



PERFORMANCE PLAN

For

Mrs U.P. Mahlasela



Ukhlebezwe Local Municipality

Budget and Treasury Office

03 September 2013 to 30 June 2014



RATING	DEFINITION OF SCORE
5	Outstanding performance
4	Performance significantly above expectation
3	Fully effective
2	Performance not fully satisfactory
1	Unacceptable performance

Period Under Review	
Surname	Mahlasela
Name	Unathi P
Municipality	Ubuhlebezwe Municipality
Department	Budget and Treasury Office
Race	African
Gender	Female
Employee Number	0239
Date Of Appointment	03 September 2012
Salary Package	



PERFORMANCE PLAN

IDP / SDBIP NO.	NATIONAL KEY PERFORMANCE AREAS	STRATEGIC OBJECTIVES	OUTPUTS	INDICATORS	WEIGHT	2013/2014	QUARTERLY TARGETS & ACTUALS				ANNUAL BUDGET	ACTUAL	ACHIEVED/ NOT ACHIEVED	HOD SCORE	PANEL SCORE	COMMENT/CORRECTIVE ACTION	PORTFOLIO OF EVIDENCE	
						ANNUAL TARGET	QUARTER 1	QUARTER 2	QUARTER 3	QUARTER 4								
						PROJECTED	PROJECTED	PROJECTED	PROJECTED	PROJECTED								
	MUNICIPAL TRANSFORMATION AND INSTITUTIONAL DEVELOPMENT																	
BTO01		To improve the performance and functioning of the municipality	Risk and performance reports	HOD's submit quarterly performance reports to the office of the MM	1	4 quarterly performance reports submitted to the office of the MM	1 quarterly performance report submitted to the office of the MM (quarter 4 of 12/13 financial year)	1 quarterly performance report submitted to the office of the MM (quarter 1 of 13/14 financial year)	1 quarterly performance report submitted to the office of the MM (quarter 1 of 13/14 financial year)	1 quarterly performance report submitted to the office of the MM (quarter 1 of 13/14 financial year)	OPEX						Proof of submission	
OPEX				OPEX	OPEX	OPEX	OPEX	OPEX										
BTO02			4 quarterly updated risk register reports submitted to the office of the MM	1	4 quarterly updated risk register reports submitted to the office of the MM	1 quarterly updated risk register report submitted to the office of the MM	1 quarterly updated risk register report submitted to the office of the MM	1 quarterly updated risk register report submitted to the office of the MM	1 quarterly updated risk register report submitted to the office of the MM	1 quarterly updated risk register report submitted to the office of the MM	OPEX							proof of submission & updated risk register
		OPEX	OPEX	OPEX	OPEX	OPEX	OPEX	OPEX	OPEX	OPEX								
BTO03	To develop staff to ensure effective service delivery	Training of finance staff	6 finance staff trained by 31-Mar-14	3	6 finance staff trained by 31-Mar-14	2 finance staff trained by 31-Sep-13	3 finance staff trained by 31-Dec-13	1 finance staff trained by 31-Mar-14	n/a	AS PER WSP							Signed attendance register/ Confirmation of attendance & approved WSP	
					AS PER WSP	AS PER WSP	AS PER WSP	AS PER WSP	AS PER WSP	AS PER WSP								
					5													
	BASIC SERVICE DELIVERY AND INFRASTRUCTURE																	



