CAPE WINELANDS DISTRICT
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DRAFT 2026/2027 IDP AMENDMENT

---

of the 2022/2023 – 2026/2027

Integrated Development Plan

CAPE WINELANDS DISTRICT
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The Cape Winelands District Municipality is one of five district municipalities in the Western Cape and is bordered by all the other Districts and the City of Cape Town. The Cape Winelands stretches across
an area of more than 22 000 square kilometers of fertile valleys, majestic mountains and unique fauna and flora. The district is served by five local municipalities namely, Stellenbosch, Drakenstein, Witzenberg, Breede Valley and Langeberg.

The Cape Winelands District is the second most populous district in the Western Cape after the City of Cape Town, accounting for 13,6% of the Western Cape's population and continues to grow. It is natural therefore that the area is also the second largest center of economic activity in the Western Cape and is not only famous because of its wine.

In fact, the Cape Winelands District is the largest exporter of soft fruit in the Southern Hemisphere and has the most diverse tourism related industry, catering for every need and taste and offers internationally renowned educational institutions, including two that cater specifically to special education. All this is available in as little as a half an hour drive from Cape Town International Airport.



Local Municipal Overview

The Breede Valley includes towns such as Rawsonville, De Doorns, Touws River and Worcester. Worcester, approximately 100km from Cape Town, is the main economic node in the Breede Valley municipal area and is well connected through the N1 and the rail network. The Breede Valley municipal area is well known for its scenic beauty, wine industry and other farming activities

The Drakenstein municipal area is well known for its fruit and wine production and processing, as well as its heritage sites and tourist attractions. Paarl is the main service centre and has a rich history and several tourist attractions. Other towns in the municipal area include Wellington, Saron, Gouda, Hermon, Mbekweni and Simondium. These towns primarily serve as service centres for the local agriculture industry. The Drakenstein municipal area is very well connected, with the N1 traversing the area.

The Langeberg municipal area is well known for its wine route (Route 62), which is the longest in the world. The municipal area includes the towns of Robertson, Ashton, Bonnievale, McGregor and Montagu, with Robertson being the main service centre. The towns in the municipal area have a rich history, and the scenic beauty of the area makes it a popular tourist destination

Towns within the Stellenbosch municipal area include Franschhoek, Stellenbosch, Pniël, Klapmuts, Kylemore, Jamestown, Raithby, Ida's Valley, Cloetesville, Kayamandi and Vlottenburg. The town of Stellenbosch is the main economic node within the municipal area and is the second-oldest town in South Africa. The Stellenbosch and Franschhoek areas are well known for their fruit- and wine- production activities, and cultural and heritage attractions. Stellenbosch is also considered a university town, as it houses Stellenbosch University, which attracts both national and international students

The Witzenberg municipal area consists of five towns, namely Ceres, Tulbagh, Wolseley, Op die Berg and Prince Alfred Hamlet. These towns provide goods and services for the local agricultural industry, with some agro-processing also taking place. The Witzenberg municipal area is well known for producing export- quality deciduous fruit, vegetables and wine, and has also created a footprint as a family and adventure tourist destination



Breede Valley Municipality



Drakenstein Municipality



Stellenbosch Municipality



Langeberg Municipality



Stellenbosch Municipality



Agriculture & Agro-Processing



Tourism & Heritage Attractions



Transport & Connectivity



Breede Valley Municipality



Drakenstein Municipality



Langeberg Municipality



Stellenbosch Municipality



Witzenberg Municipality



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CAPE WINELANDS DISTRICT MUNICIPALITY

DRAFT IDP REVIEW REPORT

MARCH 2026

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1. Introduction & Legal Context

The Cape Winelands District Municipality (the Municipality) is legally required to review its Integrated Development Plan (IDP) annually in line with section 34 of the Local Government: Municipal Systems Act 32 of 2000 (MSA). The review must be based on an assessment of the Municipality's performance measurements and any changes in circumstances that demand further revisions and/or amendments to the IDP.

2. The IDP Review Process

2.1 Background

The Municipality's 2022-2027 IDP Process Plan was adopted on 28 April 2022 to provide a clear programme with applicable timeframes for each stage of the IDP formulation, adoption review and/or amendment process and its linkages to the budgeting cycle. In line with the adopted IDP Process Plan and section 21 of the Local Government: Municipal Finance Management Act (MFMA), the annually approved Time Schedule of Key Deadlines (Time Schedule) is utilized to facilitate the annual review of the IDP and the co-ordination of the budget process. The Time Schedule was approved by Council on 18 August 2025. In accordance with the Time Schedule, some of the following activities were taken into account as part of the IDP review process:

- District public participation Forums.
- Strategic Integrated Municipal Engagement (SIME) that served through the Minister and Mayoral Technical Committee (MinMay-Tech).
- Quarterly Service Delivery and Budget Implementation Plans (SDBIPs).
- Medium-Term Budget Policy Statement.
- 2025/26 Adjustments Budget.

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In addition to the above, the following public participation engagements were held through the Mayoral Mondays programme in line with the mechanisms for participation made provision for in the 2022-2027 IDP Process Plan:

1 September 2025	Breede Valley Municipality
8 September 2025	Langeberg Municipality
15 September 2025	Stellenbosch Municipality
22 September 2025	Witzenberg Municipality
29 September 2025	Drakenstein Municipality
04 October 2025	Tankwa Karoo

The Municipality has further been instrumental in consolidating strategic matters across the local municipalities to serve at the Strategic Integrated Municipal Engagement 1 which convened on 24 November 2025 through MinMay-Tech.

2.2 Assessment of Performance Measurements

Council is in the process of finalizing the last annual IDP review process of the current term of office and should take into account the performance of the IDP as reflected through the statutory In-Year Monitoring Reports, Annual Reports, IDP Assessment from the office of the MEC: Local Government and emerging strategic risks. To this end, the MFMA sections 71, 52 and 72 Reports, draft 2024/25 Annual Report, MEC: Local Government 2025 IDP Assessment recommendations, 2025/26 Adjustments Budget and 2025/26 SDBIPs were considered throughout the IDP review process.

The Western Cape Department of Local Government (DLG) provided guidance during the 2025 IDP Assessment Process which informed the 2025/26 IDP Review Process. To this end, the DLG provided an analysis on the implementation trends of the IDP through examining the 2022/23 & 2023/24 Annual Reports which informed the recommendations contained in the Assessment Report. The following recommendations were taken into account during the Strategic Integrated Municipal Engagement that took place during April 2025 and are addressed throughout the 2025/26 financial year.

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1. The Municipality's Annual Reports reflect a trend of underperformance in granting water and/or sanitation subsidies to eligible beneficiaries in the district.
2. The Municipality's Annual Reports reflect a trend of underperformance for two Key Performance Indicators (KPIs) linked to Strategic Objective 2 which include the number of sport facilities upgraded or completed and/or supplied with equipment, and the number of solar geysers installed.

2.3 Changing circumstances

The main consideration of changing circumstances that influence the review of the IDP is the revised Roads Delivery Model announced by the Western Cape MEC: Infrastructure which includes phasing out the roads agency function of the Cape Winelands District Municipality and absorbing the function back into the Western Cape Department of Infrastructure. The scale of its implications on the strategic direction of the Municipality is currently in the process of being determined. This, however, presents a strategic risk that informs the view that the IDP should undergo an IDP amendment process in line section 34b of the Municipal Systems Act and Regulation 3 of the Local Government: Municipal Planning and Performance Management Regulations.

The Roads component of the Technical Services department is expected to be affected by the absorption of the roads agency function and will require a shift in strategic focus and reconsideration of the KPIs linked to strategic objective 3. While the Municipality will not change the strategic objectives at this stage, the intended achievement of outcomes linked to strategic objective 3 i.e., *Municipal infrastructure and transport planning systems are developed in a resilient and well-functioning manner as to result in longevity, and a safe and secure communal environment facilitating socio-economic opportunities,* may be at risk. Noting the commitments made in the IDP adopted in May 2025, spending the grant received and subsequent SDBIPs, together with KPIs to measure the blading and re-gravelling of roads , Council is advised to amend the IDP to make provision for the shift in strategic focus following the impending absorption of the roads agency function.

In addition, the Municipality intends to operationalize the regional landfill site in the 2026/2027 financial year which signals a shift in the manner in which solid waste will be

managed throughout the district. The regional landfill site is also a Priority Focus Area on the Cape Winelands Joint District and Metro Approach Implementation Plan which has reached a level of maturity to impending operationalization. This is another changing circumstance that the Municipality has taken into account as part of the IDP review process which provides motivation for Council to consider amending the IDP for the 2026/27 financial year.

3. Review of the IDP Chapters

IDP Chapters	(Is an update required?) (Y/N)	Reasons to review sections of the chapter.	Impact on SDBIP & KPIs? (Y/N)	Do the reasons justify an IDP amendment process? (Y/N)
1. Introduction & overview	N	N/A	N	N
2. Economic Profile of the District	Y	Updated statistics extracted from the Municipal Economic Review & Outlook and Socio-Economic Profile publications from the Provincial Treasury.	N	N
3. Strategic substance of the IDP	Y	Update public participation process followed through the Mayoral Mondays programme.	N	N
4. Departmental Inputs	Y	Provincial Roads Delivery Model & operationalization of the regional landfill site.	Y	Y
5. Support for local municipalities	Y	Updated information on financial support to municipalities.	N	N
6. Organizational Performance	Y	Updated municipal scorecard and financial plan.	N	N

Scorecard and Financial Plan				
7. Financial Information	**Y**	**Updated financial plan to reflect the draft 2026/27 Medium-Term Revenue and Expenditure Framework.**	**N**	**N**
8. Monitoring and Evaluation	**Y**	**Updated quarterly projections of the service delivery targets and performance indicators.**	**Y**	**N**

4. Conclusion and recommendation

Taking into account the requirements of section 34 of the Municipal Systems Act, within the context of the impending new Roads Delivery Model and the operationalization of the regional landfill site, Council is advised to follow the prescribed process set out in Regulation 3 of the Local Government: Municipal Planning and Performance Regulations to amend the IDP for the 2026/27 financial year. The IDP amendment process provides an opportunity to refocus the strategic thrust of the IDP to ensure agility and responsible resourcing of programmes and projects to promote longer term sustainability of the Municipality's fiscal framework.

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CAPE WINELANDS DISTRICT
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OFFICE OF THE EXECUTIVE MAYOR

MEMORANDUM TO	:	COUNCIL – AMENDMENT OF THE 2022-2027 IDP
MEMORANDUM FROM	:	Alderman (Dr) H Von Schlicht Executive Mayor
REFERENCE	:	
DATE	:	19/03/2026

TABLING OF THE DRAFT AMENDED 2022-2027 INTEGRATED DEVELOPMENT PLAN (IDP) OF THE CAPE WINELANDS DISTRICT MUNICIPALITY

1. PURPOSE

The purpose of this Memorandum is to set out the reasons for the proposal to amend the Cape Winelands District Municipality's 2022-2027 IDP following the 2025/26 IDP review process, in line with the provisions of the Local Government: Municipal Systems Act (32 of 2000) and the Local Government: Municipal Planning and Performance Management Regulations, 2001.

2. LEGISLATIVE AND REGULATORY REFERENCE

Local Government: Municipal Systems Act (32 of 2000) (MSA)

Section 25: *Adoption of integrated development plans.*

(2) An integrated development plan adopted by a municipal council in terms of subsection (1) may be amended in terms of section 34 and remains in force until an integrated development plan is adopted by the next elected council.

Section 34: *Annual review and amendment of integrated development plan.*

A municipal council –

(a) Must review its integrated development plan –

(i) Annually in accordance with an assessment of its performance measurements in terms of section 41; and

(ii) To the extent that changing circumstances so demand; and

(iii) May amend its integrated development plan in accordance with a prescribed process.

Local Government: Municipal Planning and Performance Management Regulation, 2001

Regulation 3: *Process for amending integrated development plans.*

(1) Only a member or committee of a municipal council may introduce a proposal for amending the municipality's integrated development plan in the council.

(2) Any proposal for amending a municipality's integrated development plan must be –

(a) accompanied by a memorandum setting out he reasons for the proposal; and

(b) aligned with the framework adopted in terms of section 27 of the Act.

(3) An amendment to a municipality's integrated development plan is adopted by a decision taken by a municipal council in accordance with the rules and orders of the council.

(4) No amendment to a municipality's integrated development plan may be adopted by the municipal council unless-

(a) all the members of the council have been given reasonable notice;

(b) the proposed amendment bas been published for public comment for a period of at least 21 days in a manner that allows the public an opportunity to make representations with regard to the proposed amendment;

(c) the municipality, if it is a district municipality, has complied with sub-regulation (5); and

d) the municipality, if it is a local municipality, has complied with sub-regulation (5)

A district municipality that considers an amendment to its integrated development plan must-

(a) consult all the local municipalities in the area of the district municipality on the proposed amendment; and

(b) take all comments submitted to it by the local municipalities in that area into account before it takes a final decision on the proposed amendment.

(6) A local municipality that considers an amendment to its integrated development plan must-

(a) consult the district municipality in whose area it falls on the proposed amendment; and

(b) take all comments submitted to it by the district municipality into account before it takes a final decision on the proposed amendment.

Taking into account the requirements of the MSA and its Regulations, the Cape Winelands District Municipality underwent the IDP review process as guided by the Local Government: Time Schedule of Key Deadlines. To this end, two main considerations were taken into account in line with the requirements of section 34 of the MSA i.e., the new Roads Delivery Model of the Western Cape Department of Infrastructure and the Impending operationalization of the regional landfill site.

3. REASONS FOR THE PROPOSAL TO AMEND THE IDP

The main consideration of changing circumstances that influence the review of the IDP is the revised Roads Delivery Model announced by the Western Cape MEC: Infrastructure which includes phasing out the roads agency function of the Cape Winelands District Municipality and absorbing the function back into the Department of Infrastructure. The scale of its implications on the strategic direction of the Municipality has not yet been determined. This, however, presents a strategic risk that informs the view that the IDP should undergo an IDP amendment process in line section 34b of the MSA and Regulation 3 of the Local Government: Municipal Planning and Performance Management Regulations.

The Roads component of the Technical Services department is expected to be affected by the absorption of the roads agency function and will require a shift in strategic focus and reconsideration of the KPIs linked to strategic objective 3. While the Municipality will not change the strategic objectives at this stage, the intended achievement of outcomes linked to strategic objective 3 i.e., *Municipal infrastructure and transport planning systems are developed in a resilient and well-functioning manner as to result in longevity, and a safe and secure communal environment facilitating socio-economic opportunities,* may be at risk. Noting the commitments made in the IDP adopted in May 2025 and subsequent SDBIPs, together with KPIs to measure the blading and re-gravelling of roads, Council is advised to amend the IDP to make provision for the shift in strategic focus following the impending absorption of the roads agency function.

In addition, the Municipality intends to operationalize the regional landfill site in the 2026/2027 financial year, which signals a shift in the manner in which solid waste will be managed throughout the district. The regional landfill site is also a Priority Focus Area on the Cape Winelands Joint District and Metro Approach Implementation Plan which has reached a level of maturity to impending operationalization. This is another changing circumstance that the Municipality has taken into account as part of the IDP review process which provides motivation for Council to consider amending the IDP for implementation over the 2026/27 financial year.

This Memorandum further advises that the proposal to amend the IDP is aligned with the 2022 – 2027 Cape Winelands District Framework adopted by Council on 28 April 2022 in terms of section 27 of the MSA.

ALDERMAN (DR) HELENA VON SCHLICHT
EXECUTIVE MAYOR





Ald (Dr) Elna von Schlicht

Executive Mayor Foreword

It gives me great honour to present the amended Integrated Development Plan (IDP) for the 2026/2027 financial year, which continues to serve as the Cape Winelands District Municipality's principal strategic document guiding development, service delivery, and the improvement of the quality of life for all citizens within our district.

This amended IDP reflects our commitment as a municipality to respond to changing circumstances and to ensure that our planning remains relevant, realistic, and responsive to the needs of our communities. It represents our collective resolve to build a responsive, inclusive, and developmental municipality that serves all communities within our jurisdiction, in line with the objectives of local government.

The IDP is not only a legislative requirement in terms of Chapter 5 of the Local Government: Municipal Systems Act, 2000 (Act No 32 of 2000), but more importantly, it is a strategic instrument that informs our planning, budgeting, and service delivery priorities. It must reflect the voices and needs of our communities, gathered through extensive and meaningful public participation processes. Council approved a comprehensive public participation roadmap, which was further strengthened by additional initiatives undertaken by the Cape Winelands District Municipality to ensure that we genuinely listen to and engage with our communities.

Our IDP is aligned with national and provincial priorities, ensuring that our efforts contribute meaningfully to broader development goals. We recognise that sustainable development can only be achieved through strong partnerships, and we value the collaboration between stakeholders, including local communities, business, civil society, and government, in enhancing the vision, mission, and strategic objectives of Cape Winelands District Municipality.

A significant development in our planning is that, as from 1 April 2026, the Roads Agency function will no longer form part of the services delivered by Cape Winelands District Municipality. This change has necessitated a review of certain priorities and programmes to ensure that we continue to deliver services effectively and responsibly.

At the centre of this plan are the communities we serve. Through engagements with citizens, community organisations, and stakeholders, including our Mayoral Monday engagements, where government was brought closer to communities and where they are afforded the opportunity to engage directly with the Executive Mayor and municipal departments. During these public participation engagements, we have gained valuable insight into the challenges faced by our communities and the priorities that matter most to them.

Key issues such as safe and reliable road infrastructure, accessible transport, basic service delivery, local economic development, community safety, job creation, poverty alleviation, and sustainable development remain central to our focus.

One of our significant legacy projects is the Regional Landfill Site, into which Council has already invested approximately R110 million. This capital project will strengthen waste management services across the Breede Valley, Witzenberg, and Langeberg municipal areas. It is also a critical initiative aimed at promoting dignity, environmental sustainability, and long-term resilience in our district.

The IDP further reflects our ongoing commitment to working collaboratively with communities, government partners, and stakeholders to build a municipality that is inclusive, responsive, and focused on sustainable, long-term development. Meaningful public participation remains essential in shaping our development trajectory and ensuring that our initiatives respond to the lived realities of our citizens.

While we remain aware of the challenges facing municipalities across the country, we are resolute in our commitment to improving service delivery, strengthening infrastructure, and creating an enabling environment for economic growth and social development.

On behalf of Council, I extend my sincere appreciation to all communities and stakeholders who participated in the IDP process. Your contributions are invaluable and continue to shape the future of our municipality.

We will continue striving towards a strong, resilient, effective, and responsive Cape Winelands District Municipality that serves all communities equitably.

“A Cape Winelands District Municipality of Excellence and Sustainable Development”

ALDERMAN (DR) ELNA VON SCHLICHT
EXECUTIVE MAYOR


Mr Henry

Municipal Manager Foreword

The Integrated Development Plan (IDP) remains the principal strategic planning instrument that guides the development priorities, service delivery objectives, and resource allocation of the municipality. It provides a framework through which the municipality aligns its planning and budgeting processes to the needs and aspirations of the community while ensuring compliance with national and provincial legislation.

The 2026/2027 Amended IDP has been prepared to reflect significant institutional and operational changes that have occurred during the current planning cycle, particularly in relation to the Roads Agency Function. These changes have had a direct impact on the municipality's roles, responsibilities, and associated resource requirements. As a result, it became necessary to review and amend the existing IDP to ensure that the strategic priorities, programmes, and financial planning of the municipality remain aligned with the revised service delivery environment.

In terms of Section 34 of the Municipal Systems Act (Act 32 of 2000), a municipal council must review and may amend its Integrated Development Plan when changing circumstances so demand. The amendments contained in this document therefore ensure that the IDP continues to be a credible, relevant, and responsive planning instrument that reflects current realities. Furthermore, the review process has been undertaken in alignment with the requirements of the Municipal Systems Act, the Municipal Finance Management Act (Act 56 of 2003), and other applicable legislative and policy frameworks that regulate municipal planning, performance management, and budgeting.

The amendment process also reaffirms the municipality's commitment to integrated planning, sound governance, and accountable service delivery. It ensures that the municipality remains focused on sustainable infrastructure development and the continued enhancement of basic service delivery to our communities.

I would like to acknowledge the contributions of Council, management, officials, sector departments, and stakeholders who participated in the review process. Their input has been valuable in ensuring that this amended IDP remains a practical and implementable guide for development within the municipality.

The municipality remains committed to transparent governance, effective planning, and the responsible management of public resources in pursuit of sustainable local development and improved quality of life for all residents.

