*Municipality **Siyancuma** Munisipaliteit*

Performance Agreement

Period: 1 July 2026 30 June 2027

Charlene Zealand

Chief Financial Officer

And

Madoda Vilakazi

Municipal Manager

Performance Agreement: Financial Services

Performance agreement made and entered into by and between

The Siyancuma Municipality and represented by the Municipal Manager: **Mr Madoda Vilakazi** (*herein and after referred as Employer*)

and

Charlene Zealand, Chief Financial Officer (*herein and after referred as Employee*) for the period 1 July 2026 to 30 June 2027

Whereas

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 Mayoral Committee of the Municipality constituted in terms of Section 60 of the Local Government: Municipal Structures Act 117 of 1998 ("the Structures Act") as represented by its chairperson, the Executive Mayor;

1.1.3 "the Employee" means the Manager appointed in terms of Section 56 of the Systems Act;

1.1.4 "the Employer" means the Municipality; and

1.1.5 "the Parties" means the Employer and Employee.

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 July 2026** and will remain in force until **30 June 2027**.

3.2 This Agreement will terminate on the termination of the Employee's contract of employment for any reason during the period of validity, as described in 3.1;

3.3 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

3.4 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.

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 manager 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 a key objective 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;

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;

KPA NO	KEY PERFORMANCE AREA
1	Municipal Transformation and Institutional Development
2	Basic Service Delivery
3	Local Economic Development
4	Municipal Financial Viability and Management
5	Good Governance, Public Participation

Total 80%

5.7 The Competencies will make up the other 20% of the Employee's assessment score. The Competencies are split into two groups, leading competencies (indicated in blue on the graph below) that drive strategic intent and direction and core competencies (indicated in green on the graph below), which drive the execution of the leading competencies.

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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 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;

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 will submit his self-evaluation to the Employer prior to the formal assessment;

6.6.4 In the instance where the employee could not perform due to reasons outside the control of the employer and employee, the KPI will not be considered during the evaluation. The employee should provide sufficient evidence in such instances; and

6.6.5 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

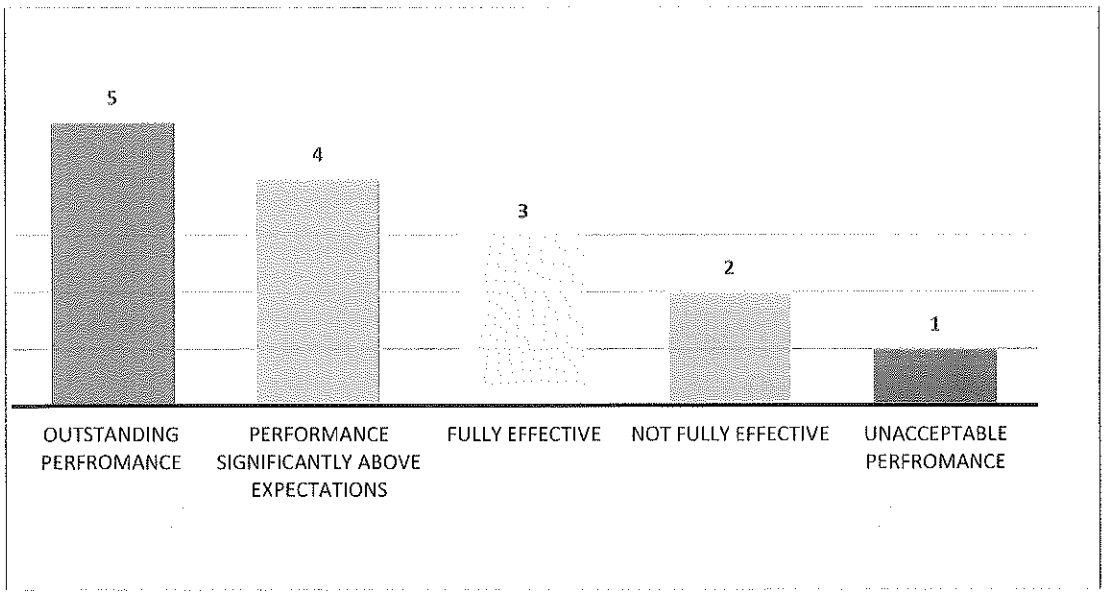
6.7.3 An overall score will be calculated based on the total of the individual scores calculated above.

