

# KAREEBERG MUNICIPALITY



## Performance Agreement for the financial year 1 January 2026 – 30 June 2026

**Chief Financial Officer**

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Performance agreement made and entered into by and between

The Kareeberg Municipality and represented by the Municipal Manager (*herein and after referred as Employer*)

and

Jonita Phateka Jack, the Chief Financial Officer (*herein and after referred as Employee*) for the period 1 January 2026 to 30 June 2026.

Where as

- a. 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"). The Employer and the Employee are hereinafter referred as "the Parties";
- b. 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;
- c. 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 promote local government goals; and
- d. The Parties wish to ensure that there is compliance with Sections 57(4B) and 57(5) of the Systems Act.

## 1. INTERPRETATION

1.1 In this Agreement the followings terms will have the meaning ascribed thereto:

1.1.1 "this Agreement" – means the performance agreement between the Employer and the employee and the Annexures thereto;

1.1.2 "the Executive Authority" – means the Council of the Municipality constituted in terms of Section 157 of the Constitution as represented by its chairperson, the Mayor;

1.1.3 "the Employee" means the Chief Financial Officer appointed in terms of Section 54A of the Systems Act;

1.1.4 "the Employer" means the Municipality; and

1.1.5 "the Parties" means the Employer and Employee.

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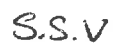



**2. PURPOSE OF THIS AGREEMENT**

- 2.1 To comply with the provisions of Section 57(1)(b),(4B) and (5) of the Systems Act as well as the Contract of Employment entered into between the Parties;
- 2.2 To specify objectives and targets established for the Employee and to communicate to the Employee the Employer's expectations of the Employee's performance targets and accountabilities;
- 2.3 To specify accountabilities as set out in the Performance Plan (Annexure A);
- 2.4 To monitor and measure performance against set targeted outputs and outcomes;
- 2.5 To establish a transparent and accountable working relationship;
- 2.6 To appropriately reward the employee in accordance with section 11 of this agreement; and
- 2.7 To give effect to the Employer's commitment to a performance-orientated relationship with the Employee in attaining improved service delivery.

**3. COMMENCEMENT AND DURATION**

- 3.1 This Agreement will commence on 1 January 2026 and will remain in force until 30 June 2026 where-after a new Performance Agreement shall be concluded between the parties for the next financial year or any portion thereof;
- 3.2 The Parties will conclude a new Performance Agreement that replaces this Agreement at least once a year by not later than 31<sup>st</sup> of July of the succeeding financial year;
- 3.3 This Agreement will terminate on the termination of the Employee's contract of employment for any reason;
- 3.4 If at any time during the validity of the agreement the work environment alters to the extent that the contents of the agreement are no longer appropriate, the contents must by mutual agreement between the parties, immediately be revised; and
- 3.5 Any significant amendments or deviations must take cognizance of the requirements of sections 34 and 42 of the Municipal Systems Act and Regulation 4(5) of the Regulations.




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#### 4. PERFORMANCE OBJECTIVES

- 4.1 The Performance Plan (Annexure A) sets out –
- 4.1.1 The performance objectives and targets that must be met by the Employee;
  - 4.1.2 The timeframes within which those performance objectives and targets must be met; and
  - 4.1.3 The competencies (Annexure B – definitions in terms of Regulation 21 of 17 January 2014) required to operate effectively as senior managers in the local government environment.
- 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, Service Delivery and Budget Implementation Plan (SDBIP) and the Budget of the Employer, and shall include:
- 4.2.1 Key objectives that describe the main tasks that need to be done;
  - 4.2.2 Key performance indicators that provide the details of the evidence that must be provided to show that an indicator has been achieved by the employee;
  - 4.2.3 Target dates that describe the timeframe in which the targets must be achieved; and
  - 4.2.4 Weightings showing the relative importance of the key objectives to each other.
- 4.3 The Personal Development Plan (Annexure C) sets out the Employee's personal development requirements in line with the objectives and targets of the Employer; and
- 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 adopted for the employees of the Employer;
- 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 employees and service providers to perform to the standards required;

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- 5.3 The Employer must consult the Employee about the specific performance standards and targets that will be included in the performance management system applicable to the Employee;
- 5.4 The Employee undertakes to actively focus on the promotion and implementation of the key performance indicators (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 shall be assessed shall consist of two components, Operational Performance and Competencies both of which shall be contained in the Performance Agreement;
- 5.6 The Employee's assessment will be based on his performance in terms of the outputs/outcomes (performance indicators) identified as per attached Performance Plan, which are linked to the KPAs, and will constitute 80% of the overall assessment result as per the weightings agreed to between the Employer and Employee;
- 5.7 The Competencies will make up the other 20% of the Employee's assessment score. The Competencies are spilt into two groups, leading competencies that drive strategic intent and direction and core competencies, which drive the execution of the leading competencies.

## 6. PERFORMANCE ASSESSMENT

- 6.1 The Performance Plan (Annexure A) to this Agreement sets out key performance indicators and competencies that needs to be evaluated in terms of –
  - 6.1.1 The standards and procedures for evaluating the Employee's performance; and
  - 6.1.2 During the intervals for the evaluation of the Employee's performance.
- 6.2 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;
- 6.3 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;