IDP / SDBIP NO.	NATIONAL KEY PERFORMANCE AREAS	STRATEGIC OBJECTIVES	OUTPUTS	INDICATORS	WEIGHT	2013/2014	QUARTERLY TARGETS & ACTUALS				ANNUAL BUDGET	ACTUAL	ACHIEVED/ NOT ACHIEVED	HOD SCORE	PANEL SCORE	COMMENT/CORRECTIVE ACTION	PORTFOLIO OF EVIDENCE
						ANNUAL TARGET	QUARTER 1	QUARTER 2	QUARTER 3	QUARTER 4							
						PROJECTED	PROJECTED	PROJECTED	PROJECTED	PROJECTED							
BTO04	DEVELOPMENT	To improve the performance and functioning of the municipality	Provide effective SCM support to service delivery departments	Turnaround time for bid processing not more than specified timeframes (90 Days turnaround time for the bids R200000+ to be finalised; 14 day turnaround time for bids 30000 to R199999 and 6 day turnaround time for quotations less than R30000)	3	Turnaround time for bid processing not more than specified timeframes (90 Days turnaround time for the bids R200000+ to be finalised; 14 day turnaround time for bids 30000 to R199999 and 6 day turnaround time for quotations less than R30000)	90 Days turnaround time for the bids R200000+ to be finalised; 14 day turnaround time for bids 30000 to R199999 and 6 day turnaround time for quotations less than R30000	90 Days turnaround time for the bids R200000+ to be finalised; 14 day turnaround time for bids 30000 to R199999 and 6 day turnaround time for quotations less than R30000	90 Days turnaround time for the bids R200000+ to be finalised; 14 day turnaround time for bids 30000 to R199999 and 6 day turnaround time for quotations less than R30000	90 Days turnaround time for the bids R200000+ to be finalised; 14 day turnaround time for bids 30000 to R199999 and 6 day turnaround time for quotations less than R30000	OPEX						Register of lodgment of request with date of lodgment and date of finalisation & Appointment letters
						OPEX	OPEX	OPEX	OPEX	OPEX	OPEX						
BTO05		To practice sound financial management principles	Indigent Register	Indigent register updated by 30-Mar-14	2	Indigent register updated by 30-Mar-14	n/a	n/a	Indigent register updated by 30-Mar-14	n/a	OPEX						Old & New updated indigent register
						OPEX	n/a	n/a	OPEX	n/a	OPEX						
					5												



IDP / SDBIP NO.	NATIONAL KEY PERFORMANCE AREAS	STRATEGIC OBJECTIVES	OUTPUTS	INDICATORS	WEIGHT	2013/2014	QUARTERLY TARGETS & ACTUALS				ANNUAL BUDGET	ACTUAL	ACHIEVED/ NOT ACHIEVED	HOD SCORE	PANEL SCORE	COMMENT/CORRECTIVE ACTION	PORTFOLIO OF EVIDENCE
						ANNUAL TARGET	QUARTER 1	QUARTER 2	QUARTER 3	QUARTER 4							
						PROJECTED	PROJECTED	PROJECTED	PROJECTED	PROJECTED							
	LOCAL ECONOMIC DEVELOPMENT																
BTO06		To pursue investment in strategic infrastructure necessary to attract and maintain business	Workshop small businesses on compliance and financial issues	1 workshop for small businesses on compliance and financial issues conducted by 30 September 2013	5	1 workshop for small businesses on compliance and financial issues conducted by 30 September 2013	1 workshop for small businesses on compliance and financial issues conducted by 30 September 2013	n/a	n/a	n/a	OPEX						Attendance register & content of the workshop
						OPEX	OPEX	n/a	n/a	n/a	OPEX						
					5												
	GOOD GOVERNANCE, COMMUNITY PARTICIPATION AND WARD COMMITTEE SYSTEMS																
BTO07		To promote accountability to the citizens of Ubhulebezwe	Public consultation	2 public participation meetings attended by Nov-13 and Apr-14	3	2 public participation meetings attended by Nov-13 and Apr-14	n/a	1 public participation meeting attended by Nov-13	n/a	1 public participation meeting attended by Apr-14	OPEX						Attendance register and minutes
						OPEX	n/a	OPEX	n/a	OPEX	OPEX						



