

OVERSTRAND MUNICIPALITY



Performance Agreement for the financial year 1 July 2026 – 30 June 2027

CHIEF FINANCIAL OFFICER

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Performance agreement made and entered into by and between

The Overstrand Municipality and represented by Dr Dean O'Neill, the Municipal Manager
(*herein and after referred as Employer*)

and

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

Where as

- 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 following 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 55 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 Director appointed in terms of Section 56 of the Systems Act;

1.1.4 "the Employer" means Overstrand Municipality; and

1.1.5 "the Parties" means the Employer and Employee.

- 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 (Annexure A), which are linked to the National KPAs, and will constitute 80% of the overall assessment result as per the weightings agreed to between the Employer and Employee;
- 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 that drive strategic intent and direction and core competencies, which drive the execution of the leading competencies.

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 the –
 - 6.1.1 standards and procedures for evaluating the Employee's performance; and
 - 6.1.2 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;



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 with delay.

11. REWARD

11.1 The annual evaluation of the Employee's performance will form the basis for acknowledging outstanding performance or correcting unacceptable performance;

- 11.2 An annual performance bonus will be paid to the Employee in terms of the provisions of the Local Government: Municipal Performance Regulations for Municipal Managers and managers directly accountable to Municipal Managers (Regulation 805 of August 2006) based on the following bonus structure:

Overall Percentage Achieved (100%)	Overall Percentage Achieved (R805 200%)	Bonus Percentage of Total Package	Total Average Score (Rating 1-5)
65%	130%	5%	3.25
66%	132%	5.5%	3.30
67%	134%	6%	3.35
68%	136%	6.5%	3.40
69%	138%	7%	3.45
70%	140%	7.5%	3.50
71%	142%	8%	3.55
72%	144%	8.5%	3.60
73%	146%	9%	3.65
74%	148%	9.5%	3.70
75%	150%	10%	3.75
76%	152%	10.5%	3.80
77%	154%	11%	3.85
78%	156%	11.5%	3.90
79%	158%	12%	3.95
80%	160%	12.5%	4.00
81%	162%	13%	4.05
82%	164%	13.5%	4.10
83%	166%	14%	4.15

- 11.3 In the event of the Employee terminating his services during the validity period of this Agreement, but only after three months after the start of this agreement's inception date, the Employee's performance will be evaluated for the period during which he/she was employed and he/she will be entitled to a pro-rata performance bonus based on his/her evaluated performance for the period of actual service;
- 11.4 The Employer will submit the total score of the annual assessment and of the Employee, to full Council for purposes of recommending the bonus allocation; and.



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


14. GENERAL

14.1 The contents of this agreement and the outcome of any review conducted in terms of Annexure A may be made available to the public by the Employer; 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 HERMANUS on the 19th day June of 2026.

AS WITNESSES:

1. 



DIRECTOR

2. 

Thus done and signed at Hermanus on the 23rd day June of 2026.

AS WITNESSES:

1. 


D.G.I. O'Neill
Municipal Manager
MUNICIPAL MANAGER

2. R. Louis @



Performance Plan

Chief Financial Officer

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This Performance Plan sets out the:

- 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.

Performance will be evaluated:

- a) Quarterly of which the annual evaluation will be done by the panel as constituted in paragraph 6.11 of the agreement;
- b) Performance will be assessed on a scale of 1 – 5 as outlined in paragraphs 6.9 – 6.10 of the agreement;
- c) In the instance where an indicator do not have a target or is not applicable due to valid reason or where the performance could not be delivered for a valid reason outside of the control of employee, the indicator will not be evaluated, the weighting will be cancelled and the score total will be re-calculated to calculate the final score;

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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.