HENRY F. PRINS
MUNICIPAL MANAGER

INTEGRATED DEVELOPMENT PLAN



CHAPTER 1

INTRODUCTION AND OVERVIEW



CAPE WINELANDS DISTRICT

MUNICIPALITY • MUNISIPALITEIT • UMASIPALA

Vision

A unified Cape Winelands of excellence for sustainable development

Mission

Working together towards effective, efficient and economically sustainable development

The following core values reflect the character and organisational culture of the municipality:



Commitment to the development of people



Integrity in the performance of our duty



Respect for our natural resources



Transparency in accounting for our actions



Regular consultation with customers on the level and quality of service



Higher levels of courtesy and professionalism in the workplace



Efficient spending and responsible utilization of municipal assets



Celebrating Diversity

Top Administrative Structure



Mr Henry Prins

MUNICIPAL MANAGER

Executive Directors



Mrs Fiona Du Raan-Groenewald

CHIEF FINANCIAL OFFICER



Mrs Ingrid Barnard

CORPORATE SERVICES



Mr Pietie Williams

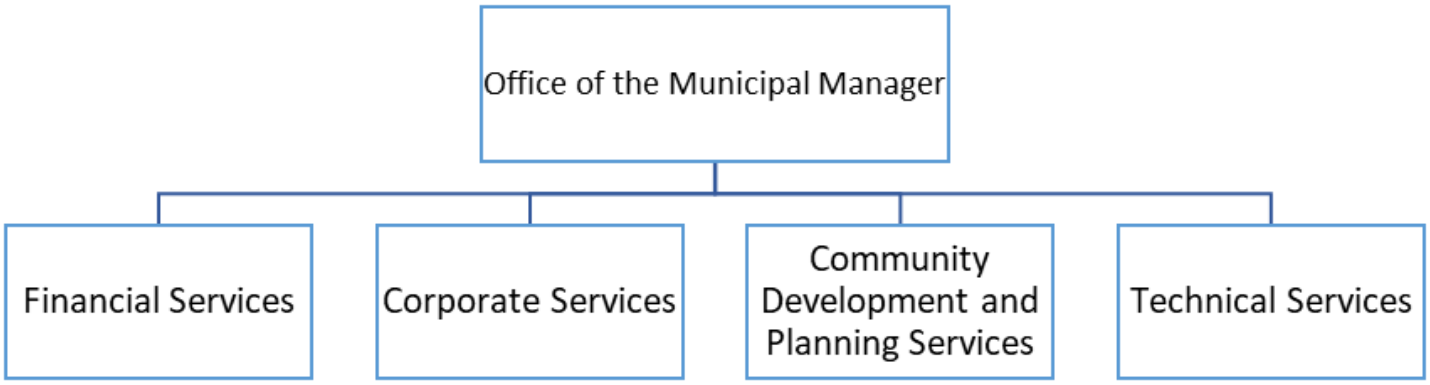
COMMUNITY DEVELOPMENT AND PLANNING SERVICES



Vacant

TECHNICAL SERVICES

CWDM: Macro Structure



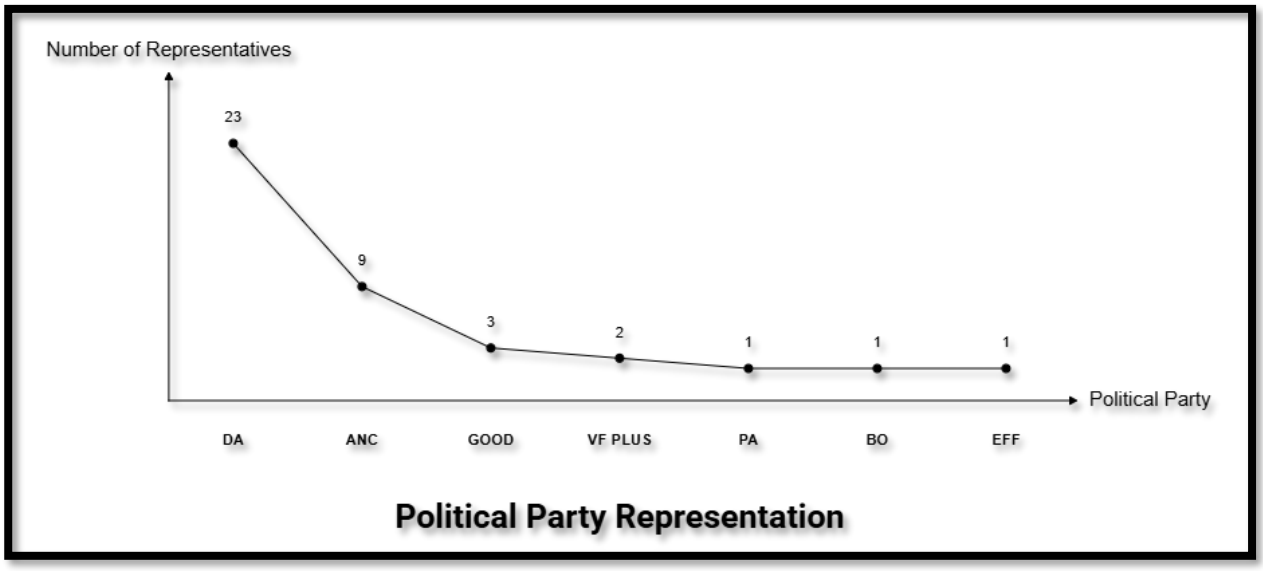
POLITICAL LEADERSHIP

CAPE WINELANDS DISTRICT

MUNICIPALITY

The Cape Winelands District Municipality is an organ of state within the local sphere of government exercising legislative and executive authority within its area of jurisdiction as specified by the Local Government: Municipal Structures Act No. 117 of 1998.





STRATEGIC OBJECTIVES

National KPA	SO	Strategic Objectives	Outcomes
Municipal Financial Viability and Management	**SO1**	**Provide sustainable strategic financial management and support services**	• *The municipality aims to create sustainable sources of funding and management thereof, ensuring long-term financial viability.* • *Resources are efficiently used to maximise contributions to LED and support services.*
Good Governance and Public Participation	**SO2**	**Foster good governance processes as prescribed by legislation and best practice**	• *A foundation for effective governance that promotes political and administrative stability, the mitigation of identified risks, an improved ethical culture and functional oversight, has been established and is adhered to.*
Basic Service Delivery	**SO3**	**Provide sustainable infrastructure services and transport planning services that enable social and economic opportunities**	• *Infrastructure services and resources are financially supported and measured.* • *Municipal infrastructure and transport planning systems are developed in a resilient and well-functioning manner as to result in longevity, and a safe and secure communal environment facilitating socio- economic opportunities*

National KPA	SO	Strategic Objectives	Outcomes
Basic Service Delivery	**SO4**	**Monitor and promote a clean, healthy and safe living environment whilst providing emergency response services for all residents throughout the district**	• *All residents have equal access to basic service delivery.* • *Resources, including stable infrastructure, technological and spatial resources, as well as the promotion of water services, are efficiently utilized to ensure the long-term well-being and unity of the community.* • *Disaster response plans are well-established and regularly tested, enabling an improved response to incidents, which creates stronger relationships within the district and a well-coordinated disaster management centre* • *A well-coordinated fire services division, establishing a fire safe environment for all.* • *The provision of municipal health services and air quality management.*
Municipal Transformation and Institutional Development	**SO5**	**Establish a skilled workforce and performance orientated administration to promote the growth and development of the organisation**	*A capable and knowledgeable workforce that positively contribute and successfully provide high-quality services to the community, and become enablers of development.* *Consequence/ development management and a performance management system embedded into the functioning of the municipality in order to promote optimal performance.*
Local Economic Development	**SO6**	**Facilitate partnerships that cultivate economic growth and development throughout the district**	• *Achieving an enabled environment by creating inclusive and equitable economies, and developmental growth through the economic benefits generated from niche markets, innovation, and partnerships.*

CHAPTER 2

SOCIO-ECONOMIC PROFILE OF THE DISTRICT



Cape Winelands District: At a Glance

Demographics

Population Estimates, 2024; Actual households, 2024

Population

1 013 983

(Source: Department of Health)

Households

217 455

(Source: Cape Winelands District Municipality)

Education

2023

Matric Pass Rate	74.5%
Learner Retention Rate	77.2%
Learner-Teacher Ratio	27.1

Poverty

2023

Gini Coefficient	0.59
Poverty Head Count Ratio (UBPL)	69.4%

Health

2023/24

Primary Health Care Facilities	Immunisation Rate	Maternal Mortality Ratio (per 100 000 live births)	Teenage Pregnancies – Delivery rate to women U/19
45 (excl. mobile/satellite clinics)	65.5%	31.4	11.5%

Safety and Security

Actual number of reported cases in 2023/24

Residential Burglaries	DUI	Drug-related Crimes	Murder	Sexual Offences
4 234	758	7 388	437	1 039

Access to Basic Service Delivery

Percentage of households with access to basic services, 2023

Water	Refuse Removal	Electricity	Sanitation	Housing
87.1%	85.6%	97.1%	96.2%	88.8%

Labour

2023

Unemployment Rate (narrow definition)

11.6%

Socio-economic Risks

Risk 1	Job losses
Risk 2	Low learner retention
Risk 3	Low skills base (Labour)

Largest 3 Sectors

Contribution to GDP, 2023

Finance, insurance, real estate and business services	Wholesale & retail trade, catering and accommodation	Manufacturing
28.3%	15.0%	13.9%

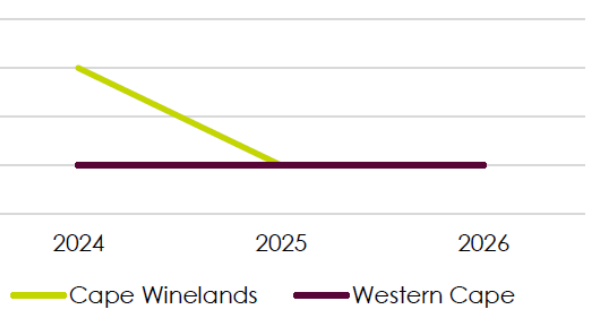
DEMOGRAPHICS

Current Population
1 013 983 2024

Estimated Population
1 098 839 2029

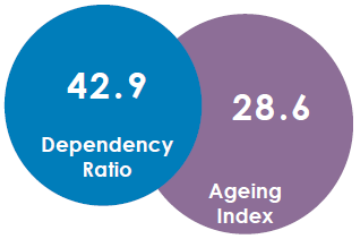
Estimated Average Annual Population Growth Rate 2023 - 2029
1.4%

Estimated Population Growth

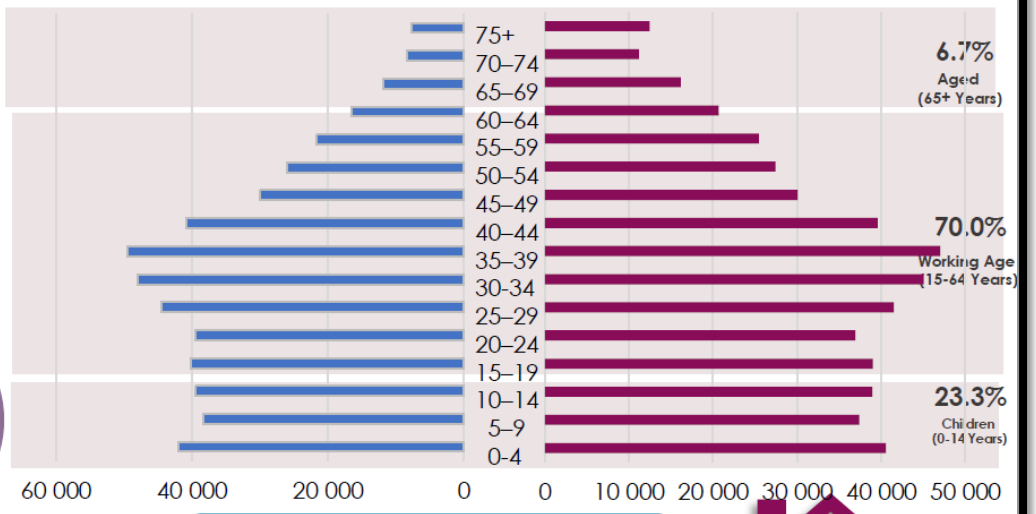


Gender and Age Dynamics

Female 50.4%
Male 49.6%



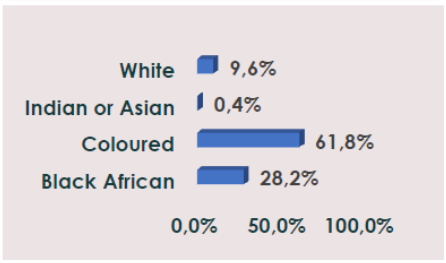
Population by Age 2024

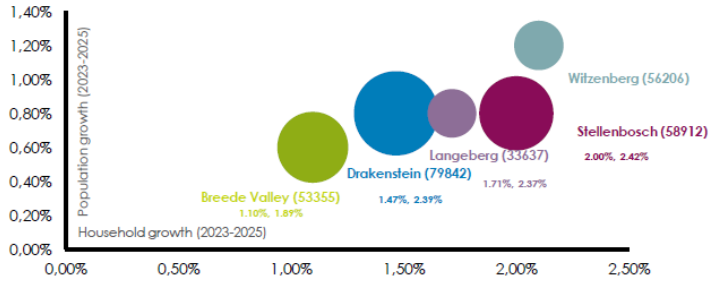


Population and Household Growth 2024

3.6
Household Size

Racial Split



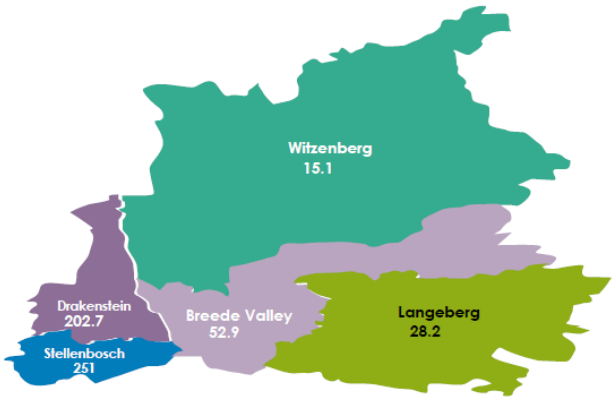


Population Density Cape Winelands 2024



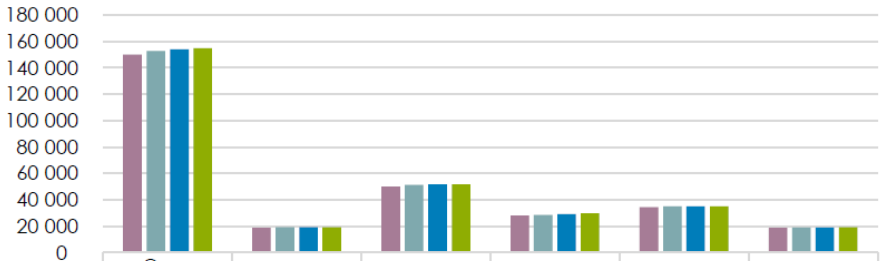
45.9 people/km² 2023

46.6 people/km² 2024



EDUCATION

Learner enrolment
2020 - 2023



	Cape Winelands District	Witzenberg	Drakenstein	Stellenbosch	Breede Valley	Langeberg
2020	150 125	18 705	50 186	28 033	34 542	18 659
2021	152 914	19 112	51 128	28 594	35 092	18 988
2022	154 061	19 138	51 730	29 092	35 112	18 989
2023	154 858	19 282	51 648	29 826	34 980	19 122

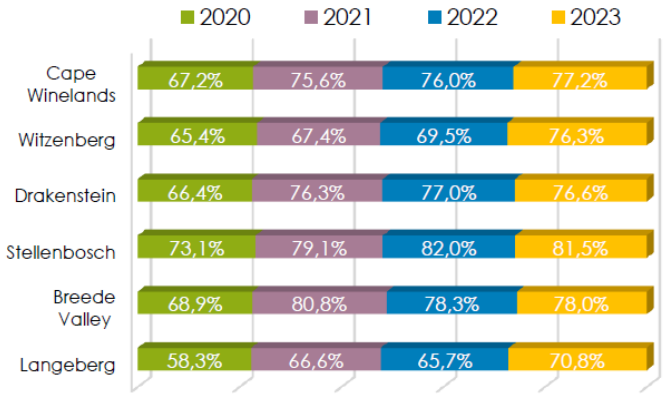
Educational facilities
2023

271
Number of schools

76.4%
Proportion of no-fee schools

Number of schools with libraries **122**

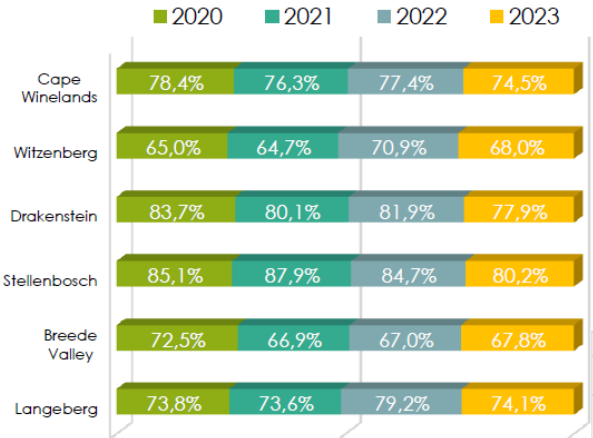
Learner retention
2020 - 2023



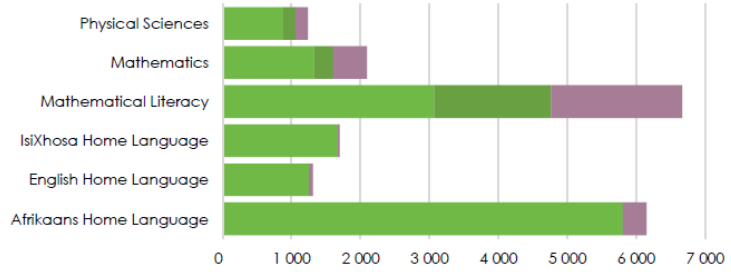
Learner-teacher ratio
2020 - 2023

	2020	2021	2022	2023
Cape Winelands District	27.8	28.0	27.8	27.1
Witzenberg	27.8	28.6	29.0	27.8
Drakenstein	27.7	28.0	27.6	27.0
Stellenbosch	26.8	27.2	26.7	26.3
Breede Valley	28.3	28.0	27.8	27.5
Langeberg	28.4	28.4	27.7	27.4

Matric outcomes
2020 - 2023



Matric subject outcomes
Cape Winelands District 2023



	Afrikaans Home Language	English Home Language	IsiXhosa Home Language	Mathematical Literacy	Mathematics	Physical Sciences
Achieved at 40%	5 809	1 255	1 675	3 071	1 328	884
Achieved at 30% - not shown for Home Languages				1 692	274	171
Achieved below 40% for Home Languages Achieved below 30% for Maths Lit, Maths, Physics	343	56	23	1 904	489	186

2024 Socio-Economic Profile

HEALTH

Healthcare Facilities

45 Fixed PHC Facilities

31 Mobile Clinics

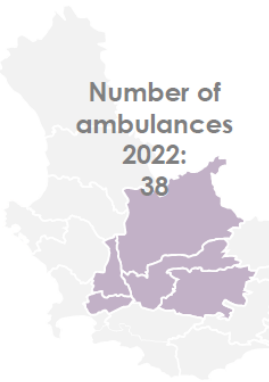
59 ART Clinics/ Treatment Sites

81 TB Clinics/ Treatment Sites

4 District Hospitals

2 Regional Hospitals

Emergency Medical Services



EMS per 10 000 people	
CWD	**0.4**
Witzenberg	0.4
Drakenstein	**0.2**
Stellenbosch	0.3
Breede Valley	0.5
Langeberg	0.7

Maternal Health

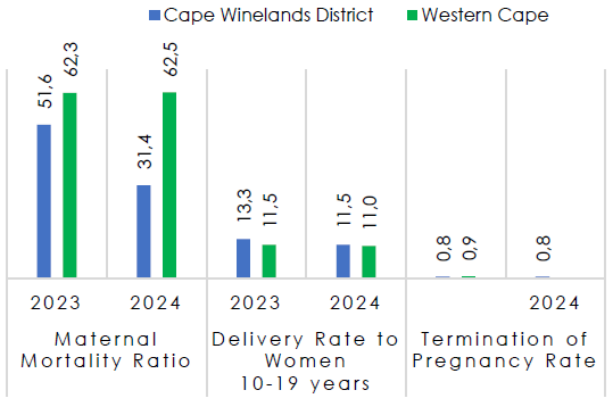
CAPE WINELANDS DISTRICT 2024: Maternal Health Indicators

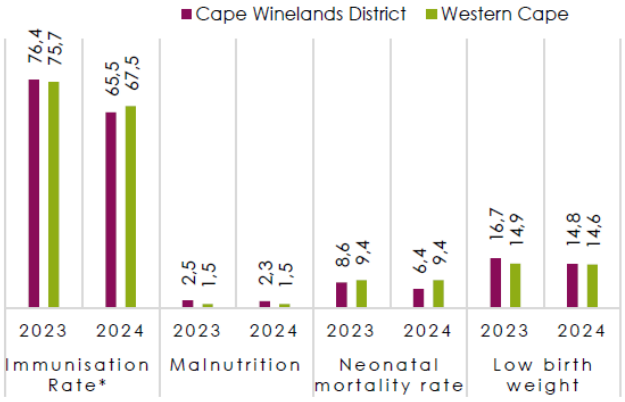
- Maternal deaths in facility : 4
- Deliveries in facility u19 years : 1 624
- Termination of pregnancy : 2 134

Child Health

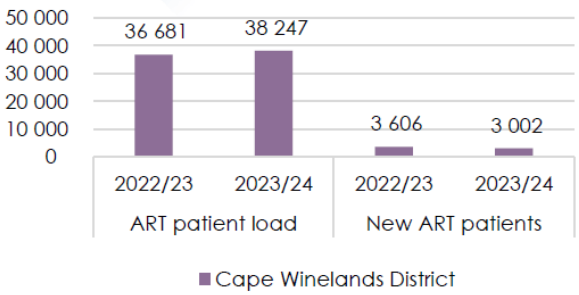
CAPE WINELANDS DISTRICT 2024: Child Health Indicators