6.8 Overall rating

6.8.1 An overall rating is calculated by adding the overall scores as calculated in *6.6.5* and *6.7.3* above; and

6.8.2 Such overall rating represents the outcome of the performance appraisal.

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



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Terminology	Description
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.
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.
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.
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.
Unacceptable performance	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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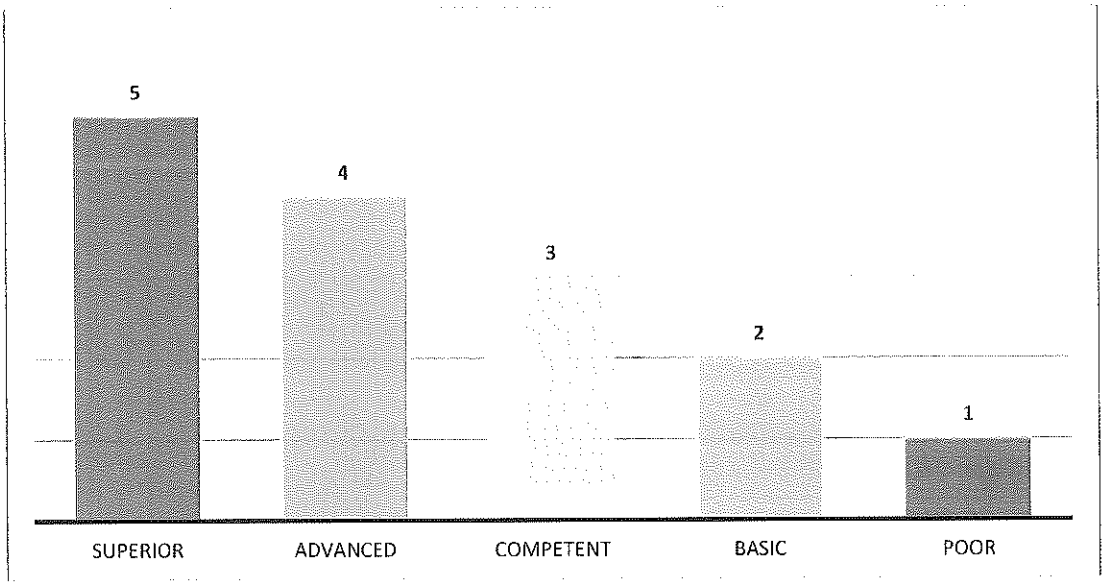
6.10 The assessment of the competencies will be based on the following rating scale:



Achievement Level	Description
Poor	Do not apply the basic concepts and methods to proof a basic understanding of local government operations and requires extensive supervision and development interventions.
Basic	Applies basic concepts, methods, and understanding of local government operations, but requires supervision and development intervention.
Competent	Develops and applies more progressive concepts, methods and understanding. Plans and guides the work of others and executes progressive analysis.
Advanced	Develops and applies complex concepts, methods and understanding. Effectively directs and leads a group and executes in-depth analysis.
Superior	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 Municipal Manager;

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; and

6.11.4 The Member of the EXCO (Portfolio Chairperson).

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6.12 The Municipal Manager will evaluate the performance of the Employee as at the end of the 1st and 3rd 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 in the first and the third quarter may be verbal if performance is satisfactory:

Quarter	Months	Review Period
1	July – September	Informal
2	October – December	February 2027
3	January – March	Informal
4	April – June	September 2027

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.

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 without delay.

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 Employer will submit the results of the annual assessment and the scoring report of the Employee, to full Council for purposes of recommending the bonus allocation;

11.3 In the event of the Employee terminating his service during the validity period of their agreement, the Employee's performance will be evaluated for the portion during which he/she was employed and will be entitled to a pro-rata performance bonus based on his evaluated performance for the period of actual service, and

11.4 A performance bonus may be considered based on the following scheme:

Performance calculation

POINTS AWARDED	% BONUS
2.5	5.0%
2.51–2.55	5.2%
2.56–2.60	5.6%
2.61–2.65	6.0%
2.66–2.70	6.4%
2.71–2.75	6.8%
2.76–2.80	7.2%
2.81–2.85	7.6%
2.86–2.90	8.0%
2.91–2.95	8.4%
2.96–2.99	8.8%
3.0	9.0%
3.01	10%
3.02–3.05	10.2%
3.06–3.10	10.6%
3.11–3.15	11.0%
3.16–3.20	11.4%
3.21–3.25	11.8%
3.26–3.30	12.2%
3.31–3.35	12.6%
3.36–3.40	13.0%
3.41–3.45	13.4%
3.46–3.49	13.8%
3.50	14.0%

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 –
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

CFO: _____ MM : _____

Employer may consider steps to terminate the contract of employment of the Employee on grounds of unfitness or incapacity to carry out his or her duties.

