

## Annexure A

### Performance Plan

#### Mopani District Municipality



The **main parts** to this Performance Plan are:

1. Performance Plan Overview
2. Strategy Map
3. A statement about the *Purpose* of the Position;
4. A performance scorecard per Key Performance Area (KPI's), IDP Objectives, Objective Weightings, Performance Indicators (KPIs), KPI Weightings, Targets (quarterly), evidence required
5. A performance scorecard per Key Performance Area (Projects), IDP Objectives, Objective Weightings, Projects / Initiatives, Quarterly Deliverables, Evidence required
6. Competencies
7. Approval of Personal Performance Plan
8. Summary Scorecard
9. Rating Scales
10. Assessment Process

**Name: Ms MO Mathebula**

**Position: Director Community Services**

**Accountable to: Municipal Manager**

**Plan Period: 01.07.2009 – 30.06.2010**



# Annexure A

## PERFORMANCE PLAN

### **1. Purpose**

The performance plan defines the Council's expectations of the Municipal Manager's performance agreement to which this document is attached and Section 57 (5) of the Municipal Systems Act, which provides that performance objectives and targets must be based on the key performance indicators as set in the Municipality's Integrated Development Plan (IDP) and as reviewed annually.

### **2. Objects of Local Government**

The following objects of local government will inform the Municipal Manager's performance against set performance indicators:

- 2.1 Provide democratic and accountable government for local communities.
- 2.2 Ensure the provision of services to communities in a sustainable manner.
- 2.3 Promote social and economic development.
- 2.4 Promote a safe and healthy environment.
- 2.5 Encourage the involvement of communities and community organisations in the matters of local government.

### **3. Key Performance Areas**

The following Key Performance Areas (KPA's) as outlined in the Local Government: Municipal Planning and Performance Management

**Regulations (2001) inform the strategic objectives listed in the table below:**

- 3.1 Municipal Transformation and Organisational Development
- 3.2 Infrastructure Development and Service Delivery
- 3.3 Local Economic Development (LED)
- 3.4 Municipal Financial Viability and Management
- 3.5 Good Governance and Public Participation

### **4. BSC Perspectives**

The BSC Methodology was used for the development of the Performance

**Management System and will read as follows:**

- 4.1 Community
- 4.2 Financial
- 4.3 Institutional Processes
- 4.4 Learning and Growth

## **5. Strategic Objectives**

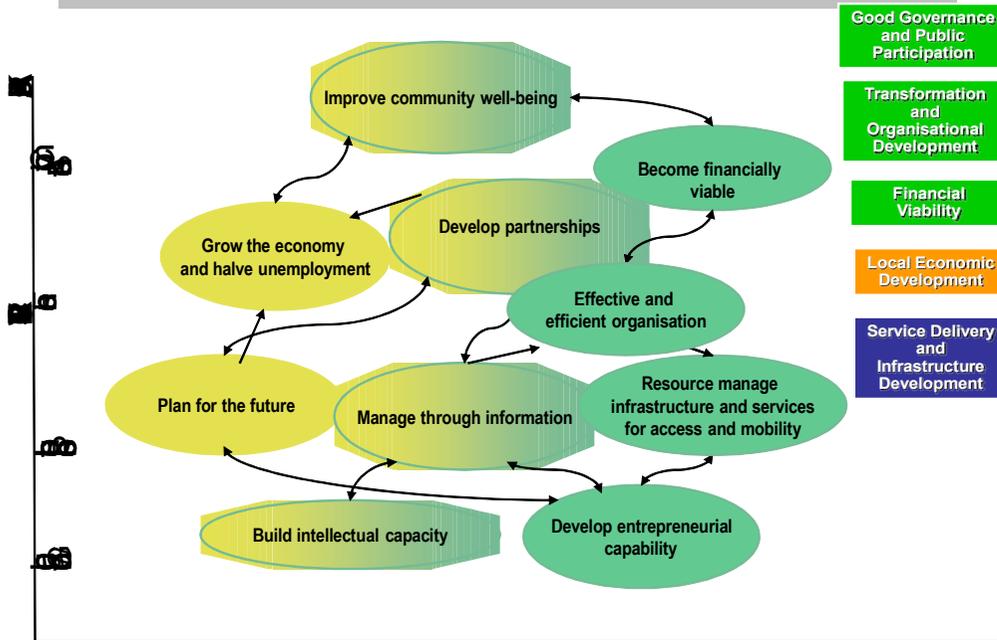
**The Key Performance Indicators are devised according to the IDP  
Institutional Objectives to be achieved as depicted on the next page**