- Live births under 2500g (low birth weight) : 2 128
- Inpatient deaths 6-28 day : 92
- Immunisation u1 year : 12 238
- Severe acute malnutrition u5 years : 199

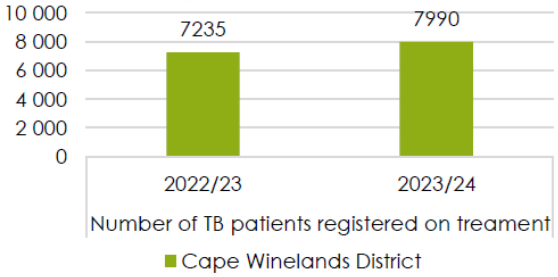




HIV/AIDS

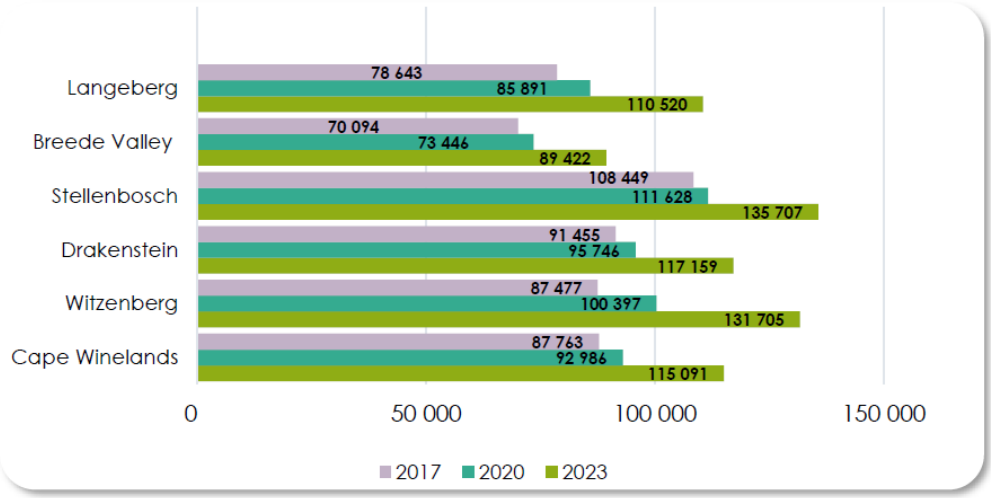


Tuberculosis

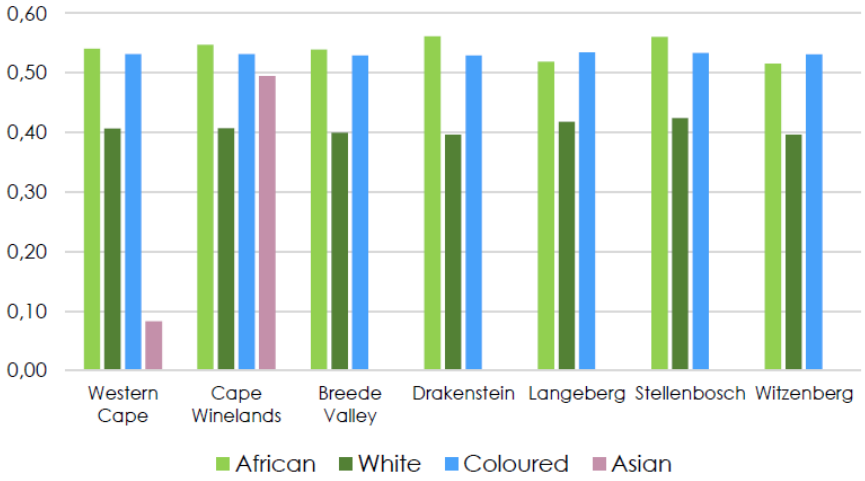


POVERTY

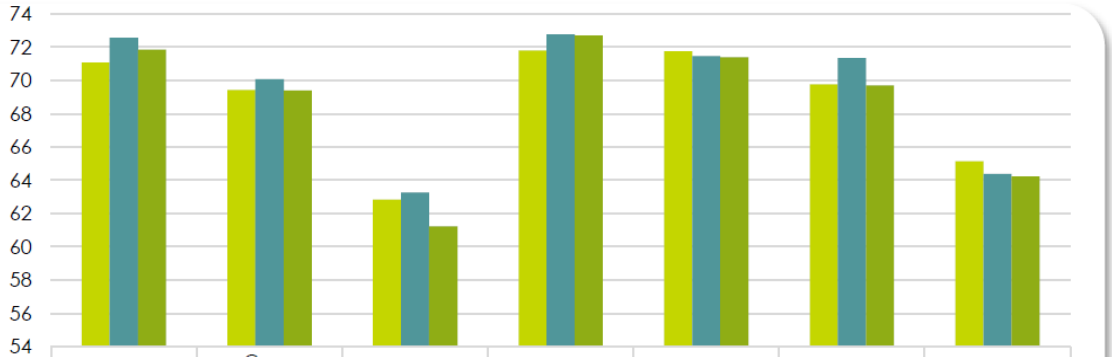
GDP per capita



Income Inequality



Poverty Line



	Western Cape	Cape Winelands	Witzenberg	Drakenstein	Stellenbosch	Breede Valley	Langeberg
2017	71,1	69,4	62,8	71,8	71,7	69,8	65,1
2020	72,6	70,1	63,3	72,8	71,5	71,3	64,4
2023	71,9	69,4	61,2	72,7	71,4	69,7	64,2

BASIC SERVICE DELIVERY



27 432

Western Cape

Total number of households

Cape Metro	1 369 703	West Coast	136 715
Cape Winelands	217 455	Overberg	110 767
Central Karoo	27 432	Garden Route	241 347



87.5% Cape Metro
88.0% Cape Winelands
99.0% Central Karoo
89.1% West Coast
86.1% Overberg
89.4% Garden Route
Formal Dwelling



0.5% Cape Metro
0.8% Cape Winelands
0.3% Central Karoo
1.5% West Coast
0.8% Overberg
1.3% Garden Route
Traditional Dwelling



11.7% Cape Metro
11.7% Cape Winelands
0.8% Central Karoo
10.5% West Coast
13.7% Overberg
10.4% Garden Route
Informal Dwelling

0.2% Cape Metro
0.2% Cape Winelands
0.1% Central Karoo
0.4% West Coast
0.3% Overberg
0.2% Garden Route
Other/Unspecified



Piped water inside dwelling/yard or communal/neighbor's tap

Cape Metro	85.4%
Cape Winelands	98.9%
Central Karoo	99.7%
West Coast	98.8%
Overberg	98.7%
Garden Route	99.4%



Flush/chemical toilet

Cape Metro	93.4%
Cape Winelands	96.0%
Central Karoo	97.5%
West Coast	94.5%
Overberg	93.4%
Garden Route	94.5%



Electricity (incl. generator) as primary source of lighting

Cape Metro	96.7%
Cape Winelands	96.9%
Central Karoo	96.5%
West Coast	95.8%
Overberg	95.0%
Garden Route	95.8%



Refuse removal at least once a week

Cape Metro	90.2%
Cape Winelands	86.7%
Central Karoo	81.4%
West Coast	87.7%
Overberg	85.6%
Garden Route	90.9%

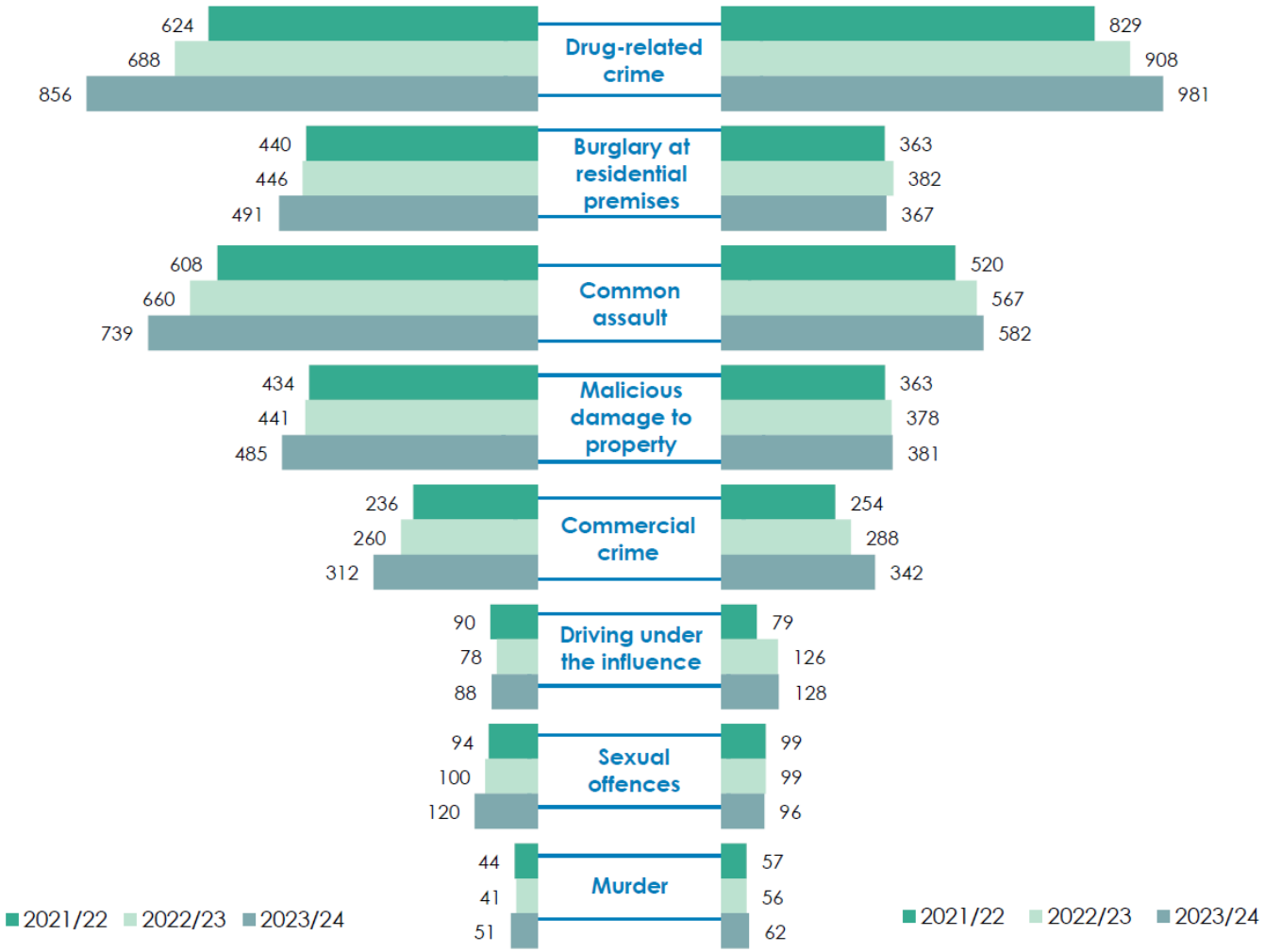
SAFETY AND SECURITY

CAPE WINELANDS

3 142 Total reported crime per 100 000 people in the Cape Winelands District in 2023/24

WESTERN CAPE

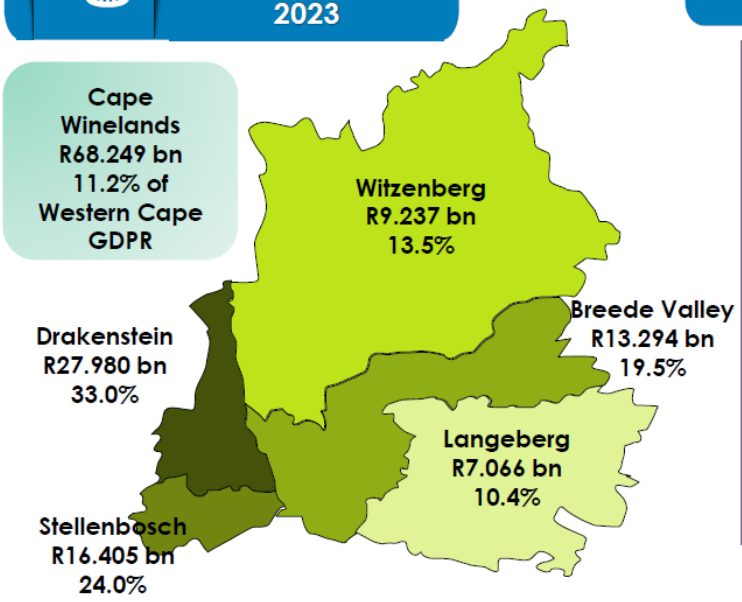
2 939 Total reported crime per 100 000 people in Western Cape in 2023/24





GDPR PERFORMANCE

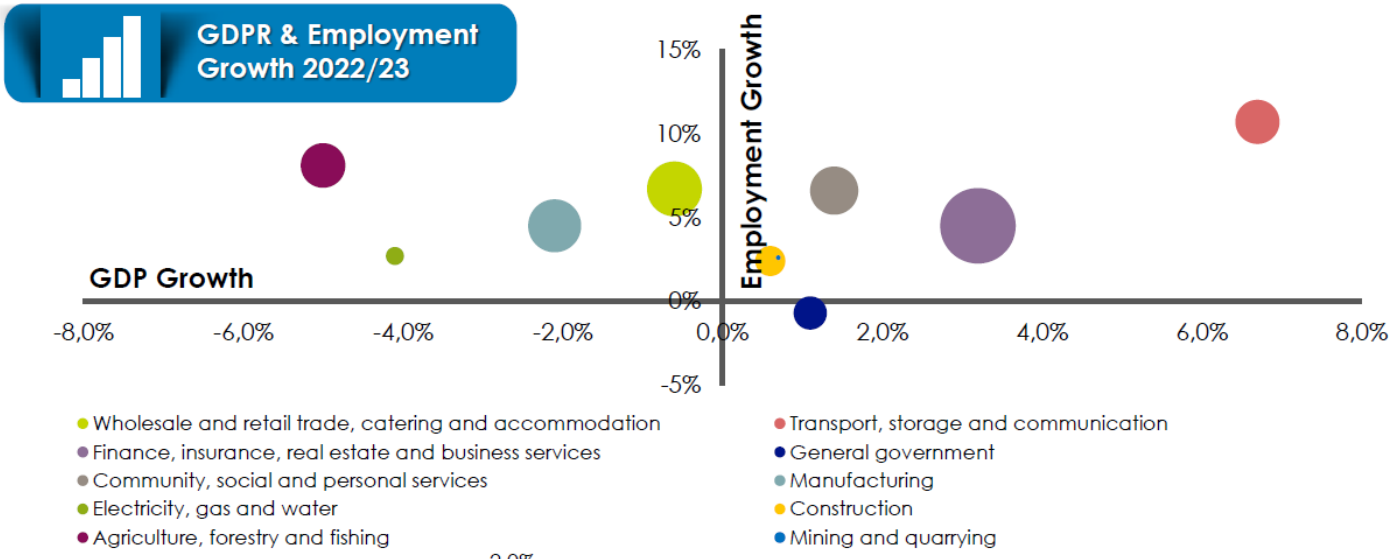
GDPR Contribution 2023



Sectoral contribution to GDPR 2023



GDPR & Employment Growth 2022/23



GDPR forecast



	2023	2024	2025	2026
Cape Winelands	1,9%	1,3%	1,4%	1,4%
Western Cape	0,7%	1,1%	1,7%	1,2%

International Trade, 2023

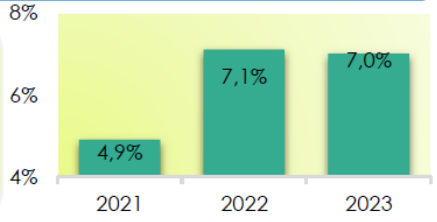


Imports R16.2 billion

Exports R55.2 billion

Top exported products	Top imported products
Citrus fruit, fresh or dried	Rice
Wine of fresh grapes, including fortified wines	Fruit juices (including grape must) and vegetable juices, unfermented
Grapes, fresh or dried	Wheat and meslin

Tourism spend % of GDP



CHAPTER 3

STRATEGIC SUBSTANCE

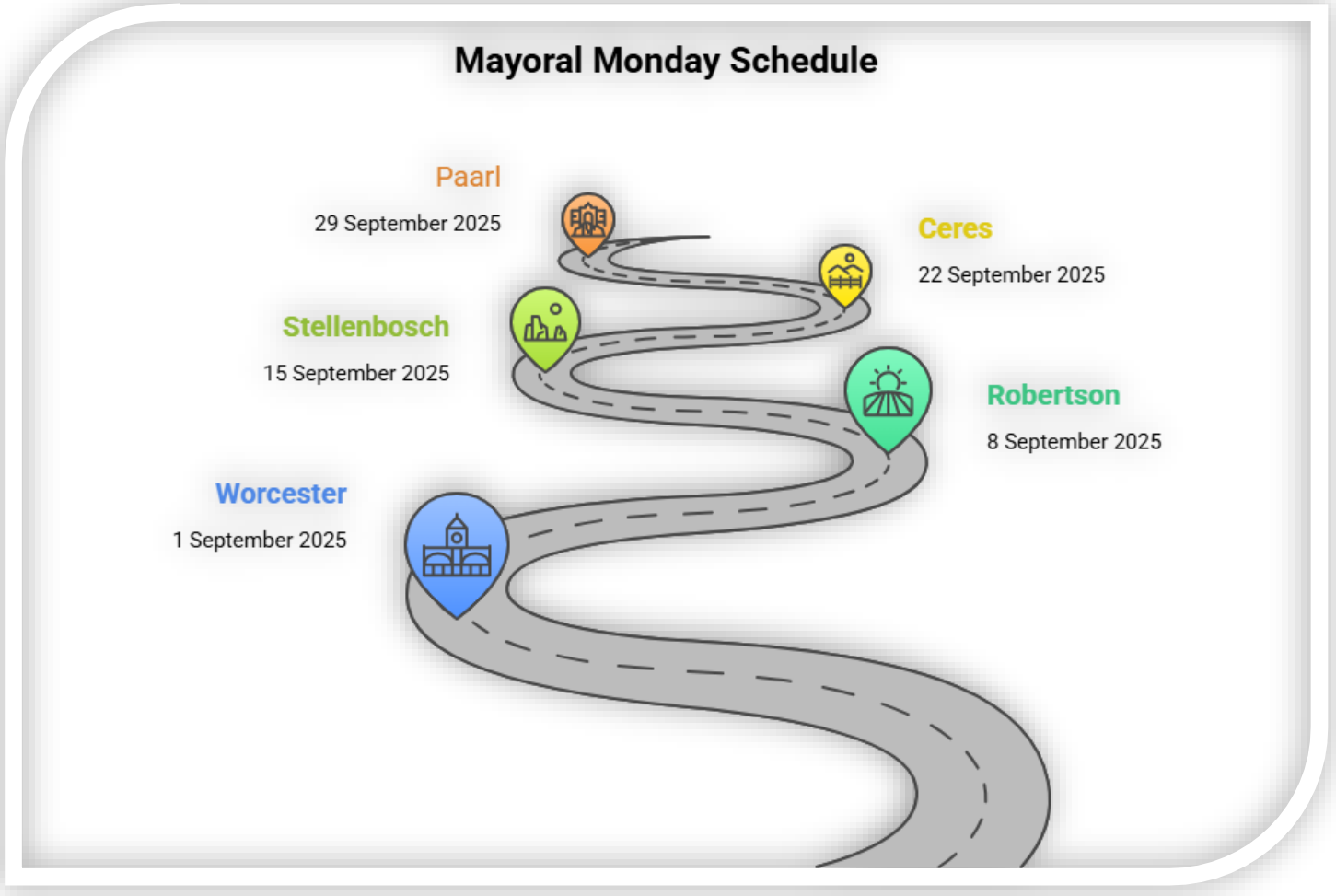
OF THE IDP



Public Participation Process

Cape Winelands District Municipality implemented the following initiatives to ensure public participation:

- **Mayoral Mondays:** Held in each local municipality to facilitate direct engagement.
- **Public Invitations:** Disseminated via various social media platforms.
- **Newspaper Advertisements:** Published in local newspapers across the district.
- **Online Accessibility:** IDP- and budget-related documents were made available on the municipal website.
- **Mayoral Business Engagement:** Businesses and Farm owners' network to unlock the excellence of our district.



Joint District and Metro Approach (JDMA)

Introduction

JDMA is a strategy aimed at fostering collaboration and alignment between different spheres of government to address complex challenges and improve service delivery outcomes, through:

1. **Integrated Planning:** Ensuring that all government entities operating within a district or metro are aligned in their plans and priorities to avoid duplication and promote efficiency.
2. **Improved Service Delivery:** Addressing socio-economic challenges more effectively by leveraging shared resources and expertise.
3. **Increased Stakeholder Collaboration:** Engaging municipalities, government departments, traditional leadership, and the private sector to work together towards common development goals.
4. **Cost-effectiveness:** Reduce duplication and enhanced coverage.