13. DISPUTE RESOLUTION

13.1 Any disputes about the nature of the **Employee's** performance agreement, whether it relates to key responsibilities, priorities, methods of assessment and/or any other matter provided for, shall be mediated by the Executive Mayor within thirty (30) days of receipt of formal dispute from the **Employee**.
The Executive Mayor's decision shall be final and binding on both parties.

13.2 Any disputes about the outcome of the employee's performance evaluation, must be mediated by the Executive Mayor or a member of the municipal council within thirty (30) days of receipt of a formal dispute from the **Employee**, provided that such member was not part of the evaluation panel provided for in Paragraph 6.11 of this Agreement. The decision of this member 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.

Thus done and signed at Douglas on the 1 day of July of 2026

AS WITNESSES:

1. _____

_____
Chief Financial Officer

2. _____

Thus done and signed at DOUGLAS on the 1ST day of JULY of 2026

AS WITNESSES:

1. _____

_____
Municipal Manager

2. _____

CFO: _____ MM : _____

KEY PERFORMANCE INDICATORS

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

Top Level institutional Scorecard 2026/2027														
GOOD GOVERNANCE														
Reference	Directorate	Strategic Objective	Municipal Planned Delivery		Ward	Baseline Actual 2025/2026	Delivery Indicator	Top Layer Service Delivery Budget Implementation Plan (SDBIP) 2026/2027				Annual Target	Weight
			Key Performance Indicator	Unit of Measurement				Q1	Q2	Q3	Q4		
TL14	Financial Services	To grow the revenue base of the municipality	Council minutes where Adjustment budget was submitted to Council by 28 February 2027	Submission of the Adjustment budget to Council for approval by 28 February 2027	All	1	Output	N/A	N/A	1	N/A	1	10%
TL15	Financial Services	To grow the revenue base of the municipality	Council minutes where Draft Budget was submitted to Council by 31 March 2027	Submission of the Draft Budget to Council for noting 31 March 2027	All	1	Output	N/A	N/A	1	N/A	1	10%
TL16	Financial Services	To grow the revenue base of the municipality	Council minutes where Anual Budget was submitted to Council by 31 May 2027	Submission of the Anual Budget to Council for approval by 31 May 2027	All	1	Output	N/A	N/A	N/A	1	1	10%
TL17	Financial Services	To grow the revenue base of the municipality	2026/27 Mid-Year Budget and Performance Assessment Report.	One S72 MFMA Mid-Year Budget Assessment Report 2026/27 tabled in council by January 2027	All	1	Output	N/A	N/A	1	N/A	1	10%
TL18	Financial Services	To achieve and maintain a financially compliant and accountable municipality through effective financial management and reporting	Submission of Fixed Asset Register (FAR) in compliance with applicable Generally Recognised Accounting Practice (GRAP) Standards to the Auditor-General by end-August 2026	One Fixed Asset Register submitted to the Auditor-General by end-August 2026	All	1	Output	1	N/A	N/A	N/A	1	10%
TL19	Financial Services	Implement the Procurement Plan	Implement the Procurement Plan	Number of Reports submitted to Provincial treasury on the implementation of the procurement plan	All	4	Output	1	1	1	1	4	10%

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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.

CFO: _____ MM : _____

ANNEXURE A

Performance Plan

CFO: _____ MM : _____

CLUSTER:	CORE COMPETENCIES		
COMPETENCY NAME:	Results and Quality Focus		
COMPETENCY DEFINITION:	**Able to maintain high quality standards, focus on achieving results and objectives while consistently striving to exceed expectations and encourage others to meet quality standards. Further, to actively monitor and measure results and quality against identified objectives**		
	ACHIEVEMENT LEVELS		
BASIC	**COMPETENT**	**ADVANCED**	**SUPERIOR**
• Understand quality of work but requires guidance in attending to important matters	• Focus on high-priority actions and does not become distracted by lower-priority activities	• Consistently verify own standards and outcomes to ensure quality output	• Coach and guide others to exceed quality standards and results
• Show a basic commitment to achieving the correct results	• Display firm commitment and pride in achieving the correct results	• Focus on the end result and avoids being distracted	• Develop challenging, client-focused goals and sets high standards for personal performance
• Produce the minimum level of results required in the role	• Set quality standards and design processes and tasks around achieving set standards	• Demonstrate a determined and committed approach to achieving results and quality standards	• Commit to exceed the results and quality standards, monitor own performance and implement remedial interventions when required
• Produce outcomes that is of a good standard	• Produce output of high quality	• Follow tasks and projects through to completion	• Work with team to set ambitious and challenging team goals, communicating long- and short-term expectations
• Focus on the quantity of output but requires development in incorporating quality of work	• Able to balance the quantity and quality of results in order to achieve objectives	• Set challenging goals and objectives to self and team and display commitment to achieving expectations	• Take appropriate risks to accomplish goals
• Produce quality work in general circumstances, but fails to meet expectation under pressure	• Monitor progress, quality of work and use of resources; provide status updates and make adjustments as needed	• Maintain a focus on quality outputs when placed under pressure	• Overcome setbacks and adjust action plans to realise goals
•	•	• Establishing institutional systems for managing and assigning work, defining responsibilities, tracking, monitoring and measuring	• Focus people on critical activities that yield a high impact

