



Performance Plan

Director: Financial Services

Director Financial Services: _____

Municipal Manager: _____



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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.

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 80% (eighty percent) of the total employee assessment score.

Part 1: Implementation of Service Delivery and Budget Implementation Plan (80%)

| Ref No. | National KPA | Strategic Objective | Indicator | Unit of Measurement | Baseline (Actual 2022/2023) | 2024/2025 | Service Delivery and Budget Implementation Plan (SDBIP 2024/2025) | | | | Weight |
|------------------------------|--|-----------------------------------|--|---|-----------------------------|-----------|---|-----|-----|-----|--------|
| | | | | | | | Q1 | Q2 | Q3 | Q4 | |
| DIVISIONAL MANAGEMENT | | | | | | | | | | | |
| SDBIP Graph | Municipal Transformation and Institutional Development | Good Governance and Human Capital | Effective Management and Functional Supervision of the Financial Management Division | Percentage of the Indicators of the Financial Management Division achieved (Actual vs Target) | 90% | 90% | 90% | 90% | 90% | 90% | 4 |
| SDBIP Graph | Municipal Transformation and | Good Governance and Human Capital | Effective Management and Functional Supervision of the Revenue Management Division | Percentage of the Indicators of the Revenue Management | 90% | 90% | 90% | 90% | 90% | 90% | 4 |

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|---------------------------|--|-----------------------------------|--|--|-----------------------------|-----------|---|-----|-----|----|--------|
| | | | | | | | Q1 | Q2 | Q3 | Q4 | |
| | Institutional Development | | | Division achieved (Actual vs Target) | | | | | | | |
| SDBIP Graph | Municipal Transformation and Institutional Development | Good Governance and Human Capital | Effective Management and Functional Supervision of the Expenditure and SCM Division | Percentage of Indicators of the Expenditure and SCM Division achieved (Actual vs Target) | 90% | 90% | 90% | 90% | 90% | 4 | |
| SDBIP Graph | Municipal Transformation and Institutional Development | Good Governance and Human Capital | Effective Management and Functional Supervision of the IT Division | Percentage of Indicators of the IT Division achieved (Actual vs Target) | 90% | 90% | 90% | 90% | 90% | 4 | |
| GENERAL MANAGEMENT | | | | | | | | | | | |
| TBC | Municipal Transformation and Institutional Development | Good Governance and Human Capital | Complete matters allocated on collaborator (other than service delivery complaints) within 10 days | Percentage of matters allocated on collaborator completed within 10 days | 98.42% | 95% | 95% | 95% | 95% | 4 | |

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|---------|--|-----------------------------------|--|--|-----------------------------|-----------|---|------|------|----|--------|
| | | | | | | | Q1 | Q2 | Q3 | Q4 | |
| TBC | Municipal Transformation and Institutional Development | Good Governance and Human Capital | Advertise tenders at least 5 months prior to the expiration of the current tender | Percentage of tenders advertised at least 5 months prior to expiration | 100% | 100% | 100% | 100% | 100% | 3 | |
| TBC | Good Governance and Public Participation | Good Governance and Human Capital | Monitor and report monthly to the MM on SLA's/contracts with service providers in line with relevant legislation Section 116 of the MFMA | Number of evaluations conducted | 12 | 3 | 3 | 3 | 3 | 3 | |
| TBC | Good Governance and Public Participation | Good Governance and Human Capital | Respond to all audit queries received from the AG/IA within 3 days (excluding instances where extension was granted) | Percentage of AG audit queries responded to within 3 days | 100% | 100% | 100% | 100% | 100% | 3 | |
| TBC | Good Governance and Public Participation | Good Governance and Human Capital | Implement the agreed corrective measures as identified within internal/external audit reports within due dates | Percentage of corrective measures identified in external audit reports implemented | 100% | 100% | 100% | 100% | 100% | 3 | |