Cape Winelands District Municipality: Joint District and Metro Approach – Implementation Plan (Appendix A) – *Presentation as approved by the DCF on 22 November 2024*

CHAPTER 4

DEPARTMENTAL INPUTS

2026/2027



CAPE WINELANDS DISTRICT

MUNICIPALITY • MUNISIPALITEIT • UMASIPALA

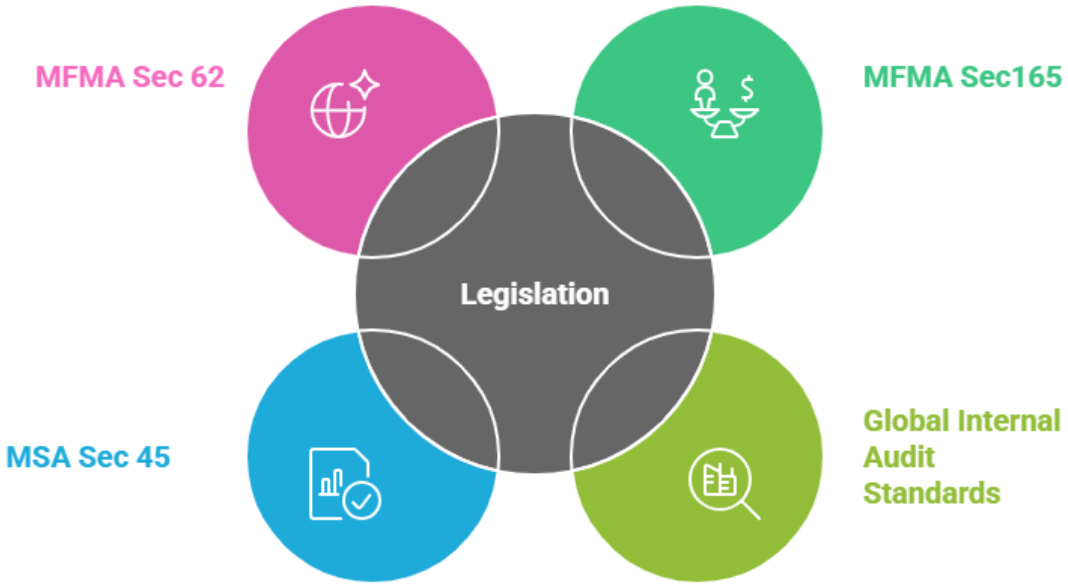
OFFICE OF THE MUNICIPAL MANGER

DIVISION

Internal Audit

Internal Auditing strengthens the organisation's ability to create, protect and sustain value by providing board and management with independent, risk-based and objective assurance, advice, insight and foresight.

Legislative context of division





MAJOR OPERATIONAL AND/OR CAPITAL EXPENDITURE PLANNED FOR 2026/2027

Procurement of an integrated Internal Audit and Risk Management Software Tool – Approx R1m

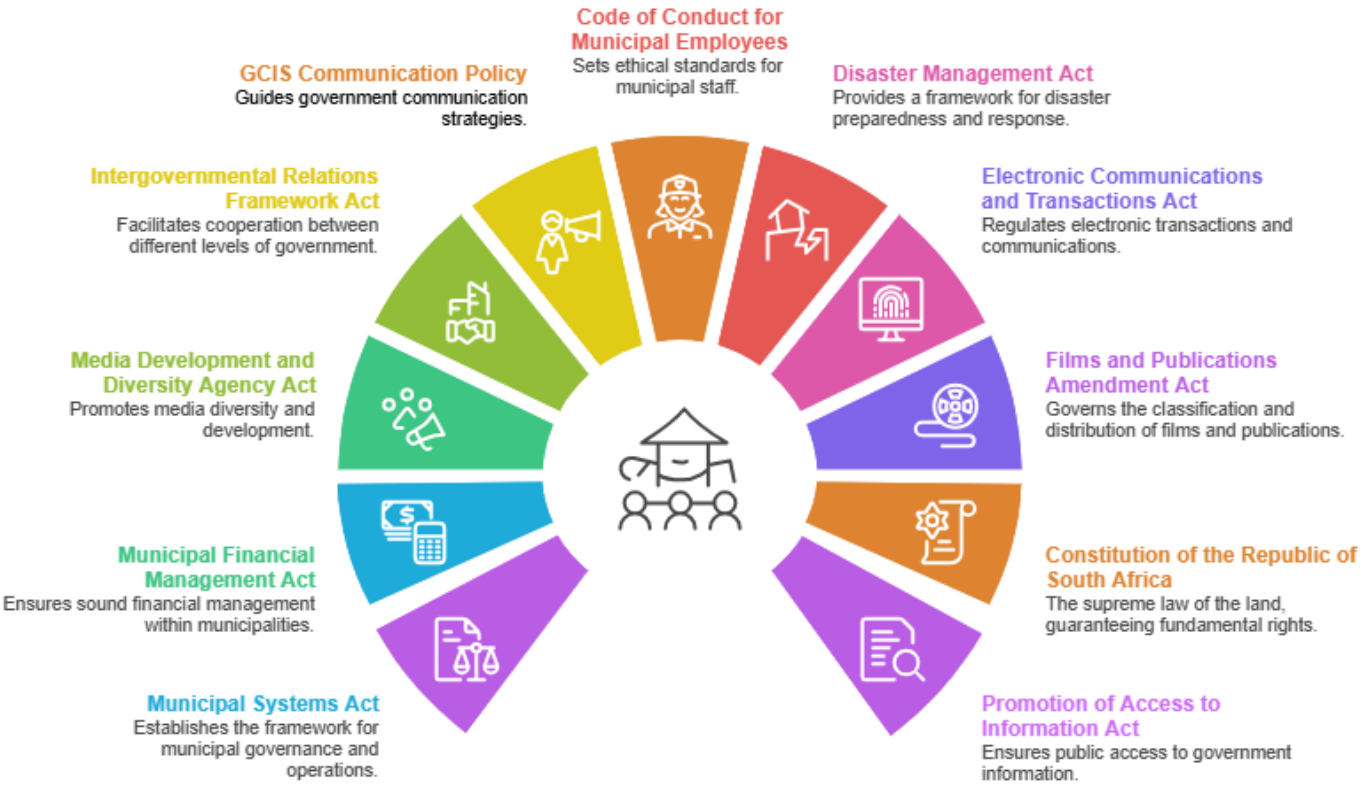
KEY PROJECTS OR PLANNED EVENTS FOR 2026/2027

- Implementation of an integrated Internal Audit and Risk Management Software Tool
- Implementation of the Combined Assurance Policy, Framework and Plan

DIVISION

Communications

Legislative Framework



MEDIA—DIVISION

MEDIA	Our office is involved in most events and functions, specifically related to reporting to media and management with independent, risk-based advice, insight, and foresight. Those constraints grow footprint in new exciting ways of communicating
REPUTATION MANAGEMENT	The CWDM's involved in more regular relevant coverage addressing issues that are relevant; waste management community health
EXTERNAL COMMUNICA-CATION	Challenging, but done via Internal newsletters, desk drops, Road Shows etc
INTERNAL COMMUNICA-CATION	Improved action-cooperation and commitment to internal communications

DIVISION

Risk and Compliance

To be included

CAPE WINELANDS DISTRICT

MUNICIPALITY • MUNISIPALITEIT • UMASIPALA

COMMUNITY DEVELOPMENT

AND PLANNING SERVICES

DIVISION

Municipal Health Services

Provide a comprehensive and equitable MHS including AQM throughout CWDM.

Legislative context for division: Section 32(1) of the NATIONAL HEALTH ACT, 2003 (Act 61 of 2003) determines that every metropolitan and district municipality must ensure that appropriate municipal health services are effectively and equitably provided in their respective areas.

PLANNED PROJECTS FOR 2026/2027

ENVIRONMENTAL HEALTH EDUCATION PROJECT

The project entails live theatre shows, using live theatre techniques and pre-recorded music at schools and in communities in order to promote environmental awareness amongst young children and the development of educational material on a variety of environmental health topics

Budget: R 714 000

MICROBIOLOGICAL AND CHEMICAL ANALYSES OF FOOD AND WATER SAMPLES

Purpose of project:
Monitor and ensure food and water safety

Budget: R 1 866 000

DIVISION

Disaster Management

Ensure coordination of multi-disciplinary and sectoral disaster risk reduction through integrated institutional capacity for Disaster Risk management, Disaster Risk Assessment and Response and Recovery.

Legislative context for division: The Disaster Management Act 57 of 2002 provides for an integrated & coordinated disaster management policy that focuses on: Prevention; Mitigation; Emergency preparedness; Rapid & effective response; & post-disaster recovery.

PLANNED PROJECTS FOR 2025/2026



Ward Based Risk Assessment (WBRA)
Purpose of project: **R 250 000**
To identify hazards and risks that communities/wards are exposed to



Training of Role Players in Disaster Management
Purpose of project: **R 100 000**
To capacitate internal and extemal role players



Mediators Training
To build mediation capacity within the district
Purpose of project **R 200 000**
Community Safety awareness targeting problematic youth

Education & Awareness campaigns
Purpose of project: **R 200 000**
For disaster prevention and mitigation purposes

MAJOR CAPITAL ITEMS FOR 2025/26–2027/28



Disaster Management Replacement Vehicle
Purpose of item: **R1 600 000**
For Disaster Management operational activities



Radio Room Renovations
Purpose of project: **R 250 000**
To be able to communcate with different role players



Mediators Training
To build mediation capacity within disastersasters
Purpose of project **R 2 500 000**
To ensure Disaster Relief items



Education Facility Renovations
Purpose of project: **R 290 000**
For disaster prevention/relief items

Sector Plan	Review Date
Municipal Disaster Management Plan	2025
Cape Winelands Flood Management Plan	2016

DIVISION

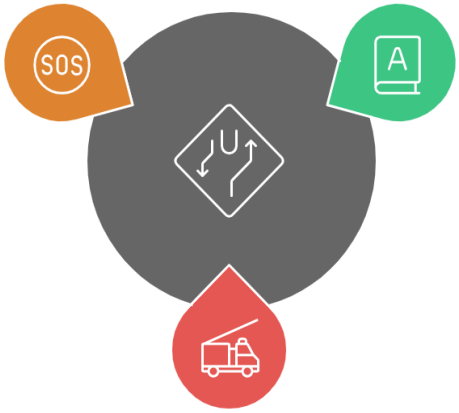
Fire Service

Effective planning and coordination of specialized fire-fighting services throughout the CWDM. Specialized fire-fighting services is not limited to our operational functions of combatting veld fires and mitigating HAZMAT incidents, it also refers the co-ordination of incidents as a whole which includes our local municipal fire services i.e. If they declare a code red with the district, we are the co-ordinating authority that must ensure that they receive the necessary resources timeously to stabilise the situation.

Legislative context for division

Municipal Structures Act

Mandates district municipalities' to provide Fire Fighting Services in its area as whole



Constitution of South Africa

Assigns the function Fire Fighting Services to Local Governments.

Fire Brigade Act

Provides for the establishment, maintenance, employment, co-ordination and standardization of Fire Brigade Services; and for matters connected therewith

CAPITAL PROJECTS

- Building upgrade/ repair – Robertson Fire Depot R8.8 mil
- Building upgrade/ repair – Nieuwedrift Fire Depot R20 mil
- Steel structure fire truck carport – Stellenbosch Fire Depot R1.2 mil

CAPITAL EXPENDITURE FOR 2026/2027

- 1 x MAJOR 4 x 4 FIRE FIGHTING VEHICLE R4 588 118
- 1 x LIGHT 4 x 4 FIRE FIGHTING VEHICLE R2 500 000
- 4 x 4 Double Cab R1.2 mil

DIVISION

Socio Economic Development and Tourism

.

Legislative context for division

Western Cape Investment and Trade Promotion Agency Law

Governs tourism and trade in the Western Cape.

Constitution of South Africa

Establishes foundational objectives for local governance.



Tourism Act

Promotes and regulates tourism activities.

Municipal Structures Act

Defines roles and responsibilities of municipalities.

National LED Framework

Outlines government roles in economic development.

Tourism

Legislative context of division



Western Cape Acts

Regulates tourism in the Western Cape Province

Constitution

Sets objectives for local government and development

Tourism Amendment Act

Amends tourism laws for better regulation

Municipal Structures Act

Defines functions and powers between municipalities

Tourism Act

Promotes and regulates tourism industry

PLANNED PROJECTS FOR 2026/2027



Tourism Training

Capacity building, training, skills development and mentoring to Tourism Staff and relevant stakeholders.

R 517 025.00



Township Tourism

Provision of financial and non-financial support for existing and developing new tourism routes

R 166 391.00

Local Economic Development

Role of Economic Development in Cape Winelands

Facilitator for Economic Development

Engages community involvement and support



Government Role

Provides leadership and enabling policies for growth

Private Sector

Offers innovation and economic vitality

Strategic Facilitator

Help to get things done.

PLANNED PROJECTS FOR 2026/2027

Project	Purpose of Project	Allocated Budget
1. Small Farmer support	This programme aims c contribute to the rural growth and development of sustainable food security by providing flnancial and small-scale farming/agro-processing projects in the	R 280 119
2. Entrepreneurial Seed funding	The programme aims to provide intrastructure support to grow the local economy in Wede Valley Municipality within Cape Winelands District	R 261 631
3. Busines Network Programme	This programme alms to provide infrastructure support to grow the local economy in Witzenberg Municipality within Cape Winelands District	R 292 086
4. Busines Network Programme	The programme aims to provide infrastructure support to grow the local economy in Witzenberg Municlpality within Cape Winelands District	R 5 000 000

RURAL AND SOCIAL DEVELOPMENT

Legislative context for division

Constitutional Schedules 4B and 5B

Defines core functional services of local government for planning and regulation



Section 153 of the Consitution

Defines developmental duties for all categories of Municipalities

PLANNED PROJECTS FOR 2026/2027

Project	Purpose of Project	Allocated Budget
1. Youth	Successful Implementation of youth empowerment programme.	R 1172 004
2. Famiilies and children	Interventions that contribute to sustainable livelibounds In Poverty.	R 369 597
3. Skills development	Improved skills levels and income generation amonest Women and Youth	R 300 000
4. Elderly	Successful Implementation of youth empowerment programme	R 292 036
5. Women	Increased awareness programmes. integration into communities	R 235 679
6. HIV/AI	Increases awareness with lisabilities	R 76 451

PLANNED PROJECTS FOR 2026/2027

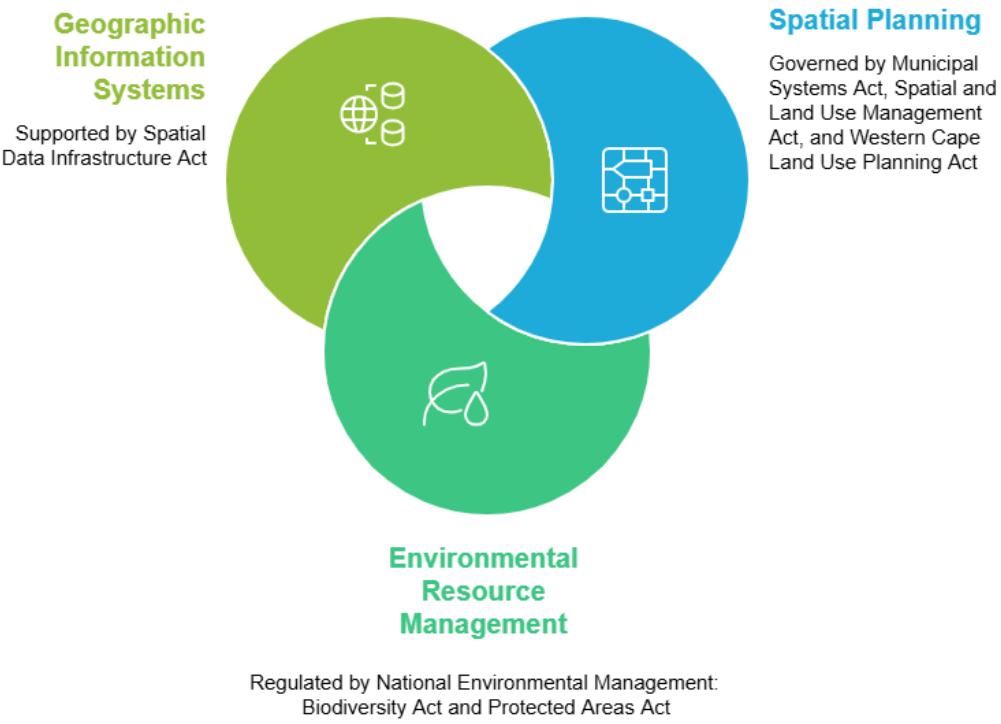
Project	Purpose of Project	Allocated Budget-
7. ECD	To provide Farly Childhood Development programme	R 1411 256
8. Sport and Recreation	Enhanced awareness of Vulnerable groups in sports, arts culture and Recreational programmes	R 957 888
8. HIV / AIDS	Improve mobility of people with disabilities through access to assistive devices	R 957 888
7. Sport	Improve mobility of people with disabilities through access to assistive devices.	R 957 888

DIVISION

SPATIAL PLANNING AND ENVIRONMENTAL MANAGEMENT

Creating an environment and forging partnerships that ensure social and economic development of all communities, including the empowerment of the poor in the Cape Winelands District.

Legislative context



Planned projects for 2026/2027

Planned projects for 2026/2027	Allocated budget
Invasive Alien Vegetation Management	R1 617 000,00

CAPE WINELANDS DISTRICT

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TECHNICAL SERVICES

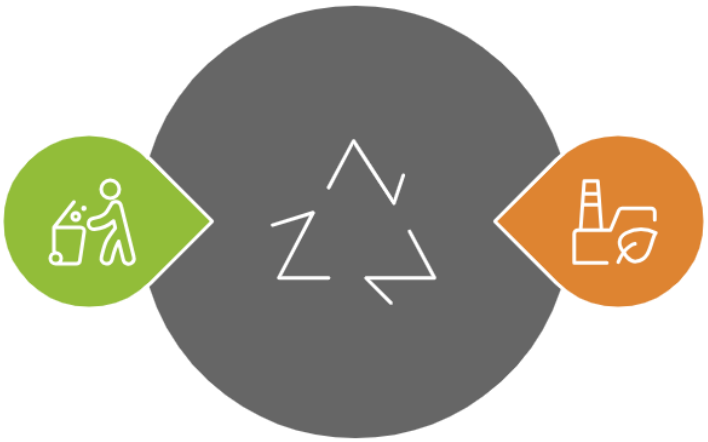
DIVISION

Project and Waste Management

Legislative context of divsion

Local Municipality Role

The NEM:WA (Act 59 of 2008) requires local authorities to implement mechanisms for the provision of waste collection services including collection, storage and disposal.



District Municipality Role

Section 84 of the Municipal Systems Act (Act 32 of 2000) assigns a function of waste disposal to District Municipalities.

PLANNED PROJECTS FOR 2026/2027

- **Grass cutting** R2 310 000
- **Waste Awareness** R 750 000
- **Sport facilities** R 500 000
- **Sidewalks** R 957 888

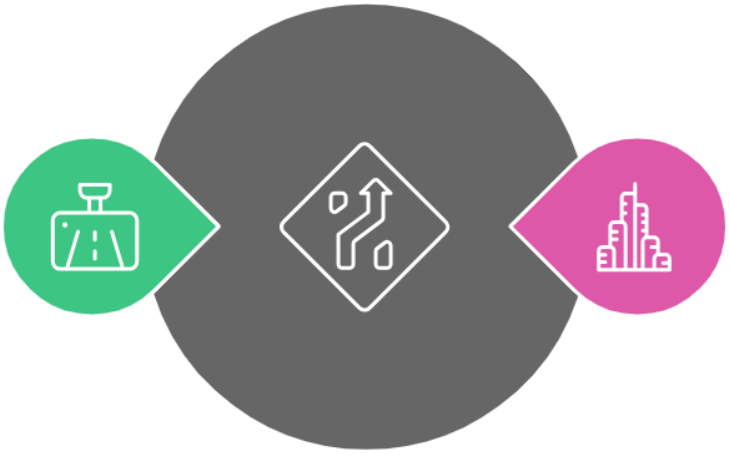
DIVISION

Regulation Passenger Transport Services

Legislative context of division

National Land Transport Act (NLTA), Act 5 of 2009

Requires all Planning Authorities to compile an Integrated Transport Plan



Integrated Development Plan

Broader development plan incorporating transport

PLANNED PROJECTS FOR 2026/2027

Full review of the District Integrated Transport Plan
Grant funding
R 982 000
and 2027/2028
R 1026 000

Distribution of Road Safety educational material to various Schools and to the Public and Transport Month Events
R 1169 000

DIVISION

Facilities Management

As a division we are responsible for maintaining the Fixed assets of CWDM and maintain a safe working environment for the employees.

Legislative context

As a division we are responsible for maintaining the Fixed assets of CWDM and maintain a safe working environment for the employees.