CFO: _____ MM : _____

CLUSTER:	**CORE COMPETENCIES**
COMPETENCY NAME:	**Communication**
COMPETENCY DEFINITION:	**Able to share information, knowledge and ideas in a clear, focused and concise manner appropriate for the audience in order to effectively convey, persuade and influence stakeholders to achieve the desired outcome**

ACHIEVEMENT LEVELS			
BASIC	**COMPETENT**	**ADVANCED**	**SUPERIOR**
• Demonstrate an understanding for communication levers and tools appropriate for the audience, but requires guidance in utilising such tools	• Express ideas to individuals and groups in formal and informal settings in a manner that is interesting and motivating	• Effectively communicate high-risk and sensitive matters to relevant stakeholders	• Regarded as a specialist in negotiations and representing the institution
• Express ideas in a clear and focused manner, but does not always take the audience into consideration	• Able to understand, tolerate and appreciate diverse perspectives, attitudes and beliefs	• Develop a well-defined communication strategy	• Able to inspire and motivate others through positive communication that is impactful and relevant
• Disseminate and convey information and knowledge adequately	• Adapt communication content and style to suit the audience and facilitate optimal information transfer	• Balance political perspectives with institutional needs when communicating viewpoints on complex issues	• Creates an environment conducive to transparent and productive communication and critical appreciation conversations
	• Deliver content in a manner that gains support, commitment and agreement from relevant stakeholders	• Able to effectively direct negotiations around complex issues	• Able to coordinate negotiations at different levels within local government and externally
	• Compile clear, focused, concise and well-structured written documents	• Market and promote the institution to external stakeholders and seek to enhance a positive image of the institution	
		• Able to communicate with the media with high levels of moral competence and discipline	•

CFO: _____ MM : _____

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
• Collect, categorise and track relevant information required for specific tasks and projects	• Use appropriate information systems and technology to manage institutional knowledge and information sharing	• Effectively predict future information and knowledge management requirements and systems	• Create and support a vision and culture where team members are empowered to seek, gain and share knowledge and information
• Analyse and interpret information to draw conclusions	• Evaluate data from various sources and use information effectively to influence decisions and provide solutions	• Develop standards and processes to meet future knowledge management needs	• Establish partnerships across local government to facilitate knowledge management
• Seek new sources of information to increase the knowledge base	• Actively create mechanisms and structures for sharing information	• Share and promote best-practice knowledge management across various institutions	• Demonstrate a mature approach
• Regularly share information and knowledge with internal stakeholders and team members	• Use external and internal resources to research and provide relevant and cutting-edge knowledge to enhance institutional effectiveness and efficiency	• Establish accurate measures and monitoring systems for knowledge and information management	• Recognise and exploit knowledge points in interactions with internal and external stakeholders
		• Create a culture conducive of learning and knowledge sharing	
		• Hold regular knowledge and information sharing sessions to elicit new ideas and share best practice approaches	

CFO: _____ MM : _____

enhance such innovative thinking			
	• Continuously identify opportunities to enhance internal processes	• Identify trends and best practices in processes and service delivery and propose institutional application	• Play an active role in sharing best practice solutions and engage in national and international local government seminars and conferences
	• Identify and analyse opportunities conducive to innovative approaches and propose remedial intervention	• Continuously engage in research to identify client needs	

CFO: _____ MM : _____

• Focus on short-term objectives in developing plans and actions	• Schedule tasks to ensure they are performed within budget and with efficient use of time and resources	• Produce clear, detailed and comprehensive plans to achieve institutional objectives	•
• Arrange information and resources required for a task, but require further structure and organisation	• Measure progress and monitor performance results	• Identify possible risk factors and design and implement appropriate contingency plans	•
•	•	• Adapt plans in light of changing circumstances	•
•	•	• Prioritise tasks and projects according to their relevant urgency and importance	•