Ref No	National KPA	Key Performance Indicator (KPI)	Unit of Measurement	Baseline	Portfolio of evidence	Targets				Weight	
						Annual	Q1	Q2	Q3		Q4
Departmental Performance											
SDBIP Graph	Basic Service Delivery	Effective management and supervision of the SDBIP on the KPIs of Division: Financial Accounting	90% of the KPI's of the division have been met as per Ignite Dashboard report	83%	Updated SDBIP and report	90%	90%	90%	90%	90%	3
SDBIP Graph	Basic Service Delivery	Effective management and supervision of the SDBIP on the KPIs of Division: Expenditure, Fleet and Asset Management	90% of the KPI's of the division have been met as per Ignite Dashboard report	80%	Updated SDBIP and report	90%	90%	90%	90%	90%	3
SDBIP Graph	Basic Service Delivery	Effective management and supervision of the SDBIP on the KPIs of Division: Revenue Management	90% of the KPI's of the division have been met as per Ignite Dashboard report	91%	Updated SDBIP and report	90%	90%	90%	90%	90%	3
SDBIP Graph	Basic Service Delivery	Effective management and supervision of the SDBIP on the KPIs of Division: SCM	90% of the KPI's of the division have been met as per Ignite Dashboard report	86%	Updated SDBIP and report	90%	90%	90%	90%	90%	3
Departmental Performance total weights											
Managerial Performance											

Ref No	National KPA	Key Performance Indicator (KPI)	Unit of Measurement	Baseline	Portfolio of evidence	Annual	Targets				Weight
							Q1	Q2	Q3	Q4	
Dept SDBIP	Municipal Financial Viability and Management	Apply proper procurement practices with the adherence to the approved SCM policy to promote good governance and to be effective in delivering services	Draft Planning schedules for procuring the financial year submitted by end February 2027 (Final Directorate inputs for the draft DMP)	1	SCM records - Draft DMP	1	0	0	1	0	2
Dept SDBIP	Municipal Financial Viability and Management	CFO submit final draft Demand Management Plan (DMP) to Council by end March 2027	Final Draft DMP submitted	1	Council resolution	1	0	0	1	0	2
Dept SDBIP	Good Governance and Public Participation	Monthly comply 80% with the anticipated timeframes for procurement processes of the Financial Services Directorate as per the approved Demand Management Plan (DMP) (BSC, BEC, and BAC).	% compliance with anticipated timeframes	98.58	Monthly DMP report issued by Supply Chain Management	80%	80%	80%	80%	80%	3
Dept SDBIP	Good Governance and Public Participation	Not more than 5 matters for the Directorate referred to Legal Services to obtain legal advice and input on administrative action of a nature which exceeds the level of skills required to exercise powers and perform duties in terms of the system of delegations	Number of matters referred	new kpi	Monthly email submission to the Municipal Manager of Schedule matters referred to Legal Services for the Directorate	5	5	5	5	5	2
Dept SDBIP	Municipal Transformation and	CFO compile and approve all direct staff's performance agreements by 30 July 2026 (current financial year)	% of staff agreements approved	100%	IPMS System report	100%	100%	0	0	0	3

Ref No	National KPA	Key Performance Indicator (KPI)	Unit of Measurement	Baseline	Portfolio of evidence	Targets				Weight	
						Annual	Q1	Q2	Q3		Q4
Dept SDBIP	Municipal Transformation and Institutional Development	CFO conduct mid-year reviews of all direct staff by 30 January 2027 (current financial year)	% of mid-year reviews conducted	100%	IPMS System report	100%	0	0	100%	0	3
Dept SDBIP	Municipal Transformation and Institutional Development	CFO conduct annual reviews of all direct staff by 30 August 2026 (for previous financial year -2025/26)	% of annual reviews conducted	100%	IPMS System report	100%	100%	0	0	0	3
Dept SDBIP	Good Governance and Public Participation	Departmental Annual Report prepared and submitted by 12 August 2026	Report submitted by 12 August 2024	1	Copy of annual report inputs submitted	1	1	0	0	0	3
Dept SDBIP	Good Governance and Public Participation	Implement agreed internal audit queries (recommendations/action plans) by the agreed upon timeframe (Actual queries implemented divided by queries received)	% of queries rectified (implemented)	85.00%	Feedback submitted to Manager: Internal Audit	85%	85%	85%	85%	85%	3
Dept SDBIP	Good Governance and Public Participation	Implement Council resolutions within the required Council item target date (Actual resolutions implemented divided by resolutions assigned to the directorate)	% of Council resolutions implemented	100.00%	Template-Council resolution POE sheet	95%	95%	95%	95%	95%	2
Dept SDBIP	Good Governance and Public Participation	Quarterly review the report submitted by the Chief Risk Officer (CRO) on the corrective measures	Number of risk action/risk management reports submitted	4	Quarterly Risk Action Report/Risk Management Report from the	4	1	1	1	1	3