We work under the following legislation:

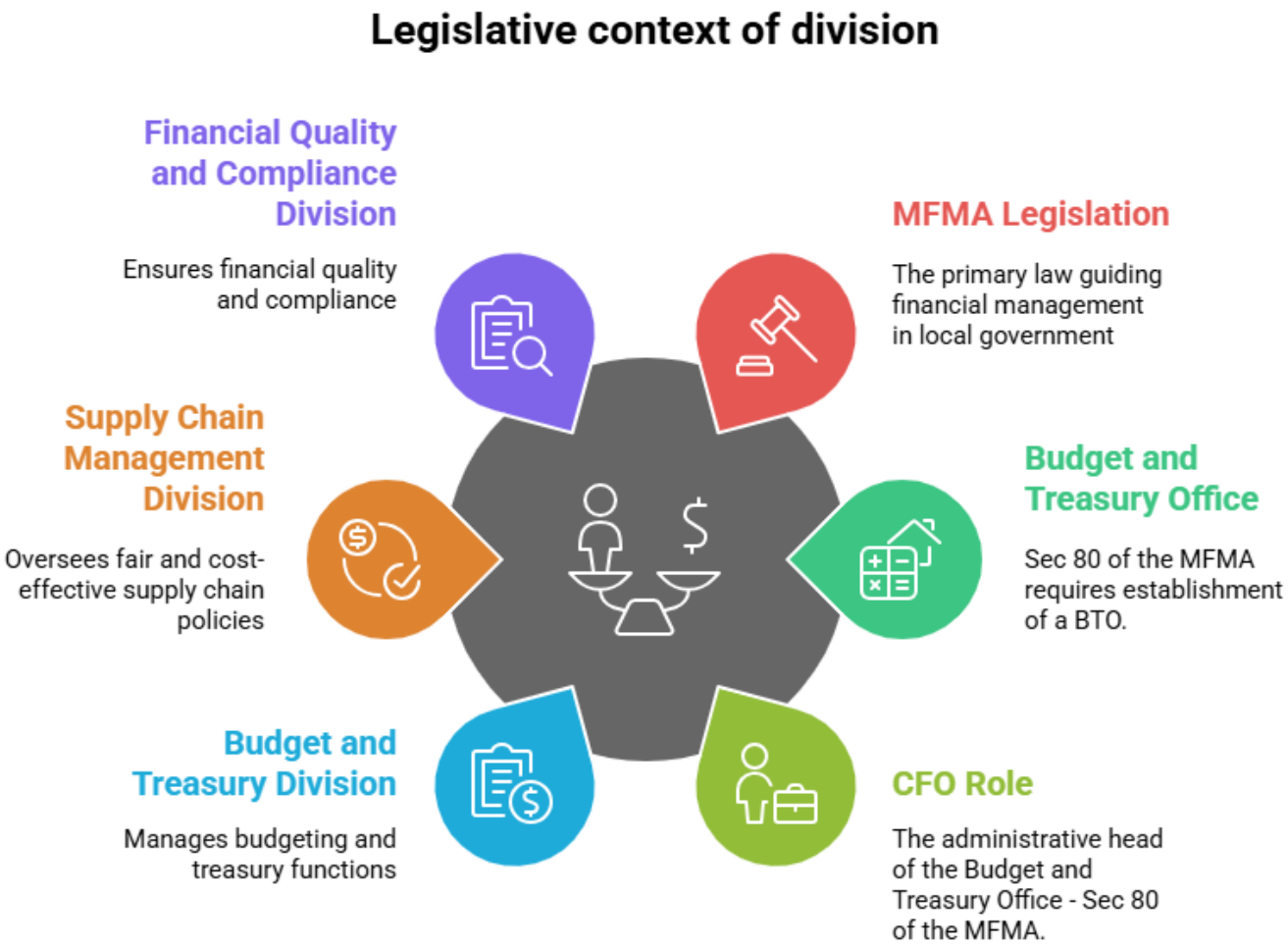
- Municipal Finance Management Act, No. 56 of 2003
- Occupational Health and Safety Act 85 of 1993
- Construction Industry Development Board Act 38 of 2000



CAPE WINELANDS DISTRICT

MUNICIPALITY • MUNISIPALITEIT • UMASIPALA

FINANCIAL SERVICES



FINANCIAL SERVICES

Legislative context

The Municipal Finance Management Act (MFMA), Act No. 56 of 2003, serves as the primary legislation guiding financial management within Local Government. It provides a comprehensive framework to ensure sound, sustainable, and transparent financial practices through structured processes for budgeting, financial planning, reporting, and oversight.

Section 80 of the MFMA requires the establishment of a Budget and Treasury Office, consisting of a Chief Financial Officer (CFO) designated by the accounting officer, who is administratively in charge of the BTO. In line with the MFMA, CWDM has established a Budget and Treasury Office (BTO), which is tasked with managing the municipality's financial affairs, including budgeting, accounting, analysis, financial reporting, cash management, debt management, supply chain management, financial management, review and other duties. The MFMA provides a framework for financial management in local government, including the establishment of supply chain management systems enabling the implementation of supply chain management policies that are

fair, equitable, transparent, competitive, and cost-effective.

To give effect to the above legislative context, the Budget and Treasury Office consist of the following three divisions:

(a) Budget and Treasury
(b) Supply Chain Management
(c) Financial Quality and Compliance

Major operational and/or capital expenditure planned for 2025/2026

It is envisaged to review, develop and implement revised long-term financial models and plans / strategies. Given the municipality's current financial position, this initiative has become a strategic priority, as it will enable the Municipality to model various financial scenarios and ensure a state of readiness for future fiscal planning.

The desired outcome is envisaged to be -

(a) Sustainable infrastructure development initiatives (regional landfill sites) over the longer term, supporting strategic plans and financed in the most effective and efficient manner.
(b) A sustainable financing and borrowing plan for infrastructure / capital plan over the longer term.
(c) A plan that supports decisions on investment selection and assesses the financial impact of policy choices, by forecasting future financial performance and the impact of infrastructure projects on borrowing capacity and financial performance of the municipality; and
(d) A long-term financial model that must inform the municipality's long-term financial plan / strategy.

The municipality will develop and implement a long-term financial plan as well as commencing with the procurement of an Enterprise Resource Planning Management System.

Current state vs Desired state

While the municipality has achieved eleven consecutive clean audits, the maturity of the Budget and Treasury Department has progressed slowly in recent years. This limited growth is likely attributable to the core financial system currently in use, which impacts the efficiency of transaction processing and the integration of non-financial information. At present, a key shortcoming is the lack of real-time, accessible management information, which hampers effective decision-making and coordination across departments.

To address this, the municipality has initiated a due diligence process to review all systems currently in use, with the aim of identifying opportunities to streamline and enhance financial and operational

processes. The subsequent Enterprise Resource Planning Management System is crucial towards the maturity of the municipality.

Current state: Reactive approach and department operating in isolation of the broader strategic planning and management of the Municipality.

Desired state: The department's desired future state is one in which real-time management information is readily available, easily shared with other departments, and presented in a user-friendly format that supports transparency, accountability, and improved strategic planning. Value driven and long-term demand planning to ensure that procurement activities are properly linked to service delivery strategies.

CAPE WINELANDS DISTRICT

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CORPORATE SERVICES

DIVISION

Support Services

Legislative Framework for Municipal Division

Protection of Personal Information Act

Protects personal information and ensures compliance.



Municipal Structures Act

Provides the foundation for municipal governance and council support.

Records Service Act

Ensures proper management and organization of records.

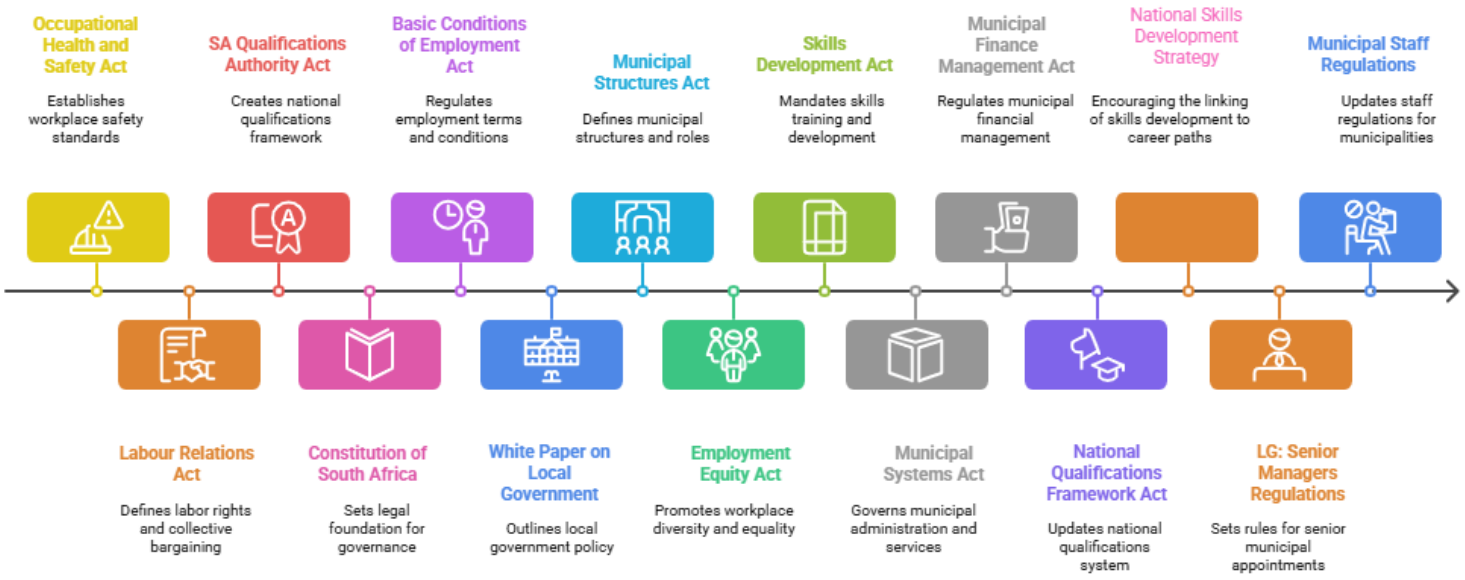
Municipal Systems Act

Assist the Municipal Manager with the executive of administrative function

DIVISION

Human Resources

Legislative context of division



OPERATIONAL 5-YEAR PLAN

The tables below indicate the necessary measures and achievable timeframes in terms of each financial year in order to fulfil the detail in the HR Strategy:

Strategic Human Resources Management:	2025/26	2026/27	2027/28
Review HR Strategy annually (with relevant HR Policies)	x	x	x
Conduct a staff establishment diagnosis annually through a in terms of Municipal Staff Regulations			x
Conclude an annual Staff Regulations Readiness Review Report for submission to Council	x	x	x
Annual HR Maturity Assessment	x	x	x
Develop an Implementation plan to address the findings and review annually	x	x	x
Develop an HR Analytics system and analyse the data (Metrics)	x		
Develop an Implementation Plan on how to address the results stemming from the analysis		x	
Review all HR policies older than 5 years annually	x	x	x

Recruitment, Selection and Workplace Planning:	2025/26	2026/27	2027/28
Keep record of the following and note effectiveness thereof (in order to recommend changes annually during revision of the Recruitment Policy): a) Time taken to fill each vacant post, measured from when the HR division is informed of the vacant post until acceptance of appointment by the successful candidate. b) The relevant success of various recruitment channels utilized in relation to each post level, measured by documenting the channel(s) through which successfully shortlisted candidates applied for a specific post. c) The total cost of each recruitment channel used for a specific post and the efficiency thereof in terms of relevant applications received			
	x		
		x	
Implement Behaviour Assessment as part of the recruitment and selection process for all levels	x		
Implement a Recruitment and Selection Analytics to evaluate all data applicable	x		

Individual Performance Management:	2025/26	2026/27	2027/28
Conclusion of Performance Agreements for all employees	x	x	x
Review of Performance Management and Development Policy on an annual basis.	x	x	x
Conduct an Performance Awareness campaign / drive annually	x	x	x
Conduct Regular Training for administrators and Managers	x	x	x

Training and Development (Learning):	2025/26	2026/27	2027/28
Management and Leadership: Emotional Intelligence,	x	x	
Financial Viability: MFMA / MMCL training in compliance with applicable legislation	x	x	x
Introduce a Management and Leadership: Middle Management Development Program	x		
Management and Leadership: Women in Management as part of succession planning and addressing EE	x		
Negotiation Skills for all employees in supervisory positions.		x	
Implement a Monitor and assess the effectiveness of training (measure ROI of training) program to ensure compliance with the MSR	x	x	x
Conduct an annual training needs assessment to ensure training is designed to improve organisational and individual performance.	x	x	x
Anger Management Programs / Training		x	
Training of managers in disciplinary hearings	x	x	x

Training and Development (Learning):	2025/26	2026/27	2027/28
Coordinate Career Exposition to internal staff and the public to create awareness of current requirements of Municipal posts.	x		
Develop and maintain PDPs for all employees and include it in Performance plans	x	x	x
Implement a Training and Development Analytics to evaluate all data applicable	x		

Compensation and Benefits:	2025/26	2026/27	2027/28
Develop Remuneration Policy.		x	
Conduct Roadshows annually to update officials regarding benefits & explain types of leave and how to capture leave	x	x	x
Employee Relations Management:	**2025/26**	**2026/27**	**2027/28**
Manage knowledge by creating a database of relevant authorities that is readily accessible to the Employee Relations team.		x	
Implement a Labour Relations Analytics to evaluate all data applicable	x		

Organisational Development (Culture):	2025/26	2026/27	2027/28
Formulate and implement Diversity Policy in line with HR Strategy	x		
Formulate tool to measure implementation and effectiveness of Diversity Policy (including employee behaviour)		x	
Conduct an Employee Satisfaction Survey bi-annually (Climate Change)		x	

Staff Wellness:	2025/26	2026/27	2027/28
Financial Wellness (financial issues may have a negative impact on health, productivity and performance).	x	x	x
HIV and TB drive (increase awareness and conduct free HIV and TB tests).		x	
Conduct an annual Wellness Day for all employees	x	x	x
Revision and implementation of HIV / Aids Policy	x		
Design and implementation of HR Gender Policy		x	

Talent Management:	2025/26	2026/27	2027/28
Implement Talent Management Analytics to evaluate all data applicable		x	
Prioritise Career Development and Succession Planning processes on an annual basis	x	x	x

Exit Management	2025/26	2026/27	2027/28
Design reporting process to assess and address negative exit interview comments.	x		
Analyse the data and make improvements	x	x	x

Employment Equity	2025/26	2026/27	2027/28
Implement improvements and affirmative action measures on EE Targets as per plan	x	x	x
Develop a Employment Equity analytics			
Health and Safety:	**2025/26**	**2026/27**	**2027/28**
Review OHS Policy annually.	x	x	x
Formulation of information sessions and refresher orientation for existing employees.	x	x	x
Analyse and review Health and Safety SOPs.		x	
Analyse data on H&S audits and IOD claims, note effectiveness of process and shortcomings, amend Policy accordingly.			x

Recruitment and Selection of competent Staff

Cape Winelands District Municipality understands the unique context and challenges specific to local government organizations and when planning for recruitment and selection, the process requires careful planning, compliance with local regulations, and a focus on efficient use of resources to meet the needs of the community while managing financial resources effectively.

By aligning the recruitment and selection process with the specific goals of the municipality, complying with relevant laws and regulations, and strategically managing both operational and capital expenditures, you can ensure that the municipality attracts and hires the right talent while maintaining financial efficiency.

Cape Winelands District Municipality employs the best and suitable qualified employees to serve our communities, within the context of relevant legislative arrangements, policies and collective agreements. We do this to:

• Ensure that the Municipality makes the best use of human resources and anticipates and manages surpluses and shortages of staff;

• Ensure that the Municipality has the right number and composition of employees with

the right competencies, in the right places, to carry out the Municipality's mandate and achieve its strategic goals and objectives.

• Ensure that municipal employees have the knowledge and abilities necessary to benefit the municipality by providing sustainable solutions, guidance, and capacity building.

• Ensure that the Municipality recruits, keeps, and develops a diverse workforce in accordance with Employment Equity legislation and goals.

Internal Task Job Evaluation

- The job evaluation process is ongoing.
- Employees can submit job descriptions for job evaluation to the Internal TASK Job Evaluation Committee (ITJEC) on a monthly basis. The ITJEC is responsible for quality checking of all the job descriptions.

- The Municipal Managers Forum adopted a new T.A.S.K Job Evaluation policy for the Western Cape and five (5) licenses will be procured from Deloitte for the City of Cape Town and 4 district municipalities to enable municipalities to perform job evaluations on the T.A.S.K job evaluation system.

Ongoing training and development initiatives

Cape Winelands District Municipality has realized that skilling of its own workforce is key in achieving its strategic objectives as noted in the Integrated Development Plan by developing and building the capacity of employees to perform their tasks in an effective, economic and accountable manner and to report on training bi-monthly, as well as the annual submission of the Workplace Skills Plan.

Cape Winelands District Municipality's will ensure the development of the workforce in order to improve productivity in the workplace and the competitiveness of the employees. Cape Winelands District Municipality (CWDM), Council and employees are fully committed to educate, train and develop all employees within the financial muscle and resources available by:

• Development of Training and Skills Development Strategy in line with the stipulations of the Skills Development Act, 1998 (Act No 97 of 1998), as amended and other relevant legislation.

• Introduce fair, reasonable and objective principles for education, training and development of employees in the employment of Council.

- Provide guidelines for training and development of employees in the employment of Council.
- Conduct thorough skills audits and identify gaps existing and devise strategies in terms of the broader vision of Council.
- Allocate significant training resources, within the means of Council.
- Ensure that people with disabilities have easy access to all learning opportunities by removing any learning barriers; and
- Put up comprehensive education, training and development programmes that focus on literacy, numeracy, technical competencies and management and development programmes

A three-year training tender was procured in December 2024, to strengthen the training capability of the CWDM – the latter will ensure that all compliance training is adhered to, as well as addressing succession planning with regard to scarce and critical skills within the municipality.

The above medium-term human resource development strategies are derived from the newly adopted CWDM HRD Strategy/Plan and mitigations of risks stemming from the HR Risk Register.

Provision of a holistic wellness program for CWDM employees and their immediate dependents

The CWDM as a caring employer remains committed to the well-being of its employees and immediate dependents. The Employee Assistance Programme benefits both the employees and the employer. Employees obtain help with personal problems, which may be affecting their wellbeing, family life or work performance whilst the employer benefits by retaining employees with valuable skills and knowledge. Early use of the Programme can contribute to the prevention of serious problems for the individual employee, family, and employer. EAP and Wellness Services will be provided on a continuous basis to CWDM employees and their immediate dependents by the Internal EAP Officer and in collaboration with the services of the new Service Provider, Health 1st.

Individual Performance Management

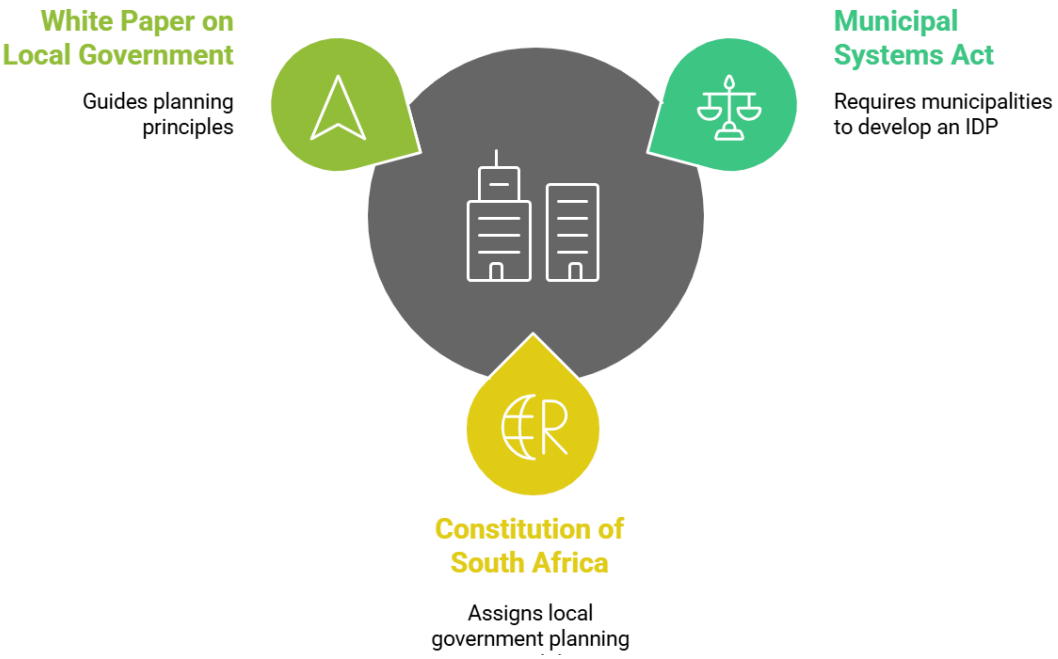
- The electronical Performance Management Development System (PMDS) was implemented by 30 July 2023 and is in full swing. The CWDM is fully compliant in terms of the Municipal Staff Regulations (MSR) in terms of the signing of Performance Agreements by the due date.
- The CWDM have been actively enhancing Performance Management within the organization in order to ultimately create a culture of excellence. Our approach to direct engagements with all staff resulted in a relatively successful first year of Performance Management implementation.
- Our vision for the 2025/26 year is to iron out all our performance management challenges, whilst consistently improving on the quality of performance management within the CWDM.
- Various Performance Management Development System MDS related training will be conducted by Ignite and the Training- and Performance Unit to all CWDM Officials staff throughout the year.
- All CWDM Officials will be assessed against their key performance areas on a continuous basis.