IDP / SDBIP NO.	NATIONAL KEY PERFORMANCE AREAS	STRATEGIC OBJECTIVES	OUTPUTS	INDICATORS	WEIGHT	2013/2014	QUARTERLY TARGETS & ACTUALS				ANNUAL BUDGET	ACTUAL	ACHIEVED/ NOT ACHIEVED	HOD SCORE	PANEL SCORE	COMMENT/CORRECTIVE ACTION	PORTFOLIO OF EVIDENCE
						ANNUAL TARGET	QUARTER 1	QUARTER 2	QUARTER 3	QUARTER 4							
						PROJECTED	PROJECTED	PROJECTED	PROJECTED	PROJECTED							
BTO08		To improve the performance and functioning of the municipality	Holding of 4 departmental meetings	Holding of 2 departmental meetings	1	Holding of 2 departmental meetings	Holding of 1 departmental meeting	n/a	Holding of 1 departmental meeting	n/a	OPEX					Attendance register and minutes	
BTO09				Attend 16 council committee meetings (4 MANCO, 4 Portfolio, 4 EXCO, 4 Council meetings)	1	Attend 16 council committee meetings (4 MANCO, 4 Portfolio, 4 EXCO, 4 Council meetings)	Attend 4 council committee meetings (1 MANCO, 1 Portfolio, 1 EXCO, 1 Council meetings)	Attend 4 council committee meetings (1 MANCO, 1 Portfolio, 1 EXCO, 1 Council meetings)	Attend 4 council committee meetings (1 MANCO, 1 Portfolio, 1 EXCO, 1 Council meetings)	Attend 4 council committee meetings (1 MANCO, 1 Portfolio, 1 EXCO, 1 Council meetings)	OPEX					Attendance register & signed minutes	
					5												
BTO10	FINANCIAL VIABILITY AND FINANCIAL MANAGEMENT	To invest in the development of the municipal area to enhance revenue	Billing and collection of all revenue	12 monthly billing/collection reports produced on monthly billings/collection	3	12 monthly billing/collection reports produced on monthly billings/collection	3 monthly billing/collection reports produced on monthly billings/collection	3 monthly billing/collection reports produced on monthly billings/collection	3 monthly billing/collection reports produced on monthly billings/collection	3 monthly billing/collection reports produced on monthly billings/collection	OPEX					Monthly billing reports	
BTO11		To incur expenditure to create value	Expenditure management	Payment of service providers within 30 days of invoices	3	Payment of service providers within 30 days of invoices	Payment of service providers within 30 days of invoices	Payment of service providers within 30 days of invoices	Payment of service providers within 30 days of invoices	Payment of service providers within 30 days of invoices	OPEX					Received date-stamped invoices/register of received and processed invoices and payment schedule	
BTO12		To practice sound financial management principles	Budgeting and Reporting	Monitoring of the budget (Section 71 reports produced monthly)	3	Monitoring of the budget (Section 71 reports produced monthly)	Monitoring of the budget (Section 71 reports produced monthly)	Monitoring of the budget (Section 71 reports produced monthly)	Monitoring of the budget (Section 71 reports produced monthly)	Monitoring of the budget (Section 71 reports produced monthly)	OPEX					Section 71 reports & signed finance portfolio minutes	



IDP / SDBIP NO.	NATIONAL KEY PERFORMANCE AREAS	STRATEGIC OBJECTIVES	OUTPUTS	INDICATORS	WEIGHT	2013/2014	QUARTERLY TARGETS & ACTUALS				ANNUAL BUDGET	ACTUAL	ACHIEVED/ NOT ACHIEVED	HOD SCORE	PANEL SCORE	COMMENT/CORRECTIVE ACTION	PORTFOLIO OF EVIDENCE
						ANNUAL TARGET	QUARTER 1	QUARTER 2	QUARTER 3	QUARTER 4							
						PROJECTED	PROJECTED	PROJECTED	PROJECTED	PROJECTED							
						OPEX	OPEX	OPEX	OPEX	OPEX	OPEX						
BTO13			Implementation of the assets management policy	12 monthly asset management reconciliations, updated asset register and a list of all insured assets	3	12 monthly asset management reconciliations, updated asset register and a list of all insured assets	3 monthly asset management reconciliations, updated asset register and a list of all insured assets	3 monthly asset management reconciliations, updated asset register and a list of all insured assets	3 monthly asset management reconciliations, updated asset register and a list of all insured assets	3 monthly asset management reconciliations, updated asset register and a list of all insured assets	OPEX						Monthly reconciliations signed by CFO, updated asset register, list of acquisitions & a list of all insured assets
						OPEX	OPEX	OPEX	OPEX	OPEX	OPEX						
BTO14			Compliance with MFMA and regulations	2013/14 Adjustments budget adopted by 28/02/2014	3	2013/14 Adjustments budget adopted by 28/02/2014	n/a	n/a	2013/14 Adjustments budget adopted by 28/02/2014	n/a	OPEX						Adjustment budget, minutes & council resolution
						OPEX	n/a	n/a	OPEX	n/a	OPEX						
BTO15			Submission of Adjustments Budget for 2014/15 to NT & PT	Submission of Adjustments Budget for 2013/14 to NT & PT within 10 days (10-Mar-14)	3	Submission of Adjustments Budget for 2013/14 to NT & PT within 10 days (10-Mar-14)	n/a	n/a	Submission of Adjustments Budget for 2013/14 to NT & PT within 10 days (10-Mar-14)	n/a	OPEX						Proof of submission/acknowledgement receipt & council resolution
						OPEX	n/a	n/a	OPEX	n/a	OPEX						
BTO16			Draft Budget for 2014/15	Draft budget for 2014/2015 adopted by 31/03/2014	3	Draft budget for 2014/2015 adopted by 31/03/2014	n/a	n/a	Draft budget for 2014/2015 adopted by 31/03/2014	n/a	OPEX						Draft budget & council resolution
						OPEX	n/a	n/a	OPEX	n/a	OPEX						
BTO17			Submission of 2014/15 Draft Budget to NT & PT	Submission of the 2014/15 Draft Budget to NT & PT immediately after approval by Council (02-Apr-14)	3	Submission of the 2014/15 Draft Budget to NT & PT immediately after approval by Council (02-Apr-14)	n/a	n/a	n/a	Submission of the 2014/15 Draft Budget to NT & PT immediately after approval by Council (02-Apr-14)	OPEX						Proof of submission & council resolution