CLUSTER:	**CORE COMPETENCIES**
COMPETENCY NAME:	**Analysis and Innovation**
COMPETENCY DEFINITION:	**Able to critically analyse information, challenges and trends to establish and implement fact-based solutions that are innovative to improve institutional processes in order to achieve key strategic objectives**

ACHIEVEMENT LEVELS

BASIC	COMPETENT	ADVANCED	SUPERIOR
• Understand the basic operation of analysis, but lack detail and thoroughness	• Demonstrate logical problem solving techniques and approaches and provide rationale for recommendations	• Coaches team members on analytical and innovative approaches and techniques	• Demonstrate complex analytical and problem solving approaches and techniques
• Able to balance independent analysis with requesting assistance from others	• Demonstrate objectivity, insight and thoroughness when analysing problems	• Engage with appropriate individuals in analysing and resolving complex problems	• Create an environment conducive to analytical and fact-based problem solving
• Recommend new ways to perform tasks within own function	• Able to break down complex problems into manageable parts and identify solutions	• Identify solutions on various areas in the institution	• Analyse, recommend solutions and monitor trends in key challenges to prevent and manage occurrence
• Propose simple remedial interventions that marginally challenge the status quo	• Consult internal and external stakeholders on opportunities to improve processes and service delivery	• Formulate and implement new ideas throughout the institution	• Create an environment that fosters innovative thinking and follows a learning organisation approach
• Listen to the ideas and perspectives of others and explore opportunities to	• Clearly communicate the benefits of new opportunities and innovative solutions to stakeholders	• Able to gain approval and buy-in for proposed interventions from relevant stakeholders	• Be a thought leader on innovative customer service delivery and process optimisation

CFO: _____ MM : _____

	without seeking personal gain		
	• Able to deal with situations of conflict of interest promptly and in the best interest of local government	• Takes an active stance against corruption and dishonesty when noted	
		• Actively promote the value of the institution to internal and external stakeholders	
		• Able to work in unity with a team and not seek personal gain	
		• Apply universal moral principles consistently to achieve moral decisions	

CLUSTER:	**CORE COMPETENCIES**
COMPETENCY NAME:	**Planning and Organising**
COMPETENCY DEFINITION:	**Able to plan, prioritise and organise information and resources effectively to ensure the quality of service delivery and build efficient contingency plans to manage risk**

ACHIEVEMENT LEVELS

BASIC	COMPETENT	ADVANCED	SUPERIOR
• Able to follow basic plans and organise tasks around set objectives	• Actively and appropriately organise information and resources required for a task	• Able to define institutional objectives, develop comprehensive plans, integrate and coordinate activities and assign appropriate resources for successful implementation	• Focus on broad strategies and initiatives when developing plans and actions
• Understand the process of planning and organising but requires guidance and development in providing detailed and comprehensive plans	• Recognise the urgency and importance of tasks	• Identify in advance required stages and actions to complete tasks	• Able to protect and forecast short, medium and long term requirements of the institution and local government
• Able to follow existing plans and ensure that objectives are met	• Balance short and long-term plans and goals and incorporate into the team's performance objectives	• Schedule realistic timelines, objectives and milestones for tasks and projects	• Translate policy into relevant projects to facilitate the achievement of institutional objectives

CFO: _____ MM : _____

•	•	• Demonstrate a thorough understanding of risk retention plans	• Able to forge positive relationships on cooperative governance level to enhance the effectiveness of local government
•	•	• Identify and implement comprehensive risk management systems and processes	• Able to shape, direct and drive the formulation of policies on a macro level
•	•	• Implement and monitor the formulation of policies, identify and analyse constraints and challenges with implementation and provide recommendations for improvement	•

CLUSTER:	**CORE COMPETENCIES**
COMPETENCY NAME:	**Moral Competence**
COMPETENCY DEFINITION:	**Able to identify moral triggers, apply reasoning that promotes honesty and integrity and consistently display behaviour that reflects moral competence**

ACHIEVEMENT LEVELS

BASIC	COMPETENT	ADVANCED	SUPERIOR
• Realise the impact of acting with integrity, but requires guidance and development in implementing principles	• Conduct self in alignment with the values of local government and the institution	• Identify, develop and apply measures of self-correction	• Create an environment conducive of moral practices
• Follow basic rules and regulations of the institution	• Able to openly admit own mistakes and weaknesses and seek assistance from others when unable to deliver	• Able to gain trust and respect through aligning actions with commitments	• Actively develop and implement measures to combat fraud and corruption
• Able to identify basic moral situations, but requires guidance and development in understanding and reasoning with moral intent	• Actively report fraudulent activity and corruption with local government	• Make proposals and recommendations that are transparent and gain the approval of relevant stakeholders	• Set integrity standards and shared accountability measures across the institution to support the objectives of local government
	• Understand and honor the confidential nature of matters	• Present values, beliefs and ideas that are congruent with the institution's rules and regulations	• Take responsibility for own actions and decisions, even if the consequences are unfavourable