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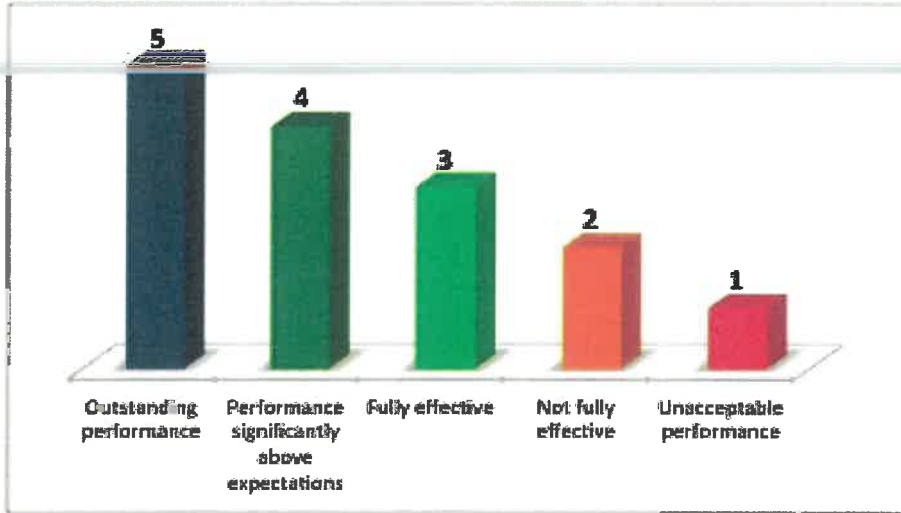
- 6.4 The Employee's performance will also be measured in terms of contributions to the goals and strategies set out in the Employer's Integrated Development Plan (IDP) as described in 6.6 – 6.13 below;
- 6.5 The Employee will submit quarterly performance reports (SDBIP) and a comprehensive annual performance report at least one week prior to the performance assessment meetings to the Evaluation Panel Chairperson for distribution to the panel members for preparation purposes;
- 6.6 Assessment of the achievement of results as outlined in the performance plan:
  - 6.6.1 Each KPI or group of KPIs shall be assessed according to the extent to which the specified standards or performance targets have been met (qualitative and quantitative) and with due regard to ad-hoc tasks that had to be performed under the KPI;
  - 6.6.2 A rating on the five-point scale described in 6.9 below shall be provided for each KPI or group of KPIs which will then be multiplied by the weighting to calculate the final score;
  - 6.6.3 The Employee could submit his self-evaluation to the Employer prior to the formal assessment;
  - 6.6.4 An overall score will be calculated based on the total of the individual scores calculated above.
- 6.7 Assessment of the Competencies:
  - 6.7.1 Each Competency will be assessed in terms of the descriptions provided (Annexure B) during the mid-year and year-end reviews;
  - 6.7.2 A rating on the five-point scale described in 6.10 below shall be provided for each Competency which will then be multiplied by the weighting to calculate the final score; and
  - 6.7.3 An overall score will be calculated based on the total of the individual scores calculated above.
- 6.8 Overall rating
  - 6.8.1 An overall rating is calculated by adding the overall scores as calculated in 6.6.4 and 6.7.3 above; and
  - 6.8.2 Such overall rating represents the outcome of the performance appraisal.

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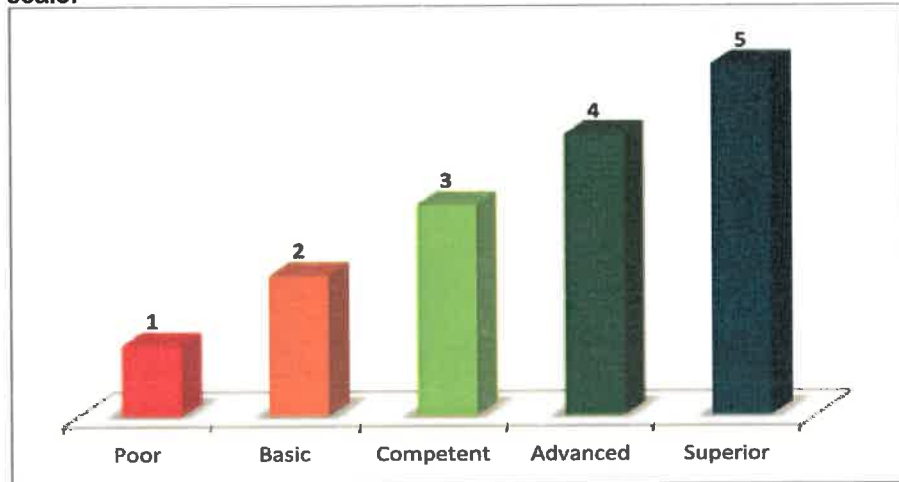
6.9 The assessment of the performance of the Employee will be based on the following rating scale for KPIs:



Terminology	Description
<b>Outstanding performance</b>	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.
<b>Performance significantly above expectations</b>	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 all others throughout the year.
<b>Fully effective</b>	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 PA and Performance Plan.
<b>Not fully effective</b>	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 performance criteria and indicators as specified in the PA and Performance Plan.
<b>Unacceptable performance</b>	Performance does not meet the standard expected for the job. The review/assessment indicates that they employee has achieved below fully effective results against almost all of the performance criteria and indicators as specified in the PA 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.

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6.10 The assessment of the competencies will be based on the following rating scale:



Achievement Level	Description
<b>Poor</b>	Do not apply the basic concepts and methods to proof a basic understanding of local government operations and requires extensive supervision and development interventions.
<b>Basic</b>	Applies basic concepts, methods, and understanding of local government operations, but requires supervision and development intervention.
<b>Competent</b>	Develops and applies more progressive concepts, methods and understanding. Plans and guides the work of others and executes progressive analysis.
<b>Advanced</b>	Develops and applies complex concepts, methods and understanding. Effectively directs and leads a group and executes in-depth analysis.
<b>Superior</b>	Has a comprehensive understanding of local government operations, critical in strategic shaping strategic direction and change, develops and applies comprehensive concepts and methods.

6.11 For purposes of evaluating the annual performance of the Employee, an evaluation panel constituted of the following persons will be established –

6.11.1 Mayor;



6.11.2 Municipal Manager from another municipality;

6.11.3 Chairperson of the Performance Audit Committee or in his/her absence thereof, the Chairperson of the Audit Committee;

6.11.4 A Member of Council; and

6.11.5 A member of the community.

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- 6.12 The Municipal Manager will evaluate the performance of the Employee as at the end of the 1<sup>st</sup> and 3<sup>rd</sup> quarters and document a summary of the discussions; and
- 6.13 The Municipal Manager will give performance feedback to the Employee within five (5) working days after each quarterly and annual assessment meetings.

**7. SCHEDULE FOR PERFORMANCE REVIEWS**




- 7.1 The performance of the Employee in relation to his performance agreement shall be reviewed for the following quarters with the understanding that the reviews for the first and the third quarter may be verbal if performance is satisfactory:

Quarter	Months
1	July - September
2	October - December
3	January - March
4	April - June

- 7.2 The Employer shall keep a record of the year-end assessment meetings;
- 7.3 Performance feedback shall be based on the Employer's assessment of the Employee's performance;
- 7.4 The Employer will be entitled to review and make reasonable changes to the provisions of Annexure A from time to time for operational reasons. The Employee will be fully consulted before any such change is made; and
- 7.5 The Employer may amend the provisions of Annexure A whenever the performance management system is adopted, implemented and/or amended as the case may be. In that case, the Employee will be fully consulted before any such change is made.

**8. DEVELOPMENTAL REQUIREMENTS**

The Personal Development Plan (PDP) for addressing developmental gaps is attached as Annexure C. Such Plan may be implemented and/or amended as the case may be after each assessment. In that case, the Employee will be fully consulted before any such change or plan is made.

