



JOE MOROLONG
LOCAL MUNICIPALITY

PERFORMANCE AGREEMENT

MADE AND ENTERED INTO BY AND BETWEEN:

THE JOE MOROLONG LOCAL MUNICIPALITY AS REPRESENTED
BY THE ACTING MUNICIPAL MANAGER:

MR. TATOLO GOPETSE

AND

THE EMPLOYEE OF THE MUNICIPALITY

CHIEF FINANCIAL OFFICER

MRS. BOIPELO D. MOTLHAPING

FOR THE PERIOD:

01 JULY 2023 – 30 JUNE 2024

THIS PERFORMANCE AGREEMENT IS ENTERED INTO BY AND BETWEEN:

The Joe Morolong Local Municipality herein represented by Mr. T. Gopetse in his capacity as the Acting Municipal Manager (hereinafter referred to as the **Employer** or Supervisor)
And

Mrs. B.D. Motlhaping as the Employee of the Municipality of Joe Morolong Local Municipality (hereinafter referred to as the **Employee**).

WHEREBY IT IS AGREED AS FOLLOWS:

1. INTRODUCTION

- 1.1. The **Employer** has entered into a contract of employment with the **Employee** in terms of section 57(1)(a) of the Local Government: Municipal Systems Act 32 of 2000 ("the Systems Act"). The **Employer** and the **Employee** are hereinafter referred to as "the Parties".
- 1.2. Section 57(1)(b) of the Systems Act, read with the Contract of Employment concluded between the parties, requires the parties to conclude an annual performance Agreement.
- 1.3. The parties wish to ensure that they are clear about the goals to be achieved, and secure the commitment of the **Employee** to a set of outcomes that will secure local government policy goals.
- 1.4. The parties wish to ensure that there is compliance with Sections 57(4A), 57(4B) and 57(5) of the Systems Act.

2. PURPOSE OF THIS AGREEMENT

The purpose of this Agreement is to –

- 2.1. Comply with the provisions of Section 57(1)(b),(4A),(4B) and (5) of the Systems Act as well as the Contract of Employment entered into between the parties;
- 2.2. Specify Key objectives and targets defined and agreed with the Employee and to communicate to the Employee the Employers expectations of the Employees performance and accountabilities in alignment with the Integrated Development Plan, Service Delivery Budget Implementation Plan and the Budget of the Municipality;

- 2.3. Specify accountabilities as set out in the Performance Plan (Annexure A);
- 2.4. Monitor and measure performance against set targeted outputs;
- 2.5. Use the Performance Agreement and Performance Plan as the basis for assessing the suitability of the **Employee** for permanent employment and/or to assess whether the **Employee** has met the performance expectations applicable to his job;
- 2.6. Appropriately reward the **Employee** in accordance with the **Employer's** performance management policy in the event of outstanding performance; and
- 2.7. Give effect to the **Employer's** commitment to a performance-orientated relationship with the **Employee** in attaining equitable and improved service delivery.

3. COMMENCEMENT AND DURATION

- 3.1. This Agreement will commence on the **01 July 2023** and will remain in force until **30 June 2024**, where after a new Performance Agreement, Performance Plan and Personal Development Plan shall be concluded between the parties for the next financial year or any portion thereof.
- 3.2. The parties will review the provisions of this Agreement during June each year. The parties will conclude a new Performance Agreement and Performance Plan that replaces this Agreement at least once a year by not later than the beginning of each successive financial year.
- 3.3. This Agreement will terminate on the termination of the **Employee's** contract of employment for any reason.
- 3.4. The content of this Agreement may be revised at any time during the above-mentioned period to determine the applicability of the matters agreed upon.
- 3.5. If at any time during the validity of this Agreement the work environment alters (whether as a result of government or council decisions or otherwise) to the extent that the contents of this Agreement are no longer appropriate, the contents shall immediately be revised.

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; and

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

5. PERFORMANCE MANAGEMENT SYSTEM

- 5.1. The **Employee** agrees to participate in the performance management system that the **Employer** adopts or introduces for the **Employer**, management and municipal staff 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 **Employer**, management and municipal staff to perform to the standards required.
- 5.3. The **Employer** will consult the **Employee** about the specific performance standards that will be included in the performance management system as applicable to the **Employee**.

6. THE EMPLOYEE AGREES TO PARTICIPATE IN THE PERFORMANCE MANAGEMENT AND DEVELOPMENT SYSTEM THAT THE EMPLOYER ADOPTS

- 6.1. The **Employee** undertakes to actively focus towards the promotion and implementation of the KPAs (including special projects relevant to the employee's responsibilities) within the local government framework.
- 6.2. The criteria upon which the performance of the **Employee** shall be assessed shall consist of two components, both of which shall be contained in the Performance Agreement.