CFO: _____ MM : m.vil

• Understand the impact of change interventions on the institution within the broader scope of local government	• Identify change readiness levels and assist in resolving resistance to change factors	• Benchmark change interventions against best change practices	
	• Design change interventions that are aligned with the institution's strategic objectives and goals	• Understand the impact and psychology of change and put remedial interventions in place to facilitate effective transformation	
		• Take calculated risk and seek new ideas from best practice scenarios and identify the potential for implementation	

CLUSTER:	**LEADING COMPETENCIES**
COMPETENCY NAME:	**Governance Leadership**
COMPETENCY DEFINITION:	**Able to promote, direct and apply professionalism in managing risk and compliance requirements and apply a thorough understanding of governance practices and obligations. Further, able to direct the conceptualisation of relevant policies and enhance cooperative governance relationships**

ACHIEVEMENT LEVELS

BASIC	COMPETENT	ADVANCED	SUPERIOR
• Display a basic awareness of risk, compliance and governance factors but require guidance and development in implementing such requirements	• Display a thorough understanding of governance and risk and compliance factors and implement plans to address these	• Able to link risk initiatives into key institutional objectives and drivers	• Demonstrate a high level of commitment in complying with governance requirements
• Understand the structure of cooperative government but requires guidance on fostering workable relationships between stakeholders	• Demonstrate understanding of the techniques and processes for optimising risk taking decisions within the institution	• Identify, analyse and measure risk, create valid risk forecasts and map risk profiles	• Implement governance and compliance strategy to ensure achievement of institutional objectives within the legislative framework
• Provide input into policy formulation	• Actively drive policy formulation within the institution to ensure the achievement of objectives	• Apply risk control methodology and approaches to prevent and reduce risk that impede on the achievement of institutional objectives	• Able to advise local government on risk management, best practice interventions and compliance management

CFO: _____ MM : Mvil

•	• Ensure that delegation and instructions as required by National Treasury guidelines are reviewed and updated	• Promote National Treasury's regulatory framework for Financial Management	• Display professionalism in dealing with financial data and processes
•	• Identify and implement proper monitoring and evaluation practices to ensure appropriate spending against budget	•	•

CLUSTER:	LEADING COMPETENCIES		
COMPETENCY NAME:	Change Leadership		
COMPETENCY DEFINITION:	Able to direct and initiate institutional transformation on all levels in order to successfully drive and implement new initiatives and deliver professional and quality services to the community		
	ACHIEVEMENT LEVELS		
BASIC	COMPETENT	ADVANCED	SUPERIOR
• Display an awareness of change interventions and the benefits of transformation initiatives	• Perform an analysis of the change impact on the social, political and economic environment	• Actively monitor change impact and results and convey progress to relevant stakeholders	• Sponsor change agents and create a network of change leaders who support the interventions
• Able to identify basic needs for change	• Maintain calm and focus during change	• Secure buy-in and sponsorship for change initiatives	• Actively adapt current structures and processes to incorporate the change interventions
• Identify gaps between the current and desired state	• Able to assist team members during change and keep them focused on the deliverables	• Continuously evaluate change strategy and design and introduce new approaches to enhance the institution's effectiveness	• Mentor and guide team members on the effects of change, resistance factors and how to integrate change
• Identify potential risk and challenges to transformation, including resistance to change factors	• Volunteer to lead change efforts outside of own work team	• Build and nurture relationships with various stakeholders to establish strategic alliance in facilitating change	• Motivate and inspire others around change initiatives
• Participate in change programs and piloting change interventions	• Able to gain buy-in and approval for change from relevant stakeholders	• Take the lead in impactful change programs	

CFO: _____ MM : _____

•	• Monitor progress and use of resources and make needed adjustments to timelines, steps and resource allocation	• Influence and motivate project team to deliver exceptional results	
		• Monitor policy implementation and apply procedures to manage risks	

CLUSTER:	**LEADING COMPETENCIES**
COMPETENCY NAME:	**Financial Management**
COMPETENCY DEFINITION:	**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**