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**9. OBLIGATIONS OF THE EMPLOYER**

**9.1 The Employer shall-**





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

**10. CONSULTATION**

**10.1 The Employer agrees to consult the Employee timeously where the exercising of its powers will have amongst others-**

- 10.1.1 A direct effect on the performance of any of the Employee's functions;
- 10.1.2 Commit the Employee to implement or to give effect to a decision made by the Employer; and
- 10.1.3 A substantial financial effect on the Employer.

**10.2 The Employer agrees to inform the Employee of the outcome of any decisions taken pursuant to the exercise of powers contemplated in clause 12.1 as soon as is practicable to enable the Employee to take any necessary action with delay.**

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**11. REWARD**





- 11.1 The evaluation of the Employee's performance will form the basis for acknowledging outstanding performance or correcting unacceptable performance;
- 11.2 The payment of the performance bonus is determined by the performance score obtained during the 4<sup>th</sup> quarter;
- 11.3 The performance bonus will be awarded pro-rata according to the period of this agreement based on the following scheme:

Performance Rating		Bonus Calculation
0% - 64%	Poor Performance	0% of total package
65% - 69%	Average Performance	5% of total package
70% - 74%	Fair Performance	9% of total package
75% - 79%	Good Performance	11% of total package
80% - 100%	Excellent Performance	14% of total package

- 11.4 In the event of the Employee terminating his services during the validity period of this Agreement, but only after three months after the start of this agreement's inception date, the Employee's performance will be evaluated for the period during which he/she was employed and he/she will be entitled to a pro-rata performance bonus based on his/her evaluated performance for the period of actual service; and
- 11.5 The Employer will submit the total score of the annual assessment and of the Employee, to full Council for purposes of recommending the bonus allocation.

**12. MANAGEMENT OF EVALUATION OUTCOMES**

- 12.1 Where the Employer is, any time during the Employee's employment, not satisfied with the Employee's performance with respect to any matter dealt with in this Agreement, the Employer will give notice to the Employee to attend a meeting;
- 12.2 The Employee will have the opportunity at the meeting to satisfy the Employer of the measures being taken to ensure that his performance becomes satisfactory and any programme, including any dates, for implementing these measures;
- 12.3 Where there is a dispute or difference as to the performance of the Employee under this Agreement, the Parties will confer with a view to resolving the dispute or difference; and
- 12.4 In the case of unacceptable performance, the Employer shall –

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12.4.1 Provide systematic remedial or developmental support to assist the Employee to improve his performance; and

12.4.2 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 Disputes will be dealt with in terms of Section 33 of the Local Government: Municipal Performance Regulations for Municipal Managers and managers directly accountable to Municipal Managers (Regulation 805 of August 2006).

13.2 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,

- (a) must be mediated by the MEC for local government in the province within thirty (30) days of receipt of a formal dispute from the employee,
- (b) or any other person designated by the MEC whose decision shall be final and binding on both parties

13.3 Any disputes about the outcome of the employee's performance evaluation,



- (a) must be mediated by the MEC for local government in the province within thirty (30) days of receipt of a formal dispute from the employee,
- (b) or any other person designated by the MEC whose decision shall be final and binding on both parties.

### 14. GENERAL

14.1 The contents of this agreement and the outcome of any review conducted in terms of Annexure A may be made available to the public by the Employer; and

14.2 Nothing in this agreement diminishes the obligations, duties or accountabilities of the Employee in terms of his contract of employment, or the effects of existing or new regulations, circulars, policies, directives or other instruments.

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Thus done and signed at Carnarvon on the 23 day of January 2026.

**AS WITNESSES:**

1. [Signature]
2. [Signature]

[Signature]  
**CHIEF FINANCIAL OFFICER**

Thus done and signed at Carnarvon on the 23 day of January 2026.

**AS WITNESSES:**

1. [Signature]
2. [Signature]

[Signature]  
**MUNICIPAL MANAGER**



MM: [Signature] CFO: J.P

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[Signature] [Signature]



# Performance Plan

Chief Financial Officer

  
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**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 instance where an indicator do 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 recalculated 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.

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## KEY PERFORMANCE INDICATORS

The key performance areas, the performance objectives, key performance indicators and targets that must be met within the agreed time frame 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
				Q3	Q4	
SDBIP Graph	Municipal Transformation and Institutional Development	Manage and achieve 90% of the KPI's of the Sub-directorate: Development and Strategic Services	90% of the KPI's of the sub-directorate have been met as per Ignite Dashboard report	90%	90%	2
SDBIP Graph	Municipal Transformation and Institutional Development	Manage and achieve 90% of the KPI's of the Sub-directorate: Development and Strategic Services	90% of the KPI's of the sub-directorate have been met as per Ignite Dashboard report	90%	90%	2
SDBIP Graph	Municipal Transformation and Institutional Development	Manage and achieve 90% of the KPI's of the Sub-directorate: Development and Strategic Services	90% of the KPI's of the sub-directorate have been met as per Ignite Dashboard report	90%	90%	2
SDBIP Graph	Municipal Transformation and Institutional Development	Manage and achieve 90% of the KPI's of the Sub-directorate: Development and Strategic Services	90% of the KPI's of the sub-directorate have been met as per Ignite Dashboard report	90%	90%	2
TL17	Basic Service Delivery	Number of formal residential properties that receive piped water (credit) that is connected to the municipal water infrastructure network and billed for the service as at 30 June 2026	Number of residential properties which are billed for water as at 30 June 2026	0	1 800	2
TL18	Basic Service Delivery	Number of formal residential properties connected to the municipal electrical infrastructure network (credit and prepaid electrical metering)(Excluding Eskom areas) and billed for the service as at 30 June 2026	Number of residential properties which are billed for electricity or have pre-paid meters (Excluding Eskom areas) as at 30 June 2026	0	1 029	2