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						ANNUAL TARGET	QUARTER 1	QUARTER 2	QUARTER 3	QUARTER 4							
						PROJECTED	PROJECTED	PROJECTED	PROJECTED	PROJECTED							
						OPEX	n/a	n/a	n/a	OPEX	OPEX						
BTO18			2014/15 Final Budget	2014/15 Final budget adopted by 30-May-14	3	2014/15 Final budget adopted by 30-May-14	n/a	n/a	n/a	2014/15 Final budget adopted by 30-May-14	OPEX						Final budget, minutes & council resolution
						OPEX	n/a	n/a	n/a	OPEX	OPEX						
BTO19			Submission of 2014/15 Final Budget	Submission of 2014/15 adopted Final Budget to NT & PT within 10 days (10-Jun-14)	3	Submission of 2014/15 adopted Final Budget to NT & PT within 10 days (10-Jun-14)	n/a	n/a	n/a	Submission of 2014/15 adopted Final Budget to NT & PT within 10 days (10-Jun-14)	OPEX						Council resolution & proof of submission
						OPEX	n/a	n/a	n/a	OPEX	OPEX						
BTO20			Annual Financial Statements for 2012/13	2012/13 Annual financial statements (with annual report) submitted to AG by 31-Aug-13	3	2012/13 Annual financial statements (with annual report) submitted to AG by 31-Aug-13	2012/13 Annual financial statements (with annual report) submitted to AG by 31-Aug-13	n/a	n/a	n/a	OPEX						AFS/Annual report & proof of submission
						OPEX	OPEX	n/a	n/a	n/a	OPEX						
BTO21			Section 71 reports	12 Monthly section 71 report produced	3	12 Monthly section 71 report produced	3 Monthly section 71 report produced	3 Monthly section 71 report produced	3 Monthly section 71 report produced	3 Monthly section 71 report produced	OPEX						12 section 71 reports
						OPEX	OPEX	OPEX	OPEX	OPEX	OPEX						
BTO22			2013/14 Mid-Term Budget review	2013/14 MID TERM budget review – section 72 by 25-Jan-14	3	2013/14 MID TERM budget review – section 72 by 25-Jan-14	n/a	n/a	2013/14 MID TERM budget review – section 72 by 25-Jan-14	n/a	OPEX						Mid-term budget & council resolution
						OPEX	n/a	n/a	OPEX	n/a	OPEX						
BTO23			Submission of the 2013/14 Mid-Term budget review	Submission of the 2013/14 Mid-Term budget review to NT& PT by 25-Jan-14	3	Submission of the 2013/14 Mid-Term budget review to NT& PT by 25-Jan-14	n/a	n/a	Submission of the 2013/14 Mid-Term budget review to	n/a	OPEX						Proof of submission/acknowledgement of receipt & council resolution



