



**PERFORMANCE MANAGEMENT AND  
DEVELOPMENT SYSTEM POLICY FRAMEWORK  
WEST RAND DISTRICT MUNICIPALITY**

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## LIST OF ACRONYMS/ ABBREVIATIONS

AG	Auditor General
AR	Annual Report
APR	Annual Performance Report
AOPO	Audit of Predetermined Objectives
BSC	Balanced Scorecard
CAR	Confirmed Assessment Rating
CC	Code of Conduct
CCR	Core Competency Requirements
CoGTA	Cooperative Governance and Traditional Affairs
DMC	Departmental Moderation Committee
EPMS	Employee Performance Management System
FDF	Financial Disclosure Form
FMPPI	Framework for Managing Programme Performance Information
FY	Financial Year
HRM	Human Resources Management
IDP	Integrated Development Plan
IM	Improvement Plan
JD	Job Description
KPA	Key Performance Area
KPI	Key Performance Indicator
LED	Local Economic Development
LRA	Labour Relations Act
HoD	Head of Department
MEC	Member of the Executive Council
MBO	Management by Objectives
MFMA	Municipal Financial Management Act
MM	Municipal Manager
MMC	Member of the Mayoral Committee
M-MC	Municipal Moderation Committee
MPAC	Municipal Public Accounts Committee
MSA	Municipal Systems Act
MSR	Municipal Staff Regulations
MTEF	Medium Term Expenditure Framework
NT	National Treasury
OPMS	Organisational Performance Management System
PA	Performance Agreement
PAC	Performance Audit Committee
PAR	Provisional Assessment Rating
PDP	Personal Development Plan

PMDS	Performance Management and Development System
PMS	Performance Management System
PP	Performance Plan
SALGA	South African Local Government Association
SALGBC	South African Local Government Bargaining Council
SDBIP	Service Delivery and Budget Implementation Plan
SDIP	Service Delivery Improvement Plan
SG	Strategic Goal
SO	Strategic Objective
SMART	Specific, Measurable, Achievable, Realistic, Time-bound
SM	Senior Management
RSA	Republic of South Africa
WRDM	West Rand District Municipality

## **DEFINITION OF TERMS/CONCEPTS**

**Accounting Officer:** in relation to a municipality and for the purposes of this policy, means the Municipal Manager as referred to in section 55 of the Municipal Systems Act 32 of 2000.

**Annual Report:** in relation to a municipality or municipal entity, means an annual report outlined in section 121 of the Municipal Finance Management Act.

**Auditor-General:** means the person appointed as Auditor-General in terms of section 193 of the Constitution, and includes a person-

- (a) acting as Auditor-General
- (b) acting in terms of a delegation by the Auditor-General; or
- (c) designated by the Auditor-General to exercise a power or perform a duty of the Auditor-General.

**Basic Municipal Service:** means a municipal service that is necessary to ensure an acceptable and reasonable quality of life and which, if not provided, would endanger public health or safety or the environment.

**Backlogs:** A backlog can be defined as quality of service/ goods that have accumulated over time that are still undelivered/unattended/still not produced. The backlogs in rural water, sanitation and electricity have been defined in official census figures, but vary (increase or decrease) from year to year due to migration patterns. Regardless, these backlogs are now being dealt with systematically (refer to baseline).

**Baseline:** the accurate and quantitative data at a stated point in time that marks the beginning of a trend.

**Councillor:** means a member of a municipal council.

**Section 57 Employee:** means a person employed by a municipality as a municipal manager or as a manager directly accountable to a municipal manager.

**Employee:** means any person, excluding an independent contractor, who works for the Municipality and who receives, or is entitled to receive, any remuneration.

**Employer:** means the municipality employing a person as a municipal manager or as manager directly accountable to a municipal manager and as represented by the mayor, executive mayor or municipal manager or a manager/supervisor with which a performance agreement is signed as the case may be.

**Employment Contract:** means a contract as contemplated in Section 57 of the Municipal Systems Act.

**Executive Director:**

(a) in relation to a municipality, means a manager referred to in section 56 of the Municipal Systems Act; or

(b) in relation to a municipal entity, means a manager directly accountable to the chief executive officer of the entity.

**Financial Statements:** in relation to municipality or municipal entity, means statements consisting of at least:

- (a) a statement of financial position;
- (b) a statement of financial performance;
- (c) a cash-flow statement;
- (d) any other statements that may be prescribed; and
- (e) any notes to these statements

**Financial Year:** means the financial year of municipalities that commences in July and end on 30 June of each year.

**Grievance:** means a complaint or concern resulting either from performance objectives and targets, evaluation outcome or the evaluation process.

**Input Indicator:** means an indicator that measures the costs, resources and time used to produce an output.

**Integrated Development Plan:** means a municipal strategic plan as outlined in section 25 of the Municipal Systems Act.

**Local community or community:** in relation to a municipality, means that body or persons comprising:

- (a) the residents of the municipality
- (b) the ratepayers of the municipality
- (c) any civic organisations and non-governmental, private sector or labour organisations or bodies which are involved in local affairs within the municipality.

**Mayor:** means the councillor elected as the Executive Mayor of the Municipality in terms of section 55 of the Municipal Structures Act.

**MEC:** means the member of a provincial executive council.

**MEC for local government:** means the MEC for the department of Cooperative Governance and Traditional Affairs at Province.

**Minister:** means the national Minister responsible for the department of Cooperative Governance and Traditional Affairs at Province.

**Municipality”** when referred to as:

- (a) an entity, means a municipality as described in section 2; and

(b) a geographical area, means a municipal area determined in terms of the Local Government: Municipal Demarcation Act, 1998 (Act No. 27 of 1998).

**Municipal Council** or **“Council”** means a municipal council referred to in section 157(1) of the Constitution.

**Municipal Finance Management Act:** means the Local Government: Municipal Finance Management Act, 2003, and any regulations made under that Act.

**Municipal Manager:** means a person appointed in terms of section 82 of the Municipal Structures Act.

**Municipal Service:** has the meaning assigned to it in section 1 of the Municipal Systems Act.

**Municipal Structures Act:** means the Local Government: Municipal Structures Act 1998 (Act 117 of 1998).

**Municipal Systems Act:** means the Local Government: Municipal Systems Act, 2000 (Act No.32 of 2000).

**Outcome Indicator:** means an indicator that measures the quality and or impact of an output on achieving a particular objective.

**Output Indicator:** means an indicator that measures the results of activities, processes and strategies of a program of a municipality.

**Private Company:** means a company referred to in section 19 and 20 of the Companies Act, 1973 (Act No. 61 of 1973).

**Performance Agreement:** means a signed documents by both parties (Manager/Supervisor and Employee) that states objective, performance indicators, standard and target and weighting for the Employee with the aim to monitor and measure performance for a particular financial year.

**Performance Bonus:** includes financial rewards given to an employee or team members based on how well they meet or exceed performance expectations.

**Performance Indicators:** means different types of measures which could include: time, performance against set time frames, response time, quantity, quality, cost or money, maximizing income, reducing costs and improvement. It defines how performance and what standards will be measured.

**Performance Management and Development System:** means a policy framework and procedures document that guides how the Municipality’s performance planning, monitoring, measurement, review, reporting and improvement will be managed including defining the role of different role players.

**Performance Plan:** means a part of the performance agreement (Annexure A) which details the performance objectives and targets that must be met and time frame within which these must be met.

**Performance Reward:** means a benefit or incentive given to an individual or group in recognition of achieving specific goals, delivering strong results, or exceeding expectations.

**Performance Target:** means a target which is set for each Key Performance Indicator to measure by when and how that specific target should be achieved and it should be SMART (specific, measurable, attainable, realistic, and time related).

**Personal Development Plan (PDP):** means a plan that is developed after the formal assessment in July and shows what training and development activities will be planned for the year to assist the employee to be more efficient in his/her current position.

**Prescribe:** means prescribe by regulation or guidelines in terms of section 120 and.

**Prescribed:** has a corresponding meaning.

**Political Office Bearer:** means the speaker, executive mayor, mayor, deputy mayor or member of the executive committee as referred to in the Municipal Structures Act.

**Political Structure:** in relation to a municipality, means the council of the municipality or any committee or other collective structure of a municipality elected, designated or appointed in terms of a specific provision of the Municipal Structures Act.

**Resident:** in relation to a municipality, means a person who is ordinarily resident in the municipality.

**Senior Managers:** means persons appointed in terms of section 56 and 57 of the Municipal Systems Act, 32 of 2000 (Municipal Manager and Managers directly accountable to the Municipal Manager).

**Service Authority:** means the power of a municipality to regulate the provision of a municipal service by a service provider.

**Service Delivery Agreement:** means an agreement between a municipality and an institution or person mentioned in section 76(b) of the Municipal Systems Act in terms of which a municipal service is provided by that institution or person, either for its own account or on behalf of the municipality.

## **I. ABSTRACT**

This policy governs both Organisational Performance and Individual Performance Management within the municipality. Organisational Performance Management in this regard, refers to the Top Layer SDBIP, whereas Individual Performance Management refers to the Bottom Layer SDBIP, which also rules the cascading of performance management to employees at all levels. The SDBIP is segregated into two layers with the Top Layer being the Strategic SDIBIP for the entire Organization and the Bottom Layer being the Departmental SDBIP.