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Annexure A 2025/26

Ref No	National KPA	Key Performance Indicator (KPI)	Unit of Measurement	Targets		Weight
				Q3	Q4	
TL19	Basic Service Delivery	Number of formal residential properties connected to the municipal waste water sanitation/sewerage network for sewerage service, irrespective of the number of water closets (toilets) and billed for the service as at 30 June 2026	Number of residential properties which are billed for sewerage as at 30 June 2026	0	858	2
TL20	Basic Service Delivery	Number of formal residential properties for which refuse is removed once per week and billed for the service as at 30 June 2026	Number of residential properties which are billed for refuse removal as at 30 June 2026	0	1 910	2
TL21	Basic Service Delivery	Provide free basic water to indigent households as at 30 June 2026	Number of indigent households receiving free basic water	0	1000	2
TL22	Basic Service Delivery	Provide free basic electricity to indigent households as at 30 June 2026	Number of indigent households receiving free basic electricity	0	1000	2
TL23	Basic Service Delivery	Provide free basic sanitation to indigent households as at 30 June 2026	Number of indigent households receiving free basic sanitation services	0	1000	2
TL24	Basic Service Delivery	Provide free basic refuse removal to indigent households as at 30 June 2026	Number of indigent households receiving free basic refuse removal services	0	1000	2
TL25	Basic Service Delivery	The percentage of the municipal capital budget actually spent on capital projects by 30 June 2026 [(Amount actually spent on capital projects/ Amount budgeted for capital projects)x100]	% of capital budget spent on capital projects by 30 June 2026	60%	80%	2
TL26	Municipal Financial Viability and Management	80% of the total municipal operational budget spent by 30 June 2026 ((Actual amount spent on total operational budget/Total operational budget)x100)	% of the total municipal operational budget spent by 30 June 2026	60%	80%	2
TL27	Municipal Financial Viability and Management	Financial viability measured in terms of the municipality's ability to meet its service debt obligations as at 30 June 2026 ((Short Term Borrowing + Bank Overdraft + Short Term Lease + Long Term Borrowing + Long Term Lease) / Total Operating Revenue - Operating Conditional Grant)	% debt coverage	0%	45%	2

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Annexure A 2025/26

Ref No	National KPA	Key Performance Indicator (KPI)	Unit of Measurement	Targets		Weight
				Q3	Q4	
TL28	Municipal Financial Viability and Management	Financial viability measured in terms of the outstanding service debtors as at 30 June 2026 ((Total outstanding service debtors/ revenue received for services)X100)	% of outstanding service debtors to revenue received for services	0%	97%	3
TL29	Municipal Financial Viability and Management	Financial viability measured in terms of the available cash to cover fixed operating expenditure as at 30 June 2026 ((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))	Number of months it takes to cover fixed operating expenditure with available cash	0	1	3
TL31	Municipal Financial Viability and Management	Submit the draft main budget for the 2026/27 financial year to Council by 31 March 2026	Draft main budget for the 2026/27 financial year submitted to Council by 31 March 2026	1	0	3
TL32	Municipal Financial Viability and Management	Achieve a debtor payment percentage of 80% by 30 June 2026 {(Gross Debtors Opening Balance + Billed Revenue - Gross Debtors Closing Balance - Bad Debts Written Off)/Billed Revenue x 100}	% debtor payment achieved	0%	80%	3
TL33	Municipal Transformation and Institutional Development	Purchase and install a Document Storage Server by 30 June 2026	Server purchased and installed by 30 June 2026	0	1	3
TL34	Good Governance and Public Participation	Review the Municipal Finance Management Act (Act 56 of 2003) delegations and submit to Council by 30 June 2026	Delegations reviewed and submitted to Council by 30 June 2026	0	1	3
D33	Municipal Financial Viability and Management	Conduct bi-monthly meetings with managers/supervisors	Number of meetings conducted	1	2	3

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Annexure A 2025/26

Ref No	National KPA	Key Performance Indicator (KPI)	Unit of Measurement	Targets		Weight
				Q3	Q4	
D34	Municipal Financial Viability and Management	Submit quarterly report on progress made with the implementation of council decisions applicable to the Department to the MM	Number of reports submitted	1	1	2
D35	Municipal Financial Viability and Management	Conduct quarterly meetings with all personnel in the department	Number of meetings conducted	1	1	2
D36	Municipal Financial Viability and Management	Visit Van Wykswlei and Vosburg offices at least once per quarter	Number of visits	2	2	2
D37	Municipal Financial Viability and Management	Submit monthly reports to the MM	Number of reports submitted	3	3	2
D38	Municipal Financial Viability and Management	Submit the adjustments budget for consideration to Council by 28 February	Adjustment budget submitted to Council by 28 February	1	0	2
D39	Municipal Financial Viability and Management	Submit the sec 71 of the MFMA reports to National Treasury, Provincial Treasury and the Mayor within 10 working days after the start of the month	Number of section 71 reports submitted	3	3	2
D40	Municipal Financial Viability and Management	Prepare the mid year budget and performance report in terms of sec 72 of the MFMA and submit to the Mayor by the 25th of January	Report submitted to the Mayor by 25 January	1	0	2
D41	Municipal Financial Viability and Management	Develop and distribute communication on the indigent policy to Ward Committees to raise awareness annually by 31 March	Communication developed and distributed by 31 March	1	0	2
D43	Municipal Financial Viability and Management	Submit the MTEF Final budget for consideration to Council by 31 May	Final MTEF Budget submitted	0	1	2
D44	Municipal Financial Viability and Management	Attend to the Internal Audit and respond to the internal audit exceptions 3 days after receiving from the internal auditors of PKSDM	% internal audit exceptions responded to within 3 days after receiving from the internal auditors of PKSDM	100%	100%	2


  
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Annexure A 2025/26

Ref No	National KPA	Key Performance Indicator (KPI)	Unit of Measurement	Targets		Weight
				Q3	Q4	
D46	Municipal Financial Viability and Management	Update and balance the asset register by 30 June	Asset register updated and balanced by 30 June	0	1	2
D47	Municipal Financial Viability and Management	Update investments register and balance with the general ledger by the 10th working day of every month	Number of updates	3	3	2
D48	Municipal Financial Viability and Management	Submit quarterly reports to the MM on the progress made with the implementation with Audit Action plan	Number of reports submitted	1	1	2
D49	Municipal Financial Viability and Management	Submit MIG financial progress reports as required by the Provincial Department of Local Government before the 10th working day of the month	Number of MIG progress reports submitted to the Provincial Department of Local Government before the 10th working day of the month	3	3	3
<b>TOTAL</b>				<b>80</b>		<b>80</b>

  
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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
<b>LEADING COPEENCIES</b>		
Strategic direction and leadership	<p>Provide and direct a vision for the institution, and inspire and deploy others to deliver on the strategic institution's mandate. It includes:</p> <ul style="list-style-type: none"> <li>• Impact and influence</li> <li>• Institutional performance management</li> <li>• Strategic planning and management</li> <li>• Organisational awareness</li> </ul>	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"> <li>• Human capital planning and development</li> <li>• Diversity management</li> <li>• Employee relations management</li> <li>• Negotiation and dispute management</li> </ul>	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"> <li>• Program and project planning and implementation</li> <li>• Service delivery management</li> <li>• Program and project monitoring and evaluation</li> </ul>	1.67
Financial management	<p>Able to compile, plan and manage budgets, control cash flow, institute financial risk management and administrative 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"> <li>• Budget planning and execution</li> <li>• Financial strategy and delivery</li> <li>• Financial reporting and delivery</li> </ul>	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"> <li>• Change vision and strategy</li> </ul>	1.67