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|---------|--|-----------------------------------|---|--|-----------------------------|-----------|---|-----|-----|-----|--------|
| | | | | | | | Q1 | Q2 | Q3 | Q4 | |
| TBC | Good Governance and Public Participation | Good Governance and Human Capital | Submit all inputs (non-financial) for the Annual Report to the Manager: IDP and PMS by 31 July 2024 | Percentage of inputs (non-financial) for the Annual Report to the Manager: IDP and PMS | 100% | 100% | 100% | N/A | N/A | N/A | 2 |
| TBC | Good Governance and Public Participation | Good Governance and Human Capital | Submit all IDP inputs to the Manager: IDP and PMS by 30 November 2024 | Percentage of inputs submitted | 100% | 100% | 100% | N/A | N/A | N/A | 2 |
| TBC | Municipal Transformation and Institutional Development | Good Governance and Human Capital | Review and sign-off monthly tracker reports | Number of reviewed and signed-off tracker reports | New KPI | 12 | 3 | 3 | 3 | 3 | 1 |
| TBC | Municipal Financial Viability and Management | Good Governance and Human Capital | Reduce annual overtime expenditure by 10% | Percentage of annual overtime expenditure reduced | New KPI | 10% | N/A | N/A | N/A | 10% | 2 |
| TBC | Municipal Transformation and Institutional Development | Good Governance and Human Capital | Review ICT Strategy by 31 March 2025 | Number of ICT strategies reviewed by 31 March 2025 | New KPI | 1 | N/A | N/A | N/A | 1 | 3 |

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|---------|--|-----------------------------------|--|--|-----------------------------|-----------|---|------|-----|------|--------|
| | | | | | | | Q1 | Q2 | Q3 | Q4 | |
| TBC | Municipal Transformation and Institutional Development | Good Governance and Human Capital | Track ICT strategy implementation and reports to MIM | Number of ICT strategy implementation reports submitted to the MIM | New KPI | 9 | N/A | 3 | 3 | 3 | 2 |
| TBC | Municipal Transformation and Institutional Development | Good Governance and Human Capital | Evaluate performance agreements with all Deputy Directors reporting to Director by in terms of Regulation 890 | % of performance agreements evaluated | New KPI | 100% | N/A | 100% | N/A | 100% | 2 |
| | Municipal Transformation and Institutional Development | Good Governance and Human Capital | Actual expenditure on the approved Capital Budget for the Finance Directorate by 30 June 2025 (NKPI - MFMA, Reg. S10(c)) | The percentage of the finance directorate capital budget actually spent on capital projects by 30 June 2025 {(Actual amount spent on projects/Total amount budgeted for capital projects less savings) X100} | 96.56% | 95% | 10% | 40% | 60% | 95% | 4 |

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|---------|------------------------|-----------------------------|--|---|-----------------------------|-----------|---|-----|-----|--------|--------|
| | | | | | | | Q1 | Q2 | Q3 | Q4 | |
| TBC | Basic Service Delivery | Affordable Quality Services | Provision of basic service delivery to George Residents (NKPI Proxy – MFMA, Reg. S10(a)) | Number of residential water meters which are connected to the municipal water infrastructure network | 37 586 | 37 600 | N/A | N/A | N/A | 37 600 | 2 |
| TBC | Basic Service Delivery | Affordable Quality Services | Provision of basic service delivery to George Residents (NKPI Proxy – MFMA, Reg. S10(a)) | Number of residential electricity meters connected to the municipal electrical infrastructure network | 45 395 | 44 500 | N/A | N/A | N/A | 44 500 | 2 |
| TBC | Basic Service Delivery | Affordable Quality Services | Provision of basic service delivery to George Residents (NKPI Proxy – MFMA, Reg. S10(a)) | Number of residential account holders which are billed for sewerage | 39 014 | 39 100 | N/A | N/A | N/A | 39 100 | 2 |
| TBC | Basic Service Delivery | Affordable Quality Services | Provision of basic service delivery to George Residents (NKPI Proxy – MFMA, Reg. S10(a)) | Number of residential account holders which are billed for refuse removal | 40 452 | 40 500 | N/A | N/A | N/A | 40 500 | 2 |