ACHIEVEMENT LEVELS

BASIC	COMPETENT	ADVANCED	SUPERIOR
• Understand basic financial concepts and methods as they relate to institutional processes and activities	• Exhibit knowledge of general financial concepts, planning, budgeting and forecasting and how they interrelate	• Take active ownership of planning, budgeting and forecasting processes and provides credible answers to queries within own responsibility	• Develop planning tools to assist in evaluating and monitoring future expenditure trends
• Display awareness into the various sources of financial data, reporting mechanisms, financial governance, processes and systems	• Assess, identify and manage financial risks	• Prepare budgets that are aligned to the strategic objectives of the institution	• Set budget frameworks for the institution
• Understand the importance of financial accountability	• Assume a cost-saving approach to financial management	• Address complex budgeting and financial management concerns	• Set strategic direction for the institution on expenditure and other financial processes
• Understand the importance of asset control	• Prepare financial reports based on specified formats	• Put systems and processes in place to enhance the quality and integrity of financial management practices	• Build and nurture partnerships to improve financial management and achieve financial savings
•	• Consider and understand the financial implications of decisions and suggestions	• Advise on policies and procedures regarding asset control	• Actively identify and implement new methods to improve asset control

CFO: _____ MM : _____

		• Achieve agreement or consensus in adversarial environments	
		• Lead and unite diverse teams across divisions to achieve institutional objectives	

CLUSTER:	**LEADING COMPETENCIES**
COMPETENCY NAME:	**Programme and Project Management**
COMPETENCY DEFINITION:	**Able to understand program and project management methodology; plan, manage, monitor and evaluate specific activities in order to deliver on set objectives**

ACHIEVEMENT LEVELS

BASIC	COMPETENT	ADVANCED	SUPERIOR
• Initiate projects after approval from higher authorities	• Establish broad stakeholder involvement and communicate the project status and key milestones	• Manage multiple programs and balance priorities and conflicts according to institutional goals	• Understand and conceptualise the long-term implications of desired project outcomes
• Understand procedures of program and project management methodology, implications and stakeholder involvement	• Define the roles and responsibilities of the project team and create clarity around expectations	• Apply effective risk management strategies through impact assessment and resource requirements	• Direct a comprehensive strategic macro and micro analysis and scope projects accordingly to realise institutional objectives
• Understand the rationale of projects in relation to the institution's strategic objectives	• Find a balance between project deadline and the quality of deliverables	• Modify project scope and budget when required without compromising the quality and objectives of the project	• Influence people in positions of authority to implement outcomes of projects
• Document and communicate factors and risk associated with own work	• Identify appropriate project resources to facilitate the effective completion of the deliverables	• Involve top-level authorities and relevant stakeholders in seeking project buy-in	• Lead and direct translation of policy into workable action plans
• Use results and approaches of successful project implementation as guide	• Comply with statutory requirements and apply policies in a consistent manner	• Identify and apply contemporary project management methodology	• Ensures that programs are monitored to track progress and optimal resource utilisation, and that adjustments are made as needed

CFO: _____ MM : _____

	• Understand the aim and objectives of the institution and relate it to own work	• Guide the institution through complex and ambiguous concern	
		• Use understanding of power relationships and dynamic tensions among key players to frame communications and develop strategies, positions and alliances	

CLUSTER:	**LEADING COMPETENCIES**
COMPETENCY NAME:	**People Management**
COMPETENCY DEFINITION:	**Effectively manage, inspire and encourage people, respect diversity, optimise talent and build and nurture relationships in order to achieve institutional objectives**

ACHIEVEMENT LEVELS

BASIC	COMPETENT	ADVANCED	SUPERIOR
• Participate in team goalsetting and problem solving	• Seek opportunities to increase team contribution and responsibility	• Identify ineffective team and work processes and recommend remedial interventions	• Develop and incorporate best practice people management processes, approaches and tools across the institution
• Interact and collaborate with people of diverse backgrounds	• Respect and support the diverse nature of others and be aware of benefits of a diverse approach	• Recognise and reward effective and desired behavior	• Foster a culture of discipline, responsibility and accountability
• Aware of guidelines for employee development, but requires support in implementing development initiatives	• Effectively delegate tasks and empower others to increase contribution and execute functions optimally	• Provide mentoring and guidance to others in order to increase personal effectiveness	• Understand the impact of diversity in performance and actively incorporate a diversity strategy in the institution
	• Apply relevant employee legislation fairly and consistently	• Identify development and learning needs within the team	• Develop comprehensive integrated strategies and approaches to human capital development and management
	• Effectively identify capacity requirements to fulfil the strategic mandate	• Inspire a culture of performance excellence by giving positive and constructive feedback to the team	• Actively identify trends and predict capacity requirements to facilitate unified transition and performance management