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						ANNUAL TARGET	QUARTER 1	QUARTER 2	QUARTER 3	QUARTER 4							
						PROJECTED	PROJECTED	PROJECTED	PROJECTED	PROJECTED							
BTO26				(Operational expenditure monitored to be 100% or less of amount budgeted) Monthly submission of section 71 reports to Finance portfolio, Exco & Council	3	(Operational expenditure monitored to be 100% or less of amount budgeted) Monthly submission of section 71 reports to Finance portfolio, Exco & Council	(Operational expenditure monitored to be 100% or less of amount budgeted) 3 Monthly submission of section 71 reports to Finance portfolio, Exco & Council	(Operational expenditure monitored to be 100% or less of amount budgeted) 3 Monthly submission of section 71 reports to Finance portfolio, Exco & Council	(Operational expenditure monitored to be 100% or less of amount budgeted) 3 Monthly submission of section 71 reports to Finance portfolio, Exco & Council	(Operational expenditure monitored to be 100% or less of amount budgeted) 3 Monthly submission of section 71 reports to Finance portfolio, Exco & Council							
						OPEX	OPEX	OPEX	OPEX	OPEX							
BTO27				(Monitor percentage of a municipality's capital budget actually spent on capital projects identified in the IDP to be 100%) Monthly submission of section 71 reports to Finance portfolio, Exco & Council	3	(Monitor percentage of a municipality's capital budget actually spent on capital projects identified in the IDP to be 100%) Monthly submission of section 71 reports to Finance portfolio, Exco & Council	(Monitor percentage of a municipality's capital budget actually spent on capital projects identified in the IDP to be 100%) 3 Monthly submission of section 71 reports to Finance portfolio, Exco & Council	(Monitor percentage of a municipality's capital budget actually spent on capital projects identified in the IDP to be 100%) 3 Monthly submission of section 71 reports to Finance portfolio, Exco & Council	(Monitor percentage of a municipality's capital budget actually spent on capital projects identified in the IDP to be 100%) 3 Monthly submission of section 71 reports to Finance portfolio, Exco & Council	(Monitor percentage of a municipality's capital budget actually spent on capital projects identified in the IDP to be 100%) 3 Monthly submission of section 71 reports to Finance portfolio, Exco & Council	OPEX						
						OPEX	OPEX	OPEX	OPEX	OPEX							
BTO28				Annual procurement plan developed and adopted by 30-May-14	3	Annual procurement plan developed and adopted by 30-May-14	n/a	n/a	n/a	Annual procurement plan developed and adopted by 30-May-14	OPEX						Annual procurement plan & council resolution
						OPEX	n/a	n/a	n/a	OPEX							



IDP / SDBIP NO.	NATIONAL KEY PERFORMANCE AREAS	STRATEGIC OBJECTIVES	OUTPUTS	INDICATORS	WEIGHT	2013/2014	QUARTERLY TARGETS & ACTUALS				ANNUAL BUDGET	ACTUAL	ACHIEVED/ NOT ACHIEVED	HOD SCORE	PANEL SCORE	COMMENT/CORRECTIVE ACTION	PORTFOLIO OF EVIDENCE	
						ANNUAL TARGET	QUARTER 1	QUARTER 2	QUARTER 3	QUARTER 4								
						PROJECTED	PROJECTED	PROJECTED	PROJECTED	PROJECTED								
BTO29			Improved Audit Opinion	Debtors at 40% by 30-Jun-14 (current debt over total debt)	3	Debtors at 40% by 30-Jun-14	Debtors at 20% by 31-Sep-13	Debtors at 30% by 31-Dec-13	Debtors at 35% by 31-Mar-14	Debtor at 40% by 31-Jun-14	OPEX						Debtors age analysis	
						OPEX	OPEX	OPEX	OPEX	OPEX	OPEX							
BTO30				Operational expenditure at 90% of amount budgeted by 30-Jun-14	3	Operational expenditure at 90% of amount budgeted by 30-Jun-14	Operational expenditure at 20% of amount budgeted by 31-Sep-13	Operational expenditure at 50% of amount budgeted by 31-Dec-13	Operational expenditure at 60% of amount budgeted by 31-Mar-14	Operational expenditure at 90% of amount budgeted by 31-Jun-14	OPEX							Expenditure report
						OPEX	OPEX	OPEX	OPEX	OPEX	OPEX							
BTO31				Percentage spent of Operational Budget (OPEX) at 90% on repairs and maintenance of infrastructure by 31-Jun-14	3	Percentage spent of Operational Budget (OPEX) at 90% on repairs and maintenance of infrastructure by 31-Jun-14	Percentage spent of Operational Budget (OPEX) at 20% on repairs and maintenance of infrastructure by 31-Sep-13	Percentage spent of Operational Budget (OPEX) at 50% on repairs and maintenance of infrastructure by 31-Dec-13	Percentage spent of Operational Budget (OPEX) at 60% on repairs and maintenance of infrastructure by 31-Mar-14	Percentage spent of Operational Budget (OPEX) at 90% on repairs and maintenance of infrastructure by 31-Jun-14	OPEX						Expenditure report	
						OPEX	OPEX	OPEX	OPEX	OPEX	OPEX							
BTO32				Percentage of a municipality's capital budget actually spent on capital projects identified in the IDP at 100% by 31-Jun-14	3	Percentage of a municipality's capital budget actually spent on capital projects identified in the IDP at 100% by 31-Jun-14	Percentage of a municipality's capital budget actually spent on capital projects identified in the IDP at 10% by 31-Sep-13	Percentage of a municipality's capital budget actually spent on capital projects identified in the IDP at 60% by 31-Dec-13	Percentage of a municipality's capital budget actually spent on capital projects identified in the IDP at 75% by 31-Mar-14	Percentage of a municipality's capital budget actually spent on capital projects identified in the IDP at 100% by 31-Jun-14	OPEX						Section 71 reports	
						OPEX	OPEX	OPEX	OPEX	OPEX	OPEX							