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|---------|------------------------|-----------------------------|--|--|-----------------------------|-----------|---|--------|--------|--------|--------|
| | | | | | | | Q1 | Q2 | Q3 | Q4 | |
| TBC | Basic Service Delivery | Affordable Quality Services | Provision of basic service delivery to George Residents (NKPI Proxy – MFMA, Reg. S10(a)) | Number of indigent account holders receiving free basic water | 10 488 | 10 500 | 10 500 | 10 500 | 10 500 | 10 500 | 2 |
| TBC | Basic Service Delivery | Affordable Quality Services | Provision of basic service delivery to George Residents (NKPI Proxy – MFMA, Reg. S10(a)) | Number of indigent account holders receiving free basic electricity | 14 878 | 14 000 | 14 000 | 14 000 | 14 000 | 14 000 | 2 |
| TBC | Basic Service Delivery | Affordable Quality Services | Provision of basic service delivery to George Residents (NKPI Proxy – MFMA, Reg. S10(a)) | Number of indigent account holders receiving free basic sanitation | 10 228 | 10 500 | 10 500 | 10 500 | 10 500 | 10 500 | 2 |
| TBC | Basic Service Delivery | Affordable Quality Services | Provision of basic service delivery to George Residents (NKPI Proxy – MFMA, Reg. S10(a)) | Number of indigent account holders receiving free basic refuse removal | 10 318 | 10 500 | 10 500 | 10 500 | 10 500 | 10 500 | 2 |

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|---------|--|-----------------------------------|---|---|-----------------------------|-----------|---|-----|-----|------|--------|
| | | | | | | | Q1 | Q2 | Q3 | Q4 | |
| TBC | Municipal Financial Viability and Management | Good Governance and Human Capital | Financial viability measured in terms of the municipality's ability to meet its service debt obligations as at 30 June 2025{(Short Term Borrowing + Bank Overdraft + Short Term Lease + Long Term Borrowing + Long Term Lease) / (Total Operating Revenue - Operating Conditional Grant) X 100} | Percentage Debt to Revenue obligations met as at 30 June 2025 | 14% | ≤45% | N/A | N/A | N/A | ≤45% | 4 |
| TBC | Municipal Financial Viability and Management | Good Governance and Human Capital | Financial viability measured in terms of the outstanding service debtors as at 30 June 2025{[(Total outstanding service debtors/ revenue received for services) x 100]} | Percentage Service debtors as at 30 June 2025 | 13.72% | 16% | N/A | N/A | N/A | 16% | 4 |
| TBC | Municipal Financial Viability and Management | Good Governance and Human Capital | Financial viability measured in terms of the available cash to cover fixed operating expenditure as at 30 June 2025{(Cash and Cash Equivalents - Unspent | Number of months it takes to cover fixed operating expenditure with available cash as at 30 June 2025 | 2.19 | 2 | N/A | N/A | N/A | 2 | 4 |

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|---------|--|-----------------------------------|--|--|-----------------------------|-----------|---|-----|-----|-----|-----------|
| | | | | | | | Q1 | Q2 | Q3 | Q4 | |
| TBC | Municipal Financial Viability and Management | Good Governance and Human Capital | 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)) Achieve a payment percentage of 95% by 30 June 2025{(Gross Debtors Opening Balance + Billed Revenue - Gross Debtors Closing Balance - Bad Debts Written Off)/Billed Revenue x 100} | Percentage of payment achieved by 30 June 2025 | 91.69% | 95% | N/A | N/A | N/A | 95% | 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 manager, 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 for the 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 |

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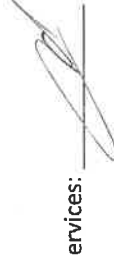


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| Competency | Definition | Weight |
|--------------------------------------|--|--------|
| Financial management | <p>Able to compile, plan and manage budgets, control cash flow, institute financial risk management and administer procurement process 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 <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 visions and strategy Process design and improvement Change impact monitoring and evaluation | 1.67 |
| Change 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 |
| Governance leadership | <p>CORE COMPETENCIES</p> <p>Able to identify moral triggers, apply reasoning that promotes honesty and integrity and display behaviour that reflects moral competence</p> | 1.67 |
| Moral competence | <p>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.</p> | 1.67 |
| Planning and organising | <p>Able to critically analyse information, challenges and trends to establish and implement fact-based solutions that are innovative to improve institutional process in order to achieve key strategic objectives.</p> | 1.67 |
| Analysis and innovation | <p>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.</p> | 1.67 |
| Knowledge and information management | | |

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| Competency | Definition | Weight |
|---------------------------|--|-----------|
| 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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