CFO: _____ MM : _____

CLUSTER	Leading Competencies		
COMPETENCY NAME	Strategic Direction and Leadership		
COMPETENCY DEFINITION	Provide and direct a vision for the institution, and inspire and deploy others to deliver on the strategic institutional mandate		
	ACHIEVEMENT LEVELS		
BASIC	COMPETENT	ADVANCED	SUPERIOR
• Understand institutional and departmental strategic objectives, but lacks the ability to inspire others to achieve set mandate	• Give direction to a team in realising the institution's strategic mandate and set objectives	• Evaluate all activities to determine value and alignment to strategic intent	• Structure and position the institution to local government priorities
• Describe how specific tasks link to institutional strategies but has limited influence in directing a strategy	• Has a positive impact and influence on the morale, engagement and participation of team members	• Display in-depth knowledge and understanding of strategic planning	• Actively use in-depth knowledge and understanding to develop and implement a comprehensive institutional framework
• Has a basic understanding of institutional performance management, but lacks the ability to integrate systems into a collective whole	• Develop action plans to execute and guide strategy	• Align strategy and goals across all functional areas	• Hold self-accountable for strategy execution and results
• Demonstrate basic understanding of key decision makers	• Assist in defining performance measures to monitor the progress and effectiveness of the institution	• Actively define performance measures to monitor the progress and effectiveness of the institution	• Provide impact and influence through building and maintaining strategic relationships
	• Displays an awareness of institutional structures and political factors	• Consistently challenge strategic plans to ensure relevance	• Create an environment that facilitates loyalty and innovation. Display a superior level of self-discipline and integrity in actions
	• Effectively communicate barriers to execution to relevant parties	• Understand institutional structures and political factors, and the consequences of actions	• Integrate various systems into a collective whole to optimise institutional performance management
	• Provide guidance to all stakeholders in the achievement of the strategic mandate	• Empower others to follow the strategic direction and deal with complex situations	• Uses understanding of competing interests to maneuver successfully to a win/win outcome

CFO: _____ MM : _____

Competency	Definition	
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 consistently 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

CFO: _____ MM : _____

Competency	Definition	Weight
	Leading Competencies	
Strategic direction and leadership	Provide and direct a vision for the institution, and inspire and deploy others to deliver on the strategic institutional mandate. It includes: • Impact and influence • Institutional performance management • Strategic planning and management • Organisational awareness	1.67
People management	Effectively manage, inspire and encourage people, respect diversity, optimise talent and build and nurture relationships in order to achieve institutional objectives. It includes: • Human capital planning and development • Diversity management • Employee relations management • Negotiation and dispute management	1.67
Programme and project management	Able to understand program and project management methodology; plan, manage, monitor and evaluate specific activities in order to deliver on set objectives. It includes: • Program and project planning and implementation • Service delivery management • Program and project monitoring and evaluation	1.67
Financial management	Able to compile, plan and manage budgets, control cash flow, institute financial risk management and administer procurement processes in accordance with recognised financial practices. Further to ensure that all financial transactions are managed in an ethical manner. It includes: • Budget planning and execution • Financial strategy and delivery • Financial reporting and delivery	1.67
Change leadership	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: • Change vision and strategy •Process design and improvement • Change impact monitoring and evaluation	1.67
Governance leadership	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: • Policy formulation • Risk and compliance management • Cooperative governance	1.67
	Core Competencies	

CFO: _____ MM : _____

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.

CFO: _____ MM : _____

ANNEXURE B

Competency Framework

CFO: _____ MM : _____

TL20	Financial Services	To achieve and maintain a financially compliant and accountable municipality through effective financial management and reporting	Submit the Section 52(d) Report to Council following the end of each quarter as prescribed in the Local Government: Municipal Finance Management Act, No. 56 of 2003	Four Financial Section 52(d) Reports submitted to Council for noting	All	4	Output	1	1	1	1	4	10%
TL21	Financial Services	Conduct quarterly revenue and expenditure reviews with Municipal Councils.	Number of Finance Portfolio Committee meetings conducted	Number of Finance Portfolio Committee meetings conducted	All	4	Output	1	1	1	1	4	10%
Total													80%

CFO: _____ MM : _____

ANNEXURE C

Personal Development Plan

CFO: _____ MM : _____

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

Signed and accepted by the Employee

Date: 01.07.2026

Signed by the Municipal Manager on behalf of the Municipality

Date 01.07.2026

CFO: _____ MM : _____