Ref No	National KPA	Key Performance Indicator (KPI)	Unit of Measurement	Baseline	Portfolio of evidence	Targets				Weight	
						Annual	Q1	Q2	Q3		Q4
		implemented to reduce risk areas			Chief Risk Officer (CRO)						
Dept SDBIP	Municipal Financial Viability and Management	Verify correctness of the quarterly report on the performance of all contracts for service providers in terms of the Municipal Systems Act and submit to SCM	Number of reports verified	4	Copies of reports verified	4	1	1	1	1	2
Dept SDBIP	Municipal Financial Viability and Management	Submit the Final MTREF Budget by the end of May 2027	Final Budget submitted	1	Minutes of Meeting where the MTREF was tabled.	1	0	0	0	1	5
Dept SDBIP	Good Governance and Public Participation	Respond to 90% of all citizen queries/complaints/requests, i.e. emails sent to enquiries@overstrand.gov.za, within 14 days from when these queries/complaints/requests are received via the Collaborator system. (Generate collaborator report - POE-not on calendar month, but from 15th of previous month to 14th of the current reporting period)	% responded to within 14 days	95.71%	Collaborator report	90%	90%	90%	90%	90%	2
Managerial Performance total weights											
Strategic (Top Layer) Performance											
TL9	Municipal Financial Viability and Management	Financial viability measured in terms of the available cash to cover fixed operating expenditure ((Available cash+ investments)/ Monthly fixed operating expenditure) (MPPMR Reg 10 (g))	Ratio achieved	6.29	Latest actual ratio available	4.6	0	0	0	4.6	4

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Ref No	National KPA	Key Performance Indicator (KPI)	Unit of Measurement	Baseline	Portfolio of evidence	Annual	Targets				Weight
							Q1	Q2	Q3	Q4	
TL10	Municipal Financial Viability and Management	Financial viability measured in terms of the municipality's ability to meet its service debt obligations ((Total operating revenue-operating grants received)/debt service payments due within the year) (MPPMR Reg 10 (g))	Ratio achieved	35.98%	Latest actual ratio available	16%	0%	0%	16%		4
TL11	Municipal Financial Viability and Management	Financial viability measured in terms of the outstanding service debtors (Total outstanding service debtors/ revenue received for services) (MPPMR Reg 10 (g))	% achieved	14.84%	Latest actual ratio available	14%	0	0	14%		3
TL12	Municipal Financial Viability and Management	Financial statements submitted to the Auditor-General by end August 2026	Financial statements submitted	1	AFS submitted to the AG	1	1	0	0		5
TL13	Municipal Financial Viability and Management	Submit a reviewed long term financial plan to the CFO by end of October 2026	Reviewed long term financial plan submitted	1	Reviewed long term financial plan	1	0	1	0		5
TL14	Municipal Financial Viability and Management	Report monthly to the MM on the status of 30/60/90 days debtor payments	Number of reports submitted	12	Email sent to MM	12	3	3	3		3
TL28	Basic Service Delivery	Provision of free basic electricity, refuse removal, sanitation and water in terms of the equitable share requirements (MPPMR Reg 10 (b))	Number of Indigent households	5646	Monthly summary from the indigent register	7800	7800	7800	7800		2

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Ref No	National KPA	Key Performance Indicator (KPI)	Unit of Measurement	Baseline	Portfolio of evidence	Annual	Targets				Weight
							Q1	Q2	Q3	Q4	
TL33	Municipal Financial Viability and Management	Achieve a debt recovery rate not less than 98% (Receipts/total billed for the 12 month period x 100)	% Recovered	98.11%	Calculation of 12 month rolling average	98%	98%	98%	98%	4	
Strategic (Top Layer) Performance total weights											
TOTAL											
80											

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COMPETENCIES

The competencies required from employees prescribed in the Regulations on the appointment and conditions of employment of senior 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.