- 6.2.1. The **Employee** must be assessed against both components, with a weighting of 80:20 allocated to the Key Performance Areas (KPAs) and the Core Managerial Competencies (CMCs) respectively.
- 6.2.2. Each area of assessment will be weighted and will contribute a specific part to the total score.
- 6.2.3. KPAs covering the main areas of work will account for 80% and CMCs will account for 20% of the final assessment.
- 6.3. The **Employee's** assessment will be based on his performance in terms of the outputs/ outcomes (performance indicators) identified as per attached Performance Plan (**Annexure A**), which are linked to the KPA's, and will constitute 80% of the overall assessment result as per the weightings agreed to between the **Employer** and **Employee**:

Key Performance Areas (KPA's)	Weighting
Basic Service Delivery	00
Municipal Institutional Development and Transformation	10
Local Economic Development (LED)	00
Municipal Financial Viability and Management	65
Good Governance and Public Participation	25
Total	100%

- 6.4. The CMCs will make up the other 20% of the Employee's assessment score. CMCs that are deemed to be most critical for the Employee's specific job should be selected (✓) from the list below as agreed to between the Employer and Employee:

CORE COMPETENCY REQUIREMENTS FOR EMPLOYEES		
CORE MANAGERIAL and OCCUPATIONAL COMPETENCIES (CMC)	✓ (INDICATE CHOICE)	WEIGHT
CORE MANAGERIAL COMPETENCIES		
Strategic Capability and Leadership		5
Programme and Project Management		5
Financial Management	✓	5
Change Management		5
Knowledge Management		5
Service Delivery Innovation		5

Problem Solving and Analysis		5
People Management and Empowerment	√	5
Client Orientation and Customer Focus	√	5
Communication		5
Honesty and Integrity		5
CORE OCCUPATIONAL COMPETENCIES		
Competence in Self- Management		5
Interpretation of and implementation within the legislative and national policy frameworks		5
Knowledge of developmental local government		5
Knowledge of Performance Management and Reporting		5
Knowledge of global and South African specific political, social and economic contexts		0
Competence in policy conceptualisation, analysis and implementation		5
Knowledge of more than one functional municipal field/discipline		5
Skills in Mediation		5
Skills in Governance		3
Competence as required by other national line sector departments		2
Exceptional and dynamic creativity to improve the functioning of the municipality		5
		100%

7. EVALUATING PERFORMANCE

7.1. The Performance Plan (Annexure A) to this Agreement sets out –

7.1.1. The standards and procedures for evaluating the **Employee's** performance; and

7.1.2. The intervals for the evaluation of the **Employee's** performance.

7.2. Despite the establishment of agreed intervals for evaluation, the **Employer** may in addition review the **Employee's** performance at any stage while the contract of employment remains in force.

7.3. Personal growth and development needs identified during any performance review discussion must be documented in a Personal Development Plan as well as the actions agreed to and implementation must take place within set time frames.

7.4. The **Employee's** performance will be measured in terms of contributions to the goals and strategies set out in the **Employer's** IDP.

7.5. The annual performance appraisal will involve:

7.5.1. **Assessment of the achievement of results as outlined in the performance plan:**

- a) Each KPA should be assessed according to the extent to which the specified standards or performance indicators have been met and with due regard to ad hoc tasks that had to be performed under the KPA.
- b) An indicative rating on the five-point scale should be provided for each KPA.
- c) The applicable **assessment rating calculator** (refer to paragraph 6.5.3 below) **must then be used to add the scores and calculate a final KPA score.**

7.5.2. **Assessment of the CMCs**

- a) Each CMC should be assessed according to the extent to which the specified standards have been met.
- b) An indicative rating on the five-point scale should be provided for each CMC.
- c) The applicable **assessment rating calculator** (refer to paragraph 6.5.1) **must then be used to add the scores and calculate a final CMC score.**

7.5.3. **Overall rating**

An overall rating is calculated by using the applicable **assessment-rating calculator**. Such overall rating represents the outcome of the performance appraisal.

7.6. The assessment of the performance of the **Employee** will be based on the following rating scale for KPA's and CMCs:

Level	Terminology	Description	Rating				
			1	2	3	4	5
5	Outstanding performance	Performance far exceeds the standard expected of an employee at this level. The appraisal indicates that the Employee has achieved above fully effective results against all performance criteria and indicators as specified in the PA and Performance plan and maintained this in all areas of responsibility throughout the year.					
4	Performance significantly above expectations	Performance is significantly higher than the standard expected in the job. The appraisal indicates that the Employee has achieved above fully effective results against more than half of the performance criteria and indicators and fully achieved all others throughout the year.					

Level	Terminology	Description	Rating				
			1	2	3	4	5
3	Fully effective	Performance fully meets the standards expected in all areas of the job. The appraisal indicates that the Employee has fully achieved effective results against all significant performance criteria and indicators as specified in the PA and Performance Plan.					
2	Not fully effective	Performance is below the standard required for the job in key areas. Performance meets some of the standards expected for the job. The review/assessment indicates that the employee has achieved below fully effective results against more than half the key performance criteria and indicators as specified in the PA and Performance Plan.					
1	Unacceptable performance	Performance does not meet the standard expected for the job. The review/assessment indicates that the employee has achieved below fully effective results against almost all of the performance criteria and indicators as specified in the 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.					

