upon receipt of request to the Office of the Municipal Manager	Number of quarterly questionnaires inputs submitted within five working days upon receipt of request	1	1	1	1	2
ADD	Good Governance and Public Participation	Provide feedback on Ward Committee recommendations monthly within five working days to the Municipal Manager	Number of inputs submitted feedback on Ward Committee recommendations within five working days upon receipt of request	3	3	3	3	2
ADD	Good Governance and Public Participation	Monthly MPAC meeting held on the fifth working day after Council Meeting	Number of meetings held five working days after Council Meeting	1	1	1	1	2
TOTAL								80

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COMPETENCIES

The competencies required from employees prescribed in the Regulations on the appointment and conditions of employment of senior managers, R21 of 2014. The assessment of these competencies will account for **twenty percent** of the total employee assessment score.

Annexure B describes the different achievement levels for each Competency and should therefore form part of this section of the Performance Plan.

Competency	Definition	Weight
LEADING COMPETENCIES		
Strategic direction and leadership	<p>Provide and direct a vision for the institution, and inspire and deploy others to deliver on the strategic institutional mandate. It includes:</p> <ul style="list-style-type: none"> • Impact and influence • Institutional performance management • Strategic planning and management • Organisational awareness 	1.67
People management	<p>Effectively manage, inspire and encourage people, respect diversity, optimise talent and build and nurture relationships in order to achieve institutional objectives. It includes:</p> <ul style="list-style-type: none"> • Human capital planning and development • Diversity management • Employee relations management • Negotiation and dispute management 	1.67
Programme and project management	<p>Able to understand program and project management methodology; plan, manage, monitor and evaluate specific activities in order to deliver on set objectives. It includes:</p> <ul style="list-style-type: none"> • Program and project planning and implementation • Service delivery management • Program and project monitoring and evaluation 	1.67
Financial management	<p>Able to compile, plan and manage budgets, control cash flow, institute financial risk management and administer procurement processes in accordance with recognised financial practices. Further to ensure that all financial transactions are managed in an ethical manner. It includes:</p> <ul style="list-style-type: none"> • Budget planning and execution • Financial strategy and delivery • Financial reporting and delivery 	1.67
Change leadership	<p>Able to direct and initiate transformation on all levels in order to successfully drive and implement new initiatives and deliver professional and quality services to the community. It includes:</p> <ul style="list-style-type: none"> • Change vision and strategy 	1.67

Competency	Definition	Weight
	<ul style="list-style-type: none"> • Process design and improvement • Change impact monitoring and evaluation 	
Governance leadership	<p>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 conceptualisation of relevant policies and enhance cooperative governance relationships. It includes:</p> <ul style="list-style-type: none"> • Policy formulation • Risk and compliance management • Cooperative governance 	1.67
CORE COMPETENCIES		
Moral competence	Able to identify moral triggers, apply reasoning that promotes honesty and integrity and display behaviour that reflects moral competence.	1.67
Planning and organising	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.	1.67
Analysis and innovation	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.	1.67
Knowledge and information management	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	1.67
Communication	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.	1.67
Results and quality focus	Able to maintain high quality standards, focus on achieving results and objectives while consistency striving to exceed expectations and encourage others to meet quality standards. Further, to actively monitor and measure results and quality against identified objectives.	1.67
TOTAL		20

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