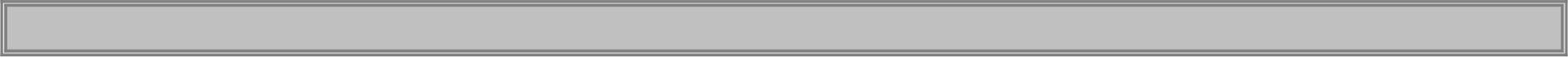
# MOPANI DISTRICT STRATEGY MAP

To be the food basket of Southern Africa and the Tourism destination of choice





<b>STRATEGIC VISION</b>
“To be the Food Basket of Southern Africa and the Tourism Destination of choice”
<b>STRATEGIC MISSION</b>
- To provide integrated sustainable equitable services through democratic responsible and accountable governance
- Promoting the sustainable use of resources for economic growth to benefit the community
<b>JOB PURPOSE</b>
<b>Position Goal</b>
Mopani District to be an area where communities are healthy, responsible, literate, experiencing safety, where the environment is protected and sustained for positive investment and economic growth and Council assets protection
<b>Position Purpose</b>
Community Services Director is required to manage, lead and direct the MDM in co-ordination of Environmental Health Services, Sports Arts and culture, Education, Safety and security, Housing, Waste management, Fire and Health Services programmes. The incumbent must ensure the IDP is managed according to the directorate's performance management requirements
<b>The Director Community Services is accountable and responsible for amongst others:</b>
➤ The management of Municipality's administration in accordance with Municipal legislation and other legislation applicable to the Municipality, includes management, discipline and development of staff
➤ Through Environmental management, ensuring clean, safe and quality water, pollution free environment and the appropriate disposal of the dead and refuse
➤ Through Environmental Health Management, ensuring healthy and safe premises
➤ Co-ordination of Health programmes ensuring healthy communities, productive workforce and economic growth
➤ Manage the provision of fire and rescue services in saving lives, the prevention of fires, safeguarding of property, humans and animals
➤ The promotion of Sports, Arts and Culture for purposes of wellness, preserved and diverse culture and a society with high morals
➤ The endorsement of literacy, economic growth, enrichment of minds, job security and safe schools
➤ Facilitation of a crime free environment
➤ Monitoring the provision of adequate housing and the restoration of dignity
➤ The implementing the municipality Integrated Development Plan (IDP) and responsible to the needs of the local community



## KPA 2. Basic Service Delivery - KPI's

IDP Objective	Obj. Weight	Programme	Institutional KPI	KPI Weight	2009/10 Quarterly Targets				Evidence Required
					1st Q	2nd Q	3rd Q	4th Q	
Improve Community well-being	80%	Environmental Health and Waste Management	Number of water – borne diseases investigated within 2 days / Number of water - borne diseases cases reported as %	2%	100%	100%	100%	100%	Monthly reports
			% water samples from water treatment works complying to standards	2%	100%	100%	100%	100%	Monthly reports
			% referred water - borne cases investigated by EHP's	2%	100%	100%	100%	100%	Monthly reports
			% population in district affected by violation of drinking water quality	5%	0,1%	0,1%	0,1%	0,1%	Monthly reports
			% food outlets complying to standards	3%	90%	90%	90%	90%	Monthly reports
			% municipalities with licensed landfill sites	5%	0%	0%	0%	100%	Monthly reports
		Health Services: Community Health and Social Development Services	% health complaints resolved within 48 hours	5%	100%	100%	100%	100%	Monthly reports
			% of referred food poisoning cases investigated by EHPs	5%	100%	100%	100%	100%	Monthly reports
			# Food control committee meetings held	2%	1	2	3	4	Agendas and minutes
			# Environmental health practitioners per 15 000 of population	2%	35	35	35	35	Monthly reports