7.7. For purposes of evaluating the performance of the **Employee**, an evaluation panel constituted by the following persons will be established –

7.7.1. Municipal Manager

7.7.2. Chairperson of the performance Audit Committee (PAC) or the Audit Committee (AC) in the absence of a Performance Audit Committee

7.7.3. A member of EXCO;

7.7.4. Municipal Manager from another municipality and

7.7.5. Manager responsible for Human Resources (secretariat)

8. SCHEDULE FOR PERFORMANCE REVIEWS

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

Quarter	Months	Assessment
First quarter	July – September	October 2023
Second quarter	October – December	January 2024
Third quarter	January – March	April 2024
Fourth quarter	April – June	July 2024

8.2. The **Employer** shall keep a record of the mid-year review and annual assessment meetings.

8.3. Performance feedback shall be based on the **Employer's** assessment of the **Employee's** performance.

- 8.4. The **Employer** will be entitled to review and make reasonable changes to the provisions of Annexure "A" from time to time for operational reasons. The **Employee** will be fully consulted before any such change is made.
- 8.5. 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.

9. DEVELOPMENTAL REQUIREMENTS

The Personal Development Plan (PDP) for addressing developmental gaps is attached as Annexure B.

10. OBLIGATIONS OF THE EMPLOYER

10.1. The **Employer** shall –

- 10.1.1. Create an enabling environment to facilitate effective performance by the employee;
- 10.1.2. Provide access to skills development and capacity building opportunities;
- 10.1.3. Work collaboratively with the **Employee** to solve problems and generate solutions to common problems that may impact on the performance of the **Employee**;
- 10.1.4. 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
- 10.1.5. Make available to the **Employee** such resources as the **Employee** may reasonably require from time to time to assist him to meet the performance objectives and targets established in terms of this Agreement.

11. CONSULTATION

- 11.1. The **Employer** agrees to consult the **Employee** timeously where the exercising of the powers will have amongst others –
- 11.1.1. A direct effect on the performance of any of the **Employee's** functions;
- 11.1.2. Commit the **Employee** to implement or to give effect to a decision made by the **Employer**; and

11.1.3. A substantial financial effect on the **Employer**.

11.2. The **Employer** agrees to inform the **Employee** of the outcome of any decisions taken pursuant to the exercise of powers contemplated in 11.1 as soon as is practicable to enable the **Employee** to take any necessary action without delay.

12. MANAGEMENT OF EVALUATION OUTCOMES

12.1. The evaluation of the **Employee's** performance will form the basis for rewarding outstanding performance or correcting unacceptable performance.

12.2. A performance bonus of 5% to 14% of the inclusive annual remuneration package may be paid to the **Employee** in recognition of outstanding performance. In determining the performance bonus the relevant percentage is based on the overall rating, calculated by using the applicable assessment rating calculator based on the following achievement:

12.2.1. A score of 130% to 149% is awarded a performance bonus ranging from 5% to 9%; and

12.2.2. A score of 150% and above is awarded a performance bonus ranging from 10% to 14%, in terms of the Joe Morolong Local Municipalities' PMS Policy.

12.3. In the case of unacceptable performance, the **Employer** shall –

12.3.1. Provide systematic remedial or developmental support to assist the **Employee** to improve his performance; and

12.3.2. 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 duties.

13. DISPUTE RESOLUTION

13.1.1. The MEC for Cooperative Governance, Human Settlement and Traditional Affairs in the province within thirty (30) days of receipt of a formal dispute from the Employee; or

13.1.2. Any other person appointed by the MEC.


13.2. In the event that the mediation process contemplated above fails, clause 19.3 of the Contract of Employment shall apply.

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**.

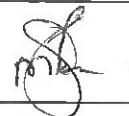
14.2. Nothing in this agreement diminishes the obligations, duties or accountabilities of the **Employee** in terms of his contract of employment, or the effects of existing or new regulations, circulars, policies, directives or other instruments.

Thus, done and signed at Joe Morolong Local Municipality on this the 03 day of July 2023.


EMPLOYEE

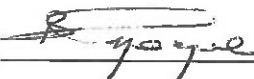
AS WITNESSES:

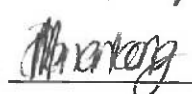
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2. 


ACTING MUNICIPAL MANAGER

AS WITNESSES:

1. 

2. 

17.5.4

ANNEXURE A

PERFORMANCE PLAN

TECHNICAL SERVICE DELIVERY AND BUDGET IMPLEMENTATION PLAN (SDBIP)

CHIEF FINANCIAL OFFICER

MRS. BOIPELO D. MOTLHAPING

2023/2024 FINANCIAL YEAR

1. Departmental Purpose

The Finance Department is committed to providing timely, accurate, clear and complete information and support to other departments and the community at large.