Competency	Definition	Weight
LEADING COPETENCIES		
Strategic direction and leadership	<p>Provide and direct a vision for the institution, and inspire and deploy others to deliver on the strategic institutional mandate. It includes:</p> <ul style="list-style-type: none"> • Impact and influence • Institutional performance management • Strategic planning and management • Organisational awareness 	1.67
People management	<p>Effectively manage, inspire and encourage people, respect diversity, optimise talent and build and nurture relationships in order to achieve institutional objectives. It includes:</p> <ul style="list-style-type: none"> • Human capital planning and development • Diversity management • Employee relations management • Negotiation and dispute management 	1.67
Programme and project management	<p>Able to understand program and project management methodology; plan, manage, monitor and evaluate specific activities in order to deliver on set objectives. It includes:</p> <ul style="list-style-type: none"> • Program and project planning and implementation • Service delivery management • Program and project monitoring and evaluation 	1.67
Financial management	<p>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:</p> <ul style="list-style-type: none"> • Budget planning and execution • Financial strategy and delivery • Financial reporting and delivery 	1.67
Change leadership	<p>Able to direct and initiate transformation on all levels in order to successfully drive and implement new initiatives and deliver professional and quality services to the community. It includes:</p> <ul style="list-style-type: none"> • Change vision and strategy • Process design and improvement 	1.66

Competency	Definition	Weight
Governance leadership	<ul style="list-style-type: none"> • Change impact monitoring and evaluation <p>Able to promote, direct and apply professionalism in managing risk and compliance requirements and apply a thorough understanding of governance practices and obligations. Further, able to direct the conceptualisation of relevant policies and enhance cooperative governance relationships. It includes:</p> <ul style="list-style-type: none"> • Policy formulation • Risk and compliance management • Cooperative governance 	1.66
CORE COMPETENCIES		
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.	1.66
Results and quality focus	Able to maintain high quality standards, focus on achieving results and objectives while consistency striving to exceed expectations and encourage others to meet quality standards. Further, to actively monitor and measure results and quality against identified objectives.	1.66
TOTAL		20

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Competency Framework

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LEADING COMPETENCIES		ACHIEVEMENT LEVELS		
CLUSTER :	COMPETENCY NAME :	COMPETENT	ADVANCED	SUPERIOR
	<p>Strategic Direction and Leadership</p> <p>Provide and direct a vision for the institution, and inspire and deploy others to deliver on the strategic institutional mandate</p>			
	<p>BASIC</p> <ul style="list-style-type: none"> Understand Institutional and departmental strategic objectives, but lacks the ability to inspire others to achieve set mandate Describe how specific tasks link to institutional strategies but has limited influence in directing a strategy Has a basic understanding of institutional performance management, but lacks the ability to integrate systems into a collective whole Demonstrate basic understanding of key decision makers 	<ul style="list-style-type: none"> Give direction to a team in realising the institution's strategic mandate and set objectives Has a positive impact and influence on the morale, engagement and participation of team members Develop action plans to execute and guide strategy Assist in defining performance measures to monitor the progress and effectiveness of the institution Displays an awareness of institutional structures and political factors Effectively communicate barriers to execution to relevant parties Provide guidance to all stakeholders in the achievement of the strategic mandate Understand the aim and objectives of the institution and relate it to own work 	<ul style="list-style-type: none"> Evaluate all activities to determine value and alignment to strategic intent Display in-depth knowledge and understanding of strategic planning Align strategy and goals across all functional areas Actively define performance measures to monitor the progress and effectiveness of the institution Consistently challenge strategic plans to ensure relevance Understand institutional structures and political factors, and the consequences of actions Empower others to follow the strategic direction and deal with complex situations 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 	<ul style="list-style-type: none"> Structure and position the institution to local government priorities Actively use in-depth knowledge and understanding to develop and implement a comprehensive institutional framework Hold self-accountable for strategy execution and results Provide impact and influence through building and maintaining strategic relationships Create an environment that facilitates loyalty and innovation. Display a superior level of self-discipline and integrity in actions Integrate various systems into a collective whole to optimise institutional performance management Uses understanding of competing interests to maneuver successfully to a win/win outcome