Thus, the SDBIP that gets approved by the Executive Mayor and also reported at the respective governance structures is the Top Layer SDBIP. This executive summary/ overview aim's to provide an overall snapshot of this PMDS Policy document. Hence these key areas are depicted as follows, but will be covered in detail within the document: Definitions; aims and objectives of performance management policy; benefits of a performance management system; the key issues underpinning the success of performance management; the elements of the performance management cycle; the performance management processes; roles and responsibilities;

## **II. PREAMBLE:**

In 1998, the White Paper on Local Government (1998) proposed the introduction of Performance Management Systems (PMS) for local government as a tool to monitor the progress of service delivery at local government level. Subsequent to this, the Municipal Systems Act of 2000 required municipalities to develop Performance Management System that is commensurate to their resources and best suited for each municipality's circumstances. It concluded that Integrated Development Planning, Budgeting and Performance Management are powerful tools that can assist municipalities to develop an integrated perspective on development in their areas. In September 2021, the Minister for Cooperative Governance and Traditional Affairs (CoGTA) promulgated the Local Government: Municipal Staff Regulations (MSR), which makes provision for the cascading of performance management to all staff levels. Furthermore, the MSR prescribes that each municipality should develop a Performance Management and Development System (PMDS) Policy Framework or review the existing PMS Policies to govern the cascading of performance management to all staff levels.

The purpose of this PMDS Policy Framework is to provide tools for measuring the extent of the implementation of the municipality's Integrated Development Plan, through the development and implementation of SDBIPs.

The main objective of this Policy Framework is to facilitate the development, implementation and continuous improvement of a performance management system that will ensure effective management, monitoring and measurement of institutional and individual performance in the WRDM. The said system will also help recognise and reward employees who consistently perform at a high level while ensuring that the WRDM remains transparent, responsible and accountable to its community.

## **1. INTRODUCTION**

Underdevelopment, poverty, infrastructure backlogs and inequitable access to basic services, is a legacy that is continually endured by South Africans. However, in an effort to rectify these imbalances, Government is putting in place various mechanisms and measures to turn the situation around. In the local government context, a comprehensive and elaborate system of monitoring performance of municipalities has been legislated.

Performance Management is a strategic management process, which measures the implementation of the organisation's development and growth strategy. It equips leaders, managers, workers and stakeholders at different levels with a set of tools and techniques for regularly planning, continuously monitoring, and periodically measuring and reviewing the performance of the municipality in terms of indicators and targets for efficiency, effectiveness and economy. Performance management is aimed at ensuring that municipalities monitor their Integrated Development Plan's and continuously improve their operations and in terms of the Local Government: Municipal Systems Act No. 32 of 2000 that they annually review their overall performance in achieving their constitutional objectives.

Furthermore, the Municipal Planning and Performance Management Regulations (2001) stipulate that a "municipality's performance management system should entail a framework that describes and represents how the municipality's cycle and processes of performance planning, monitoring, measurement, review, reporting and improvement will be conducted, organised and managed, including determining the roles of the different role-players".

The focus of this policy framework is beyond achieving compliance, its main objective is to ensure that the WRDM achieves its vision of integrating district governance to achieve a better life for all people in the West Rand.

## **2. PURPOSE**

The overall purpose of a Performance Management and Development System Policy Framework is to provide tools for measuring the extent of the implementation of the municipality's Integrated Development Plan, through the development and implementation of Service Delivery and Budget Implementation Plans (SDBIPs). This policy framework essentially provides procedures on how organisational plans are translated into individuals' plans or scorecard and it also provides procedures for managing, monitoring and evaluating performance in the municipality at organisational and individual level.

## **3. LEGISLATIVE AND POLICY FRAMEWORK UNDERPINNING PERFORMANCE MANAGEMENT**

### **3.1 The Constitution of the Republic of South Africa, Act 108 of 1996**

Chapter 7 deals with Local Government and provides for the establishment of the local sphere of government. The Constitution established a complete new operational framework for Municipalities. There is increased pressure on the fiscal resources of Municipalities with new goals such as the promotion of social and economic development and equity; the promotion of a safe and healthy environment and the encouragement of local community participation in the formulation of policies, programmes and budgets.

**Section 152 (1)** of the Constitution sets out the goals and objectives of local government:

- to provide democratic and accountable government for local communities;
- to ensure the provision of services to local communities in a sustainable manner;
- to promote social and economic development;
- to promote a safe and healthy environment; and

- to encourage the involvement of communities and community organisations' in the matters of local government.

### **3.2 Labour Relations Act, No. 66 of 1995**

In addition, The Labour Relations Act (LRA), of 1995, through the *Code of Good Practice: Dismissal* provides guidelines on the management of poor performance. These provisions in the *LRA* are of significance in that they preceded the other pieces of legislation on Local Government and provide a legal basis for the implementation of performance management.

### **3.3 Employment Equity Act, 1998 (Act No. 55 of 1998)**

It is required by Chapter Two, Section 5 that the '... employer must take steps to promote opportunity in the workplace by eliminating unfair discrimination in any employment policy or practice'. In defining 'employment policy or practice' the Act indicates in Chapter One (1) (h) that this includes any 'performance evaluation system'.

### **3.4 The Batho-Pele White Paper, 1998**

An important perspective in the management of the performance of a Municipality is its relationship with its customers, namely, local citizens and partners. The Batho-Pele White Paper (1998) provides an approach to building a culture and practice of customer service that is responsive to the needs of citizens and business as consumers and end-users of municipal services. For this to happen, even within the context of limited resources at the disposal of municipalities, everyone in the public service, needs to do so with a high degree of commitment and a sense of duty, through living the Batho-Pele principles and the new belief set of "***We belong, We care, We serve***"

Eight Batho-Pele principles were developed to serve as the acceptable policy and legislative framework of service delivery in the public service. These principles are aligned with the Constitutional ideals of:

- Promoting and maintaining high standards of professional ethics;
- Providing service impartially, fairly, equitably and without bias;
- Utilising resources efficiently and effectively;
- Responding to people's needs (citizens are encouraged to participate in policy-making); and
- Rendering an accountable, transparent, and development-oriented public administration.

### **3.5 The White Paper on Local Government, 1998**

The White Paper on Local Government provides for the development of a coherent planning framework for Integrated Development Planning that informs the effective design and implementation of the Performance Management system on both organisational and individual level, which will:

- Enable planning around the needs prioritised in consultation with community groups;
- Facilitate vertical integration with the national and provincial policies and programmes, and;
- Gear municipal resources and capacity to meet the objectives identified in the IDPs.

In order to support the integrated development planning the **White Paper** advocated the development of a performance management system with the aim to:

- Enable realistic planning;
- Allow municipalities to assess the impact of their administrative reorganisation processes and development strategies, and;

- Enhance local government accountability.

### **3.6 The Municipal Systems Act 32 of 2000**

The Systems Act determines specifically that individual Municipalities should develop their own performance management systems in the interest of efficient and effective management. This is achieved through planning targets and the achievement and maintenance of quality and accountability in the delivery of projects and services to the communities within the Municipality. The following is required of municipalities in terms of the Act:

#### **Section 38**

- Establish a PMS that is commensurate with its resources, best suited to its circumstances and in line with the priorities, objectives and targets in the IDP.
- Promote a culture of performance management among its political structures, political office bearers and councillors and in its administration.
- Administer its affairs in an economical, effective, efficient and accountable manner

#### **Section 39**

- The Executive Mayor must manage the development of the municipality's performance management system:
- assign responsibilities in this regard to the municipal manager, and
- submit the proposed system to the municipal council for adoption

#### **Section 41**

- Set appropriate key performance measures (indicators) as a yardstick for measuring performance with regard to the development priorities and objectives in the IDP.

- Set measurable performance targets for each of those development priorities and objectives.
- Monitor performance.
- Measure and evaluate performance at least once per year.
- Take steps to improve performance.
- Establish a process of regular reporting to Council, other political structures, political office bearers and staff of the Municipality; and of the public and appropriate organs of state.

#### **Section 42**

Involve the local community in the development, implementation and review of the Municipality's PMS, and, in particular, allow the community to participate in the setting of appropriate measures and targets

#### **Section 44**

Make known, both internal and to the general public, the performance measures and targets set by it for the purposes of its PMS.

#### **Section 45**

Audit the results of the performance measurement as part of internal auditing processes and annually by the Auditor General.

#### **Section 46**

Publish an annual performance report reflecting the performance of the Municipality and of each external service provider; a comparison of the performances with targets; and measures taken to improve performance.

### **3.7 Promotion of Access to Information Act (Act 2 of 2000)**

This Act seeks to foster a culture of transparency and accountability in public and private bodies by giving effect to the right of access to information, including access to performance information.

### **3.8. Municipal Planning and Performance Management Regulations, 2001**

The Municipal Planning and Performance Management Regulations deal in more detail with the following aspects of the PMS in regulations 7 to 15. The performance framework that describes and represents how the Municipality's cycle and processes of performance planning, monitoring, measurement, evaluation, reporting and improvement will be conducted, organised and managed, including determining the roles of the different role-players.

- The setting of performance measures (indicators) and the involvement of communities in this.
- The general key performance indicators.
- The annual review of measures as part of the performance review process.
- The setting of performance targets for each of the measures.
- The monitoring, measurement and evaluation of performance.
- Internal auditing of performance measurements.
- Community participation in respect of performance management.

### **3.9 Municipal Finance Management Act, 2003**

The Municipal Finance Management Act links financial management, performance management and the IDP in no uncertain terms, e.g. –

### **Section 17**

An annual budget, when it is tabled in Council for approval, must be accompanied by measurable performance objectives for revenue from each source and for each vote in the budget, taking into account the Municipality's IDP.

### **Section 24**

An annual budget must be approved together with the adoption of resolutions approving abovementioned performance objectives.