2. Functions of the Department

- To provide the efficient and effective financial management and business operations.
- To improve strategies for the improvement of revenue, i.e. debt management.
- To provide accurate and relevant financial information for decision making.
- Ensure financial prudent compliance with Internal Audit and unqualified audits by the Auditor General.
- To enhance efficient and effective expenditure and supply chain management.
- To promote local economic development and job creation.
- Maintain the municipal asset register
- Management of cash and bank
- Compliance with relevant legislation

3. Link with the Top Layer SDBIP

3.1. Lead Department Objectives

- Manage Revenue section
- Manage Budget and treasury section
- Sustain Financial Management
- Manage Supply chain management & asset management section
- Cash flow management
- Promote good governance
- Ensure effective budget management

4. Support from other departments

LEAD FUNCTION	SUPPORT EXPECTED
<ul style="list-style-type: none">• Manage Revenue section	<ul style="list-style-type: none">• Recruiting and retention of suitably skilled candidate, and ensuring that staff members adhere to continuous professional development.• Timeous response on repairs and maintenance of revenue yielding infrastructure.
<ul style="list-style-type: none">• Manage Budget and treasury section	<ul style="list-style-type: none">• Submission of all supporting documents by all relevant departments which will necessitate submission of credible information as per the legislation.• Adherence to the procurement plan by all departments to ensure compliance with the approved budget.• Avoidance of irregular, fruitless and wasteful expenditure.
<ul style="list-style-type: none">• Manage Supply chain management section	<ul style="list-style-type: none">• Centralising all procurements to the SCM section.• Submission of requests to SCM timeously.• Timeous submission of procurement plans to necessitate accurate and speedily procurement process.

<ul style="list-style-type: none"> • Manage asset management section 	<ul style="list-style-type: none"> • Safeguarding all inventories (assets) under their custody. Reporting to Asset Management section all donated assets for inclusion in the FAR. • Reporting all broken or faulty assets to the Asset Management section timeously so that necessary adjustments and insurance claims can be made.
<ul style="list-style-type: none"> • Ensure effective budget management 	<ul style="list-style-type: none"> • Adherence to the procurement plan by all departments to ensure compliance with the approved budget.

5. Support to other departments

LEAD FUNCTION	SUPPORT EXPECTED
<ul style="list-style-type: none"> • Manage Revenue section 	<ul style="list-style-type: none"> • Submission of information relating to other services provided by the departments to enable correct invoicing. Timeous submission of invoices for services rendered by other departments.
<ul style="list-style-type: none"> • Manage Budget and treasury section 	<ul style="list-style-type: none"> • Regular update of the system which will enable other departments to know the extent of their respective expenditure on the approved budget.
<ul style="list-style-type: none"> • Manage Supply chain management section 	<ul style="list-style-type: none"> • Submit financial information needed to all departments for their regular reporting. • Render procurement services to all departments
<ul style="list-style-type: none"> • Manage asset management section 	<ul style="list-style-type: none"> • Coordination of asset management
<ul style="list-style-type: none"> • Ensure effective budget management 	<ul style="list-style-type: none"> • Provide monthly income and expenditure reports to other departments • Ensure adherence of budget management regulations

6. Departmental Scorecard

KPI NO.	KEY PERFORMANCE AREA	IDP PROGRAMME/ PRIORITY AREA	STRATEGIC OBJECTIVE	KEY PERFORMANCE INDICATOR	TARGET (OUTPUT)	UNIT OF MEASUREMENT	REPORTING CYCLE	TARGET BREAKDOWN				PORTFOLIO OF EVIDENCE	BUDGET
								Q1	Q2	Q3	Q4		
1.	Good Governance and Community Participation	Sustainable Development Orientated Municipality	To review and report IDP and Budget implementation progress against predetermined objectives To ensure MSCOA compliance	Number of quarterly IDP/Budget/PMS Steering Committee meetings attended by 30 June 2024	4 quarterly IDP/Budget/PMS Steering Committee meetings attended by 30 June 2024	Number	Quarterly	1	1	1	1	Attendance Registers	
2.	Good Governance and Community Participation	Sustainable Development Orientated Municipality		Number of monthly MSCOA and IT meetings attended by 30 June 2024	12 monthly MSCOA and IT meetings attended by 30 June 2024	Number	Monthly	3	3	3	3	Attendance Registers	
3.	Municipal Transformation & Institutional Development	Sustainable Development Orientated Municipality	To govern municipal affairs	Number of monthly Financial Services departmental meetings held by 30 June 2024	12 monthly Financial Services departmental meetings held by 30 June 2024	Number	Monthly	3	3	3	3	Minutes and Attendance Registers	
4.	Municipal Transformation & Institutional Development	Sustainable Development Orientated Municipality	To govern municipal affairs	Number of monthly management meetings attended by 30 June 2024	12 monthly management meetings attended by 30 June 2024	Number	Monthly	3	3	3	3	Attendance Registers	
5.	Municipal Transformation & Institutional Development	Sustainable Development Orientated Municipality	To govern municipal affairs	Number of quarterly extended management meetings attended by 30 June 2024	4 quarterly extended management meetings attended by 30 June 2024	Number	Quarterly	1	1	1	1	Attendance Registers	