LEADING COMPETENCIES		ACHIEVEMENT LEVELS		
CLUSTER :	COMPETENCY NAME :	COMPETENT	ADVANCED	SUPERIOR
	<p>People Management</p> <p>Effectively manage, inspire and encourage people, respect diversity, optimise talent and build and nurture relationships in order to achieve Institutional objectives</p>			
	<p>BASIC</p> <ul style="list-style-type: none"> Participate in team goalsetting and problem solving Interact and collaborate with people of diverse backgrounds Aware of guidelines for employee development, but requires support in implementing development initiatives 	<ul style="list-style-type: none"> Seek opportunities to increase team contribution and responsibility Respect and support the diverse nature of others and be aware of the benefits of a diverse approach Effectively delegate tasks and empower others to increase contribution and execute functions optimally Apply relevant employee legislation fairly and consistently Effectively identify capacity requirements to fulfill the strategic mandate 	<ul style="list-style-type: none"> Identify ineffective team and work processes and recommend remedial interventions Recognise and reward effective and desired behavior Provide mentoring and guidance to others in order to increase personal effectiveness Identify development and learning needs within the team Inspire a culture of performance excellence by giving positive and constructive feedback to the team Achieve agreement or consensus in adversarial environments Lead and unite diverse teams across divisions to achieve institutional objectives 	<ul style="list-style-type: none"> Develop and incorporate best practice people management processes, approaches and tools across the institution Foster a culture of discipline, responsibility and accountability Understand the impact of diversity in performance and actively incorporate a diversity strategy in the institution Develop comprehensive integrated strategies and approaches to human capital development and management Actively identify trends and predict capacity requirements to facilitate unified transition and performance management

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LEADING COMPETENCIES		ACHIEVEMENT LEVELS		
CLUSTER :	COMPETENCY NAME :	COMPETENT	ADVANCED	SUPERIOR
	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			
COMPETENCY DEFINITION :		ACHIEVEMENT LEVELS		
BASIC	COMPETENT	ADVANCED	SUPERIOR	
<ul style="list-style-type: none"> Understand basic financial concepts and methods as they relate to institutional processes and activities Display awareness into the various sources of financial data, reporting mechanisms, financial governance, processes and systems Understand the importance of financial accountability Understand the importance of asset control 	<ul style="list-style-type: none"> Exhibit knowledge of general financial concepts, planning, budgeting and forecasting and how they interrelate Assess, identify and manage financial risks Assume a cost-saving approach to financial management Prepare financial reports based on specified formats Consider and understand the financial implications of decisions and suggestions Ensure that delegation and instructions as required by National Treasury guidelines are reviewed and updated Identify and implement proper monitoring and evaluation practices to ensure appropriate spending against budget 	<ul style="list-style-type: none"> Take active ownership of planning, budgeting and forecasting processes and provides credible answers to queries within own responsibility Prepare budgets that are aligned to the strategic objectives of the institution Address complex budgeting and financial management concerns Put systems and processes in place to enhance the quality and integrity of financial management practices Advise on policies and procedures regarding asset control Promote National Treasury's regulatory framework for Financial Management 	<ul style="list-style-type: none"> Develop planning tools to assist in evaluating and monitoring future expenditure trends Set budget frameworks for the institution Set strategic direction for the institution on expenditure and other financial processes Build and nurture partnerships to improve financial management and achieve financial savings Actively identify and implement new methods to improve asset control Display professionalism in dealing with financial data and processes 	

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LEADING COMPETENCIES		ACHIEVEMENT LEVELS		
CLUSTER :	COMPETENCY NAME :	COMPETENT	ADVANCED	SUPERIOR
	Change Leadership			
	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	
<ul style="list-style-type: none"> • Display an awareness of change interventions and the benefits of transformation initiatives • Able to identify basic needs for change • Identify gaps between the current and desired state • Identify potential risk and challenges to transformation, including resistance to change factors • Participate in change programs and piloting change interventions • Understand the impact of change interventions on the institution within the broader scope of local government 	<ul style="list-style-type: none"> • Perform an analysis of the change impact on the social, political and economic environment • Maintain calm and focus during change • Able to assist team members during change and keep them focused on the deliverables • Volunteer to lead change efforts outside of own work team • Able to gain buy-in and approval for change from relevant stakeholders • Identify change readiness levels and assist in resolving resistance to change factors • Design change interventions that are aligned with the institution's strategic objectives and goals 	<ul style="list-style-type: none"> • Actively monitor change impact and results and convey progress to relevant stakeholders • Secure buy-in and sponsorship for change initiatives • Continuously evaluate change strategy and design and introduce new approaches to enhance the institution's effectiveness • Build and nurture relationships with various stakeholders to establish strategic alliance in facilitating change programs • Take the lead in impactful change programs • Benchmark change interventions against best change practices • 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 	<ul style="list-style-type: none"> • Sponsor change agents and create a network of change leaders who support the interventions • Actively adapt current structures and processes to incorporate the change interventions • Mentor and guide team members on the effects of change, resistance factors and how to integrate change • Motivate and inspire others around change initiatives 	