Competency	Definition	Weight
	<ul style="list-style-type: none"> <li>Process design and improvement</li> <li>Change impact monitoring and evaluation</li> </ul>	
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"> <li>Policy formulation</li> <li>Risk and compliance management</li> <li>Cooperative governance</li> </ul>	1.67
<b>CORE COMPETENCIES</b>		
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
<b>TOTAL</b>		<b>20</b>

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## Competency Framework

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LEADING COMPETENCIES		ACHIEVEMENT LEVELS		
CLUSTER:	Strategic Direction and Leadership			
COMPETENCY NAME :	Provide and direct a vision for the institution, and inspire and deploy others to deliver on the strategic institutional mandate			
COMPETENCY DEFINITION :				
BASIC	COMPETENT	ADVANCED	SUPERIOR	
<ul style="list-style-type: none"> <li>Understand Institutional and departmental strategic objectives, but lacks the ability to inspire others to achieve set mandate</li> <li>Describe how specific tasks link to institutional strategies but has limited influence in directing a strategy</li> <li>Has a basic understanding of institutional performance management, but lacks the ability to integrate systems into a collective whole</li> <li>Demonstrate basic understanding of key decision makers</li> </ul>	<ul style="list-style-type: none"> <li>Give direction to a team in realising the institution's strategic mandate and set objectives</li> <li>Has a positive impact and influence on the morale, engagement and participation of team members</li> <li>Develop action plans to execute and guide strategy</li> <li>Assist in defining performance measures to monitor the progress and effectiveness of the institution</li> <li>Displays an awareness of institutional structures and political factors</li> <li>Effectively communicate barriers to execution to relevant parties</li> <li>Provide guidance to all stakeholders in the achievement of the strategic mandate</li> <li>Understand the aim and objectives of the institution and relate it to own work</li> </ul>	<ul style="list-style-type: none"> <li>Evaluate all activities to determine value and alignment to strategic intent</li> <li>Display in-depth knowledge and understanding of strategic planning</li> <li>Align strategy and goals across all functional areas</li> <li>Actively define performance measures to monitor the progress and effectiveness of the institution</li> <li>Consistently challenge strategic plans to ensure relevance</li> <li>Understand institutional structures and political factors, and the consequences of actions</li> <li>Empower others to follow the strategic direction and deal with complex situations</li> <li>Guide the institution through complex and ambiguous concern</li> </ul>	<ul style="list-style-type: none"> <li>Structure and position the institution to local government priorities</li> <li>Actively use in-depth knowledge and understanding to develop and implement a comprehensive institutional framework</li> <li>Hold self-accountable for strategy execution and results</li> <li>Provide impact and influence through building and maintaining strategic relationships</li> <li>Create an environment that facilitates loyalty and innovation. Display a superior level of self-discipline and integrity in actions</li> <li>Integrate various systems into a collective whole to optimise institutional performance management</li> <li>Uses understanding of competing interests to maneuver successfully to a win/win outcome</li> </ul>	

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<b>CLUSTER:</b>	<b>LEADING COMPETENCIES</b>		
<b>COMPETENCY NAME :</b>	<b>Strategic Direction and Leadership</b>		
<b>COMPETENCY DEFINITION :</b>	<b>Provide and direct a vision for the institution, and inspire and deploy others to deliver on the strategic institutional mandate</b>		
	<b>ACHIEVEMENT LEVELS</b>		
<b>BASIC</b>	<b>COMPETENT</b>	<b>ADVANCED</b>	<b>SUPERIOR</b>
		<ul style="list-style-type: none"> <li>Use understanding of power relationships and dynamic tensions among key players to frame communications and develop strategies, positions and alliances</li> </ul>	

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LEADING COMPETENCIES		ACHIEVEMENT LEVELS			
CLUSTER:	COMPETENCY NAME :	BASIC	COMPETENT	ADVANCED	SUPERIOR
	People Management				
	Effectively manage, inspire and encourage people, respect diversity, optimise talent and build and nurture relationships in order to achieve institutional objectives				
		<ul style="list-style-type: none"> <li>Participate in team goalsetting and problem solving</li> <li>Interact and collaborate with people of diverse backgrounds</li> <li>Aware of guidelines for employee development, but requires support in implementing development initiatives</li> </ul>	<ul style="list-style-type: none"> <li>Seek opportunities to increase team contribution and responsibility</li> <li>Respect and support the diverse nature of others and be aware of the benefits of a diverse approach</li> <li>Effectively delegate tasks and empower others to increase contribution and execute functions optimally</li> <li>Apply relevant employee legislation fairly and consistently</li> <li>Effectively identify capacity requirements to fulfill the strategic mandate</li> </ul>	<ul style="list-style-type: none"> <li>Identify ineffective team and work processes and recommend remedial interventions</li> <li>Recognise and reward effective and desired behavior</li> <li>Provide mentoring and guidance to others in order to increase personal effectiveness</li> <li>Identify development and learning needs within the team</li> <li>Inspire a culture of performance excellence by giving positive and constructive feedback to the team</li> <li>Achieve agreement or consensus in adversarial environments</li> <li>Lead and unite diverse teams across divisions to achieve institutional objectives</li> </ul>	<ul style="list-style-type: none"> <li>Develop and incorporate best practice people management processes, approaches and tools across the institution</li> <li>Foster a culture of discipline, responsibility and accountability</li> <li>Understand the impact of diversity in performance and actively incorporate a diversity strategy in the institution</li> <li>Develop comprehensive integrated strategies and approaches to human capital development and management</li> <li>Actively identify trends and predict capacity requirements to facilitate unified transition and performance management</li> </ul>