KPI NO.	KEY PERFORMANCE AREA	IDP PROGRAMME/ PRIORITY AREA	STRATEGIC OBJECTIVE	KEY PERFORMANCE INDICATOR	TARGET (OUTPUT)	UNIT OF MEASUREMENT	REPORTING CYCLE	TARGET BREAKDOWN				PORTFOLIO OF EVIDENCE	BUDGET
								Q1	Q2	Q3	Q4		
6.	Good Governance and Community Participation	Sustainable Development Orientated Municipality	To improve public participation	Number of quarterly municipal website reports compiled in line with MFMA section 75 by 30 June 2024	4 quarterly municipal website reports compiled in line with MFMA section 75 by 30 June 2024	Number	Quarterly	1	1	1	1	Reports	
7.	Good Governance and Public Participation	Sustainable Development Orientated Municipality	To promote achievement of a clean annual audit outcome for the municipality	Audit Action Plan annually developed and adopted by Council by 31 January 2024	Audit Action Plan annually developed and adopted by Council by 31 January 2024	Date	Annually	-	-	31 Jan	-	Audit Action Plan and Council Resolution	
8.	Good Governance and Public Participation	Sustainable Development Orientated Municipality	To promote achievement of a clean annual audit outcome for the municipality	Number of quarterly reports on the implementation of the audit action plan developed and submitted to Council and Treasury by 30 June 2024	4 quarterly reports on the implementation of the audit action plan developed and submitted to Council and Treasury by 30 June 2024	Number	Quarterly	1	1	1	1	Reports, Council Resolution and proof of submission to Treasury	
9.	Municipal Financial Management & Viability	Sustainable Development Orientated Municipality	To promote and enhance the financial viability of the municipality	Number of monthly cashbook and bank reconciliation reports developed and submitted to the Municipal Manager by 30 June 2024	12 monthly cashbook and bank reconciliation reports developed and submitted to the Municipal Manager by 30 June 2024	Number	Monthly	3	3	3	3	Reports and proof of submission to the Municipal Manager	
10.	Municipal Financial Management & Viability	Sustainable Development Orientated Municipality	To promote and enhance the financial viability of the municipality	Annual Financial Statements and supporting schedules submitted to AGSA by 31 August 2023	Annual Financial Statements and supporting schedules submitted to AGSA by 31 August 2023	Date	Annually	31 Aug	-	-	-	Annual Financial Statements and supporting schedules and proof of submission to AGSA	R 7 576 052,00

KPI NO.	KEY PERFORMANCE AREA	IDP PROGRAMME/ PRIORITY AREA	STRATEGIC OBJECTIVE	KEY PERFORMANCE INDICATOR	TARGET (OUTPUT)	UNIT OF MEASUREMENT	REPORTING CYCLE	TARGET BREAKDOWN				PORTFOLIO OF EVIDENCE	BUDGET
								Q1	Q2	Q3	Q4		
11.	Municipal Financial Management & Viability	Sustainable Development Orientated Municipality	To promote and enhance the financial viability of the municipality	Number of monthly reports on timeous billing and mailing of accounts to customers developed and submitted to the Municipal Manager by 30 June 2024	12 monthly reports on timeous billing and mailing of accounts to customers developed and submitted to the Municipal Manager by 30 June 2024	Number	Monthly	3	3	3	3	Reports and proof of submission to the Municipal Manager	
12.	Municipal Financial Management & Viability	Sustainable Development Orientated Municipality	To promote and enhance the financial viability of the municipality	Number of quarterly reports on bad debts written off developed and submitted to Council by 30 June	4 quarterly reports on bad debts written off developed and submitted to Council by 30 June	Number	Quarterly	1	1	1	1	Reports and Council Resolutions	
13.	Municipal Financial Management & Viability	Sustainable Development Orientated Municipality	To promote and enhance the financial viability of the municipality	Number of monthly reports on debtors' reconciliation developed and submitted to the Municipal Manager by 30 June 2024	12 monthly reports on debtors' reconciliation developed and submitted to the Municipal Manager by 30 June 2024	Number	Monthly	3	3	3	3	Reports and proof of submission to the Municipal Manager	
14.	Municipal Financial Management & Viability	Sustainable Development Orientated Municipality	To promote and enhance the financial viability of the municipality	Indigent register annually developed and submitted to Council by 30 June 2024	Indigent register annually developed and submitted to Council by 30 June 2024	Date	Annually	-	-	-	30 June	Indigent Register and Council Resolution	
15.	Municipal Financial Management & Viability	Sustainable Development Orientated Municipality	To promote and enhance the financial viability of the municipality	Draft Budget annually compiled and submitted to Council by 31 March 2024	Draft Budget annually compiled and submitted to Council by 31 March 2024	Date	Annually	-	-	31 Mar	-	Draft Budget and Council Resolution	