### **Section 53**

The Municipality's service delivery and budget implementation plan (SDBIP) must include service delivery targets and performance measures for each quarter. The annual performance agreements must be linked to the measurable performance objectives approved with the budget and to the SDBIP.

### **Section 72**

There must be a mid-year budget and performance assessment in January of each year.

## **3.10 The Skills Development Amendment Act (Act 31 of 2003)**

This Act refers to the need to budget for at least one per cent of the payroll for the training and education of employees, with effect from 1 April 2000. This training and development links to the requirement of performance management for personal development plans.

### **3.11 Performance Management Regulations for Municipal Managers and Managers Directly Accountable to the Municipal Managers, 2006**

The Municipal Performance Management Regulation for Section 56 and 57, seek to provide a uniform framework that can be applied by local, district and metropolitan municipalities whilst recognising their unique conditions.

- These regulations seek to provide for practical mechanisms and enablers in implementation, monitoring and evaluation of service delivery and development.
- In view of the need to on the one hand, attract and retain skilled managers in municipalities and on the other hand the need to provide clarity on remuneration and conditions of employment, the regulations set specific principles in this regard.
- The determination of remuneration should be competency-based, market related and appropriate to local conditions.
- The recognition of outstanding performance remains an important part of performance management. However, it is proposed that bonuses be awarded on a sliding scale ranging from 5% to a maximum of 14%.

### **3.12 Municipal Performance Regulations for Appointment and Conditions of Senior Managers, 2014**

These Regulations seek to provide a uniform framework that can be applied by the municipalities when embarking on recruitment process for the section 56 and 57 managers, to appoint skilled and competent senior managers and on the other hand the need to provide clarity on remuneration and conditions of employment, the regulations set specific principles in this regard.

### **3.13 Municipal Staff Regulations, 2021**

These Regulations seek to provide a uniform framework that can be applied by the municipalities when embarking on recruitment process for municipal staff members other than section 56 and 57 managers

The Regulations also provide guidance on the appointment of skilled and competent municipal employees including how their performance should be managed in relation to:-

- Planning of performance
- Measuring and reviewing of performance
- Monitoring and evaluation
- Rewarding good performance
- Dealing with poor performance

#### **4. OBJECTIVES**

The objectives of the performance management and development policy framework of the WRDM can be summarized as follows:

- Translate the WRDM's vision and mission into clear measurable outcomes and performance indicators that define success and that are shared throughout the municipality and with the municipality's customers and stakeholders;
- To improve the organisational performance by improving team and individual performance and ensuring synergy with IDP and other strategic processes requirements and standards;
- To clarify expectations of what teams and individuals are required to achieve;
- To develop the skills, competencies and abilities of individuals within the organization;
- To develop a sound working relationship between Managers/Supervisors and Employees through the development of agreed objectives, the provision of feedback, mentoring and coaching;
- To identify and reward staff who renders exceptional performance;

- To identify staff who render unsatisfactory performance and provide appropriate remedial action;
- To provide a mechanism for identifying and linking training and development needs to performance management;
- To ensure that staff is actively involved in managing their own performance; and
- To instill a performance-oriented culture throughout the organization.

## **5. BENEFITS OF THE PMDS**

Efficient and effective implementation of the PMDS has the following benefits:

- It facilitates the alignment of individual goals with institutional goals;
- Employees have a clear understanding of their roles, responsibilities, performance standards and targets expected to attain;
- It facilitates early detection of challenges in meeting the IDP and SDBIP objectives, so that these can be remedied.
- It highlights gaps in the competencies of staff so that these can be addressed;
- It ensures that employees are provided with opportunities for learning and development in order to enable them to competently meet their performance targets.
- It rewards outstanding performance and thereby provides motivation for improved performance.

## **6. SCOPE**

The performance management and development system policy framework applies to all Employees employed by the WRDM, excluding EPWP, CWP employees and the internship employees. Municipal employees to which this policy is applicable are employees employed on a:

- Permanent basis;
- Fixed term contract basis (for the duration which is over 12 months).

There are two categories of Employees in the municipality. These include the following:

**Section 56/57 Employees:**

- Municipal Manager; and Executive Directors (managers directly accountable to the municipal manager).

**Employees other than section 57 Employees (Governed by SALGBC).**

- All other employees such as managers; coordinators; supervisors etc.

**7. ROLES AND RESPONSIBILITIES IN THE PERFORMANCE MANAGEMENT PROCESS**

There are different role players with different responsibilities in the performance management and development process and these are outlined in detailed on the table below:

**Table 1: Role players and their responsibilities in PMDS Process**

Role Player	Roles and Responsibilities
Executive Mayor	<ul style="list-style-type: none"> <li>▪ Manage the development of the performance management and development system</li> <li>▪ Assigns the responsibility for the management of the PMDS to the Municipal Manager</li> <li>▪ Submits the proposed system to Council for adoption</li> <li>▪ Approves the Service Delivery and Budget Implementation Plans (SDBIP)</li> <li>▪ Enters into a performance agreement with the Municipal Manager on behalf of the Municipal Council</li> <li>▪ Report to Council on quarterly, mid-term review and the annual report on the performance of the municipality</li> </ul>
Council	<ul style="list-style-type: none"> <li>▪ Adopts the performance management and development system</li> <li>▪ Provide oversight over municipal performance through reviewing the quarterly, mid-year and annual reports</li> <li>▪ Reports progress made on municipal performance to the community</li> </ul>

Role Player	Roles and Responsibilities
Municipal Manager	<ul style="list-style-type: none"> <li>▪ Manages the overall development and implementation of the Performance Management and Development System (PMDS) as delegated by the Executive Mayor</li> <li>▪ Leads the process of the formulation and revision of the Service Delivery and Budget Implementation Plan</li> <li>▪ Enters into performance agreements with Executive Directors/Managers directly accountable to the Municipal Manager on behalf of Council</li> <li>▪ Quarterly reviews the performance of departments to improve the economy, efficiency and effectiveness of the municipality and annually evaluates the performance of Section 56 Managers</li> <li>▪ Monthly, quarterly and annually reports to the Executive Mayor on the performance of Executive Directors /Section 56 Managers and departments</li> </ul>
Heads of Departments (Executive Directors)	<ul style="list-style-type: none"> <li>▪ Participate in the formulation of the SDBIP and the municipal strategic/ organisational scorecard</li> <li>▪ Manage subordinates' overall performance</li> <li>▪ Enter into performance agreements with the Municipal Manager</li> <li>▪ Implement Departmental SDBIPs/scorecards and ensure the performance objectives in the performance agreements are achieved</li> <li>▪ Quarterly, Mid-yearly and Annually report to the Municipal Manager on the performance of their departments</li> <li>▪ Identify improvement mechanisms for poor performance and report progress on implementation of improvement measures (Action Plan) adopted by Council</li> </ul>
All Managers/Supervisors	<ul style="list-style-type: none"> <li>▪ Communicate the big picture of the WRDM's overall and department goals to employees, and show the relationship between their jobs and the success of the municipality;</li> <li>▪ Assist employees identify realistic objectives that are linked to their department's operational plans/job descriptions and ultimately the municipality's IDP, SDBIP and other related strategies;</li> <li>▪ Ensure timely completion and submission of employee's performance agreements, plans and reviews.</li> <li>▪ Ensure timely completion and submission of directorates monthly, quarterly and annual reports to the Heads of Departments (Directors)</li> <li>▪ Provide regular coaching and ongoing feedback to Employees and assess performance on a continuous basis;</li> <li>▪ Identify Employee development needs and work with Human Resources Division to implement specific development plans to address such needs;</li> </ul>
Employees (Staff Members)	<ul style="list-style-type: none"> <li>▪ To support the WRDM's strategic objectives, departmental as well as own individual performance objectives</li> <li>▪ To take ownership of the performance management and development system</li> <li>▪ To request for feedback from Manager/Supervisor to monitor own performance</li> </ul>

Role Player	Roles and Responsibilities
	<ul style="list-style-type: none"> <li>▪ To give feedback to the Manager/Supervisor on progress with regard to their performance on a regular basis</li> <li>▪ To review own progress according to the performance agreement</li> <li>▪ Keep Manager/Supervisor informed of any problems or potential problems that may affect their ability to achieve some or all their performance objectives</li> <li>▪ To continuously improve their performance</li> <li>▪ To bring to Manager/Supervisor’s attention, significant other outcomes that were delivered during this period and which may not be contained in the performance agreement, where applicable</li> <li>▪ To give input on appropriate action to be taken on areas of performance, which the supervisor has identified as not being satisfactory</li> <li>▪ To make contributions for the improvement of the performance management system; and</li> <li>▪ To collect documented evidence of outcomes achieved.</li> </ul>
Human Resources Department	<ul style="list-style-type: none"> <li>▪ Assist the Heads of Departments with the development of performance agreements and its annexures for employees below Section 56/57 Managers</li> <li>▪ The HR Manager will provide secretariat service to the formal performance assessments of senior managers</li> <li>▪ Make use of the training needs identified in the employee’s personal development plan to compile the municipality’s workplace skills plan</li> <li>▪ Ensure that the skills development is budgeted for within the municipality to capacitate employees</li> <li>▪ Ensure training of employees on the performance management and development system.</li> <li>▪ Ensure record keeping of employee performance management records <ul style="list-style-type: none"> <li>-Employment Contracts;</li> <li>-Performance Agreements; and</li> <li>-Performance Assessments.</li> <li>-Quarterly reviews; and</li> <li>-Annual review (appraisals).</li> </ul> </li> </ul>
Municipal Performance Management Division	<ul style="list-style-type: none"> <li>▪ Ensure the Performance Management and Development System developed is in line with the Local Government Prescripts.</li> <li>▪ Administer and implement the performance management and development policy</li> <li>▪ Ensure that the performance management and development system assists the institution achieve its developmental objectives contained in the IDP</li> <li>▪ Development of the SDBIP which is aligned to the IDP and the Budget</li> </ul>