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LEADING COMPETENCIES		ACHIEVEMENT LEVELS			
CLUSTER :	COMPETENCY NAME :	BASIC	COMPETENT	ADVANCED	SUPERIOR
	Program and Project Management				
	<b>Able to understand program and project management methodology; plan, manage, monitor and evaluate specific activities in order to deliver on set objectives</b>				
	<ul style="list-style-type: none"> <li>Initiate projects after approval from higher authorities</li> <li>Understand procedures of program and project management methodology, implications and stakeholder involvement</li> <li>Understand the rational of projects in relation to the institution's strategic objectives</li> <li>Document and communicate factors and risk associated with own work</li> <li>Use results and approaches of successful project implementation as guide</li> </ul>	<ul style="list-style-type: none"> <li>Establish broad stakeholder involvement and communicate the project status and key milestones</li> <li>Define the roles and responsibilities of the project team and create clarity around expectations</li> <li>Find a balance between project deadline and the quality of deliverables</li> <li>Identify appropriate project resources to facilitate the effective completion of the deliverables</li> <li>Comply with statutory requirements and apply policies in a consistent manner</li> <li>Monitor progress and use of resources and make needed adjustments to timelines, steps and resource allocation</li> </ul>	<ul style="list-style-type: none"> <li>Manage multiple programs and balance priorities and conflicts according to institutional goals</li> <li>Apply effective risk management strategies through impact assessment and resource requirements</li> <li>Modify project scope and budget when required without compromising the quality and objectives of the project</li> <li>Involve top-level authorities and relevant stakeholders in seeking project buy-in</li> <li>Identify and apply contemporary project management methodology</li> <li>Influence and motivate project team to deliver exceptional results</li> <li>Monitor policy implementation and apply procedures to manage risks</li> </ul>	<ul style="list-style-type: none"> <li>Understand and conceptualise the long-term implications of project outcomes</li> <li>Direct a comprehensive strategic macro and micro analysis and scope projects accordingly to realise institutional objectives</li> <li>Influence people in positions of authority to implement outcomes of projects</li> <li>Lead and direct translation of policy into workable action plans</li> <li>Ensure that programs are monitored to track progress and optimize resource utilisation, and that adjustments are made as needed</li> </ul>	

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LEADING COMPETENCIES		ACHIEVEMENT LEVELS			
CLUSTER :	COMPETENCY NAME :	BASIC	COMPETENT	ADVANCED	SUPERIOR
	<b>Financial Management</b> <b>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</b>				
		<ul style="list-style-type: none"> <li>Understand basic financial concepts and methods as they relate to institutional processes and activities</li> <li>Display awareness into the various sources of financial data, reporting mechanisms, financial governance, processes and systems</li> <li>Understand the importance of financial accountability</li> <li>Understand the importance of asset control</li> </ul>	<ul style="list-style-type: none"> <li>Exhibit knowledge of general financial concepts, planning, budgeting and forecasting and how they interrelate</li> <li>Assess, identify and manage financial risks</li> <li>Assume a cost-saving approach to financial management</li> <li>Prepare financial reports based on specified formats</li> <li>Consider and understand the financial implications of decisions and suggestions</li> <li>Ensure that delegation and instructions as required by National Treasury guidelines are reviewed and updated</li> <li>Identify and implement proper monitoring and evaluation practices to ensure appropriate spending against budget</li> </ul>	<ul style="list-style-type: none"> <li>Take active ownership of planning, budgeting and forecasting processes and provides credible answers to queries within own responsibility</li> <li>Prepare budgets that are aligned to the strategic objectives of the institution</li> <li>Address complex budgeting and financial management concerns</li> <li>Put systems and processes in place to enhance the quality and integrity of financial management practices</li> <li>Advise on policies and procedures regarding asset control</li> <li>Promote National Treasury's regulatory framework for Financial Management</li> </ul>	<ul style="list-style-type: none"> <li>Develop planning tools to assist in evaluating and monitoring future expenditure trends</li> <li>Set budget frameworks for the institution</li> <li>Set strategic direction for the institution on expenditure and other financial processes</li> <li>Build and nurture partnerships to improve financial management and achieve financial savings</li> <li>Actively identify and implement new methods to improve asset control</li> <li>Display professionalism in dealing with financial data and processes</li> </ul>

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LEADING COMPETENCIES		ACHIEVEMENT LEVELS		
CLUSTER :	COMPETENCY NAME :	COMPETENT	ADVANCED	SUPERIOR
	Change Leadership			
	<b>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</b>			
COMPETENCY DEFINITION :		BASIC	COMPETENT	ADVANCED
		<ul style="list-style-type: none"> <li>Display an awareness of change interventions and the benefits of transformation initiatives</li> <li>Able to identify basic needs for change</li> <li>Identify gaps between the current and desired state</li> <li>Identify potential risk and challenges to transformation, including resistance to change factors</li> <li>Participate in change programs and piloting change interventions</li> <li>Understand the impact of change interventions on the institution within the broader scope of local government</li> </ul>	<ul style="list-style-type: none"> <li>Perform an analysis of the change impact on the social, political and economic environment</li> <li>Maintain calm and focus during change</li> <li>Able to assist team members during change and keep them focused on the deliverables</li> <li>Volunteer to lead change efforts outside of own work team</li> <li>Able to gain buy-in and approval for change from relevant stakeholders</li> <li>Identify change readiness levels and assist in resolving resistance to change factors</li> <li>Design change interventions that are aligned with the institution's strategic objectives and goals</li> </ul>	<ul style="list-style-type: none"> <li>Actively monitor change impact and results and convey progress to relevant stakeholders</li> <li>Secure buy-in and sponsorship for change initiatives</li> <li>Continuously evaluate change strategy and design and introduce new approaches to enhance the institution's effectiveness</li> <li>Build and nurture relationships with various stakeholders to establish strategic alliance in facilitating change</li> <li>Take the lead in impactful change programs</li> <li>Benchmark change interventions against best change practices</li> <li>Understand the impact and psychology of change and put remedial interventions in place to facilitate effective transformation</li> <li>Take calculated risk and seek new ideas from best practice scenarios and identify the potential for implementation</li> </ul>
		<ul style="list-style-type: none"> <li>Sponsor change agents and create a network of change leaders who support the interventions</li> <li>Actively adapt current structures and processes to incorporate the change interventions</li> <li>Mentor and guide team members on the effects of change, resistance factors and how to integrate change</li> <li>Motivate and inspire others around change initiatives</li> </ul>		

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LEADING COMPETENCIES		ACHIEVEMENT LEVELS			
CLUSTER :	COMPETENCY NAME :	BASIC	COMPETENT	ADVANCED	SUPERIOR
	<b>Governance Leadership</b> <b>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</b>				
	<b>COMPETENCY DEFINITION :</b>				
		<ul style="list-style-type: none"> <li>Display a basic awareness of risk, compliance and governance factors but require guidance and development in implementing such requirements</li> <li>Understand the structure of cooperative government but requires guidance on fostering workable relationships between stakeholders</li> <li>Provide input into policy formulation</li> </ul>	<ul style="list-style-type: none"> <li>Display a thorough understanding of governance and risk and compliance factors and implement plans to address these</li> <li>Demonstrate understanding of the techniques and processes for optimising risk taking decisions within the institution</li> <li>Actively drive policy formulation within the institution to ensure the achievement of objectives</li> </ul>	<ul style="list-style-type: none"> <li>Able to link risk initiatives into key institutional objectives and drivers</li> <li>Identify, analyse and measure risk, create valid risk forecasts and map risk profiles</li> <li>Apply risk control methodology and approaches to prevent and reduce risk that impede on the achievement of institutional objectives</li> <li>Demonstrate a thorough understanding of risk retention plans</li> <li>Identify and implement comprehensive risk management systems and processes</li> <li>Implement and monitor the formulation of policies, identify and analyse constraints and challenges with implementation and provide recommendations for improvement</li> </ul>	<ul style="list-style-type: none"> <li>Demonstrate a high level of commitment in complying with governance requirements</li> <li>Implement governance and compliance strategy to ensure achievement of institutional objectives within the legislative framework</li> <li>Able to advise local government on risk management, best practice interventions and compliance management</li> <li>Able to forge positive relationships on cooperative governance level to enhance the effectiveness of local government</li> <li>Able to shape, direct and drive the formulation of policies on a macro level</li> </ul>