KPI NO.	KEY PERFORMANCE AREA	IDP PROGRAMME/ PRIORITY AREA	STRATEGIC OBJECTIVE	KEY PERFORMANCE INDICATOR	TARGET (OUTPUT)	UNIT OF MEASUREMENT	REPORTING CYCLE	TARGET BREAKDOWN				PORTFOLIO OF EVIDENCE	BUDGET
								Q1	Q2	Q3	Q4		
16.	Municipal Financial Management & Viability	Sustainable Development Orientated Municipality	To promote and enhance the financial viability of the municipality	Adjustment Budget annually compiled and submitted to Council by 28 February 2024	Adjustment Budget annually compiled and submitted to Council by 28 February 2024	Date	Annually	-	-	28 Feb	-	Adjustment Budget and Council Resolution	
17.	Municipal Financial Management & Viability	Sustainable Development Orientated Municipality	To promote and enhance the financial viability of the municipality	Final Budget annually compiled and submitted to Council by 31 May 2024	Final Budget annually compiled and submitted to Council by 31 May 2024	Date	Annually	-	-	-	31 May	Final Budget and Council Resolution	
18.	Municipal Financial Management & Viability	Sustainable Development Orientated Municipality	To promote and enhance the financial viability of the municipality	Number of monthly Section 71 reports developed and submitted to the Municipal Manager and Treasury by 30 June 2024	12 monthly Section 71 reports developed and submitted to the Municipal Manager and Treasury by 30 June 2024	Number	Monthly	3	3	3	3	Reports and proof of submission to the Municipal Manager and Treasury	
19.	Municipal Financial Management & Viability	Sustainable Development Orientated Municipality	To promote and enhance the financial viability of the municipality	Section 72 report annually developed and submitted to Council by 31 January 2024	Section 72 report annually developed and submitted to Council by 31 January 2024	Date	Annually	-	-	31 Jan	-	Report and Council Resolution	
20.	Municipal Financial Management & Viability	Sustainable Development Orientated Municipality	To promote and enhance the financial viability of the municipality	Number of quarterly reports on withdrawals developed and submitted to Council and Treasury by 30 June 2024	4 quarterly reports on withdrawals developed and submitted to Council and Treasury by 30 June 2024	Number	Quarterly	1	1	1	1	Reports and Council Resolutions	

KPI NO.	KEY PERFORMANCE AREA	IDP PROGRAMME/ PRIORITY AREA	STRATEGIC OBJECTIVE	KEY PERFORMANCE INDICATOR	TARGET (OUTPUT)	UNIT OF MEASUREMENT	REPORTING CYCLE	TARGET BREAKDOWN				PORTFOLIO OF EVIDENCE	BUDGET
								Q1	Q2	Q3	Q4		
21.	Municipal Financial Management & Viability	Sustainable Development Orientated Municipality	To promote and enhance the financial viability of the municipality	Number of monthly conditional grants expenditure reports developed and submitted to the Municipal Manager and Treasury by 30 June 2024	12 monthly conditional grants expenditure reports developed and submitted to the Municipal Manager and Treasury by 30 June 2024	Number	Monthly	3	3	3	3	Reports and proof of submission to the Municipal Manager and Treasury	
22.	Municipal Financial Management & Viability	Sustainable Development Orientated Municipality	To promote and enhance the financial viability of the municipality	Number of quarterly reports on investments made developed and submitted to Council and Treasury by 30 June 2024	4 quarterly reports on investments made developed and submitted to Council and Treasury by 30 June 2024	Number	Quarterly	1	1	1	1	Reports and Council Resolutions	
23.	Municipal Financial Management & Viability	Sustainable Development Orientated Municipality	To promote and enhance the financial viability of the municipality	Number of quarterly updated contract registers submitted to Council by 30 June 2024	4 quarterly updated contract registers submitted to Council by 30 June 2024	Number	Quarterly	1	1	1	1	Contract Registers and Council Resolutions	
24.	Municipal Financial Management & Viability	Sustainable Development Orientated Municipality	To promote and enhance the financial viability of the municipality	Number of monthly reports on inventory stock counts developed and submitted to the Municipal Manager and Treasury by 30 June 2024	12 monthly reports on inventory stock counts developed and submitted to the Municipal Manager and Treasury by 30 June 2024	Number	Monthly	3	3	3	3	Reports and proof of submission to the Municipal Manager and Treasury	
25.	Municipal Financial Management & Viability	Sustainable Development Orientated Municipality	To promote and enhance the financial viability of the municipality	Procurement plan annually developed and submitted to Council and Treasury by 30 September 2024	Procurement plan annually developed and submitted to Council and Treasury by 30 September 2024	Date	Annually	30 Sep	-	-	-	Procurement plan and Council Resolutions	