Role Player	Roles and Responsibilities
	<ul style="list-style-type: none"> <li>▪ Develop performance agreements and its annexures for the Municipal Manager and Managers directly accountable to the Municipal Manager</li> <li>▪ Consolidate departmental reports and compile municipal/institutional performance reports to be tabled in Council</li> <li>▪ Annually review the performance management and development system</li> </ul>
Internal Audit	<ul style="list-style-type: none"> <li>• On a continuous basis (quarterly and annually) audit the performance measurements of the municipality as part of quality assurance on the reported targets by directorates.</li> <li>• Submit quarterly reports on their audits to the Municipal Manager and the Performance Audit Committee.</li> <li>• Assess the effective functioning of the municipality's PMS to ensure it complies with the Act</li> <li>• Recommend to the Management relevant improvement measures to curb future audit findings</li> </ul>
Performance Audit Committee	<ul style="list-style-type: none"> <li>▪ Review quarterly reports from the performance management and internal audit offices on quarterly basis</li> <li>▪ Review annual performance report and the annual financial statements before submission to the Auditor General for audit purpose</li> <li>▪ Submit reports with recommendations for improvement performance to the Municipal Council</li> </ul>
Departmental Performance Moderation Committee	<ul style="list-style-type: none"> <li>▪ Conduct moderation of annual staff members performance results, to ensure that the norms and standards for performance management are applied in a fair, realistic and consistent manner across departments</li> <li>▪ Determine the cost implications for recognition of performance of staff members within the department</li> <li>▪ Recommend the moderated scores for all staff members to the municipal moderation committee for approval</li> <li>▪ Recommend performance rewards as well as remedial actions for performance considered to be below effective performance</li> </ul>
Municipal Performance Moderation Committee	<ul style="list-style-type: none"> <li>▪ Provide oversight over the staff performance management and development system to ensure performance process is valid, fair and objective</li> <li>▪ Moderate the overall performance assessment score for staff determined after departmental moderation process</li> <li>▪ Determine the percentages for merit based rewards subject to affordability</li> <li>▪ Recommend appropriate remedial actions for performance believed to be substandard</li> </ul>
Trade unions	<ul style="list-style-type: none"> <li>• Observe and monitor the application of the performance management and development system;</li> </ul>

Role Player	Roles and Responsibilities
	<ul style="list-style-type: none"> <li>• Encourage their members to support the system;</li> <li>• Represent their employees in the event of grievances arising from the implementation of the performance management and development system</li> </ul>
Community/Stakeholders	<ul style="list-style-type: none"> <li>▪ Participate in the drafting of the municipality’s IDP and Budget through established public participation platforms.</li> <li>▪ Participate in the review of municipality’s overall performance annually, in the form of the annual report, wherein they provide comments on the Draft Annual Reports tabled in Council.</li> </ul>

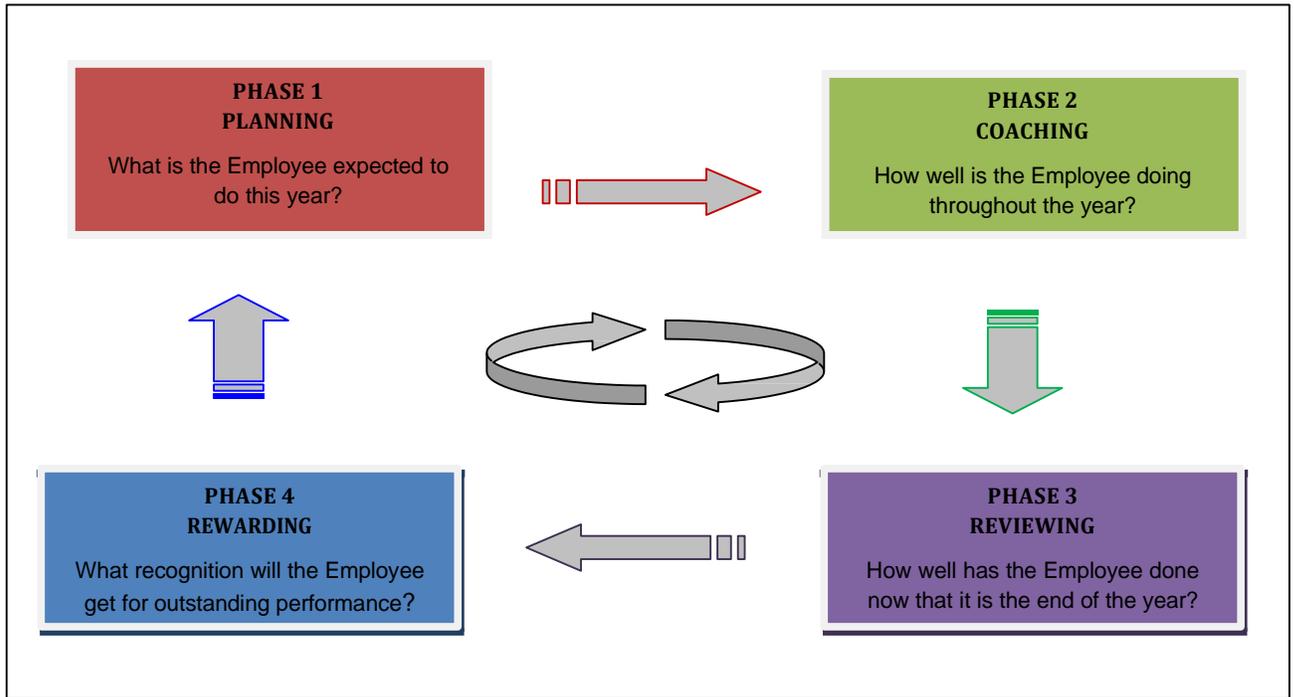
## 8. PERFORMANCE MANAGEMENT CYCLE

The performance management process involves four key phases. These key phases in the performance management cycle are designed to ensure that each phase is taken into consideration when managing the performance of an employee, and they are as follows:

- **Planning:** This phase involves jointly identifying individual performance expectations and gaining the employee’s commitment to achieving these expectations.
- **Coaching:** This is a crucial phase of continuously tracking and improving performance, through feedback and reinforcement of key results and competencies.
- **Reviewing:** This phase involves jointly assessing actual performance against expectations at the end of the performance cycle to review and document planned vs. actual performance.
- **Rewarding:** This phase establishes the link between performance and reward. It aims to direct and reinforce effective work behaviours by

determining and allocating equitable and appropriate rewards to employees.

A figure below depicts the performance management cycle:



**Figure 1: The Four Phases of the Performance Management Cycle**

The cycle of performance management and development in a financial year is illustrated by the table below:

**Table 2: Performance Management and Development Cycle**

Performance Management and Development Cycle													
Performance Management Process		JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUNE
<b>1</b>	Approval of IDP, budget & SDBIP											✓	✓
<b>2</b>	Finalise Performance Agreements on basis of SDBIP	✓											✓
<b>3</b>	Monitor Performance Agreements	✓			✓			✓			✓		
<b>4</b>	Quarterly review performance	✓			✓			✓			✓		
<b>5</b>	Recognise and/or reward performance		✓					✓					
<b>6</b>	Formal feedback to Council							✓					

## **8.1 PLANNING PHASE (MAY TO JULY)**

At the beginning of the performance management cycle is planning. This stage involves translating community aspirations and priorities in the IDP into measurable key performance indicators (KPIs) and targets which can be implemented and measured annually.

These indicators and targets are implemented through the **5 National KPA's** as contained in the 5 year Local Government Strategic Agenda and therefore, are the core KPA's in the WRDM organisational performance scorecard. The KPA's are as follows:

- Basic Service Delivery;
- Local Economic development;
- Municipal Financial Viability and Management.
- Good Governance and Public Participation;
- Municipal Transformation and Organizational Development; and

### **Key Performance Indicators (KPI'S)**

The priorities and objectives contained in the IDP will guide the identification of indicators. Key Performance Indicators are measurements that indicate whether progress is being made in achieving the strategic goals and objectives. Indicators are important as they:

- (a) Provide a common framework for gathering data for measurements and reporting;
- (b) Translate complex concepts into simple operational measurable variables;
- (c) Enable the review of goals and objectives;
- (d) Help provide feedback to the municipality and staff; and
- (e) Identify the gaps between IDP strategies and the operational plans of the various departments.

**Setting of Key Performance Indicators:** The following **SMART** criteria must be used for the setting of indicators and targets:

- **S** – Specific
- **M** - Measurable
- **A** - Achievable
- **R** - Realistic
- **T** - time-bound

Key Performance Information concepts should also be considered when indicators are set:

- **Input Indicators:** all the resources that contribute to the production and delivery of outputs. Inputs are “what we use to do the work”. They include finances, personnel, equipment and buildings.
- **Activity indicators:** the processes or actions that use a range of inputs to produce the desired outputs and ultimately outcomes. In essence, activities describe “what we do”.
- **Output indicators:** the final products, or goods and services produced for delivery. Outputs may be defined as “what we produce or deliver”.
- **Outcome indicators:** the medium-term results for specific beneficiaries that are the consequence of achieving specific outputs. Outcomes should relate clearly to an institution’s strategic goals and objectives set out in its plans. Outcomes are “what we wish to achieve”.
- **Impact indicators:** the results of achieving specific outcomes, such as reducing poverty and creating jobs.