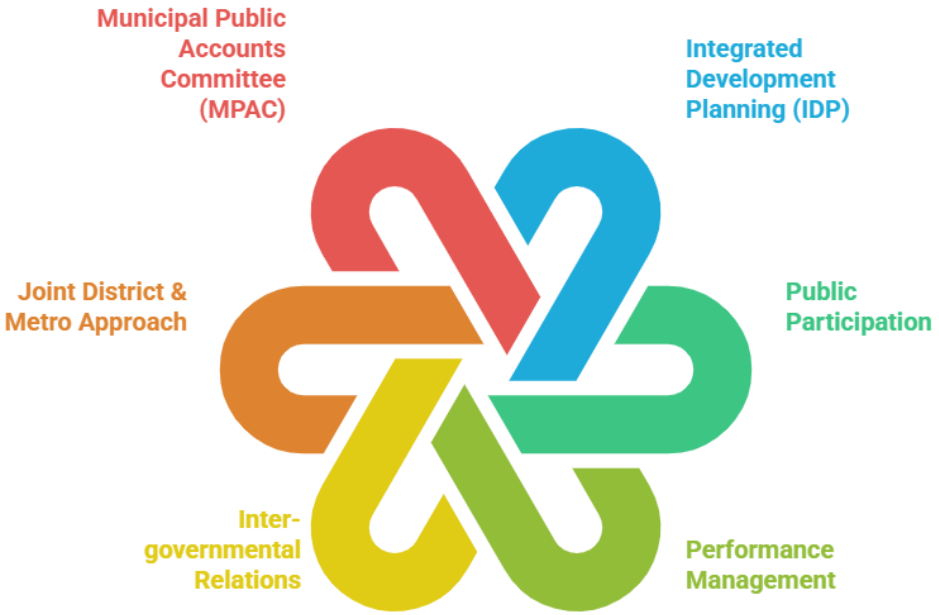
**For more details on the CWDM Performance Management and Development System Framework refer to Appendix B.*

DIVISION

IDP and Performance Management

Legislative context of division





DIVISION

Information and Communication Technology

Legislative context of division



Municipal Finance Management Act

Establishing financial management guidelines

Legislative Alignment

Harmonizing ICT policies with relevant laws

Municipal Systems Act

Defining municipal responsibilities and governance

Stakeholder Collaboration

Engaging with key stakeholders for insights

CHAPTER 5

SUPPORT TO LOCAL MUNICIPALITIES

FINANCIAL IMPACT

(2026/2027)



SUPPORT TO LOCAL MUNICIPALITIES

FINANCIAL IMPACT (2026/2027)

All projects, planning initiatives and programmes are implemented within the jurisdiction areas of the applicable local municipalities or district wide, as illustrated in the following table:

District Wide Support		
Type of support	**Deliverable**	**Financial Impact**
Subsidies – Water & Sanitation	Number of farms serviced – Educational	R 0
Environmental Health Education	Number of theatre performances	R 954 720
Clearing of road reserves	800 km's cleaned	R 2 284 200
Rural infrastructure support	Provision of water services to schools	R 500 000
Renewable Infrastructure – Rural Areas	Solar systems supply to farmers	R 0
Upgrading of Sport Facilities	Number of Sport Facilities upgraded	R 0
Entrepreneurial Seed Funding	Number of SMME's supported	R 261 632
Business Retention Expansion Programme	Number of action plans for tourism sector	R 0

Investment Attraction Programme	Number of projects implemented	R	0
Small Farmers Support Programme	Number of small farmers supported	R	280 060
SMME Training and Mentorship	Number of processes implemented	R	292 086
Tourism Business Training	Number of training and mentoring sessions	R	517 026
Tourism Educational	Number of educational	R	0
Tourism Month	Tourism month activities	R	15 617
Township Tourism	Number of SMME’s linked with formal economy	R	166 391
LTA Projects	Number of LTA’s participating	R	0
Tourism Events	Number of tourism events	R	0
Sport Tourism Winter Campaign	Campaign implemented	R	0

EPWP Invasive Alien Management Programme	Number of hectares cleared	R	1 330 737
HIV/AIDS Programme	Number of HIV/AIDS Programmes Implemented	R	89 503
Elderly	Number of Active Age programmes implemented	R	272 412
Disabled	Number of interventions implemented which focus on the rights of people with disabilities	R	313 830
Community Support Programme	Number of Service Level Agreements signed with community-based organisations	R	0
Families and Children (Substance Abuse)	Programmes and support for vulnerable children Provision of sanitary towels Support for ECDs	R	346 384
Early Childhood Development	Number of Early Childhood Development Toolkits distributed	R	112 048
Sport, Recreation and Culture Programmes	Number of programmes	R	815 720
Youth	Number of youth development programmes	R	932 203
Women	Number of awareness programmes	R	189 251
Sidewalks and Embayment's	Number of sidewalks and Embayment's completed	R	1 553 820
Road Safety Education	Number of Road Safety Education programmes	R	1 169 603
River rehabilitation (EPWP)	Hectares cleared	R	0
Skills Development (EPWP)	Number of skills development initiatives implemented	R	164 710

CHAPTER 6

FINANCIAL PLAN

(3 YEARS)



Budget Allocation for 2026/2027 Financial Year

NR	DIVISION/DEPARTMENT NAME	DIVISIONS/DEPARTMENTS	2026/2027 BUDGET (R)	STRATEGIC OBJECTIVE NR	STRATEGIC OBJECTIVE NAME	OUTCOMES
1	Office of the Municipal Manager	Office of the Municipal Manager Internal Audit Communication Services	28.431.228.00	SO 2	Foster good governance processes as prescribed by legislation and best practice	A foundation for effective governance that promotes political and administrative stability, the mitigation of identified risks, an improved ethical culture and functional oversight, has been established and is adhered to.
				SO 6	Facilitate partnerships that cultivate economic growth and development throughout the district	Achieving an enabled environment by creating inclusive and equitable economies, and developmental growth through the economic benefits generated from niche markets, innovation, and partnerships.
2	Corporate Services	ICT Admin & Council Support Human Resources IDP & Performance Management Legal Services	132.392.447.00	SO 2	Foster good governance processes as prescribed by legislation and best practice	A foundation for effective governance that promotes political and administrative stability, the mitigation of identified risks, an improved ethical culture and functional oversight, has been established and is adhered to.
				SO 5	Establish a skilled workforce and performance orientated administration to promote the growth and development of the organisation	• A capable and knowledgeable workforce that positively contribute and successfully provide high-quality services to the community, and become enablers of development. • Consequence/ development management and a performance management system embedded into the functioning of the municipality in order to promote optimal performance.
3	Financial Services	BTO SCM Compliance	33.106.193.00	SO 1	Provide sustainable strategic financial management and support services	• The municipality aims to create sustainable sources of funding and management thereof, ensuring long-term financial viability. • Resources are efficiently used to maximise contributions to LED and support services.

4	Community Development & Planning Services	MHS Disaster Management Fire Services Socio-Economic Development Spatial Planning & Environmental Management	151.848.782.00	SO 4	Monitor and promote a clean, healthy and safe living environment whilst providing emergency response services for all residents throughout the district	• All residents have equal access to basic service delivery. • Resources, including stable infrastructure, technological and spatial resources, as well as the promotion of water services, are efficiently utilized to ensure the long-term well-being and unity of the community. • Disaster response plans are well-established and regularly tested, enabling an improved response to incidents, which creates stronger relationships within the district and a well-coordinated disaster management centre • A well-coordinated fire services division, establishing a fire safe environment for all. • The provision of municipal health services including air quality management.
				SO 6	Facilitate partnerships that cultivate economic growth and development throughout the district	Achieving an enabled environment by creating inclusive and equitable economies, and developmental growth through the economic benefits generated from niche markets, innovation, and partnerships.
5	Technical Services	Roads Building Maintenance Regulation of Passenger Transport Services Projects	44.161.350.00	SO 3	Provide sustainable infrastructure services and transport planning services that enable social and economic opportunities	• Infrastructure services and resources are financially supported and measured. • Municipal infrastructure and transport planning systems are developed in a resilient and well-functioning manner as to result in longevity, and a safe and secure communal environment facilitating socio- economic opportunities

Budget Allocation for 2027/2028 Financial Year

NR	DIVISION/DEPARTMENT NAME	DIVISIONS/DEPARTMENTS	2027/2028 BUDGET (R)	STRATEGIC OBJECTIVE NR	STRATEGIC OBJECTIVE NAME	OUTCOMES
1	Office of the Municipal Manager	Office of the Municipal Manager Internal Audit Communication Services	13.756.328.00	SO 2	Foster good governance processes as prescribed by legislation and best practice	A foundation for effective governance that promotes political and administrative stability, the mitigation of identified risks, an improved ethical culture and functional oversight, has been established and is adhered to.
				SO 6	Facilitate partnerships that cultivate economic growth and development throughout the district	Achieving an enabled environment by creating inclusive and equitable economies, and developmental growth through the economic benefits generated from niche markets, innovation, and partnerships.
2	Corporate Services	ICT Admin & Council Support Human Resources IDP & Performance Management Legal Services	138.584.934.00	SO 2	Foster good governance processes as prescribed by legislation and best practice	A foundation for effective governance that promotes political and administrative stability, the mitigation of identified risks, an improved ethical culture and functional oversight, has been established and is adhered to.
				SO 5	Establish a skilled workforce and performance orientated administration to promote the growth and development of the organisation	• A capable and knowledgeable workforce that positively contribute and successfully provide high-quality services to the community, and become enablers of development. • Consequence/ development management and a performance management system embedded into the functioning of the municipality in order to promote optimal performance.
3	Financial Services	BTO SCM Compliance	34.114.726.00	SO 1	Provide sustainable strategic financial management and support services	• The municipality aims to create sustainable sources of funding and management thereof, ensuring long-term financial viability. • Resources are efficiently used to maximise contributions to LED and support services.

4	Community Development & Planning Services	MHS Disaster Management Fire Services Socio-Economic Development Spatial Planning & Environmental Management	161.747.875.00	SO 4	Monitor and promote a clean, healthy and safe living environment whilst providing emergency response services for all residents throughout the district	• All residents have equal access to basic service delivery. • Resources, including stable infrastructure, technological and spatial resources, as well as the promotion of water services, are efficiently utilized to ensure the long-term well-being and unity of the community. • Disaster response plans are well-established and regularly tested, enabling an improved response to incidents, which creates stronger relationships within the district and a well-coordinated disaster management centre • A well-coordinated fire services division, establishing a fire safe environment for all. • The provision of municipal health services including air quality management.
				SO 6	Facilitate partnerships that cultivate economic growth and development throughout the district	Achieving an enabled environment by creating inclusive and equitable economies, and developmental growth through the economic benefits generated from niche markets, innovation, and partnerships.
5	Technical Services	Building Maintenance Regulation of Passenger Transport Services Projects Regional Landfill Site	45.670.346.00	SO 3	Provide sustainable infrastructure services and transport planning services that enable social and economic opportunities	• Infrastructure services and resources are financially supported and measured. • Municipal infrastructure and transport planning systems are developed in a resilient and well-functioning manner as to result in longevity, and a safe and secure communal environment facilitating socio- economic opportunities
	GRAND TOTAL		393.874.209.00			

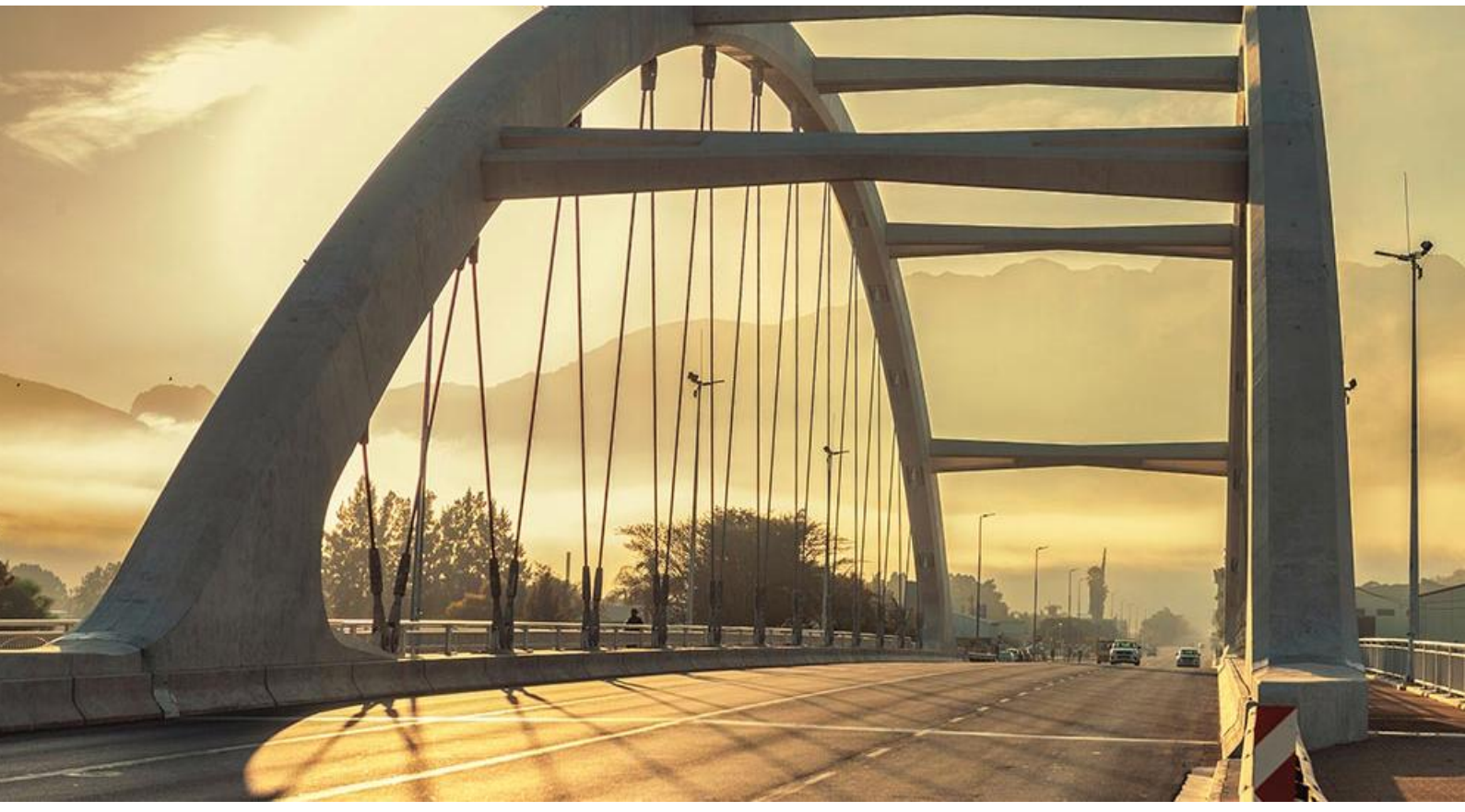
Budget Allocation for 2028/2029 Financial Year

NR	DIVISION/DEPARTMENT NAME	DIVISIONS/DEPARTMENTS	2028/2029 BUDGET (R)	STRATEGIC OBJECTIVE NR	STRATEGIC OBJECTIVE NAME	OUTCOMES
1	Office of the Municipal Manager	Office of the Municipal Manager Internal Audit Communication Services	14.032.553.00	SO 2	Foster good governance processes as prescribed by legislation and best practice	A foundation for effective governance that promotes political and administrative stability, the mitigation of identified risks, an improved ethical culture and functional oversight, has been established and is adhered to.
				SO 6	Facilitate partnerships that cultivate economic growth and development throughout the district	Achieving an enabled environment by creating inclusive and equitable economies, and developmental growth through the economic benefits generated from niche markets, innovation, and partnerships.
2	Corporate Services	ICT Admin & Council Support Human Resources IDP & Performance Management Legal Services	141.368.019.00	SO 2	Foster good governance processes as prescribed by legislation and best practice	A foundation for effective governance that promotes political and administrative stability, the mitigation of identified risks, an improved ethical culture and functional oversight, has been established and is adhered to.
				SO 5	Establish a skilled workforce and performance orientated administration to promote the growth and development of the organisation	• A capable and knowledgeable workforce that positively contribute and successfully provide high-quality services to the community, and become enablers of development. • Consequence/ development management and a performance management system embedded into the functioning of the municipality in order to promote optimal performance.
3	Financial Services	BTO SCM Compliance	35.251.005.00	SO 1	Provide sustainable strategic financial management and support services	• The municipality aims to create sustainable sources of funding and management thereof, ensuring long-term financial viability. • Resources are efficiently used to maximise contributions to LED and support services.
4	Community Development & Planning Services	MHS Disaster Management Fire Services Socio-Economic Development Spatial Planning & Environmental Management	164.792.754.00	SO 4	Monitor and promote a clean, healthy and safe living environment whilst providing emergency response services for all residents throughout the district	• All residents have equal access to basic service delivery. • Resources, including stable infrastructure, technological and spatial resources, as well as the promotion of water services, are efficiently utilized to ensure the long-term well-being and unity of the community. • Disaster response plans are well-established and regularly tested, enabling an improved response to incidents, which creates stronger relationships within the district and a well-coordinated disaster management centre • A well-coordinated fire services division, establishing a fire safe environment for all. • The provision of municipal health services including air quality management.
				SO 6	Facilitate partnerships that cultivate economic growth and development throughout the district	Achieving an enabled environment by creating inclusive and equitable economies, and developmental growth through the economic benefits generated from

						niche markets, innovation, and partnerships.
5	Technical Services	Building Maintenance Regulation of Passenger Transport Services Projects Regional Landfill Site	48.113.746.00	SO 3	Provide sustainable infrastructure services and transport planning services that enable social and economic opportunities	• Infrastructure services and resources are financially supported and measured. • Municipal infrastructure and transport planning systems are developed in a resilient and well-functioning manner as to result in longevity, and a safe and secure communal environment facilitating socio-economic opportunities
	GRAND TOTAL		403.558.077.00			

CHAPTER 7

FINANCIAL INFORMATION



Introduction

The application of sound financial management principles for the compilation of the Municipality's financial plan is essential and critical to ensure that the Municipality remains financially viable and that municipal services are provide sustainably, economically and equitably to all communities.

The Municipality's business and service delivery priorities were reviewed as part of this year's planning and budget process. The municipality also strives to deliver sustainable services to its community without overburdening the consumers with excessive tariffs.

The top strategic and emerging risks identified by the last annual risk assessments can be summarised as follows:

1. Compromised financial sustainability of the municipality
2. Insufficient electricity supply (loadshedding)
3. Loss of provincial roads services function
4. Deteriorating employee wellness
5. Natural disasters
6. Social unrest/Increasing social ills
7. Commercial crime
8. Operational inefficiencies
9. Third party risk
10. Limitations to attract, retain and further develop skilled staff

For each of the above risk areas the municipality has put mitigating measures in place aligned to the specific department in the budget. These measures will be implemented throughout the MTREF period.

The top strategic and emerging risks are currently being reviewed and the outcome of this process will be included in the 2025/2026 SDBIP, to be finalised and approved by the Executive Mayor in June 2025, in accordance with legislative requirements.

Due to the decreasing Equitable Share Allocation the municipality could not budget for a surplus, which will have a negative effect on its Accumulated Surplus. In addressing the key considerations contained in National Treasury's MFMA Circular 74, the following are highlighted in the budget:

- The municipality cut back on capital and operating expenditure related to the upgrading of rural roads (which is the property of the Provincial Government) to maintain accumulated reserves and ensure long term sustainability of the municipality
- Capital projects were spread out over the MTREF to avoid large fluctuations in spending and ensure that priority is given to projects with high importance
- Tariff increases were kept as low as possible to ensure affordability thereof, whilst keeping in mind the cost of delivering services of a high quality.
- The municipality recognizes the importance of cash reserves and therefor strives to maintain a current ratio of not lower than 2.1(Current Assets: Current Liabilities)

In view of the aforementioned, the following table is a consolidated overview of the proposed 2025/2026 Medium- term Revenue and Expenditure Framework

OPERATING BUDGET:

YEAR	EXPENDITURE	INCOME	SURPLUS (-) /DEFICIT
2026/2027	389.940.000	-389.940.000	-
2027/2028	393.874.209	-393.874.209	-
2028/2029	403.558.077	-403.558.077	-

CAPITAL BUDGET:

YEAR	EXPENDITURE	INCOME	SURPLUS (-) /DEFICIT
2026/2027	81.995.219	-81.995.219	-
2027/2028	45.499.700	-45.499.700	-
2028/2029	27.973.000	-27.973.000	-

OPERATING BUDGET – REVENUE

The Cape Winelands District Municipality is reliant on grant funding. This is as a result of the abolishment of the RSC Levies. The RSC replacement grant only increase with 4%, 4% and 3% over the MTREF period.