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CORE COMPETENCIES		ACHIEVEMENT LEVELS		
CLUSTER :	COMPETENCY NAME :	COMPETENT	ADVANCED	SUPERIOR
	<b>Moral Competence</b> Able to identify moral triggers, apply reasoning that promotes honesty and integrity and consistently display behavior that reflects moral competence			
		<ul style="list-style-type: none"> <li>Conduct self in alignment with the values of local government and the institution</li> <li>Able to openly admit own mistakes and weaknesses and seek assistance from others when unable to deliver</li> <li>Actively report fraudulent activity and corruption with local government</li> <li>Understand and honor the confidential nature of matters without seeking personal gain</li> <li>Able to deal with situations of conflict of interest promptly and in the best interest of local government</li> </ul>	<ul style="list-style-type: none"> <li>Identify, develop and apply measures of self-correction</li> <li>Able to gain trust and respect through aligning actions with commitments</li> <li>Make proposals and recommendations that are transparent and gain the approval of relevant stakeholders</li> <li>Present values, beliefs and ideas that are congruent with the institution's rules and regulations</li> <li>Takes an active stance against corruption and dishonesty when noted</li> <li>Actively promote the value of the institution to internal and external stakeholders</li> <li>Able to work in unity with a team and not seek personal gain</li> <li>Apply universal moral principles consistently to achieve moral decisions</li> </ul>	<ul style="list-style-type: none"> <li>Create an environment conducive of moral practices</li> <li>Actively develop and implement measures to combat fraud and corruption</li> <li>Set integrity standards and share accountability measures across the institution to support the objectives of local government</li> <li>Take responsibility for own actions and decisions, even if the consequences are unfavorable</li> </ul>

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CORE COMPETENCIES		ACHIEVEMENT LEVELS			
CLUSTER :	COMPETENCY NAME :	BASIC	COMPETENT	ADVANCED	SUPERIOR
	<b>Planning and Organising</b> <b>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</b>				
	<b>COMPETENCY DEFINITION :</b>				
		<ul style="list-style-type: none"> <li>• Able to follow basic plans and organise tasks around set objectives</li> </ul>	<ul style="list-style-type: none"> <li>• Actively and appropriately organise information and resources required for a task</li> </ul>	<ul style="list-style-type: none"> <li>• Able to define institutional objectives, develop comprehensive plans, integrate and coordinate activities and assign appropriate resources for successful implementation</li> </ul>	<ul style="list-style-type: none"> <li>• Focus on broad strategies and initiatives when developing plans and actions</li> </ul>
		<ul style="list-style-type: none"> <li>• Understand the process of planning and organising but requires guidance and development in providing detailed and comprehensive plans</li> </ul>	<ul style="list-style-type: none"> <li>• Recognise the urgency and importance of tasks</li> </ul>	<ul style="list-style-type: none"> <li>• Identify in advance required stages and actions to complete tasks</li> </ul>	<ul style="list-style-type: none"> <li>• Able to protect and forecast short, medium and long term requirements of the institution and local government</li> </ul>
		<ul style="list-style-type: none"> <li>• Able to follow existing plans and ensure that objectives are met</li> </ul>	<ul style="list-style-type: none"> <li>• Balance short and long-term plans and goals and incorporate into the team's performance objectives</li> </ul>	<ul style="list-style-type: none"> <li>• Schedule realistic timelines, objectives and milestones for tasks and projects</li> </ul>	<ul style="list-style-type: none"> <li>• Translate policy into relevant projects to facilitate the achievement of institutional objectives</li> </ul>
		<ul style="list-style-type: none"> <li>• Focus on short-term objectives in developing plans and actions</li> </ul>	<ul style="list-style-type: none"> <li>• Schedule tasks to ensure they are performed within budget and with efficient use of time and resources</li> </ul>	<ul style="list-style-type: none"> <li>• Produce clear, detailed and comprehensive plans to achieve institutional objectives</li> </ul>	
		<ul style="list-style-type: none"> <li>• Arrange information and resources required for a task, but require further structure and organisation</li> </ul>	<ul style="list-style-type: none"> <li>• Measures progress and monitor performance results</li> </ul>	<ul style="list-style-type: none"> <li>• Identify possible risk factors and design and implement appropriate contingency plans</li> </ul>	
				<ul style="list-style-type: none"> <li>• Adapt plans in light of changing circumstances</li> </ul>	
				<ul style="list-style-type: none"> <li>• Prioritise tasks and projects according to their relevant urgency and importance</li> </ul>	

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CORE COMPETENCIES		ACHIEVEMENT LEVELS			
CLUSTER :	COMPETENCY NAME :	BASIC	COMPETENT	ADVANCED	SUPERIOR
	<b>Analysis and Innovation</b>				
	<b>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</b>				
		<ul style="list-style-type: none"> <li>Understand the basic operation of analysis, but lack detail and thoroughness</li> <li>Able to balance independent analysis with requesting assistance from others</li> <li>Recommend new ways to perform tasks within own function</li> <li>Propose simple remedial interventions that marginally challenges the status quo</li> <li>Listen to the ideas and perspectives of others and explore opportunities to enhance such innovative thinking</li> </ul>	<ul style="list-style-type: none"> <li>Demonstrate logical problem solving techniques and provide rationale for recommendations</li> <li>Demonstrate objectivity, insight and thoroughness when analysing problems</li> <li>Able to break down complex problems into manageable parts and identify solutions</li> <li>Consult internal and external stakeholders on opportunities to improve processes and service delivery</li> <li>Clearly communicate the benefits of new opportunities and innovative solutions and stakeholders</li> <li>Continuously identify opportunities to enhance internal processes</li> <li>Identify and analyse opportunities conducive to innovative approaches and propose remedial intervention</li> </ul>	<ul style="list-style-type: none"> <li>Coaches team members on analytical and innovative approaches and techniques</li> <li>Engage with appropriate individuals in analysing and resolving complex problems</li> <li>Identify solutions on various areas in the institution</li> <li>Formulate and implement new ideas throughout the institution</li> <li>Able to gain approval and buy-in for proposed interventions from relevant stakeholders</li> <li>Identify trends and best practices in process and service delivery and propose institutional application</li> <li>Continuously engage in research to identify client needs</li> </ul>	<ul style="list-style-type: none"> <li>Demonstrate complex analytical and problem solving approaches and techniques</li> <li>Create an environment conducive to analytical and fact-based problem solving</li> <li>Analyse, recommend solutions and monitor trends in key challenges to prevent and manage occurrence</li> <li>Create an environment that fosters innovative thinking and follows a learning organisation approach</li> <li>Be a thought leader on innovative customer service delivery and process optimisation</li> <li>Play an active role in sharing best practice solutions and engaging in national and international local government seminars and conferences</li> </ul>