## KPA 2. Basic Service Delivery - KPI's

IDP Objective	Obj. Weighting	Programme	Institutional KPI	KPI Weighting	2009/10 Quarterly Targets				Evidence Required
					1st Q	2nd Q	3rd Q	4th Q	
Improve Community well-being	ng	Health Services: Community Health and Social Development Services	# HIV and AIDS Technical Task Team Committee Activities held	2%	1	2	3	4	Monthly reports
			# HIV and AIDS ARV sites monitored	2%	2	4	6	8	Monthly reports
			% HIV & AIDS Prevalence	5%	23.8%	23.8%	23.8%	23.8%	Monthly reports
			# NGOs supported and monitored	2%	3	5	7	10	Monthly reports
			# HIV and AIDS Awareness campaigns conducted	5%	2	4	6	8	Programmes and reports
			# MIPPA & WAPPA structures supported	2%	N/A	1	N/A	2	Monthly reports
			# Health awareness campaigns supported	2%	2	4	6	8	Programmes and reports
			# health facilities visited & supported	5%	2	4	6	10	Monthly reports
			# Chronic Diseases Support Groups supported	2%	1	2	4	6	Monthly reports
			# School health services monitored	2%	2	4	6	10	Monthly reports
			# Sanitation projects monitored	3%	10	20	30	35	Monthly reports
			# District Health Council (DHC) meetings Held	2%	1	2	3	4	Agendas and minutes
			# District Health AIDS (DAC) meetings Held	2%	1	2	3	4	Agendas and minutes

## KPA 2. Basic Service Delivery - KPI's

IDP Objective	Obj. Weighting	Programme	Institutional KPI	KPI Weighting	2009/10 Quarterly Targets				Evidence Required
					1st Q	2nd Q	3rd Q	4th Q	
Improve Community well-being	ng	Fire Services	% emergency incidents arrived at within 60 minutes from dispatch	2%	100%	100%	100%	100%	Monthly reports
			% Emergency equipment in safe working order	2%	100%	100%	100%	100%	Monthly reports
			# Fire Prevention Inspections conducted	2%	200	400	600	800	Monthly reports
			# Fire Protection Association meetings held	2%	12	24	36	48	Agendas and minutes
			Total # people trained in the use of Fire Extinguishing Equipment	2%	90	180	270	360	Programmes and reports. Attendance registers
			% of reported fire incidents attended to	2%	100%	100%	100%	100%	Monthly reports
			% reported rescue incidents attended	2%	100%	100%	100%	100%	Monthly reports
		Safety and security	# District Safety and Security Forum meetings held	2%	1	2	3	4	Agendas and minutes
		Sport, Arts and Culture	# Sport, arts and culture events coordinated per quarter	2%	2	1	2	1	Programmes and reports. Attendance registers
			Total # of sports development programmes offered	2%		1			Programmes and reports. Attendance registers
R spent on sports and recreation facilities and services	2%		186,250	372,550	558,750	745,000	Financial reports		
Improve Community well-being		Sport, Arts and Culture	# of recreational programmes offered per quarter	2%		1		Programmes and reports. Attendance registers	

## KPA 2. Basic Service Delivery - KPI's

IDP Objective	Obj. Weighting	Programme	Institutional KPI	KPI Weighting	2009/10 Quarterly Targets				Evidence Required
					1st Q	2nd Q	3rd Q	4th Q	
			# of cultural programmes offered per quarter	2%	1		2		Programmes and reports. Attendance registers
			# of arts, culture and heritage programmes implemented	2%	1		2		Programmes and reports. Attendance registers
			% increase in participation of community members in arts and culture initiatives	3%	5%	10%	15%	20%	Programmes and reports. Attendance registers
Resource management infrastructure and services for access and mobility	20%	Housing	# District Housing Forum meetings held	50%	1	2	3	4	Programmes and reports. Attendance registers
			# Housing Beneficiaries workshops held	50%	1	2	3	4	Agendas and minutes

## KPA 2. Basic Service Delivery - Projects

IDP Objective	Obj. Weightin	Programme	Project / Initiative	Proj. Weighti	Budget 2009/10	Target date	2009/10 Quarterly Outputs			
							1st Q	2nd Q	3rd Q	4th Q
Improve Community well-being	80%	Environmental Health and Waste Management	Environmental Status quo	4%	600,000	30-Jun	Supply chain procedures	Environmental analysis conducted		Completion of Environmental Status quo report by end June
			Cleaning up campaigns	3%	40,000	30-Jun	Support anti-litter / cleaning up campaigns at local municipalities	Support anti-litter / cleaning up campaigns at local municipalities	Support anti-litter / cleaning up campaigns at local municipalities	Support anti-litter / cleaning up campaigns at local municipalities
			Establishment of Waste Disposal Site - GGM	8%	2,000,000	30-Jun		Render technical support to local municipalities to establish and license their waste disposal sites	Render technical support to local municipalities to establish and license their waste disposal sites	Render technical support to local municipalities to establish and license their waste disposal sites
			Establishment of Waste Disposal Site - GLM	8%	2,000,000	30-Jun		Render technical support to local municipalities to establish and license their waste disposal sites	Render technical support to local municipalities to establish and license their waste disposal sites	Render technical support to local municipalities to establish and license their waste disposal sites
			Establishment of Waste Disposal Site - Maruleng	8%	2,000,000	30-Jun		Render technical support to local municipalities to establish and license their waste disposal sites	Render technical support to local municipalities to establish and license their waste disposal sites	Render technical support to local municipalities to establish and license their waste disposal sites