IDP / SDBIP NO.	NATIONAL KEY PERFORMANCE AREAS	STRATEGIC OBJECTIVES	OUTPUTS	INDICATORS	WEIGHT	2013/2014	QUARTERLY TARGETS & ACTUALS				ANNUAL BUDGET	ACTUAL	ACHIEVED/ NOT ACHIEVED	HOD SCORE	PANEL SCORE	COMMENT/CORRECTIVE ACTION	PORTFOLIO OF EVIDENCE
						ANNUAL TARGET	QUARTER 1	QUARTER 2	QUARTER 3	QUARTER 4							
						PROJECTED	PROJECTED	PROJECTED	PROJECTED	PROJECTED							
BTO33				Financial viability in terms of debt coverage	3	n/a	n/a	n/a	n/a	n/a	n/a						Investment register & creditors age analysis
						n/a	n/a	n/a	n/a	n/a	n/a						
BTO34				(Financial viability in terms of cost coverage at 7:1 ratio quarterly) Ratio: Available cash plus investments divided by monthly fixed operating expenditure	3	(Financial viability in terms of cost coverage at 7:1 ratio quarterly) Ratio: Available cash plus investments divided by monthly fixed operating expenditure	07:01	07:01	07:01	07:01	OPEX						n/a
						OPEX	OPEX	OPEX	OPEX	OPEX	OPEX						
BTO35				Financial viability in terms of outstanding service debtors to revenue	3	n/a	n/a	n/a	n/a	n/a	n/a						n/a
						n/a	n/a	n/a	n/a	n/a	n/a						
BTO36		To practice sound financial management principles	Supplier database	Update supplier database by 31-Dec-13	2	Update supplier database by 31-Dec-13	n/a	Update supplier database by 31-Dec-13	n/a	n/a	OPEX						Old & new updated supplier database



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						ANNUAL TARGET	QUARTER 1	QUARTER 2	QUARTER 3	QUARTER 4							
						PROJECTED	PROJECTED	PROJECTED	PROJECTED	PROJECTED							
						OPEX	n/a	OPEX	n/a	n/a	OPEX						
					80												



1. EVALUATION ON THE CORE MANAGEMENT CRITERIA (CMC)

CMC's are based on the eleven core competencies - every Manager should be assessed against all those CMC's that are applicable to her/his job. Compulsory CMC's for Managers are highlighted below: *(NOTE: Weight should be taken from the signed performance agreement for the year under review)*

CORE MANAGEMENT CRITERIA (CMC)	WEIGHT %	MILESTONES/COMMENTS	OWN RATING (BY MANAGER) (1-5)	RATING BY PANEL MEMBER (1-5)
1. Strategic Capability & Leadership	5			
2. Programme & Project Management	5			
3. Financial Management (Compulsory)	10			
4. Change Management				
5. Knowledge Management	5			
6. Service Delivery Innovation	5			
7. Problem Solving & Analysis				
8. People Management & Empowerment (Compulsory)	10			
9. Client Orientation & Customer Focus (Compulsory)	10			
10. Communication	5			
11. Honesty & Integrity	5			
TOTAL	100%			



2. EVALUATION ON THE CORE OCCUPATIONAL COMPETENCY (COC)

COC's are based on the eleven core competencies - every Manager should be assessed against all those COC's that are applicable to her/his job.