**In setting indicators, the following aspects must also be considered:**

- The key priorities and objectives set in the IDP, which have been determined during the public participation process.
- The activities and processes identified in the IDP for achieving the developmental objectives as well as the earmarked resources.
- Whether data is available for the measurement of the KPI's.
- Whether measurement tools to measure the performance of the indicators are available or can be developed.
- In the event that measurement tools do not exist, then it is advisable that a KPI be set which would measure the design and implementation of such a system. Once the measurement tool has been implemented, then the KPI measuring the output from the tool can then be included in the scorecard.
- The cost involved in setting up measurement tools needs to be considered.
- The time frame for the implementation of measurement tools is also important.
- It is important that the responsibility for the KPI needs to be allocated to the appropriate person who will be required to measure the output/outcome on the KPI's.

**Baseline**

A baseline can be defined as an accurate and quantitative data, at a stated point in time which marks the beginning of a trend. In the SDBIP for WRDM, the baseline figures are retrieved from the status column as at the end of the previous financial year. Organisational Performance is therefore tracked from the baseline figure obtained from the previous year to the target in the following year.

If a baseline does not exist in the previous year, then it must be indicated as a new target. After the end of the financial year in question, a baseline will be available for the following year.

## Targets

Once the KPI's are developed, the municipality can then set targets which must be quantified in terms of number/ percentage/ time etc.

The whole planning phase in performance management involves the following key tasks:

- The Senior Management translate objectives as contained in the approved IDP into the annual (SDBIP), showing the annual targets, key indicators, and baselines, outcomes, outputs, activities. Such SDBIP shall be submitted to the Executive Mayor Council (within 28 days after the approval of the IDP and Budget) for approval.
- The Executive Director and his/her team translate deliverables as contained in the SDBIP into the Departmental SDBIPs, showing quarterly targets. Such SDBIPs shall be translated into the performance plans of the staff members within the department;
- The Line Manager/Supervisor shall schedule meetings with each Employee to agree on individual performance objectives, indicators, performance targets guided by the SDBIP in terms of the IDP as well as the job descriptions for each employee;
- The Line Manager and Employee shall conclude a performance agreement including but not limited to a performance plan for the financial year based on the indicators set out in the department's SDBIP/job description. Both parties shall sign the performance agreement.
- The Performance Management Manager/Practitioner shall provide technical support to the HODs in ensuring the performance agreements are aligned to the SDBIP and that they comply with the regulations.
- The Human Resources Manager/Practitioner shall provide support to individual employees in ensuring that the performance agreements templates are circulated to employees and are aligned to the job descriptions of the employees.
- The Human Resources Manager/Practitioner shall ensure adequate record keeping of the signed performance agreements for all employees annually.

### **8.1.1 Service Delivery and Budget Implementation Plan (SDBIP)**

- The SDBIP gives effect to both the Integrated Development Plan and budget of the Municipality and it also serve as a “contract” between the administration, council and community expressing the goals and objectives set by the council as quantifiable outcomes that can be implemented by the administration over the four (4) quarters of the year.
- The WRDM SDBIP shall be approved by the Executive Mayor within 28 days after the approval of the Budget annually as required by Section 53 of the MFMA, 2003.

### **8.1.2 Performance Agreements**

Performance agreements including annexures thereto (performance plans, personal development plan, financial disclosure forms and code of conduct) shall be:

- Developed for each Employee on an annual basis;
- Developed by the immediate Manager/Supervisor of the Employee, with the assistance from the HR Section and in consultation with such Employee for input and approval by Head of Department;
- Agreed upon between the relevant Manager/Supervisor and Employee; and
- Signed and dated by the relevant Manager/Supervisor and Employee, once agreement has been reached.

Newly appointed employees shall conclude and sign performance agreements within 60 days of their appointment and employees already in the employment of the municipality shall conclude and sign performance agreements within 30 days of the commencement of the new financial year.

Signing a performance agreement means that the Employee agrees to the following:

- Fully committing to the successful delivery of all outcomes, outputs, sub-outputs, activities in the performance agreement and performance plan;

- Attending all training and development interventions and procedures as required in terms of the personal development plan; and
- Keeping and maintaining records/portfolio of evidence of all outcomes/outputs/activities achieved.

In signing the performance agreement the Manager/Supervisor (Employer) commits to the following:

- Managing the Employee's performance in full compliance with all directives governing performance management;
- Providing a conducive work environment in order for Employees to carry out their tasks; and
- Providing regular feedback and/or encouragement by means of both formal and informal communication.

Employees and Managers/Supervisors shall conclude and sign a performance agreement including annexures thereto annually; Performance Agreement, Performance Plan, Personal Development Plan, Financial disclosure forms; and Code of conduct.

The performance agreement must include a performance plan that contains:

- The name, job title and the department of the staff member;
- The objectives or targets;
- KPAs, their weightings and the target date for meeting the KPA
- The KPIs and the performance standard for each KPI
- The name and definition of the job specific competencies, their weightings and the expected level of capability for each competency
- A personal development plan
- The process of monitoring and assessing performance, including the planned dates of assessment

Amendments to the performance agreements shall be dealt with in line with the Municipal Staff Regulations, 2021 (MSR) as outlined below.

A new or amended performance agreement/ performance plan shall be signed under the following circumstances:

- If the role of the employee changes during the performance cycle
- If the employee has been acting in a higher position for a period of more than three months, wherein the supervisor shall review the KPAs and KPIs in consultation with the acting staff member to include KPAs and KPIs in the staff member's amended performance agreement.
- If the work environment of the Municipality alters (whether as a result of Government or Management decisions or otherwise e.g. restructuring, devolution of functions), to the extent that the contents of the agreement are no longer appropriate;
- If the employee has not been in the role for three months or more for any reason, as for example, maternity, ill health, study, secondment, or travel; unless this absence was built into the original agreement; and
- If this is a recommended plan of action to manage unsatisfactory performance.

All amendments to a signed performance agreement/ performance plan should be supported by a written motivation, which must be signed and dated by the relevant employee and his/ her supervisor.

### **8.1.3 Measuring**

There are two basic criteria against which Employees shall be measured:

**Key Performance Areas (KPAs):** these include the Key Performance Indicators and targets which an Employee is expected to achieve during the year. Performance indicators for each KPA must be provided detailing the evidence that will be used to assess whether or not an Employee has achieved the objective. KPAs identify what needs to be done. The five KPA's which add up to 100 are outlined in the table below:

**Table 3: KPAs weighting**

<b>KEY PERFORMANCE AREAS (KPA'S)</b>	<b>WEIGHTING</b>
Basic Service Delivery	
Municipal Institutional Development and Transformation	
Local Economic Development (LED)	
Municipal Financial Viability and Management	
Good Governance and Public Participation	
<b>Total</b>	<b>100%</b>

**Core Competency Requirements (CCRs):**

The CCRs describe the skills, knowledge and behaviours the Employee is required to demonstrate in order to achieve the objectives. Core competencies, particularly the behaviours, identify how the work needs to be done. A detailed list of CCRs for each employee shall be documented in a performance agreement of an employee as per the job profiles depicted in annexures in both the Regulations on Appointment and Conditions of employment of Senior Managers, 2014 (Senior Managers) and the Municipal Staff Regulations, 2021 (lower level staff).

**Table 4: CCRs weighting**

<b>CORE COMPETENCY REQUIREMENTS FOR EMPLOYEES (CCR)</b>		
<b>Total percentage</b>		<b>100%</b>

#### **8.1.4 Weighting**

The total of weightings on the performance agreement shall weight up to 100 points. The purpose of the weighting is to indicate key focus areas to Employees. Some objectives may have higher weighting than others as a result of their impact for instance to service delivery.

The criterion upon which the performance shall be reviewed consists of the following two components as contained in the performance agreement.

- Key Performance Areas (KPAs) i.e. key objectives or outcomes/outputs; and
- Core Competency Requirements (CCRs) i.e. knowledge, skills and behaviours or inputs.

Key performance areas and competency requirements will be scored separately to make up 100 points and then weighted to calculate the final score.

Weighting allocation for employees weighting shall apply as follows:

- KPA or outputs covering the main areas of work account for 80%; and
- CCRs will account for 20% of the assessment.

#### **8.2 MONITORING PHASE/COACHING (MONTHLY STARTING IN JULY)**

Monitoring refers to ongoing performance feedback throughout the financial year. A Manager/Supervisor shall hold informal ad hoc “one-on-one” (performance appraisals) meetings with an Employee monthly or quarterly to:

- Provide strategic guidance for alignment of work to department’s SDBIP and municipality’s IDP;
- Provide feedback to Employee to motivate and encourage good performance;
- Sustain or improve performance;
- Manager/Supervisor identify and support Employees whose performance indicates gaps/substandard performance and consult HRD in this regards;

- Ensure good understanding between the Manager/Supervisor and Employee of work completed, in progress and not started. This eliminates the element of “surprise” during formal reviews; and
- Provide Employee with an opportunity to request assistance where necessary.

Employees shall keep records (minutes) of all informal progress meetings for their own developmental use.