## KPA 2. Basic Service Delivery - Projects

IDP Objective	Obj. Weighting	Programme	Project / Initiative	Proj. Weighting	Budget 2009/10	Target date	2009/10 Quarterly Outputs			
							1st Q	2nd Q	3rd Q	4th Q
Improve Community well-being	9	Health Services: Community Health and Social Development Services	World Food Day Celebration	3%	71,000	30-Oct		Facilitate and coordinate World Food Day Celebration		
			Health and Hygiene Road Shows	3%	74,000	30-Jun	Conduct road show on health and hygiene	Conduct road show on health and hygiene	Conduct road show on health and hygiene	Conduct road show on health and hygiene
			World Diabetic/cancer Day	3%	92,000	30-Jun		World Diabetic/cancer Day		
			World AIDS Day celebration	3%	150,000	30-Jun		World AIDS Day celebration		
			Candlelight Memorial	3%	103,500	31-May				Candlelight Memorial
			Support Early Childhood Development (ECD)	3%	200,000	30-Jun	1 Awareness campaigns conducted (Report)	1 Awareness campaigns conducted (Report)	1 Awareness campaigns conducted (Report)	1 Awareness campaigns conducted (Report)

## KPA 2. Basic Service Delivery - Projects

IDP Objective	Obj. Weightin	Programme	Project / Initiative	Proj. Weighti	Budget 2009/10	Target date	2009/10 Quarterly Outputs			
							1st Q	2nd Q	3rd Q	4th Q
Improve Community well-being	9	Sports, Arts and Culture	Support District O.R.Tambo games - include youth and disabled	3%	195,000	30-Mar	Developed Business Plan; OR Tambo Games Phase 1 held			Phase 2 Games conducted (Reports)
			Support District Indigenous Games	3%	120,000	30-Apr		Developed Business Plans		Indigenous Games conducted (Report)
			Support District Wellness Day	3%	70,000	30-Apr	Wellness Day celebrated (Report)			
			Support District Junior Dipapadi	3%	90,000	30-Mar		Business Plan developed	Junior Dipapadi Festival coordinated and held by the end of March 10 (Reports)	
			Support District School Sports	3%	110,000	30-Mar	Mapungubwe heritage celebration coordinated by the end of September 09	Business plan developed	Schools on school sport programme supported and held (Reports)	

## KPA 2. Basic Service Delivery - Projects

IDP Objective	Obj. Weightin	Programme	Project / Initiative	Proj. Weighti	Budget 2009/10	Target date	2009/10 Quarterly Outputs			
							1st Q	2nd Q	3rd Q	4th Q
Improve Community well-being	9	Fire Services	Establish Mopani Satellite Sport Academy	3%	500,000	30-Mar	Consultation Meetings, establishment of forums and medical teams	Athletes support programmes	Athletes support programmes available	
			Support District Arts And Culture	3%	172,000	28-Feb	Arts and culture activities coordinated and supported (Report)	Mapungubwe District Art Festival coordinated and supported; Library Activities supported (Report)	Ku Luma vukanyi event coordinated and supported (Report)	
			Support District Sport and Recreation Council	3%		30-Mar	Talent identification on LSEN and Abled Bodied athletes by end of September 09	Talent identification on Summer Games	Talent identification on athletics and swimming by end of September 10	Talent identification on Winter Games, eg foot ball, net ball, etc
			Erection of Carports- Tzaneen Fire Station	3%	800,000	15-Jul	TOR Developed and submitted to Technical Services for implementation			
			Control Room/ Activation System- Tzaneen Fire Station	3%	170,000	30-Sep	TOR Developed and submitted to Technical Services for implementation			
			Provision of Blinds - Fire Station	3%	80,000	30-Sep	Blinds installed at Tzaneen Fire Station			