(NOTE: Weight should be taken from the signed performance agreement for the year under review)

CORE OCCUPATIONAL COMPETENCY	WEIGHT %	MILESTONES / COMMENTS	OWN RATING (BY MANAGER) (1-5)	RATING BY PANEL MEMBER (1-5)
1. Competence in Self Management	5			
2. Interpretation of and implementation within the legislation and national policy framework	10			
3. Knowledge of developmental local government				
4. Knowledge of Performance Management & Reporting	5			
5. Knowledge of global & South African specific political, social and economic contexts				
6. Competency on policy conceptualisation, analysis and implementation				
7. Knowledge of more than one functional municipal fields/discipline				
8. Skills in mediation				
9. Skills in governance				
10. Competence as required by other national line sector departments				



11. Exceptional and dynamic creativity to improve the functioning of the municipality	5			
12. Advanced influencing skills				
13. Partnership and Stakeholder Relations	5			
14. Supply Chain Management	10			
TOTAL	100%			



3. PERSONAL DEVELOPMENT PLAN

AREA TO BE DEVELOPED	TYPE OF INTERVENTION	TARGET DATE	PERFORMANCE REVIEW FOR PDP		
			PROGRESS	BARRIERS	ACTIONS TO OVERCOME BARRIERS



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4. PERFORMANCE ASSESSMENT RATING

The assessment rating calculator will be used to add the scores and calculate a final KRA score (80%) and a final CMC & COC's score (20%)

The tables below should be completed by the summarized total of each panel member (*NOTE: Weight should be taken from the signed performance agreement for the year under review*)

KPA	Weight	Rating	Score
1. Basic Service Delivery	5%		
2. Municipal Institutional Development and Transformation	5%		
3. Local Economic Development	5%		
4. Municipal Financial Viability	80%		
5. Good Governance and Public Participation	5%		
Total	%		
x 80%			%



Core Management Competencies	Weight	Rating	Score
1. Strategic Capability & Leadership	5%		
2. Programme & Project Management	5%		
3. <i>Financial Management (Compulsory)</i>	10%		
4. Change Management	%		
5. Knowledge Management	5%		
6. Service Delivery Innovation	5%		
7. Problem Solving & Analysis	%		
8. <i>People Management & Empowerment (Compulsory)</i>	10%		
9. <i>Client Orientation & Customer Focus (Compulsory)</i>	10%		
10. Communication	5%		
11. Honesty & Integrity	5%		
Total	%		
x 20%			



Core Occupational Competencies	Weight	Rating	Score
1. Competence in Self Management	5%		
2. Interpretation of and implementation within the legislation and national policy framework	10%		
3. Knowledge of developmental local government	%		
4. Knowledge of Performance Management & Reporting	5%		
5. Knowledge of global & South African specific political, social and economic contexts	%		
6. Competency on policy conceptualisation, analysis and implementation	%		
7. Knowledge of more than one functional municipal fields/discipline	%		
8. Skills in mediation	%		
9. Skills in governance	%		
10. Competence as required by other national line sector departments	%		
11. Exceptional and dynamic creativity to improve the functioning of the municipality	5%		
12. Advanced influencing skills			
13. Partnership and Stakeholder Relations	5%		
14. Supply Chain Management	10%		
Total	0%		
x 20%			



KPA	(A) SUB-TOTAL	(B) % OF ASSESSMENT	(A X B) TOTAL SCORE
KRA (Key Result Area)		80%	
CC (Conduct Criteria)		20%	
(C) FINAL SCORE			
FINAL SCORE IN PERCENTAGE (C / 5 X 100)			%

SIGNATURE OF THE EMPLOYEE:

CFO : _____

Signed in : _____ on ____ of _____ 20____

SIGNATURE OF EMPLOYER:

Municipal Manager : _____

Signed in : _____ on ____ of _____ 20____