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LEADING COMPETENCIES	
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	
ACHIEVEMENT LEVELS	
BASIC	SUPERIOR
<ul style="list-style-type: none"> • Display a basic awareness of risk, compliance and governance factors but require guidance and development in implementing such requirements • Understand the structure of cooperative government but requires guidance on fostering workable relationships between stakeholders • Provide input into policy formulation 	<ul style="list-style-type: none"> • Demonstrate a high level of commitment in complying with governance requirements • Implement governance and compliance strategy to ensure achievement of institutional objectives within the legislative framework • Able to advise local government on risk management, best practice interventions and compliance management • Able to forge positive relationships on cooperative governance level to enhance the effectiveness of local government • Able to shape, direct and drive the formulation of policies on a macro level
COMPETENT	ADVANCED
<ul style="list-style-type: none"> • Display a thorough understanding of governance and risk and compliance factors and implement plans to address these • Demonstrate understanding of the techniques and processes for optimising risk taking decisions within the institution • Actively drive policy formulation within the institution to ensure the achievement of objectives 	<ul style="list-style-type: none"> • Able to link risk initiatives into key institutional objectives and drivers • Identify, analyse and measure risk, create valid risk forecasts and map risk profiles • Apply risk control methodology and approaches to prevent and reduce risk that impede on the achievement of institutional objectives • Demonstrate a thorough understanding of risk retention plans • Identify and implement comprehensive risk management systems and processes • Implement and monitor the formulation of policies, identify and analyse constraints and challenges with implementation and provide recommendations for improvement

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CORE COMPETENCIES		ACHIEVEMENT LEVELS		
CLUSTER :	COMPETENCY NAME :	COMPETENT	ADVANCED	SUPERIOR
	Moral Competence Able to identify moral triggers, apply reasoning that promotes honesty and integrity and consistently display behavior that reflects moral competence			
	BASIC			
<ul style="list-style-type: none"> Realise the impact of acting with integrity, but requires guidance and development in implementing principles Follow basic rules and regulations of the institution Able to identify basic moral situations, but requires guidance and development in understanding and reasoning with moral intent 	<ul style="list-style-type: none"> Conduct self in alignment with the values of local government and the institution Able to openly admit own mistakes and weaknesses and seek assistance from others when unable to deliver Actively report fraudulent activity and corruption with local government Understand and honor the confidential nature of matters without seeking personal gain Able to deal with situations of conflict of interest promptly and in the best interest of local government 	<ul style="list-style-type: none"> Identify, develop and apply measures of self-correction Able to gain trust and respect through aligning actions with commitments Make proposals and recommendations that are transparent and gain the approval of relevant stakeholders Present values, beliefs and ideas that are congruent with the institution's rules and regulations 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 	<ul style="list-style-type: none"> Create an environment conducive of moral practices Actively develop and implement measures to combat fraud and corruption Set integrity standards and shared accountability measures across the institution to support the objectives of local government Take responsibility for own actions and decisions, even if the consequences are unfavorable 	