## KPA 2. Basic Service Delivery - Projects

IDP Objective	Obj. Weightin	Programme	Project / Initiative	Proj. Weighti	Budget 2009/10	Target date	2009/10 Quarterly Outputs			
							1st Q	2nd Q	3rd Q	4th Q
Improve Community well-being	9	Fire Services	Building of Sleeping Quarters / Tower/ Storerooms/Workshop-Maruleng Fire Station	3%	0	30-Sep	TOR Developed and submitted to Technical Services for implementation			
			Procurement of Vehicles	3%	5,000,000	30-Jul	Specifications Developed and submitted to Finance for procurement			
			Procurement of Equipment	3%	1,500,000	30-Jul	Specifications Developed and submitted to Finance for procurement			
			Procurement of Furniture	3%	300,000	30-Jul	Specifications Developed and submitted to Finance for procurement			
			Erection of Strategic Emergency Services Numbered Sign Boards	3%	100,000	30-Jul	Specifications Developed and submitted to Finance for procurement		Oversee the installation of the sign boards	

## KPA 2. Basic Service Delivery - Projects

IDP Objective	Obj. Weightin	Programme	Project / Initiative	Proj. Weighti	Budget 2009/10	Target date	2009/10 Quarterly Outputs				
							1st Q	2nd Q	3rd Q	4th Q	
Improve Community well-being	9	Fire Services	Letaba Show	3%	0	30-Aug	Participate in planning with the Letaba show committee. Support and provide fire services at the show				
Resource manage infrastructure and services for access and mobility		Housing	Conduct Housing Beneficiaries workshops	20%	16,000	30-Jun	Conduct workshops with Housing Beneficiaries	Conduct workshops with Housing Beneficiaries	Conduct workshops with Housing Beneficiaries	Conduct workshops with Housing Beneficiaries	
			Municipal Housing Plan	50%		30-Jun	Housing backlogs determined and costed by end Sept	Assess status of Municipal Housing Plan development and render support if needed by end Dec	Monitor that EIA's are conducted for all housing projects and that conditions are complied with	Monitor that EIA's are conducted for all housing projects and that conditions are complied with	
			Housing beneficiary list	30%		31-Mar		Assessment on management of beneficiary lists at local level and that priority lists are available by end Dec	Land for housing delivery identified by end March and developed of such land liaised with stakeholders		

Evidence Required
Status quo report
Programmes, reports and attendance registers
Monthly reports
Monthly reports
Monthly reports

Evidence Required
Programmes, reports and attendance registers

Evidence Required
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Programmes, reports and attendance registers

Evidence Required
Agendas and minutes
Programmes, reports and attendance registers
Programmes, reports and attendance registers
Memo to Technical accompanying TOR
Memo to Technical accompanying TOR
Financial reports

Evidence Required
Memo to Technical accompanying TOR
Memo to Finance accompanying specifications

Evidence Required
Monthly reports
Programmes, reports and attendance registers
Housing Status Quo report. Monthly reports
Monthly reports

### KPA 4. Municipal Financial Viability and Management - KPI's

IDP Objective	Obj. Weighting	Programme	Institutional KPI	KPI Weighting	2009/10 Quarterly Targets				Evidence Required
					1st Q	2nd Q	3rd Q	4th Q	
Become financially viable	100%	Budget and Expenditure Management	% budget variance per directorate - Community Services	100%	0%	0%	0%	0%	Financial reports

## KPA 5. Good Governance and Public Administration - KPI's

IDP Objective	Obj. Weighting	Programme	Institutional KPI	KPI Weighting	2009/10 Quarterly Targets				Evidence Required
					1st Q	2nd Q	3rd Q	4th Q	
Develop partnerships	20%	Communication	% customer satisfaction rating per directorate - Community Services	100%				100%	Survey report
Effective and efficient organisation	80%	Governance and administration	Total # Portfolio Committee meetings held	20%	3	6	9	12	Agendas and minutes
			Total # District Technical Task Team meetings convened	20%	3	6	9	12	Agendas and minutes
			Total # Social & Infrastructure Cluster meetings convened	20%	1	2	3	4	Agendas and minutes
			# Staff Meetings convened	20%	3	6	9	12	Agendas and minutes
			Total # of Moral Regeneration Forum meetings	20%	1	2	3	4	Agendas and minutes

## KPA 5. Good Governance and Public Participation - Projects

IDP Objective	Obj. Weighting	Programme	Project / Initiative	Proj. Weighting	Budget 2009/10	Target date	2009/10 Quarterly Outputs				Evidence Required
							1st Q	2nd Q	3rd Q	4th Q	
Develop partnerships	100%	Public Participation	Partnerships to address literacy and poverty	100%		16-Dec	Possible partners identified to address literacy and poverty issues by Sept for purposes of improving public participation by illiterates and poor people	Partnerships established with entities that can assist with literacy and poverty programmes by end Dec			Signed MOU's