### 8.3 PERFORMANCE REPORTING

Performance Reporting entails monthly and quarterly reporting by employees, wherein quarterly reports are prepared and sent to Internal Audit Unit for audit purpose and thereafter, are submitted to the management and the performance audit committee and ultimately to Council. A table below depicts reporting procedures:

**Table 5: Reporting Procedures/Process**

TIME-FRAME	MSA/ MFMA REPORTING ON PMS	SECTION
<b>MONTHLY REPORTING</b>	<ul style="list-style-type: none"> <li>▪ The Budget Section/CFO compile the monthly report on implementation of the budget for submission to the Executive Mayor and National Treasury.</li> </ul>	<ul style="list-style-type: none"> <li>▪ MFMA Sect 71</li> </ul>
<b>QUARTERLY-REPORTING</b>	<ul style="list-style-type: none"> <li>▪ The Budget Section/CFO compile quarterly financial performance report on implementation of the budget for submission to Council and National Treasury.</li> <li>▪ The Performance Management Unit collates the information and draft the organizational SDBIP Report (Non-financial performance report), which is submitted to Internal Audit.</li> </ul>	<ul style="list-style-type: none"> <li>▪ MFMA Sec 52 (d)</li> <li>▪ MSA Regulation 14(1)(c)</li> </ul>
	<ul style="list-style-type: none"> <li>▪ The Internal Auditor (IA) verifies performance and thereafter submits quarterly audited</li> </ul>	

<b>TIME-FRAME</b>	<b>MSA/ MFMA REPORTING ON PMS</b>	<b>SECTION</b>
	<p>reports to the Municipal Manager and to the Performance Audit Committee.</p> <ul style="list-style-type: none"> <li>▪ The Municipal Manager submits the reports to the Authorities.</li> </ul>	
<b>BI-ANNUAL REPORTING</b>	<ul style="list-style-type: none"> <li>▪ The Performance Audit Committee must review the PMS and make recommendations to council.</li> </ul>	MSA Regulation 14(4)(a)
	<ul style="list-style-type: none"> <li>▪ The Municipality must report to Council at least twice a year.</li> </ul>	Regulation 13(2)(a)
	<ul style="list-style-type: none"> <li>▪ The Accounting Officer must by 25 January of each year assess the performance of the municipality and submit a report to the Mayor, National Treasury and the relevant Provincial Treasury.</li> </ul>	MFMA S72
<b>ANNUAL REPORTING</b>	<ul style="list-style-type: none"> <li>▪ The Annual Report of a municipality must include the Annual Performance Report and any recommendations of the municipality's Audit Committee.</li> </ul>	MFMA S121 (3)(c)(j) & MSA S46
	<ul style="list-style-type: none"> <li>▪ The Accounting Officer of a municipality must submit the Annual Performance Report to the Auditor-General for auditing within two months after the end of the financial year to which that report relate.</li> </ul>	MFMA S126 1(a)
	<ul style="list-style-type: none"> <li>▪ The Auditor-General must audit the Annual Performance Report and submit the report to the Accounting Officer within three months of receipt of the performance report.</li> </ul>	MFMA S126 (3)(a)(b)
	<ul style="list-style-type: none"> <li>▪ The Executive Mayor of a municipality must, within seven months after the end of a financial year, table in the municipal council the Annual Report of the municipality.</li> </ul>	MFMA S127(2)
	<ul style="list-style-type: none"> <li>▪ The Auditor-General may submit the performance report and audit report of a municipality directly to the Municipal</li> </ul>	MFMA S127 (4)(a)

TIME-FRAME	MSA/ MFMA REPORTING ON PMS	SECTION
	<p>Council, the National Treasury, the relevant Provincial Treasury, the MEC responsible for local government in the province and any prescribed organ of the state.</p>	
	<ul style="list-style-type: none"> <li>▪ Immediately after an Annual Report is tabled in the Council, the Accounting Officer of the municipality must submit the Annual Report to the Auditor-General, the relevant Provincial Treasury and the Provincial Department responsible for Local Government in the province.</li> </ul>	MFMA S127 (5)(b)
	<ul style="list-style-type: none"> <li>▪ The Council of the municipality must consider the Annual Report by no later than two months from the date on which the Annual Report was tabled, adopt an oversight report containing Council's comments on the Annual Report.</li> </ul>	MFMA S129 (1)
	<ul style="list-style-type: none"> <li>▪ The meetings of a municipal Council at which the Annual Report is to be discussed or at which decisions concerning the Annual Report are to be taken, must be open to the public and any organ of the state.</li> </ul>	MFMA S130 (1)
<b>Oversight report</b>	<p>The Council of a municipality must consider the municipality's Annual Report (and that of any municipal entity under the municipality's control), and in terms of Section 129, within two months from the date of tabling of the Annual Report, must adopt an oversight report containing the Council's comments, which must include a statement whether the Council:</p> <ul style="list-style-type: none"> <li>• has approved the Annual Report with or without reservations;</li> <li>• has rejected the Annual Report; or</li> </ul>	MFMA Section 129

TIME-FRAME	MSA/ MFMA REPORTING ON PMS	SECTION
	<ul style="list-style-type: none"> <li>• has referred the Annual Report back for revision of those components that can be revised</li> </ul> <p>In terms of Section 132, the following documents must be submitted by the Accounting Officer to the Provincial Legislature within seven days after the municipal Council has adopted the relevant oversight report:</p> <ul style="list-style-type: none"> <li>• the Annual Report (or any components thereof) of each municipality and each municipal entity in the province; and</li> <li>• all oversight reports adopted on those Annual Reports.</li> </ul>	

#### **8.4 REVIEWING/ EVALUATION PHASES (OCTOBER, JANUARY, APRIL AND JULY)**

Performance reviews provide an opportunity to review performance against all set objectives to date prior to year – end review, thus minimising surprises during final assessment and enabling corrective action to be taken during the year. They also assist to recognise strength and determine how to improve weaknesses.

The annual performance evaluation shall involve:-

- An assessment of the extent to which employees achieved the performance objectives and targets outlined in the performance plan, which comprises:-
  - ✓ Each KPA assessed to determine the extent to which the specified standards or KPIs have been met, with due regards to ad hoc tasks that had to be performed under that KPA;
  - ✓ An indicative rating on the five-point scale set out in the table below provided for each KPA; and
  - ✓ The rating assigned to each KPA multiplied by the weight given to that KPA to provide a weight score for that KPA.

- An assessment of the extent to which employees achieved the job specific competencies outlined in the performance plan, which comprises:-
  - ✓ Each competency assessed to determine the extent to which the specified standards of KPIs have been met.
  - ✓ An indicative rating on the five –point scale set out in the table below provided for each job competency;
  - ✓ The rating assigned to each job specific competency multiplied by the weight given to that competency to provide a score for that competency.

The five-point rating scale as set out in the table below shall for purposes of implementation of performance management, apply to all employees.

**Table 6: five-point scale rating scale**

<b>Level</b>	<b>Classification</b>	<b>Definition</b>
<b>1</b>	Unacceptable performance	Performance does not meet the standard expected for the job. The review/assessment indicates that the Employee has achieved below fully effective results against almost all of the performance criteria and indicators as specified in the PA and Performance Plan. The Employee has failed to demonstrate the commitment or ability to bring performance up to the level expected in the job despite management efforts to encourage improvement.
<b>2</b>	Not fully effective	Performance is below the standard required for the job in key areas. Performance meets some of the standards expected for the job. The review/assessment indicates that the Employee has achieved below fully effective results against more than half the key performance criteria and indicators as specified in the PA and Performance Plan
<b>3</b>	Fully effective	Performance fully meets the standards expected in all areas of the job. The appraisal indicates that the Employee has fully achieved effective results against all significant performance criteria and indicators as specified in the PA and Performance Plan.
<b>4</b>	Performance significantly above expectations	Performance is significantly higher than the standard expected in the job. The appraisal indicates that the Employee has achieved above fully effective results against more than half of the performance criteria and indicators and fully achieved all others throughout the year.

5	Outstanding performance	Performance far exceeds the standard expected of an Employee at this level. The appraisal indicates that the Employee has achieved above fully effective results against all performance criteria and indicators as specified in the PA and Performance plan and maintained this in all areas of responsibility throughout the year.
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**Organisational level:**

The Municipal Manager shall have performance assessments with the Executive Directors quarterly, wherein the Executive Directors shall compile quarterly performance reports with portfolio of evidence in terms of the achieved targets, to provide progress made regarding the implementation of the planned targets depicted in their departmental SDBIP.

The following performance reports need to be prepared:

Executive Directors receive sectional performance reports from the managers to compile a department’s quarterly performance report per department with all relevant evidence and submit to the Office of the Municipal Manager (PMS Unit).

The PMS Unit shall consolidate all the departmental reports received from the Executive Directors and compile municipal (organisational) performance reports which shall be subjected to audit process, tabled before Council and made public.

The afore-mentioned performance reports are as follows:

- Quarterly municipal performance report
- Half-yearly (Mid-year) performance report
- Annual Report

There shall be four performance reviews/assessments (informal and formal) for the financial year and shall be conducted at the end of each quarter as follows:

- July-September: **October** (Informal)
- October-December (Mid-year Performance Assessment): **January** (Formal)

- January-March: **April** (Informal)
- April-June (Annual Performance Evaluation): **July** (Formal)

Annual performance evaluations shall be conducted at the end of the financial year by the panel as follows:

For purpose of evaluating the annual performance of the Municipal Manager, an evaluation panel constituted of the following persons must be established -

- Executive Mayor;
- Chairperson of the performance audit committee;
- Member of the mayoral committee;
- Mayor and/or Municipal Manager from another municipality;
- Member of a ward committee as nominated by the Executive Mayor

For the purpose of evaluating the annual performance of managers directly accountable to the municipal manager, an evaluation panel constituted of the following persons must be established-

- Municipal Manager
- Chairperson of the performance audit committee;
- Member of the Mayoral Committee
- Municipal Manager from another municipality;

The Manager for Human Resources Manager shall provide secretariat services to the panels.