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CORE COMPETENCIES		ACHIEVEMENT LEVELS		
CLUSTER :	COMPETENCY NAME :	COMPETENT	ADVANCED	SUPERIOR
	<p>Planning and Organising</p> <p>Able to plan, prioritise and organise information and resources effectively to ensure the quality of service delivery and build efficient contingency plans to manage risk</p>			
	<p>COMPETENCY DEFINITION :</p> <p>BASIC</p> <ul style="list-style-type: none"> • Able to follow basic plans and organise tasks around set objectives • Understand the process of planning and organising but requires guidance and development in providing detailed and comprehensive plans • Able to follow existing plans and ensure that objectives are met • Focus on short-term objectives in developing plans and actions • Arrange information and resources required for a task, but require further structure and organisation 	<ul style="list-style-type: none"> • Actively and appropriately organise information and resources required for a task • Recognise the urgency and importance of tasks • Balance short and long-term plans and goals and incorporate into the team's performance objectives • Schedule tasks to ensure they are performed within budget and with efficient use of time and resources • Measures progress and monitor performance results 	<ul style="list-style-type: none"> • Able to define institutional objectives, develop comprehensive plans, integrate and coordinate activities and assign appropriate resources for successful implementation • Identify in advance required stages and actions to complete tasks • Schedule realistic timelines, objectives and milestones for tasks and projects • Produce clear, detailed and comprehensive plans to achieve institutional objectives • 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 	<ul style="list-style-type: none"> • Focus on broad strategies and initiatives when developing plans and actions • Able to protect and forecast short, medium and long term requirements of the institution and local government • Translate policy into relevant projects to facilitate the achievement of institutional objectives

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CORE COMPETENCIES		ACHIEVEMENT LEVELS		
CLUSTER :	COMPETENCY NAME :	COMPETENT	ADVANCED	SUPERIOR
	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			
COMPETENCY DEFINITION :		ACHIEVEMENT LEVELS		
BASIC	COMPETENT	ADVANCED	SUPERIOR	
<ul style="list-style-type: none"> Understand the basic operation of analysis, but lack detail and thoroughness Able to balance independent analysis with requesting assistance from others Recommend new ways to perform tasks within own function Propose simple remedial interventions that marginally challenges the status quo Listen to the ideas and perspectives of others and explore opportunities to enhance such innovative thinking 	<ul style="list-style-type: none"> Demonstrate logical problem solving techniques and approaches and provide rationale for recommendations Demonstrate objectivity, insight and thoroughness when analysing problems Able to break down complex problems into manageable parts and identify solutions Consult internal and external stakeholders on opportunities to improve processes and service delivery Clearly communicate the benefits of new opportunities and innovative solutions and stakeholders Continuously identify opportunities to enhance internal processes Identify and analyse opportunities conducive to innovative approaches and propose remedial intervention 	<ul style="list-style-type: none"> Coaches team members on analytical and innovative approaches and techniques Engage with appropriate individuals in analysing and resolving complex problems Identify solutions on various areas in the institution Formulate and implement new ideas throughout the institution Able to gain approval and buy-in for proposed interventions from relevant stakeholders Identify trends and best practices in process and service delivery and propose institutional application Continuously engage in research to identify client needs 	<ul style="list-style-type: none"> Demonstrate complex analytical and problem solving approaches and techniques Create an environment conducive to analytical and fact-based problem solving Analyse, recommend solutions and monitor trends in key challenges to prevent and manage occurrence Create an environment that fosters innovative thinking and follows a learning organisation approach Be a thought leader on innovative customer service delivery and process optimisation Play an active role in sharing best practice solutions and engage in national and international local government seminars and conferences 	

CORE COMPETENCIES	
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	
ACHIEVEMENT LEVELS	
BASIC	COMPETENT
<ul style="list-style-type: none"> Collect, categorise and track relevant information required for specific tasks and projects Analyse and interpret information to draw conclusions Seek new sources of information to increase the knowledge base Regularly share information and knowledge with internal stakeholders and team members 	<ul style="list-style-type: none"> Use appropriate information systems and technology to manage institutional knowledge and information sharing Evaluate data from various sources and use information effectively to influence decisions and provide solutions Actively create mechanisms and structures for sharing information Use external and internal resources to research and provide relevant and cutting-edge knowledge to enhance institutional effectiveness and efficiency
ADVANCED	SUPERIOR
<ul style="list-style-type: none"> Effectively predict future information and knowledge management requirements and systems Develop standards and processes to meet future knowledge management needs Share and promote best-practice knowledge management across various institutions Establish accurate measures and monitoring systems for knowledge and information management 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 	<ul style="list-style-type: none"> Create and support a vision and culture where team members are empowered to seek, gain and share knowledge and information Establish partnerships across local government to facilitate knowledge management Demonstrate a mature approach Recognise and exploit knowledge points in interactions with internal and external stakeholders