The following table reflects the revenue sources for the 2025/2026 - 2028/2029 financial years:

Sources of Income	2025/2026	2026/2027	% Inc./-Dec. Between 2025/26 & 2026/27	2027/2028	2028/2029
Ex Rev: Operational Revenue	- 1.375.200	- 1.475.200	7%	- 1.475.200	- 1.475.200
Ex Rev: Rental Fixed Assets	- 18.171	- 240.000	12.21	- 240.000	- 240.000
Ex Rev: Agency Services	- 88.512.500	-	-100%	-	-
Ex Rev: Sales Goods and Services	- 8.660.517	- 2.207.300	-75%	- 2.387.300	- 2.387.300
Ex Rev: Service Charges	-	- 11.517.500	-	- 12.537.500	- 12.537.500
Ex Rev: Int Divident Rent on Land	- 85.000.000	- 79.500.000	- 0.06	- 73.954.209	- 73.842.077
Non-Ex Rev: Licence and Permits	- 623.000	- 653.000	0.05	- 653.000	- 653.000
Non-Ex Rev: Transfers & Subsidies	- 284.153.332	- 293.992.000	3%	- 302.272.000	- 312.068.000
- RSC Replacement Grant	- 270.761.000	- 280.977.000	4%	- 292.190.000	- 301.271.000
- Equitable Share	- 3.120.000	- 3.021.000	-3%	- 2.965.000	- 3.224.000
- LG Finance Management Grant	- 1.000.000	- 1.200.000	0.20	- 1.300.000	- 1.500.000
- CWDM Integrated Transprot Plan	- 982.000	- 982.000	0%	- 1.026.000	- 1.072.000
- Community Development Workers	- 88.404	- 78.000	-12%	- 78.000	- 78.000
- WC Capacity Building Grant	- 200.000	- 200.000	0%	-	-
- Expanded Public Works Programme	- 1.479.000	- 1.524.000	0.03	-	-
- Municipal Water Resiliance Grant	- 1.800.000	- 1.500.000	- 0.17		
- Safety Plan Implementation Grant	- 1.069.928	- 1.230.000	0.15	- 1.302.000	- 1.406.000
- Fire Service Capacity Building Grant	- 500.000	-	- 1.00	-	-
- Rural Roads Asset Man, System (Dora)	- 3.153.000	- 3.280.000	4%	- 3.411.000	- 3.517.000
Gains	- 355.000	- 355.000	-	- 355.000	- 355.000
Total	- 468.697.720	- 389.940.000	-17%	- 393.874.209	- 403.558.077

OPERATING EXPENDITURE

The table below illustrates the operating Expenditure of 2025/2026 to 2026/2027 financial years:

Expenditure Categories	2025/2026	2026/2027	% Inc./-Dec. Between 2024/25 & 2025/26
Employee Related Costs	257.186.646	207.247.712	-19.42%
Remuneration of Councillors	15.665.197	16.371.649	4.51%
Operational Cost	70.313.902	51.261.982	-27.10%
Contracted Services	71.009.570	65.983.935	-7.08%
Bad Debt Written Off	200.000	400.000	100.00%
Depreciation and Amortisation	10.173.711	9.145.104	-10.11%
Inventory Consumed	20.212.674	8.019.754	-60.32%
Interest Cost	7.681.580	8.451.202	10.02%
Transfers and Subsidies	9.252.440	18.403.662	98.91%
Losses	4.667.000	4.655.000	-0.26%
Total	466.362.720	389.940.000	-16.39%

EMPLOYEE RELATED COST:

Although Employee Related Costs increased by 5%, the total amount of Employee related Costs decreased with 19.42% due to the discontinuation of the Roads Function on 31 March 2026. Remuneration of Councilors is budgeted for in terms of the Public Office Bearers Act.

OPERATIONAL COST:

Management restricted the increase in operational costs to the inflation rate as far as possible. The 27.10 % decrease in Operational Costs is due to the discontinuation of the Roads Function on 31 March 2026.

CONTRACTED SERVICES

Contracted services decreased by 7.08% due to the discontinuation of the Roads Function on 31 March 2026.

INTEREST DIVIDEND RENT ON LAND

The increase of 10% is due to the capitalization of the interest cost on the regional landfill site during the 2025/2026 financial year.

INVENTORY CONSUMED

The 60.32% decrease in Inventory is related to the discontinuation of the Roads Function on 31 March 2026.

CAPITAL BUDGET

The capital budget increased from R57 910 680 in the 2025/2026 financial year to R 81 995 219 in the 2026/2027 financial year. The increase in the capital budget is primarily due to the deferral of projects.

TOTAL ACTUAL BUDGET

	2026/2027	2027/2028	2028/2029
Operating Expenditure	377.378.047	381.631.908	391.435.776
Project Expenditure	12.561.953	12.242.301	12.122.301
Sub Total	**389.940.000**	**393.874.209**	**403.558.077**
Capital Expenditure	81.995.219	45.499.700	27.973.000
Total Budget	471.935.219	439.373.909	431.531.077

COMPARISON BETWEEN THE ADJUSTMENT BUDGET AND THE 2026/2027 BUDGET

	Adjustment budget Feb 2026	2026/2027	% Variance
Operating Expenditure	446.276.090	377.378.047	-15%
Project Expenditure	20.086.630	12.561.953	-37%
Sub Total	**466.362.720**	**389.940.000**	-16%
Capital Expenditure	57.910.680	81.995.219	42%
Total Budget	524.273.400	471.935.219	-10%

FUNDING OF THE BUDGET

Definition of a Reserve:

A reserve is part of retained earnings a set aside for a specified purpose and, and hence unavailable for disbursements:

The only reserves disclosed in Council's financial statements are the following:

- Capital Replacement Reserve – to finance Property Plant and Equipment
- Revaluation reserve – to offset depreciation on the re-valued portion of building and de-valuation of buildings.

(Both the above reserves are non-distributable reserves)

Definition of a Provision:

Provisions are made to make future payments towards liabilities that you already have Future Medical Aid Liability.

	2026/2027	2027/2028	2028/2029
RSC Replacement Grant	-280.977.000	-292.190.000	-301.271.000
Equitable Share	-3.021.000	-2.965.000	-3.224.000
Finance Management Grant	-1.200.000	-1.300.000	-1.500.000
EPWP Incentive	- 1.524.000	-	-
Other National Dora Grants	-3.280.000	-3.411.000	-3.517.000
Provincial Dora Grants	-3.990.000	-2.406.000	-2.556.000
Other income	-4.930.500	-5.110.500	-5.110.500
Interest Received	-79.500.000	-73.954.209	-73.842.077
Service Charges	-11.517.500	-12.537.500	-12.537.500
Agency Services:	0	0	0
Total Budget	-389.940.000	-393.874.209	-403.558.077

FINANCIAL POSITION

	Adjustment Budget Feb 2026	2026/2027	2027/2028	2028/2029
Operating Expenditure	466.362.720	389.940.000	393.874.209	403.558.077
Operating Income	-468.697.720	- 389.940.000	- 393.874.209	- 403.558.077
(Surplus) / Deficit	-2.335.000	-	-	-

LIQUIDITY AND DEBT-EQUITY RATIO'S

Current Ratio = Current Assets / Current Liabilities

2023 / 2024 2024 / 2025

8.55:1 5.63:1

This ratio indicates that Council's Current Assets exceed its Current

Liabilities Cash Ratio = Cash and Cash Equivalents / Current Liabilities

2023 / 2024 2024 / 2025

7.87:1 5.27:1

This ratio indicates that Council will be able to honour current payments.

CAPITAL REPLACEMENT RESERVE FOR THE 2026/2027 - 2028/2029 MTREF

Capital Replacement Reserve	2026/2027	2027/2028	2028/2029
Opening Balance	15.511.740	3.516.521	18.016.821
Acquisitions for the year	- 81.995.219	- 45.499.700	- 27.973.000
Contributions to Reserve	70.000.000	60.000.000	60.000.000
Closing Balance	3.516.521	18.016.821	50.043.821

TOP LAYER SDBIP PROJECTS BUDGET 2026/2027, 2027/2028 & 2028/2029

				BUDGET 2026/2027	BUDGET 2027/2028	BUDGET 2028/2029
LOCAL ECONOMIC DEVELOPMENT						
	Unique Key	**Cost Account**	**Item Description**			
Small Farmer support						
Small Farmer Support_Stellenbosch	20240626989862	11004278520000	Allocations_in-kind: Private Enterprises	140.000	140.000	140.000
Small Farmer Support_Langeberg	20240626989857	11004278520000	Allocations_in-kind: Private Enterprises	112.048	118.444	118.444
Small Farmer Support_Drakenstein	20250627045580	11004278520000	Allocations_in-kind: Private Enterprises	28.012	29.611	29.611
				280.060	288.055	288.055
Entreprenurial Seed funding						
Entrepreneurial Seed Funding_Stellenbosch	20250627045584	11004278520000	Allocations_in-kind: Private Enterprises	61.066	64.552	64.552
Entrepreneurial Seed Funding_Drakenstein	20250627045588	11004278520000	Allocations_in-kind: Private Enterprises	60.506	63.960	63.960
Entrepreneurial Seed Funding_Breede Valley	20250627045592	11004278520000	Allocations_in-kind: Private Enterprises	42.018	44.416	44.416
Entrepreneurial Seed Funding_Witzenberg	20250627045596	11004278520000	Allocations_in-kind: Private Enterprises	28.012	29.611	29.611
Entrepreneurial Seed Funding_Langeberg	20250627045600	11004278520000	Allocations_in-kind: Private Enterprises	70.030	74.027	74.027
				261.632	276.566	276.566
Mentorship Programme						
SMME Training and mentorship_Stellenbosch	20250627043641	11004200790000	Project Management	97.453	103.016	103.016
SMME Training and mentorship_Drakenstein	20250627043642	11004200790000	Project Management	54.080	57.167	57.167

SMME Training and mentorship_Breede Valley	20250627043643	11004200790000	Project Management	32.393	34.242	34.242
SMME Training and mentorship_Witzenberg	20250627043644	11004200790000	Project Management	21.687	22.925	22.925
SMME Training and mentorship_Langeberg	20250627043640	11004200790000	Project Management	86.473	91.409	91.409
				292.086	308.759	308.759
TOTAL: LOCAL ECONOMIC DEVELOPMENT				833.778	873.380	873.380
TOURISM						
Tourism training						
Tourism Training_Stellenbosch	20250627043608	11103200480000	Professional Staff	109.807	116.075	116.075
Tourism Training_Drakenstein	20250627043609	11103200480000	Professional Staff	109.807	116.075	116.075
Tourism Training_Breede Valley	20250627043610	11103200480000	Professional Staff	109.807	116.075	116.075
Tourism Training_Witzenberg	20250627043611	11103200480000	Professional Staff	54.903	58.037	58.037
Tourism Training_Langeberg	20250627043612	11103200480000	Professional Staff	109.807	116.075	116.075
				494.131	522.337	522.337
Tourism month						
Launch of Tourism Month						
	20250627044840	11103223080000	Hire Charges	6.723	7.107	7.107
	20250627043746	11103201670000	Stage and Sound Crew	549	580	580
	20250627043711	11103201270000	Catering Services	5.051	5.339	5.339
				12.323	13.026	13.026
Mayoral Tourism Awards						
	20250627043662	11103201200000	Artists and Performers	3.294	3.482	3.482
				3.294	3.482	3.482
TOTAL: TOURISM MONTH				15.617	16.508	16.508
Tourism Campaign						
	20250627044280	11103221430000	Achievements and Awards	-	11.844	11.844

	20250627044292	11103221490000	Gifts and Prnmntinnal Items	-	17.174	17.174
	20250627044327	11103221810000	Radio and TV Transmissions	-	296.109	296.109
				-	325.127	325.127
Township Tourism						
Township Tourism_Stellenbosch	20250627043639	11103200790000	Project Management	27.452	29.019	29.019
Township Tourism_Drakenstein	20250627043636	11103200790000	Project Management	11.834	21.073	21.073
Township Tourism_Drakenstein	20250627045337	11103277880000	Tourism	150.000	150.000	150.000
				189.286	200.092	200.092
TOTAL: TOURISM				699.034	1.064.064	1.064.064
LAND-USE AND SPATIAL PLANNING						
EPWP Invasive Alien Vegetation						
Invasive Alien Vegetation_BVM	20250627043594	11521200160000	Alien Vegetation Control	199.299	210.676	210.676
Invasive Alien Vegetation_Drakenstein (EPWP Grant)	20250627043595	11521200160000	Alien Vegetation Control	449.036	463.733	463.733
Invasive Alien Vegetation_Drakenstein (EPWP Grant)	20240626986361	11521200160000	Alien Vegetation Control	300.000	-	-
Invasive Alien Vegetation_Langeberg	20250627043596	11521200160000	Alien Vegetation Control	136.984	144.803	144.803
Invasive Alien Vegetation_Witzenberg	20250627043597	11521200160000	Alien Vegetation Control	245.418	259.427	259.427
				1.330.737	1.078.639	1.078.639
TOTAL: LAND-USE AND SPATIAL PLANNING				1.330.737	1.078.639	1.078.639
PROJECTS						
Provision of water to Schools						

Pn-0334_Provision of Water Schools_Langeberg	20240626989658	11330277340000	Monetary Allocations:Farmer Support Households	200.000	200.000	200.000
Pn-0334_Provision nf Water Schools_Witzenberg	20250627045224	11330277340000	Monetary Allocations:Farmer Support Households	300.000	300.000	300.000
				500.000	500.000	500.000
Clearing of Road Reserves						
PO-0336_Clearing of Road Reserves_Witzenberg	20250627043599	11330200350000	Outsourced Services:Clearing and Grass Cutting	441.000	441.000	441.000
Pn-0337_Clearing of Road Reserves_Langeberg	20250627043600	11330200350000	Outsourced Services:Clearing and Grass Cutting	254.800	254.800	254.800
PO-0646_Clearing of Road Reserves_Langeberg (EPWP)	20240626986382	11330200350000	Outsourced Services:Clearing and Grass Cutting	424.000	-	-
PO-0912_Clearing of Road Reserves_Breede Valley (EPWP)	New ukey	11330200350000	Outsourced Services:Clearing and Grass Cutting	400.000	-	-
PO-0338_Clearing of Road Reserves_Stellenbosch	20250627043601	11330200350000	Outsourced Services:Clearing and Grass Cutting	205.800	205.800	205.800
PO-0339_Clearing of Road Reserves_Breede Valley	20250627043602	11330200350000	Outsourced Services:Clearing and Grass Cutting	263.620	263.620	263.620
PO-0396_Clearing of Road Reserves_Drakenstein	20250627043603	11330200350000	Outsourced Services:Clearing and Grass Cutting	294.980	294.980	294.980
				2.284.200	1.460.200	1.460.200
TOTAL: PROJECTS AND HOUSING				2.784.200	1.960.200	1.960.200
PUBLIC TRANSPORT REGULATION						

Road Safety Education						
PO-0278_Learner Peak Caps	20250627044287	11615221490000	Gifts and Promotional Items	211.885	215.669	215.669
PO-0793_Reflective Bibs	20240626988462	11615221490000	Gifts and Promotional Items	55.090	56.074	56.074
PO-0798_Reflective Beanies	20240626988463	11615221490000	Gifts and Promotional Items	35.314	35.945	35.945
PO-0799_Road Safety Promotional Items	20250627044298	11615221490000	Gifts and Promotional Items	443.545	451.468	451.468
PO-0281_Transport Month Event	20250627044288	11615221490000	Gifts and Promotional Items	423.769	431.339	431.339
				1.169.603	1.190.495	1.190.495
Sidewalks and Embayments						
PO-0050_Sidewalks and Embayments	20240626988188	11615220180000	Standard rated	141.256	143.780	143.780
PO-0050_Side Walks and Empayments	20250627043657	11615200950000	Civil	1.412.564	1.437.796	1.437.796
Pioneer School -Side Walks	20250627043659	11615200950000	Civil	-	-	-
				1.553.820	1.581.576	1.581.576
TOTAL: PUBLIC TRANSPORT REGULATION				2.723.423	2.772.071	2.772.071
MUNICIPAL HEALTH SERVICES						
Annual Environmental Health Educ. Prog.						
	20240626988461	11441221490000	Gifts and Promotional Items	107.800	107.800	107.800
	20240626986535	11441201270000	Catering Services	58.800	58.800	58.800
	20240626988767	11441222470000	Printing, Publications and Books	59.000	59.000	59.000
Pre-Production District Wide	20240626986507	11441201200000	Artists and Performers	253.820	253.820	253.820
Theatre Performances Breede Valley	20240626986511	11441201200000	Artists and Performers	117.600	117.600	117.600
Theatre Performances Drakenstein	20240626986510	11441201200000	Artists and Performers	78.400	78.400	78.400
Theatre Performances Langeberg	20240626986509	11441201200000	Artists and Performers	80.360	80.360	80.360

Theatre Performances Stellenbnsch	20240626986508	11441201200000	Artists and Performers	78.400	78.400	78.400
Theatre Performances Witzenberg	20240626986506	11441201200000	Artists and Performers	120.540	120.540	120.540
				954.720	954.720	954.720
TOTAL: MUNICIPAL HEALTH SERVICES				954.720	954.720	954.720
SOCIAL DEVELOPMENT						
Skills Development						
Artisan Skills Develnpment Wnmen	20250627043605	11475200480000	Outsourced Services:Professional Staff	82.355	87.056	27.056
Drivers Licence	20250627043613	11475200480000	Outsourced Services:Professional Staff	82.355	87.056	27.056
TOTAL: SKILLS DEVELPMENT				164.710	174.112	54.112
HIV/AIDS						
Aids Day Event						
	20250627044469	11475222630000	Transport Provided as Part of Departmental Act.	2.801	2.961	2.961
	20250627043607	11475200480000	Outsourced Services:Professional Staff	1.098	1.161	1.161
	20250627043666	11475201220000	Audio-visual Services	1.208	1.277	1.277
	20250627043703	11475201270000	Catering Services	16.855	17.817	17.817
	20250627044286	11475221490000	Gifts and Promotional Items	2.801	2.961	2.961
	20250627044247	11475220180000	Consumables:Standard Rated	4.563	4.824	4.824
				29.326	31.001	31.001
Aids Awareness programmes: District wide						
	20250627044459	11475222630000	Transport Provided as Part of Departmental Act.	11.205	11.844	11.844
	20250627043688	11475201270000	Catering Services	19.216	20.313	20.313

				30.421	32.157	32.157
16 days of Activism Launch						
	20250627044471	11475222630000	Transport Provided as Part of Departmental Act.	10.869	11.489	11.489
	20250627043704	11475201270000	Catering Services	18.887	19.965	19.965
				29.756	31.454	31.454
TOTAL: HIV/AIDS				89.503	94.612	94.612
ELDERLY						
Active Age Programme District wide						
	20250627044455	11475222630000	Transport Provided as Part of Departmental Act.	11.205	11.844	11.844
	20250627043686	11475201270000	Catering Services	14.275	15.090	15.090
	20250627043740	11475201670000	Stage and Sound Crew	878	929	929
				26.358	27.863	27.863
District Golden Games Event						
	20250627044470	11475222630000	Transport Provided as Part of Departmental Act.	99.204	104.867	104.867
	20250627044274	11475221430000	Achievements and Awards	11.205	11.844	11.844
	20250627043710	11475201270000	Catering Services	48.864	51.653	51.653
	20250627043745	11475201670000	Stage and Sound Crew	2.745	2.902	2.902
				162.018	171.266	171.266
Elderly Grant in Aid						
	20250627045190	11475277260000	Social Assistance: Old Age Grant	84.036	88.833	88.833
				84.036	88.833	88.833
TOTAL: ELDERLY				272.412	287.962	287.962
FAMILIES AND CHILDREN						
Families and Children Programmes						
	20250627044458	11475222630000	Transport Provided as Part of Departmental Act.	16.365	17.299	17.299

	20250627043690	11475201270000	Catering Services	27.452	29.019	29.019
				43.817	46.318	46.318
Holiday Programmmes						
	20250627044462	11475222630000	Transport Provided as Part of Departmental Act.	38.855	41.073	41.073
	20250627043699	11475201270000	Catering Services	19.216	20.313	20.313
	20250627043744	11475201670000	Stage and Sound Crew	1.647	1.741	1.741
				59.718	63.127	63.127
Substance Abuse Awareness						
	20250627044464	11475222630000	Transport Provided as Part of Departmental Act.	14.773	15.617	15.617
	20250627043668	11475201220000	Audio-visual Services	275	290	290
	20250627043697	11475201270000	Catering Services	19.216	20.313	20.313
				34.264	36.220	36.220
Victim Empowerment Programmes						
	20250627044460	11475222630000	Transport Provided as Part of Departmental Act.	16.807	17.767	17.767
	20250627043696	11475201270000	Catering Services	30.197	31.921	31.921
				47.004	49.688	49.688
Teenage Pregnancy						
	20250627044463	11475222630000	Transport Provided as Part of Departmental Act.	5.602	5.922	5.922
	20250627043698	11475201270000	Catering Services	14.110	14.916	14.916
				19.712	20.838	20.838
Life skills workshops						
	20250627044457	11475222630000	Transport Provided as Part of Departmental Act.	10.308	10.897	10.897
	20250627043685	11475201270000	Catering Services	37.883	40.046	40.046
				48.191	50.943	50.943
Educational Excursions: District Wide						
	20250627044456	11475222630000	Transport Provided as Part of Departmental Act.	29.418	31.097	31.097
	20250627043687	11475201270000	Catering Services	8.236	8.706	8.706
				37.654	39.803	39.803

Sanitary Ware						
	20250627044246	11475220180000	Consumables:Standard Rated	56.024	59.222	59.222
				56.024	59.222	59.222
TOTAL: FAMILIES AND CHILDREN				346.384	366.159	366.159
EARLY CHILDHOOD DEVELOPMENT						
PO-0295_ECD Grant_Breede Valley	20250627044927	11475276075100	Community and Social Services	40.337	42.640	42.640
PO-0296_ECD Grant_Witzenberg	20250627044920	11475276075100	Community and Social Services	4.482	4.738	4.738
PO-0297_ECD Grant_Langeberg	20250627044934	11475276075100	Community and Social Services	8.964	9.475	9.475
PO-0298_ECD Grant_Drakenstein	20250627044906	11475276075100	Community and Social Services	40.337	42.640	42.640
PO-0299_ECD Grant_Stellenbosch	20250627044913	11475276075100	Community and Social Services	17.928	18.951	18.951
				112.048	118.444	118.444
YOUTH						
Youth Camp						
	20250627044467	11475222630000	Transport Provided as Part of Departmental Act.	22.410	23.689	23.689
	20250627044834	11475223080000	Hire Charges	18.544	19.602	19.602
	20250627043701	11475201270000	Catering Services	15.922	16.831	16.831
				56.876	60.122	60.122
Youth Day						
	20250627044468	11475222630000	Transport Provided as Part of Departmental Act.	14.006	14.805	14.805
	20250627044284	11475221490000	Gifts and Promotional Items	5.602	5.922	5.922
				19.608	20.727	20.727