**Individual level:**

Ad hoc meetings shall be held between the supervisor and employee on a monthly/quarterly basis to monitor progress in the implementation of the performance plans. The monthly reports of employees shall be consolidated into a quarterly reports which feed into the supervisor/manager/Executive Directors quarterly report supported by the portfolio of evidence of all the achieved targets and variances as well as improvement plans for those variances.

Furthermore, performance reviews/assessments for the financial year shall be conducted at the end of each quarter **(October/January/April/July)** with formal performance assessment held during mid-year to assess progress made by an employee towards meeting performance targets, to identify challenges and to agree to solutions and consider reviewing targets resulting from workplace beyond the employee's control. These quarterly intervals shall be formally recorded in the individual performance agreements.

The performance reviewing process shall involve the following key tasks:

- Manager/Supervisor request Employee to prepare for formal assessment/appraisal by scoring him/herself against the agreed objectives.
- Manager/Supervisor and Employee meet to conduct formal performance appraisal and agree on final scores.
- Employee provide documented evidence of results achieved;
- During the final performance review, Manager/Supervisor and Employee prepare and agree on Employee's personal development plan;
- Both parties sign the performance assessment/appraisal and submit to HR section for record keeping.
- No unauthorised parties may have access to the evaluation results of an employee, without the written permission of the official concerned.

Annual performance evaluations shall be conducted at the end of the financial year, wherein each supervisor shall conduct annual performance evaluations to evaluate performance of their employees against the planned targets. Thereafter, the results of the performance evaluations shall be subjected to performance moderation committees.

## **8.5 REWARDING/CORRECTIVE ACTION PHASE (AUGUST-JANUARY)**

The reward stage of performance management determines what reward and recognition should be given to an individual Employee for outstanding work performed during the financial year. It also determines what corrective actions should be taken in cases of non-performance. Outstanding performance shall be encouraged in the municipality and shall also be rewarded.

A performance related reward shall be awarded to an employee:-

- Who has served the full assessment period of 12 months (1 July to 30 June of each financial year)
- Transferred or seconded horizontally during the performance cycle within the municipality.
- Who is on uninterrupted approved leave for 3 months or longer
- Who is on approved maternity leave for more than 3 months; and
- Who received a performance rating significantly above expectation or outstanding during a performance cycle after moderation of performance results.

A performance related reward shall not be awarded to an employee:

- Appointed after July of performance cycle
- Who is serving probation (newly appointed)
- Whose performance period is less than 12 months
- Whose employment is for a fixed term duration of less than 12 months
- Whose post was upgraded without a change in performance agreement.

The municipality shall not spend more than 1.5% of its annual salary and wage bill for staff performance rewards.

### 8.5.1 Financial rewards

#### Organisational level

Performance bonuses shall be paid to employees who meet the requirements, performed significantly above expectation or outstandingly and obtained rating scales of 4 or 5 during the annual performance evaluations. A performance bonus ranging from 5% to 14% of the all-inclusive remuneration package shall depending on affordability, be paid to an employee in recognition of outstanding performance. In determining the performance bonus, the relevant percentage shall be based on the overall rating, calculated by using the applicable assessment-rating calculator; whereby –

- a score of 130 % to 149 % is awarded a performance bonus ranging from 5 % to 9%; and
- a score of 150 % and above is awarded a performance bonus ranging from 10 % to 14%.

The tables below outline the performance rating/scoring and the threshold upon which a performance bonus shall be payable.

**Table 7a: Threshold for payment of Performance bonuses (Senior Managers)**

Level/ Scale	Performance category	Total Score	Performance Bonus
1	Unacceptable performance	69% and lower	None
2	Performance not fully effective	70%-99%	None
3	Performance fully effective	100%-129%	None
4	Performance significantly above expectations	130%-149%	5%-9%
5	Outstanding Performance	150% and above	10%-14%

### **Individual level**

Performance bonuses shall, based on affordability be paid to employees who meet the requirements, performed significantly above expectation or outstandingly and obtained rating scales of 4 or 5 during the annual performance evaluations. Payment of performance bonuses of staff members shall not exceed 1.5% of the municipality's annual salary and wage bill.

**Table 7b: Threshold for performance rating/scoring (Staff below)**

<b>POINT SCALE</b>	<b>SUMMARY RATING DESCRIPTIONS</b>
5 (equal to/ above 120%)	Outstanding performance
4 (from 101% to 119%)	Performance significantly above expectation
3 (from 75% to 100%)	Performance fully effective
2 (from 50% to 74%)	Performance not fully effective
1 (0% to 49%)	Unacceptable performance

### **8.5.2 Non-financial rewards (Staff below)**

In the case of the municipality being unable to pay performance bonuses due to affordability, employees' outstanding performance shall be recognised and rewarded by issuing out certificates of appreciation and/or leave days as follows:

- Certificates of merit;
- Displaying the names of employees in notice boards.
- Leave days (paid leave)

## **9. MANAGING SUBSTANDARD PERFORMANCE**

A staff member who receives a performance rating below 3 (Performance not fully effective) in terms of the five-point rating table must be assisted as follows:

- The supervisor shall assist an employee with developing his/her competencies through training and close supervision

- Develop a revised personal development plan outlining the behavior and skills that require improvement; and a description of the actions that will be undertaken to improve the identified behavior and skills that require improvement.
- A revised personal development plan shall include the deadline for improvement and a schedule of meetings to assess improvements and provide feedback. Meetings shall be recorded in writing and filed in the employee's file.
- A personal development plan to manage performance improvement shall cover a maximum period of six months at the end of which, a formal performance evaluation must take place.

The following alternatives must and shall apply in respect of a staff member whose performance has not improved to at least a performance that is fully effective:

- Continuation of the actions in the personal development plan
- Other measures as recommended by the performance moderation committee to improve performance
- Offering a staff member alternative job within the municipality which is equivalent to his/her behavior and skills
- Dismissal owing to incapacity, **after having followed the applicable disciplinary procedures** in terms of the provisions of the Labour Relations Act

Poor performance must and shall be dealt with in accordance with item 9 of schedule 8 to the Labour Relations Act.

## **10. PERFORMANCE MANAGEMENT OF STAFF MEMBERS ACTING IN POSTS**

If a staff member is required to act in a post for a period that exceeds three months, the supervisor to whom the acting staff member is reporting, must and therefore shall

review the KPAs and KPIs in consultation with the acting staff member, and include the KPAs and KPIs in the staff member's amended performance agreement.

## **11. TEAM-BASED PERFORMANCE MANAGEMENT SYSTEM**

A municipality may establish a team-based performance management and development system for a category of staff members below the level of a supervisor that will assist the municipality in managing probations, rewards and skills development of staff which is consistent with the principles set out in the MSR, 2021. Before implementing the team-based performance management and development system, the municipality:

- Must pilot the system on a team of staff members in all affected occupational streams and
- Consult the system with recognised trade unions within the local labour forum.

## **12. DISPUTES ABOUT PERFORMANCE AGREEMENTS AND ASSESSMENTS**

### **Organisational level:**

Any disputes about the nature of the employee's performance agreement, whether it relates to key responsibilities, priorities, methods of assessment and/ or any other matter provided for, shall be mediated by –

- The MEC for local government in the province within thirty (30) days of receipt of a formal dispute from the employee; or
- Any other person appointed by the MEC.
- A member of the municipal council, provided that such member was not part of the evaluation panel provided for in sub-regulation 27(4)(e) of the Municipal Performance Regulations, 2006, within thirty (30) days of receipt of a formal

dispute from the employee whose decision shall be final and binding on both parties.

**Individual level:**

- Any disputes about the performance objectives and targets must be mediated by the relevant head of department of the staff member to whom this function is delegated.
- If the dispute is not resolved to the staff member's satisfaction, the staff member may lodge a grievance in terms of the applicable procedures within the HR section.
- Any dispute relating to the conclusion of performance agreement or an amendment to the performance agreement must be referred to the relevant head of department not later than five days of lodging the grievance in terms of the applicable procedures.
- The head of department must ensure that he/she resolves the dispute received in relation to the conclusion of performance agreement or amendment thereof within one month of receipt of such a dispute having considered both representations from the staff member and his/her supervisor and consultation with the head of HR.
- A staff members who is not satisfied with the outcome resulted from the head of department's intervention, may lodge a dispute in terms of dispute resolution mechanisms of the bargaining council.

### **13.PERFORMANCE MODERATION COMMITTEES**

There shall be two moderation committees established to ensure that performance rewards process is dealt with in a fair, realistic and consistent manner within the municipality. These are; a departmental moderation committee established by the Municipal Manager and the municipal moderation committee established by the

Council both of which shall be convened annually. The moderation processes shall take place annually within six months after the end of the financial year.

### **13.1 DEPARTMENTAL PERFORMANCE MODERATION COMMITTEE**

The Municipal Manager must establish a departmental moderation committee comprising of the following:

- The relevant heads of departments, who must act as chairpersons in the committees.
- All managers directly accountable to the heads of departments, who must be recused from the committee before their assessments are considered by the committee; and
- Senior human resource functionary who will advise, guide and provide support, including arrangements for secretariat services.

The purpose of the departmental performance moderation committee is to:-

- Conduct moderation of annual staff performance results to ensure that norms and standards for performance management and development systems are applied in a fair, realistic and consistent manner across the department.
- Assess and compare the performance contribution of each staff member with his or her peers towards the achievement of departmental goals.
- Ensure fairness, consistency, and objectivity with regards to dispersal of performance recognition and ratings achieved for a common understanding amongst supervisors of the performance standards required at each level of the performance rating scale.
- Determine the cost implications for recognition of performance of all staff members within the department.
- Recommend the moderated performance scores for all staff members to the municipal moderating committee for approval.
- Ensure that performance rewards are based on affordability.