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CLUSTER :		CORE COMPETENCIES		
COMPETENCY NAME :		Knowledge and Information Management		
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				
BASIC	COMPETENT	ADVANCED	SUPERIOR	
<ul style="list-style-type: none"> <li>Collect, categorise and track relevant information required for specific tasks and projects</li> <li>Analyse and interpret information to draw conclusions</li> <li>Seek new sources of information to increase the knowledge base</li> <li>Regularly share information and knowledge with internal stakeholders and team members</li> </ul>	<ul style="list-style-type: none"> <li>Use appropriate information systems and technology to manage institutional knowledge and information sharing</li> <li>Evaluate data from various sources and use information effectively to influence decisions and provide solutions</li> <li>Actively create mechanisms and structures for sharing information</li> <li>Use external and internal resources to research and provide relevant and cutting-edge knowledge to enhance institutional effectiveness and efficiency</li> </ul>	<ul style="list-style-type: none"> <li>Effectively predict future information and knowledge management requirements and systems</li> <li>Develop standards and processes to meet future knowledge management needs</li> <li>Share and promote best-practice knowledge management across various institutions</li> <li>Establish accurate measures and monitoring systems for knowledge and information management</li> <li>Create a culture conducive of learning and knowledge sharing</li> <li>Hold regular knowledge and information sharing sessions to elicit new ideas and share best practice approaches</li> </ul>	<ul style="list-style-type: none"> <li>Create and support a vision and culture where team members are empowered to seek, gain and share knowledge and information</li> <li>Establish partnerships across local government to facilitate knowledge management</li> <li>Demonstrate a mature approach</li> <li>Recognise and exploit knowledge points in interactions with internal and external stakeholders</li> </ul>	

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CORE COMPETENCIES		ACHIEVEMENT LEVELS		
Results and Quality Focus		COMPETENT	ADVANCED	SUPERIOR
<b>CLUSTER :</b>				
<b>COMPETENCY NAME :</b>				
<b>COMPETENCY DEFINITION :</b>	<b>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</b>			
	<b>BASIC</b>			
<ul style="list-style-type: none"> <li>Understand quality of work but requires guidance in attending to important matters</li> <li>Show a basic commitment to achieving the correct results</li> <li>Produce the minimum level of results required in the role</li> <li>Produce outcomes that is of a good standard</li> <li>Focus on the quantity of output but requires development in incorporating the quality of work</li> <li>Produce quality work in general circumstances, but fails to meet expectation when under pressure</li> </ul>	<ul style="list-style-type: none"> <li>Focus on high-priority actions and does not become distracted by lower-priority activities</li> <li>Display firm commitment and pride in achieving the correct results</li> <li>Set quality standards and design processes and tasks around achieving set standards</li> <li>Produce output of high quality</li> <li>Able to balance the quantity and quality of results in order to achieve objectives</li> <li>Monitors progress, quality of work and use of resources; provide status updates and make adjustments as needed</li> </ul>	<ul style="list-style-type: none"> <li>Consistently verify own standards and outcomes to ensure quality output</li> <li>Focus on the end result and avoids being distracted</li> <li>Demonstrate a determined and committed approach to achieving results and quality standards</li> <li>Follow task and projects through to completion</li> <li>Set challenging goals and objectives to self and team and display commitment to achieving expectations</li> <li>Maintain a focus on quality outputs when placed under pressure</li> <li>Establishing institutional systems for managing and assigning work, defining responsibilities, tracking, monitoring and measuring success, evaluating and valuing the work of the institution</li> </ul>	<ul style="list-style-type: none"> <li>Coach and guide others to exceed quality standards and results</li> <li>Develop challenging, client-focused goals and sets high standards for personal performance</li> <li>Commit to exceed the results and quality standards, monitor own performance and implement remedial interventions when required</li> <li>Work with team to set ambitious and challenging team goals, communicating long- and short term expectations</li> <li>Take appropriate risks to accomplish goals</li> <li>Overcome setbacks and adjust action plans to realise goals</li> <li>Focus people on critical activities that yield a high impact</li> </ul>	

P.V.M.  S.S.V. 

# Personal Development Plan

AD

P. V. M



S.S.V.



Annexure C

2025/26

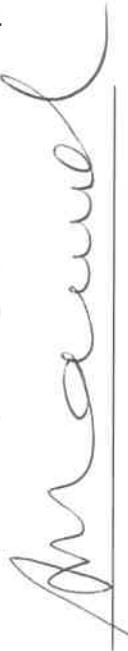
Skills Performance Gap	Outcomes Expected	Suggested training and/or development activity	Suggested mode of delivery	Suggested Time Frames	Work opportunity created to practice skill/development area	Support Person
CaseWare 1. No practical experience in using CaseWare Advanced Excel 2. Limited knowledge of advanced functions Phoenix & Sage 3.	Ability to independently prepare, review & support AFS & audit working papers. Improved efficiency in financial analysis, reconciliations and dashboards Ability to process transactions.	Formal CaseWare training course & on-the-job coaching External Short Course In-house workshops System-specific user training	External Short Course External Short Course In-house system training	3-6 Months 1-3 Months 3 Months	Interim & year-end audit file preparation & PFS compilation Preparation of monthly financial reports Daily processing of journals, creditors, debtors & Monthly System reconciliations	Senior Accountant External Auditor CFO Senior Accountant CFO Senior Accountant CFO

Signed and accepted by the Employee



Date: 23.01.2026

Signed by the Municipal Manager on behalf of the Municipality



Date: 23-01-2026