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CORE COMPETENCIES		ACHIEVEMENT LEVELS		
CLUSTER :	Communication	COMPETENT	ADVANCED	SUPERIOR
<p>COMPETENCY NAME : Communication</p> <p>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</p>				
BASIC	<ul style="list-style-type: none"> Demonstrate an understanding for communication levers and tools appropriate for the audience, but requires guidance in utilising such tools Express ideas in a clear and focused manner, but does not always take the audience into consideration Disseminate and convey information and knowledge adequately 	<ul style="list-style-type: none"> Express ideas to individuals and groups in formal and informal settings in a manner that is interesting and motivating Able to understand, tolerate and appreciate diverse perspectives, attitudes and beliefs Adapt communication content and style to suit the audience and facilitate optimal information transfer Deliver content in a manner that gains support, commitment and agreement from relevant stakeholders Compile clear, focused, concise and well-structured written documents 	<ul style="list-style-type: none"> Effectively communicate high-risk and sensitive matters to relevant stakeholders Develop a well-defined communication strategy Balance political perspectives with institutional needs when communicating viewpoints on complex issues Able to effectively direct negotiations around complex 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 	<ul style="list-style-type: none"> Regarded as a specialist in negotiations and representing the institution Able to inspire and motivate others through positive communication that is impactful and relevant Creates an environment conducive to transparent and productive communication and critical appreciate conversations Able to coordinate negotiations at different levels within local government and externally

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CORE COMPETENCIES		ACHIEVEMENT LEVELS		
CLUSTER :	Results and Quality Focus	COMPETENT	ADVANCED	SUPERIOR
COMPETENCY NAME : COMPETENCY DEFINITION :		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		
BASIC		ACHIEVEMENT LEVELS		
<ul style="list-style-type: none"> Understand quality of work but requires guidance in attending to important matters Show a basic commitment to achieving the correct results Produce the minimum level of results required in the role Produce outcomes that is of a good standard Focus on the quantity of output but requires development in incorporating the quality of work Produce quality work in general circumstances, but fails to meet expectation when under pressure 	<ul style="list-style-type: none"> Focus on high-priority actions and does not become distracted by lower-priority activities Display firm commitment and pride in achieving the correct results Set quality standards and design processes and tasks around achieving set standards Produce output of high quality Able to balance the quantity and quality and quality of results in order to achieve objectives Monitors progress, quality of work and use of resources; provide status updates and make adjustments as needed 	<ul style="list-style-type: none"> Consistently verify own standards and outcomes to ensure quality output Focus on the end result and avoids being distracted Demonstrate a determined and committed approach to achieving results and quality standards Follow task and projects through to completion Set challenging goals and objectives to self and team and display commitment to achieving expectations Maintain a focus on quality outputs when placed under pressure Establishing institutional systems for managing and assigning work, defining responsibilities, tracking, monitoring and measuring success, evaluating and valuing the work of the institution 	<ul style="list-style-type: none"> Coach and guide others to exceed quality standards and results Develop challenging, client-focused goals and sets high standards for personal performance Commit to exceed the results and quality standards, monitor own performance and implement remedial interventions when required Work with team to set ambitious and challenging team goals, communicating long- and short term expectations Take appropriate risks to accomplish goals Overcome setbacks and adjust action plans to realise goals Focus people on critical activities that yield a high impact 	

Personal Development Plan

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Annexure C


2026/27

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
1. GRAP	Keeping abreast of GRAP Standards	Workshops/ Conferences/ Training	Conferences Workshops Training Sessions	Continuous	Coaching Mentoring	Municipal Manager
2. Legislative Changes	Ensuring ongoing compliance with regulatory framework	Conferences Workshops Training Sessions	Conferences Workshops	Continuous	Coaching Mentoring	Municipal Manager
3.						

Signed and accepted by the Employee


 Date: 2026/06/17

Signed by the Municipal Manager on behalf of the Municipality

D.G.I. O'Neill
 Municipal Manager

 Date: 23/06/2026