## Competencies

	Definitions	Weighting
Strategic Capability and Leadership	Must be able to provide vision, set the direction for the municipality and inspire others in order to deliver on the municipality's mandate	10%
Programme and Project Management	Must be able to plan, manage, monitor and evaluate specific activities in order to ensure that policies are implemented and that Local Government objectives are achieved	10%
Financial Management	Must be able to know, understand and comply with the Municipal Finance Management Act No 56 of 2003.	5%
Change Management	Must be able to initiate and support municipal transformation and change in order to successfully implement new initiatives and deliver on service delivery commitments	10%
Knowledge Management	Must be able to promote the generation and sharing of knowledge and learning in order to enhance the collective knowledge of the municipality	5%
Service Delivery Innovation	Must be able to explore and implement new ways of delivering services that contribute to the improvement of municipal processes in order to achieve municipal goals	15%
Problem Solving and Analysis	Must be able to systematically identify, analyse and resolve existing and anticipated problems in order to reach optimum solutions in a timely manner	15%
People and Diversity Management	Must be able to manage and encourage people, optimise their outputs and effectively manage relationships in order to achieve the municipality's goals	10%
Client Orientation and Customer Focus	Must be willing and able to deliver services effectively in order to put the spirit of customer service (Batho Pele) into practice	10%
Communication	Must be able to exchange information and ideas in a clear and concise manner appropriate for the audience in order to explain, persuade, convince and influence others to achieve the desired outcomes	5%
Accountability and Ethical Conduct	Must be able to display and build the highest standard of ethical and moral conduct in order to promote confidence and trust in the municipality	5%
<b>Section Total:</b>		<b>100%</b>

\* These Competencies are dependent on final promulgation of the Guidelines in terms of the Regulations

## Approval of the Personal Performance Plan

The process followed ensures individual alignment to the strategic intent of the institution and give clear direction on what needs to be achieved through a self-directed approach to execute on the objectives, to build sound relationships, to develop human capital and to strengthen the organisation through excellent performance. This plan has derived from intense workshopping to ensure integration, motivation and self-direction. The employer and employee both have responsibilities and accountabilities in getting value from this plan. Neither party can succeed without the support of the other.

Undertaking of the employer / superior	Undertaking of the employee
On behalf of my organisation, I undertake to ensure that a work environment conducive for excellent employee performance is established and maintained. As such, I undertake to lead to the best of my ability, communicate comprehensively, and empower managers and employees. Employees will have access to ongoing learning, will be coached, and will clearly understand what is expected of them. I herewith approve this Performance Plan.	I herewith confirm that I understand the strategic importance of my position within the broader organisation. I furthermore confirm that I understand the purpose of my position, as well as the criteria on which my performance will be evaluated twice annually. As such, I therefore commit to do my utmost to live up to these expectations and to serve the organisation, my superiors, my colleagues and the community with loyalty, integrity and enthusiasm at all times. I hereby confirm and accept the conditions to this plan.
Signed and accepted by the Supervisor on behalf of Council:	Signed and accepted by the Employee:
<b>DATE:</b>	<b>DATE:</b>

## Summary Scorecard

Position Outcomes/Outputs	Assess Weighting	1st Assessment	2nd Assessment	Total Score	Comment
<b>Key Performance Areas</b>	<b>100</b>				
Basic Service Delivery	80				
Municipal Financial Viability and Management	10				
Good Governance and Public Participation	10				
<b>Competencies</b>	<b>100</b>				
<b>Overall Rating =</b>	$KPA \times 0.8 + Competencies \times 0.2$	$KPA \times 0.8 + Competencies \times 0.2$	$KPA \times 0.8 + Competencies \times 0.2$	Average 1st assessment + 2nd assessment	

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

<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>
<b>Outstanding Performance</b>	<b>Performance Significantly Above Expectations</b>	<b>Fully Effective</b>	<b>Not Fully Effective</b>	<b>Unacceptable Performance</b>
<p>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.</p>	<p>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.</p>	<p>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.</p>	<p>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.</p>	<p>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.</p>