KPI NO.	KEY PERFORMANCE AREA	IDP PROGRAMME/ PRIORITY AREA	STRATEGIC OBJECTIVE	KEY PERFORMANCE INDICATOR	TARGET (OUTPUT)	UNIT OF MEASUREMENT	REPORTING CYCLE	TARGET BREAKDOWN				PORTFOLIO OF EVIDENCE	BUDGET
								Q1	Q2	Q3	Q4		
26.	Municipal Financial Management & Viability	Sustainable Development Orientated Municipality	To promote and enhance the financial viability of the municipality	Number of quarterly procurement plan monitoring reports developed and submitted to Council by 30 June 2024	4 quarterly procurement plan monitoring reports developed and submitted to Council by 30 June 2024	Number	Quarterly	1	1	1	1	Reports and Council Resolutions	
27.	Municipal Financial Management & Viability	Sustainable Development Orientated Municipality	To promote and enhance the financial viability of the municipality	Number of quarterly reports on the monitoring of the performance of contracts developed and submitted to Council by 30 June 2024	4 quarterly reports on the monitoring of the performance of contracts developed and submitted to Council by 30 June 2024	Number	Quarterly	1	1	1	1	Reports and Council Resolutions	
28.	Municipal Financial Management & Viability	Sustainable Development Orientated Municipality	To promote and enhance the financial viability of the municipality	Number of monthly reports on the Unauthorized Irregular, Fruitless and Wasteful expenditure developed and submitted to the Municipal Manager by 30 June 2024	12 monthly reports on the Unauthorized Irregular, Fruitless and Wasteful expenditure developed and submitted the Municipal Manager by 30 June 2024	Number	Monthly	3	3	3	3	Reports and proof of submission to the Municipal Manager	
29.	Municipal Financial Management & Viability	Sustainable Development Orientated Municipality	To ensure that the municipal assets are properly safeguarded	Number of quarterly updated GRAP compliant asset registers developed and submitted to Office of the Auditor General by 30 June 2024	4 quarterly updated GRAP compliant asset registers developed and submitted to Office of the Auditor General by 30 June 2024	Number	Quarterly	1	1	1	1	Reports and Council Resolutions	

KPI NO.	KEY PERFORMANCE AREA	IDP PROGRAMME/ PRIORITY AREA	STRATEGIC OBJECTIVE	KEY PERFORMANCE INDICATOR	TARGET (OUTPUT)	UNIT OF MEASUREMENT	REPORTING CYCLE	TARGET BREAKDOWN				PORTFOLIO OF EVIDENCE	BUDGET
								Q1	Q2	Q3	Q4		
30.	Municipal Financial Management & Viability	Sustainable Development Orientated Municipality	To ensure that the municipal assets are properly safeguarded	Number of quarterly reports on the physical verification of assets approved by Council and submitted to Office of the Auditor General by 30 June 2024	4 quarterly reports on the physical verification of assets approved by Council and submitted to Office of the Auditor General by 30 June 2024	Number	Quarterly	1	1	1	1	Reports and Council Resolutions	
31.	Municipal Financial Management & Viability	Sustainable Development Orientated Municipality	To ensure that the municipal assets are properly safeguarded	Disposal report annually approved by Council and submitted to Office of the Auditor General by 30 June 2024	Disposal report annually approved by Council and submitted to Office of the Auditor General by 30 June 2024	Date	Annually	-	-	-	30 June	Report, Council Resolution and proof of submission to AG	

ANNEXURE B

PERSONAL DEVELOPMENT PLAN

MADE AND ENTERED INTO BY AND BETWEEN:

THE JOE MOROLONG LOCAL MUNICIPALITY AS REPRESENTED
BY THE ACTING MUNICIPAL MANAGER:

MR. TATOLO GOPETSE

AND

THE EMPLOYEE OF THE MUNICIPALITY

CHIEF FINANCIAL OFFICER:

MRS. BOIPELO D. MOTLHAPING

FOR THE PERIOD:

01 JULY 2023 – 30 JUNE 2024

1. Personal Development Plan

- 1.1. A Municipality should be committed to
 - a. The continuous training and development of its employees to achieve its vision, mission and strategic objectives and empower employees; and
 - b. Managing training and development within the ambit of relevant national policies and legislation.
- 1.2. A Municipality should follow an integrated approach to Human Resource Management, that is:
 - a. Human resource development forms an integral part of human resource planning and management.
 - b. In order for training and development strategy and plans to be successful it should be based on sound Human Resource (HR) practices, such as the (strategic) HR Plan, job descriptions, the result of regular performance appraisals and career pathing.
 - c. To ensure the necessary linkage with performance management, the Performance Management and Development System provides for the Personal Development Plans of employees to be included in their annual performance agreements. Such approach will also ensure the alignment of individual performance objectives to the municipality's strategic objectives, and that training and development needs can be identified through performance management and appraisal.
 - d. Career-pathing ensures that employees are placed and developed in jobs according to aptitude and identified potential. Through training and development they can acquire the necessary competencies to prepare them for future positions. A comprehensive competency framework and profile for Municipal Managers are attached and these should be linked to relevant registered unit standards to specifically assist them in compiling Personal Development Plans in consultation with their managers.
 - e. Personal Development Plans are compiled for individual employees and the data collated from all employees in the municipality forms the basis for the prescribed Workplace Skills Plan, which municipalities are required to compile as a basis for all training and education activities in the municipality in a specific financial year and report on progress made to the Local Government Sector Education and Training Authority.
- 1.3. The aim of the compilation of Personal Development Plans is to identify, prioritise and implement training needs.
- 1.4. Compiling the Personal Development Plan