- Consider the impact of the performance assessments on financial rewards and options for various forms of recognition.
- Recommend performance rewards as well as remedial actions for performance considered to be below effective performance; and
- Ensure that the integrity of the performance management and development system is protected.

If the departmental moderation committee has reason to believe that any performance assessment by the supervisor does not conform to performance norms and standards or that there is no evidence or information to support the performance ratings, the departmental moderation committee may not reassess, amend or adjust the performance ratings of a staff member, but may refer the assessment back to the relevant supervisor for reassessment in consultation with the affected staff member

Upon conclusion of the reassessment, the departmental moderation committee may reconvene to moderate the assessment of the staff member concerned

If the supervisor fails to reassess the staff member within the stipulated timeframe, despite the request by the relevant authority or the departmental moderation committee still has reason to believe that the performance ratings are not substantiated, the moderation committee may request the higher level supervisor to reassess the relevant staff member.

The affected staff member must be consulted and be offered an opportunity to respond.

### **13.2 MUNICIPAL PERFORMANCE MODERATION COMMITTEE**

Council must establish a municipal moderation committee comprising of the following:

- The Municipal Manager, who must act as chairperson in the committees.
- All heads of departments

- Head of municipal planning and organisational performance
- Head of the municipal internal audit
- Senior human resource functionary who will advise, guide and provide support, including arrangements for secretariat services and
- A performance specialist where applicable

The purpose of the municipal performance moderation committee is to:-

- Provide oversight over the staff performance management and development system to ensure the performance management is valid, fair, and objective.
- Moderate the overall performance assessment score for staff determined after the departmental moderation processes.
- Ensure that final individuals' performance ratings are fair across each grade and department.
- Ensure that each individual assessment outcome corresponds with the performance of the municipality and the relevant department aligned to the staff member's job description or directorate before any recognition of performance is considered.
- Determine the percentages for the merit based rewards subject to affordability and approved annual budget.
- Recommend appropriate recognitions for different levels of performance
- Recommend appropriate remedial actions for performance believed to be substandard
- Advise the municipality on recognition of performance including financial and non-financial rewards, where applicable
- Identify potential challenges in the performance management system and recommend appropriate solutions to the Municipal Manager
- Identify developmental needs for supervisors to improve the integrity of performance management and development system; and
- Consider any other matter that may be considered relevant

## **14. PERFORMANCE AUDITING PROCESS**

For the performance management and development system to enjoy credibility and legitimacy from the public and other stakeholders, performance reports shall be audited to ascertain that reported performance information is accurate, valid and reliable and to assess the effectiveness of the PMDS. The audit process shall take place on a quarterly basis through internal audit process and annually through external audit process.

### **14.1 INTERNAL AUDIT**

Performance auditing is a key element of the monitoring and evaluation process. This involves verifying that the measurement mechanisms are accurate and that proper procedures are followed to evaluate and improve performance. According to section 45, of the Systems Act, the results of the performance measurement must be audited as part of the municipality's internal auditing process and annually by the Auditor-General.

Furthermore, Regulation 14 of the Planning and Performance Regulations of 2001, makes provision that every municipality must develop and implement mechanisms, systems and processes for auditing the results of performance measurements as part of its internal auditing processes.

The Internal Audit Unit shall be responsible for quality checks balances of all performance information submitted for measurement and review. Quality control is the central and key function of the Unit which will ensure achievement of effective and efficient performance by the WRDM. The functions of the internal audit unit include the assessment of the following:

- the functionality of the municipality's performance management system;

- whether the municipality’s performance management system complies with the provisions of the Municipal Systems Act; and
- the extent to which the municipality’s performance measurements are reliable in measuring performance of municipalities on its own indicators and the national indicators

Overly, the municipality’s internal auditors must and shall:

- on a continuous basis audit the performance measurements of the municipality; and
- submit quarterly reports on their audits to the municipal manager and the performance audit committee.

### ***Audit Methodology (Predetermined Objectives)***

The audit of predetermined objectives is an audit of actual performance reported against predetermined objectives, indicators and targets as contained in the quarterly and annual performance reports of the municipality and its entities. This audit is performed to confirm compliance with laws and regulations, the usefulness and reliability of the reported performance information published in annual reports. The audit focuses on the planning, implementation, monitoring and reporting on performance information and provides assurance on whether the reported performance against predetermined objectives is useful and reliable. The audit criteria is outlined in the table below.

**Table 8: Audit Criteria**

<b>Main Criteria</b>	<b>Sub-criteria</b>	<b>Explanation of Audit Criteria</b>
<b>Compliance with legislative requirements</b>	Existence	Objectives, indicators and targets must be predetermined and performance information must be reported against them.
	Timeliness	The annual performance report, together with the annual financial statements must be submitted for audit purposes to the auditors, within two months after the financial year-end.
	Presentation	Performance information must be presented using the National Treasury guidelines. Actual performance information in tables and other information included in the annual report must be consistent. Material differences between actual and planned performance must be explained.
<b>Usefulness</b>	Measurability	Objectives must be made measurable by means of indicators and targets Indicators should be well defined and verifiable Targets should be specific, measurable and time bound.
	Relevance	Clear and logical links should exist between the objectives, outcomes, outputs, indicators and performance targets.
	Consistency	Objectives, indicators and targets must be consistent between planning and reporting documents.
<b>Reliability</b>	Validity	Actual performance reported has occurred and pertains to the entity.
	Accuracy	Amounts, numbers and other data relating to actual performance reported have been recorded and reported appropriately.
	Completeness	All actual results and events that should have been recorded have been included in the annual performance reports

## **14.2 PERFORMANCE AUDIT COMMITTEE**

Regulation 14 of the Planning and Performance Regulations stipulates the provisions that guide the establishment of the Performance Audit Committee and outline the functions and powers entrusted to the committee.

The Regional Performance Audit Committee, shall be responsible to:

- Advise on the implementation of the Performance Management System (PMS) in accordance with the relevant legislation and monitor the performance objectives as set out in the approved IDP and SDBIP;
- Review the quarterly performance reports submitted to it by the Internal Audit in terms of Regulation I4 (l)(c)(ii) of the Local Government: Municipal Planning and Performance Management Regulations; and shall engage departments to provide improvement plans for substandard performance and make recommendations in this regard to the municipal councils;
- Submit a quarterly Performance Audit Report to council during the financial year;
- Review the process for monitoring the attainment of specific goals and objectives developed by management in the Integrated Development Plan (IDP) and SDBIP;
- Prepare PAC report as part of the Annual report to be submitted to the Municipal Councils if requested by that Municipality;
- Review the annual performance report (Sec 46 of MSA) and the Annual report (Sec 121 of MFMA) for the Municipality prior to submission to the Office of the Auditor General;
- Commission in-depth performance investigations where there is either continued poor performance, or a lack of reliability in the information provided;
- Review annually the performance information systems, policies and procedures implemented by Management in order to ensure that the information systems and related controls and security are adequate and effective;

- Evaluate the adequacy, efficiency and effectiveness of the performance management processes and systems;
- Encourage the necessary respect for internal control within the Municipality and shall emphasize the importance of an effective control environment to them;
- Review arrangements established by Management for compliance with regulatory performance reporting requirements;
- Evaluate and review Management’s attitude toward the Internal Audit function and External Audit and whether recommendations made by the Internal/External Auditors are adhered to and taken into consideration for the improvement of the internal control environment;
- Review the compliance with laws, regulations and contractual obligations;
- Review any unresolved issues and matters that exist between the Internal and External Audit and Management, and encourage methods to resolve these incidents; and
- Conduct follow-up activities and monitor how Management has addressed and adhered to the internal and external audit findings.
- The Chairperson of the Performance Audit Committee shall on Mid-term and annual basis be part of the Evaluation panel that evaluates the performance information of Sec 57 candidates for the purpose of assessing performance and issuance of bonus where necessary.
- The Performance Audit Committee will have due regard to the principles of good governance and Performance management as contained in the MFMA, MSA, as amended.
- The Performance Audit Committee shall seek advice from specialists as and when necessary, to respond to a particular performance management issue(s).

### **14.3 AUDITOR GENERAL OF SOUTH AFRICA**

The WRDM Annual Report which includes the Annual Performance Report (APR) together with the Annual Financial Statements (AFS) shall be submitted to the Auditor-General of South Africa (AGSA) by the 31<sup>st</sup> of August annually for audit purpose, as required by the MFMA, 2003 and as part of the AG's audit roles in terms of the Auditor-General as per the Public Act No. 25, 2004.

### **15. CONCLUSION**

Performance management is a critical component through which service delivery is accelerated and ultimately attained as it provides the vital link to determine whether the municipality is delivering on its IDP objectives which are informed by the community aspirations. Performance management also equips political leaders, management, staff members and stakeholders at different levels with a set of tools and techniques for regularly planning, continuously monitoring, and periodically measuring and reviewing the performance of the municipality in terms of indicators and targets for efficiency, effectiveness and economy. Therefore, continuous monitoring of municipal performance is encouraged in the WRDM as it serves as a yardstick which detects areas where corrective actions are required for management to identify and implement improvement measures.

**AUTHORITY**

**Ownership & Review** : **Municipal Manager**  
**Authorization** : **Council**

**APPROVED BY COUNCIL**

**Council Resolution No. Item No.51**

**DATE OF APPROVAL: 30 June 2025**