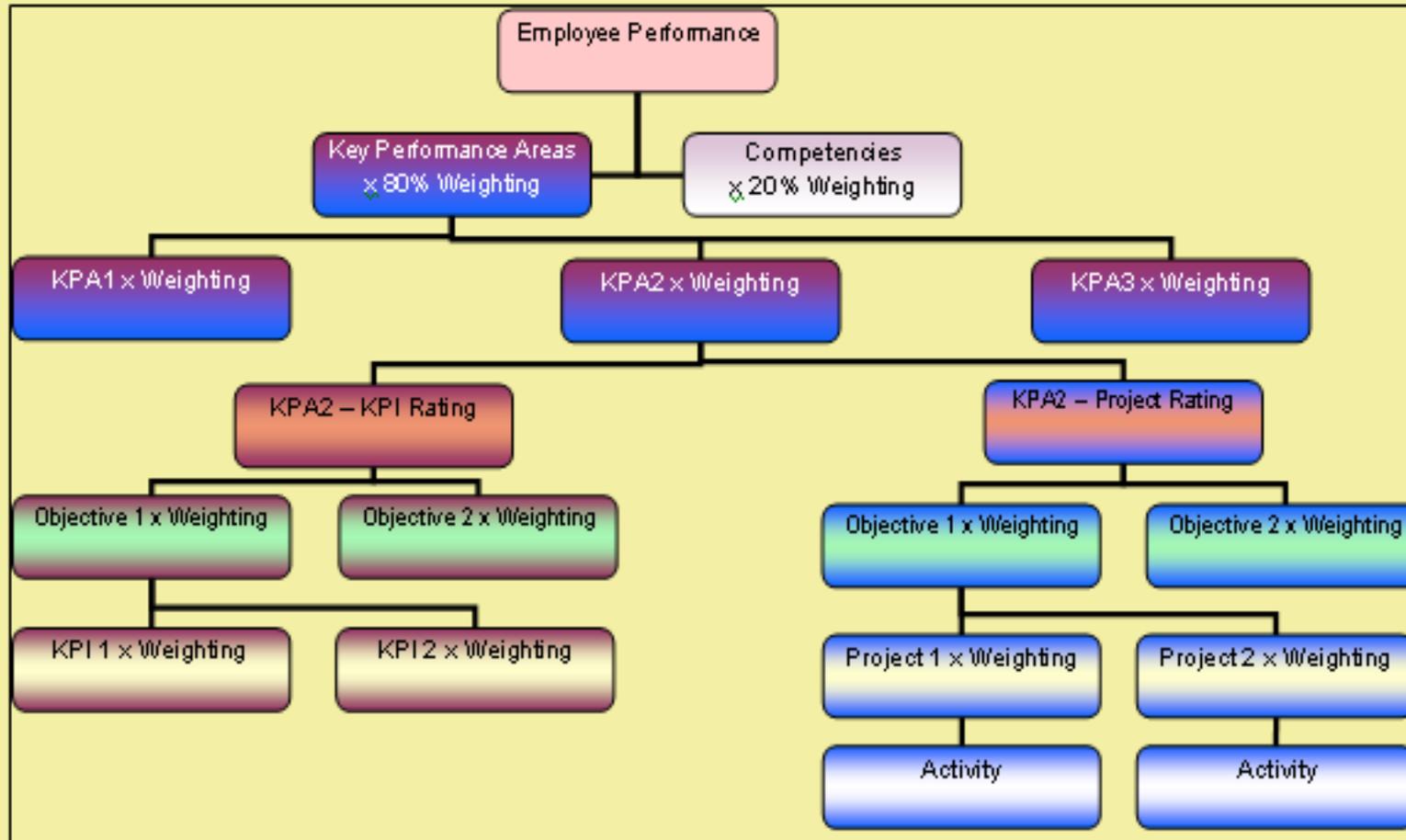
## 10. Performance Assessment Process

The following steps will be followed to ensure a fully participative and compliant performance assessment process is adhered to.

1. Performance Reviews:
  - 1.1. Formal reviews between employee and employer will take place in January and July of every year to measure the performance of the employee against the agreed performance targets for the half yearly and yearly reviews respectively.
  - 1.2. Data for the SDBIP will be captured before assessment date and scores will be calculated for the KPI's and Activities.
  - 1.3. Ratings for each KPI's and activity per project are copied to the Performance Plans.
  - 1.4. Assessment reports (both Institutional and Individual) must be audited and verified by either the internal audit unit or the District wide Performance Audit Committee.
2. The employee being assessed will compile a portfolio of evidence confirming the level of performance achieved for a given review period and submit to the panel as described in performance agreement, one calendar week prior to date of review. One independent person will be assigned to the panel by the council to act as an Observer.
3. The employee must also do a rating on him/herself and submit the rating to the panel together with the portfolio of evidence one calendar week prior to date of review.
4. The assessment rating calculator referred to in paragraph 6.5.1 of the performance agreement will be used to add the scores to arrive at an overall rating / score. The five point scale and the scores corresponds as follows:

Rating:	1	2	3	4	5
% Score:	0-66	67-99	100-132	133-166	167
5. The panel will focus on the differences between the employees rating and score and that of the SDBIP rating to give a final Key Performance Indicator rating. The **process** for Em ratings are as follows:
  - 5.1. Rate the achievement in scores for the KPI's and that of projects on a 5 point scale, indicating the level of over- or under performance in terms of decimal places shown example below: These are defined in the performance agreement (total weighting = 80%).
  - 5.2. Rate the employee's core competency requirements (CCR) on the 5 point scale indicating the level of over- or under performance in the decimal places (total weighting = 20%).

6. The Employee Scores are calculated as per the diagram below:



The above calculations are derived from the Performance Plans as follows:

Project Scores

KPA 4. Municipal Financial Viability and Management - Projects																
BS C	IDP Objective	Objective Weighting	Project / Initiative	Project Weighting	Budget 2007/08	2007/08		2007/08 Quarterly Targets				Evidence Required	1st Assessment (rated 1-5)	2nd Assessment (rated 1-5)	Final Score	
						Target date	Quantity -Output	1st Q	2nd Q	3rd Q	4th Q					
IS	Develop and improve systems, processes, procedures and policies by practicing sound governance	50%	Audit Register and plan		General Exp	07/07/08	1	Memorng and coaching of audit staff. Monthly audit	Drawing of audit register and plan by end July 07. Ensure	Conduct audits i.to. developed plan. Monthly audit reporting.	Conduct audits i.to. developd plan. Monthly audit reporting	Conduct audits i.to. developd plan. Monthly audit reporting	Register and plan and monthly reports			

Projects Score = Activity 1-5 score (decimal places shows % of target), Activity score imported from SDBIP rating

KPI Scores

KPA 4. Municipal Financial Viability and Management - KPI's															
BS C	IDP Objective	Objective Weighting	Strategic KPI	Additional KPI	KPI Weighting	Baseline 2007/08	Annual 2007/08 target	2007/08 Quarterly targets				Evidence Required	1st Assessment (rated 1-5)	2nd Assessment (rated 1-5)	Final Score
								1st Q	2nd Q	3rd Q	4th Q				
IS	Increase financial viability through increased revenue and efficient budget management	60%	% financial viability (applicable i.to. MFMA)			11%	63%	30%	60%	10%	63%	financial reports			
			R-value revenue sourced to address back				000	-	497,079,000	497,079,000	497,079,000	financial reports			

KPI Score = 1-5 (decimal places shows % of target), KPI score imported from SDBIP Rating

management

log of services  
operational

Objective Score = Weight x  
KPI Score

Core Competencies:

	Weighting	2nd Quarter	4th Quarter	Total Score
Strategic Capability	10%			
Programme and Project Management	30%			
Financial Management	15%			
Change Management	15%			
Supply Chain Management	30%			
<b>Weighting Total</b>	<b>100%</b>			
<b>Section Total:</b>	<b>20%</b>			

A score from 1 – 5 is given and multiplied by the weight for the final score, i.e. 4 out of 5 \*30% (weight) = 24% out of 30%

The various scores are all added, and then multiplied by 20% (0,2) to give the Competency score to be carried across to the Summary Scorecard

6. The performance bonus percentages described in paragraph 11 of the performance agreement will be calculated on a sliding scale as indicated in table below:

% Rating Over Performance	% Bonus
130 - 133.8	5%
133.9 – 137.6	6%
137.7 – 141.4	7%
141.5 - 145.2	8%
145.3 – 149	9%
150 – 153.4	10%
153.5 – 156.8	11%
156.9 – 160.2	12%
160.2 – 163.6	13%
163.7 – 167	14%

7. Performance bonus percentage for the two performance reviews will be used to calculate the average of the two reviews' scores and will determine the person's final percentage performance bonus

performance review.

8. The Personal Development Plan (PDP) will be concluded at the panel discussion after the performance review had been finalised, and more clarity has been established on what the essential development needs for the relevant person will be.
9. The results of the performance and development review (PDR) will be submitted to the performance audit committee for final approval of the assessments.
10. The performance assessment results of the Municipal Manager will also be submitted to the MEC responsible for Local Government in the relevant Province.