- a. Competency assessment instruments, which are dealt with more specifically in Annexure B: 1 and 2, should be established to assist with the objective assessment of employees' actual competencies against their job specific competency profiles and managerial competencies at a given period in time with the purpose of identifying training needs or skills gaps.
- b. The competency framework and profiles and relevant competency assessment results will enable a manager, in consultation with his / her employee, to compile a Personal Development Plan. The identified training needs should be entered into column 1 of Annexure B, entitled Skills / Performance Gap. The following should be carefully determined during such a process:
 - i. Organizational needs, which include the following:
 - Strategic development priorities and competency requirements, in line with the municipality's strategic objectives.
 - The competency requirements of individual jobs. The relevant job requirements (job competency profile) as identified in the job description should be compared to the current competency profile of the employee to determine the individual's competency gaps.
 - Specific competency gaps as identified during the probation period and performance appraisal of the employee.
 - ii. Individual training needs that are job / career related.
- c. Next, the prioritization of the training needs should be listed since it may not be possible to address all identified training needs in a specific financial year. It is however of critical importance that training needs be addressed on a phased and priority basis. This implies that all these needs should be prioritized for purposes of accommodating critical / strategic training and development needs in the HR Plan, Personal Development Plans and the Workplace Skills Plan.
- d. Consideration must then be given to the expected outcomes, to be listed in column 2 of Annexure B, so that once the intervention is completed the impact it had can be measured against relevant output indicators.
- e. An appropriate intervention should be identified to address training needs / skills gaps and the outcome to be achieved but with due regard to cost effectiveness. These should be listed in column 3 of Annexure B, entitled: Suggested training and / or development activity in line with the National Qualifications Framework, which could enable the trainee to obtain recognition towards a qualification for training undertaken. It is important to determine through the Training / Human Resource Development / Skills Development Unit within the municipality whether unit

standards have been developed and registered with the South African Qualifications Authority that are in line with the skills gap and expected outcomes identified. Unit standards usually have measurable assessment criteria to determine achieved competency.

- f. Guidelines regarding the number of training days per employee and the nominations of employees: An employee should on average receive at least five days of training per financial year and not unnecessarily be withdrawn from training interventions.
- g. Column 4 of Annexure B: The suggested mode of delivery refers to the chosen methodology that is deemed most relevant to ensure transfer of skills. The training / development activity should impact on delivery back in the workplace. Mode of delivery consists of, amongst others, self-study [The official takes it upon him / her to read e.g. legislation]; internal or external training provision; coaching and / or mentoring and exchange programmes, etc.
- h. The suggested time frames (column 5 of Annexure B) enable managers to effectively plan for the annum e.g. so that not all their employees are away from work within the same period and also ensuring that the PDP is implemented systematically.
- i. Work opportunity created to practice skill / development areas, in column 6 of Annexure B, further ensures internalization of information gained as well as return on investment (not just a nice to have skill but a necessary to have skill that is used in the workplace).
- j. The final column, column 7 of Annexure B, provides the employee with a support person that could act as coach or mentor with regard to the area of learning.

Personal Development Plan of Mrs B.D. Motlhapeng

1. Skills/Performance Gap (In order of priority)	2. Outcomes Expected (measurable indicators: quantity, quality and time frames)	3. Suggested training and/or development activity	4. Suggested mode of delivery	5. Suggested Time Frames	6. Work opportunity created to practice skill / development area	7. Support Person
Best practices for achieving clean audit	Improve audit outcome towards clean audit.	Workshop on best practices for achieving clean and Municipal Finance Management Program	Workshop and bench marking with similar successful institutions of our nature of business and attending of formal classes	October 2023 to December 2024	Proper supervision and adherence to legal prescripts	Municipal Manager
Appraise Performance of Managers	The manager will be able to enter into performance agreements with all managers reporting to him / her, appraise them against set criteria, within relevant time frames	A course containing theoretical and practical application with coaching in the workplace.	External provider, in line with identified unit standard and not exceeding R20 000	6 months	Appraisal of managers reporting to the Municipal Manager	Municipal Manager
Advanced Project Management	Ability to integrate the corporate services department to achieve the organizational goal	Course	Attendance	6 months	Effective and efficient management of service delivery projects	Municipal Manager
Human Resource Development	Ability to integrate the corporate services department to achieve the organizational goal	Course	Attendance	3 months	Effective and efficient HR Development systems	Municipal Manager
Advanced Computer Literacy Chief Financial Officer	Improved presentations and report writing	Course	Attendance	January 2024 to March 2024	Improved quality of presentations and reports	Municipal Manager

Acting Municipal Manager