Top Achievers Awards						
	20250627044275	11475221430000	Achievements and Awards	672.286	710.662	710.662
	20250627044283	11475221490000	Gifts and Promotional Items	28.012	29.611	29.611
	20250627043694	11475201270000	Catering Services	109.807	116.075	116.075
	20250627043618	11475200590000	Translators, Scribes and Editors	4.941	5.223	5.223
	20200109041036	11475200590000	Translaters, scribes and editnrs			
	20250627043742	11475201670000	Stage and Sound Crew	2.745	2.902	2.902
				817.791	864.473	864.473
Career Exhibitions						
	20250627044461	11475222630000	Transport Provided as Part of Departmental Act.	21.457	22.682	22.682
	20250627043695	11475201270000	Catering Services	16.471	17.411	17.411
				37.928	40.093	40.093
TOTAL: YOUTH				932.203	985.415	985.415
Women's Day Event						
Phenomenal Women Award						
	20250627044855	11475266790000	Afrikaanse Taalmuseum	-	-	-
	NEW		Project Management	54.903	58.037	58.037
				54.903	58.037	58.037
Sexual Offence Awarness campaign						
	20250627043702	11475201270000	Catering Services	21.412	22.635	22.635
	20250627044245	11475220180000	Consumables:Standard Rated	8.949	9.460	9.460
				30.361	32.095	32.095
Women's Day Event						
	20250627043614	11475200480000	Outsourced Services:Professional Staff	82.355	87.056	87.056
	20250627043700	11475201270000	Catering Services	21632	22867	22867
				103.987	109.923	109.923

TOTAL: WOMEN				189.251	200.055	200.055
TOTAL: SOCIAL DEVELOPMENT				2.106.511	2.226.759	2.106.759
RURAL DEVELOPMENT						
SPORTS, RECREATION AND CULTURE						
Sport,Recreation and culture events						
	20250627044277	11477221430000	Achievements and Awards	121.124	128.038	128.038
	20250627044289	11477221490000	Gifts and Promotional Items	2.241	2.369	2.369
	20250627044473	11477222630000	Transport Provided as Part of Departmental Act.	185.887	196.498	196.498
	20250627043717	11477201270000	Catering Services	164.710	174.112	174.112
	20250627043748	11477201670000	Stage and Sound Crew	29.648	31.340	31.340
				503.610	532.357	532.357
Sport And Rec support grant_Clubs_Witzenberg	20250627045025	11477276075200	Sport and Recreation	-	-	-
Sport And Rec support grant_Clubs_Langeberg	20250627045032	11477276075200	Sport and Recreation	-	-	-
Sport And Rec support grant_Clubs_Stellenbnsch	20250627045018	11477276075200	Sport and Recreation	-	-	-
Sport And Rec support grant_Clubs_Breede Valley	20250627045011	11477276075200	Sport and Recreation	-	-	-
Sport And Rec support grant_Clubs_Drakenstein	20250627045039	11477276075200	Sport and Recreation	-	-	-
Cape Winelands Sport Council	0	0	Hire Charges	-	71.066	71.066
Cape Winelands Sport Council	20250627043718	11477201270000		65.884	117.022	117.022
Boland Cricket	20250627045545	11477277910000	Sport Councils	-	-	-
SAFA Capewinelands	20250627045537	11477277910000	Sport Councils	-	-	-
Woordfees Stellenbosch	20250627045046	11477276075200	Sport and Recreation	-	-	-
Cape Winelands Farmworkers Association	20250627045074	11477276075300	Cape Winelands Farmworkers Association	-	-	-

				65.884	188.088	188.088
Vlakkie Cricket						
	20250627044279	11477221430000	Achievements and Awards	11.205	11.844	11.844
	20250627044475	11477222630000	Transport Provided as Part of Departmental Act.	16.807	17.767	17.767
	20250627043720	11477201270000	Catering Services	12.079	12.768	12.768
				40.091	42.379	42.379
Easter Tournament						
	20250627044278	11477221430000	Achievements and Awards	16.807	17.767	17.767
	20250627044476	11477222630000	Transport Provided as Part of Departmental Act.	13.446	14.213	14.213
	20250627043721	11477201270000	Catering Services	16.471	17.411	17.411
				46.724	49.391	49.391
Drama Festival						
	20250627044477	11477222630000	Transport Provided as Part of Departmental Act.	31.373	33.164	33.164
	20250627043722	11477201270000	Catering Services	2.196	2.321	2.321
				33.569	35.485	35.485
Rieldans						
	20250627044478	11477222630000	Transport Provided as Part of Departmental Act.	16.807	17.767	17.767
	20250627043723	11477201270000	Catering Services	8236	8706	8706
				25.043	26.473	26.473
Grassroot Sports Event						
	20250627044276	11477221430000	Achievements and Awards	11.205	11.844	11.844
	20250627044454	11477222630000	Transport Provided as Part of Departmental Act.	54.455	57.564	57.564
	20250627043691	11477201270000	Catering Services	26.354	27.858	27.858
	20250627043741	11477201670000	Stage and Sound Crew	8.785	9.286	9.286
				100.799	106.552	106.552

TOTAL: SPORTS, RECREATION AND CULTURE				815.720	980.725	980.725
Disabled						
Pn-0273_International Day for persons with Disabilities						
	20250627044474	11477222630000	Transport Provided as Part of Departmental Act.	22.410	23.689	23.689
	20250627043719	11477201270000	Catering Services	20.863	22.054	22.054
	20250627043747	11477201670000	Stage and Sound Crew	1.647	1.741	1.741
				44.920	47.484	47.484
HEARING AIDS						
Provision of Hearing Aids	20250627045182	11477277250000	Social Assistance: Grant in Aid	112.048	118.444	118.444
				112.048	118.444	118.444
Disability Grant_Breede Valley	20250627045170	11477277210000	Social Assistance: Disability Grant	49.346	52.163	52.163
Disability Grant_Stellenbosch	20250627045174	11477277210000	Social Assistance: Disability Grant	22.068	23.327	23.327
Disability Grant_Drakenstein	20250627045178	11477277210000	Social Assistance: Disability Grant	22.068	23.327	23.327
Disability Grant Witzenberg	20250627045166	11477277210000	Social Assistance: Disability Grant	7.356	7.776	7.776
Disabled adult diapers	20250627044255	11477220180000	Consumables:Standard Rated	56.024	59.222	59.222
				156.862	165.815	165.815
TOTAL: DISABLED				313.830	331.743	331.743
TOTAL: RURAL DEVELPMENT				**1.129.550**	**1.312.468**	**1.312.468**
TOTAL PROJECTS						
				12.561.953	**12.242.301**	**12.122.301**

CHAPTER 8

MONITORING AND EVALUATION

(ORGANISATIONAL PERFORMANCE SCORECARD)



CAPE WINELANDS DISTRICT MUNICIPAL SCORECARD 2026/

Strategic Alignment			Performance Indicator Number	Performance Indicator Name	Data Element	CWDM Department
National KPA	**Strategic Objective**	**Outcome**				
OUTCOME INDICATORS FOR ANNUAL MONITORING						
MFVM	*(SO1) Provide sustainable strategic financial managementt and support services*	*The municipality aims to create sustainable sources of funding and management thereof, ensuring long-term financial viability. Resources are effectively used to maximise contrabutions to LED and support services*	*PI1.1*	*Percentage of operating expenditure against total budget (excluding non cash items)*		***Financial Services***
					(1) Total expenditure (operating)	
					(2) Total budget (operating)	
			PI1.2	*Percentage of capital expenditure against total budget*		***Financial Services***
					(1) Total expenditure (capital)	
					(2) Total budget (+ capital)	
			PI1.3	*Percentage of total operating revenue to finance total debt (Total Debt (Borrowing) / Total operating revenue)*		***Financial Services***
					(1) Debt (Short Term Borrowing + Bank Overdraft + Short Term Lease + Long Term Borrowing + Long Term Lease)	
					(2) Total Operating Revenue	

					(3) Operating Conditional Grant	
			PI1.4	*Percentage change in cash backed reserves reconciliation*		***Financial Services***
					(1) Cash backed reserves (previous year)	
					(2) Cash backed reserves (current year)	
			PI1.5	*Percentage change in cash and cash equivalent (short term)*		***Financial Services***
					(1) Cash and cash equivalent (Current year)	
					(2) cash and cash equivalent (Previous year)	
			PI1.6	*Percentage of total operating expenditure on remuneration*		***Financial Services***
					(1)Employee Related Costs	
					(2) Councillors' Remuneration)	
					(3) Total Operating Expenditure	
			PI1.7	*Percentage of Revenue Growth excluding capital grants*		***Financial Services***
					(1) Total Revenue Excluding Capital Grants (current year)	
					(2) Total Revenue Excluding Capital Grants (previous year)	
			PI1.8	*Percentage of net operating surplus margin (excluding depreciation)*		***Financial Services***
					(1)Total Operating Revenue	
					(2)Total Operating Expenditure	

			PI1.9	*Cash/Cost coverage ratio*		***Financial Services***
					(1) Cash and Cash Equivalents	
					(2) Unspent Conditional Grants	
					(3) Overdraft	
					(4) Short Term Investment	
					(5) Monthly Fixed Operational Expenditure excluding (Depreciation, Amortisation, Provision for Bad Debts, Impairment and Loss on Disposal of Assets)	
			PI1.10	*Current ratio (current assets/current liabilities)*		***Financial Services***
					(1) Current assets	
					(2) Current liabilities	
			PI1.11	*Trade payables to cash ratio*		***Financial Services***
					(1) Cash and cash equivalents	
					(2) Trade payables	
			PI1.12	*Liquidity ratio*		***Financial Services***
					(1) Cash and cash equivalents	
					(2) Current liabilities	
	Monitor and promote a clean, healthy and safe living environment whilst provide emergency response services for all residents throughout the district	*A well coordinated fire service division, establishing a fire safe enviroment*	*PI2.1*	*Number of officials trained at the CWDM Fire Services Acadamy*		***Community Development & Planning Services***
					(1) Sum of officials enroled in training programme	
					(2) Sum of officials successfully completed	
		Disaster response plans are well-	*PI2.2*	*Number of annual Disaster Management Advisory Forums held*		***Community Development & Planning Services***

		established and regularly tested, enablin an improved response to incidents, which creates stronger relationships within the district and a well-coordinated disaster management centre		*(1) Total sum of Disaster Management Forums*	
		All residents have equal access to basic service delivery	*PI2.3*	*The total number of awareness campaigns conducted on waste*	***Municipal Manager***
				(1) Total number of waste campaigns as per the Waste Awareness Plan	
				(2) Count of waste awarness campaigns completed	
BSD		*Resources, including stable infrastructure, technology and spatial resources, as well as the promotion of water services, are effeciently utilized to ensure the long-term well-*			
			PI2.4	*Percentage of drinking water samples complying to SANS241*	***Community Development & Planning Services***
				(1) Number of water sample tests that complied with SANS 241 requirements	
				(2) Total number of water samples tested	
			PI2.5	*Percentage increase in own water resources*	***Community Development & Planning Services***
				Data element	

		being and unity of the communiy			*Data element*	
	Provide sustainable infrastructure services and transport planning services that enable social and economic opportunities	*Infrastructure services and resources are financially supported. Municippal infrastructure and transport planning systems are developed and in a resilient and well-functioning manner as to result in longevity, and safe and secure communal enviroment facilitating socio-economic opportunities*	*PI2.6*	*Kilometers of existing roads rehabilitated*		***Technical Services***
					(1) KM's of road reserviced	
			PI2.7	*Kilometers of existing roads resealed*		***Technical Services***
					(1) KM's of road resealed	
			PI2.8	*Percentage of wastewater samples compliant to water use license conditions*		***Technical Services Community Development & Planning Services***
					(1) Number of wastewater samples tested per determinant that meet compliance to specified water use license requirements	
					(2) Total wastewater samples tested for all determinants over the municipal financial year	
LED	*Facilitate partnerships that cultivate economic growth and development through the district*	*Achieving an enabled enviroment by creating inclusive and equitable economies, and developmental growth through the economic benefits generated from niche markets,*	*PI3.1*	*Percentage of total municipal operating expenditure spent on contracted services physically residing within the municipal area*		***Financial Services***
					(1) R-value of operating expenditure on contracted services within the municipal area	
					(2) Total municipal operating expenditure on contracted services	
			PI3.2	*Number of work opportunities created through Public Employment Programmes (incl.*		***Municipal Manager***

		innovation and partnerships		*EPWP, CWP and other related employment programmes)*		
					(1) Number of work opportunities provided by the municipality through the Expanded Public Works Programme	
					(2) Number of work opportunities provided through the Community Works Programme and other related infrastructure initiatives	
			PI3.3	*Percentage economic growth in the municipal area*		***Community Development & Planning Services***
					(1) Quantech assessment	
			PI3.4	*Average number of days from the point of advertising to the letter of award per 80/20 procurement process*		***Financial Services***
					(1) Sum of the number of days from the point of advertising a tender in terms of the 80/20 procurement process to the issuing of the letter of award	
					(2) Total number of 80/20 tenders awarded as per the procurement process	
			PI3.5	*Number of SMME's trained*		***Community Development & Planning Services***
					(1) Sum of the number of SSME's trained per training session	

GGPP	*Foster good governance processes as prescribed by legislation and best practices*	*A foundation for effecrive gorvernance that promotes political and administrative stability, the mitigation of identified risks, an improved ethical culture and functional oversight, has been established and is adhered to*	*PI4.1*	*Obtain and maintain a clean audit opinion*		***Municipal Manager***
					(1) Opinion reported by the Auditor-General (Audit outcomes) [Unqualified = 1]	
			PI4.2	*Promote management stability throughout the organisation*		***Corporate Services***
					(1) Total sum of standard working days, in the reporting period that each S56 and S57 post was occupied by a fully appointed official (not suspended or vacant) with a valid signed contract and performance agreement)	
					(2) Aggregate working days for all S56 and S57 positions	
			PI4.3	*Percentage of Councillors attending Council meetings*		***Corporate Services***
					(1) Sum total of Councillors attendance of Council meetings	
					(2) Total number of Council meetings	

					(3) Total number of Council members in the Municipality	
MTID	*Establish a skilled workforce and performance orientated administration to promote the growth and development of the organisation*	*A capable and knowledgeable workforce that positively contrabute and succesfully provide high-quality services to the community, and become enablers of development. Consequence/ development management and a performance management system embedded into the functioning of the municipality in order to promote optimal performance*	*PI5.1*	*Percentage of municipal skills development levy recovered*		***Corporate Services***
					(1) R value of municipal skills development levy recovered	
					(2)R value of the total qualifying value of the Municipality skills development levy	
			PI5.2	*Reduce staff turn-around time to less then 15% within 6 months*		***Corporate Services***
					(1) Average number of employees from 6 motnhs	
					(2) Total number of employees who left within 6 months	
			PI5.3	*Limit the vacancy rate to less then 15% of funded posts*		***Corporate Services***
					(1) Number of funded posts vacant	
					(2) Number of funded post	

QUARTERLY PROJECTIONS OF SERVICE DELIVERY TARGETS AND PERFORMANCE INDICATORS (TOP LAYER KPIs)

(To be read in conjunction with the final SDBIP approved in June 2026 and any other subsequent adjustment

Municipal Manager

Internal Ref / Indicator Code	KPI	2025/2026 Adjustment Budget Target	Target Q1	Target Q2	Target Q3	Target Q4	KPI / Target Comment	2026/2027 Annual Target
TL1	Review the Organisational Strategic Risk Register (Top 10) and submit to Council by 31 May 2027	1	0	0	0	1	Same as prior year	**1**
TL2	Develop the Annual Risk-Based Audit Plan (RBAP) for 2027/2028 and submit to the Audit Committee for consideration by 30 June 2027	1	0	0	0	1	Same as prior year	**1**
TL3	Complete 90% of the Risk Based Audit Plan (RBAP) for the 2026/2027 financial year by 30 June 2027 [(Number of audits and tasks completed for the period identified in the RBAP/ Number of audits and tasks identified in the RBAP) x 100]	90%	10%	25%	45%	90%	Same as prior year	**90%**
TL4	Spend 90% of the municipal capital budget on capital projects by 30 June 2027 {(Actual amount spent on projects /Total amount budgeted for capital projects)X100}	90%	0%	40%	60%	90%	Same as prior year	**90%**
TL5	Develop and publish External Communications on a quarterly basis	6	2	2	2	2	In line with prior year adjustment	**8**
TL6	Create work opportunities (in person days) through CWDM's various initiatives	11 000	2000	2000	3000	4000	Same as prior year	**11000**

Financial Services

Internal Ref / Indicator Code	KPI	2025/2026 Adjustment Budget Target	Target Q1	Target Q2	Target Q3	Target Q4	KPI / Target Comment	2026/2027 Annual Target
TL7	Maintain a sound liquidity ratio as at 30 June 2027 (Current Assets: Current Liabilities)	5:1	0	0	0	5:1	Same as prior year	**5:1**
TL8	Maintain a sound Impairment of Property, Plant and Equipment and Investment Property and Intangible Assets Ratio as at 30 June 2027 (Property, Plant and Equipment + Investment Property + Intangible Assets Impairment/ (Total Property, Plant and Equipment + Investment Property + Intangible Assets) x 100	0%	0%	0%	0%	0%	Same as prior year	**0%**
TL9	Maintain a sound Cash / Cost Coverage Ratio as at 30 June 2027 [(Cash and Cash Equivalents - Unspent Conditional Grants - Overdraft) + Short Term Investment) / Monthly Fixed Operational Expenditure excluding (Depreciation, Amortisation, and Provision for Bad Debts, Impairment and Loss on Disposal of Assets)].	3	0	0	0	3	Same as prior year	**3**
TL10	Maintain a sound Level of Cash Backed Reserves Ratio as at 30 June 2027 [(Cash and Cash Equivalents - Bank Overdraft + Short Term Investment + Long Term Investment - Unspent Conditional Grants) / (Net Assets - Accumulated Surplus - Non Controlling Interest - Share Premium - Share Capital - Fair Value Adjustment - Revaluation Reserve)]	100%	0%	0%	0%	100%	Same as prior year	**100%**
TL11	Maintain a sound Net Operating Surplus Margin Ratio as at 30 June 2027 [(Total Operating Revenue - Total Operating Expenditure)/ Total Operating Revenue x 100%]	0%	0%	0%	0%	0%	Same as prior year	**0%**
TL12	Compile and submit the Main Budget to Council by 31 May 2027	1	0	0	0	1	Same as prior year	**1**
TL13	Financial viability measured in terms of the municipality's ability to meet its service debt obligations by 30 June 2027 [(Short Term Borrowing + Bank Overdraft + Short Term Lease + Long Term Borrowing + Long Term Lease) / (Total Operating Revenue - Operating Conditional Grant) x 100]	45%	0%	0%	0%	45%	Same as prior year	**45%**

Corporate Services

Internal Ref / Indicator Code	KPI	2025/2026 Adjustment Budget Target	Target Q1	Target Q2	Target Q3	Target Q4	Target Comment	2026/2027 Annual Target
TL14	Percentage of people from employment equity target groups employed in the three highest levels of management in compliance with the municipality's approved employment equity plan by 30 June 2027 {(Number of appointments in 3 highest level which comply with employment equity target groups / total appointments made in 3 higher level of management x 100)	90%	0%	0%	0%	90%	Same as prior year	**90%**
TL15	Spent 0.10% of operational budget on training by 30 June 2027 {(Actual total training expenditure divided by total operational budget)x100}	0.10%	0%	0%	0%	0.10%	Same as prior year	**0.10%**
TL16	Signed 100% of individual performance agreements for all staff in terms of Regulation 890 by 30 July 2026	100%	100%	0%	0%	0%	Same as prior year	**100%**
TL17	Limit annual vacancy rate to less than 15% of funded posts {(Number of funded posts vacant / number of funded posts) x100}	15%	0%	0%	0%	15%	Same as prior year	**15%**
TL18	Review the ICT Strategic Plan and submit to Council by 31 May 2027	1	0	0	0	1	Same as prior year	**1**
TL19	Spend 90% of the capital budget allocated to ICT by 30 June 2027 [(Actual amount spent on capital projects /Total amount budgeted for capital projects) x 100]	90%	0%	40%	65%	90%	Same as prior year	**90%**
TL20	Initiate the DCF and JDMA engagements to improve intergovernmental relations	8	2	2	2	2	Same as prior year	**8**
TL21	Submit the Top Layer SDBIP 2027/2028 to the Executive Mayor for approval within 14days after the adoption of the IDP and Budget	1	0	0	0	1	Same as prior year	**1**
TL22	Submit the revised IDP 2027/2028 to Council for adoption by 31 May 2027	1	0	0	0	1	Same as prior year	**1**
TL23	Submit the Annual Report 2025/2026 to Council for adoption by 31 March 2027	1	0	0	1	0	Same as prior year	**1**

Technical Services

Internal Ref / Indicator Code	KPI	2025/2026 Adjustment Budget Target	Target Q1	Target Q2	Target Q3	Target Q4	Target Comment	2026/2027 Annual Target
TL24	Blade 3 800km's of road	3 800	0	0	0	0	No longer applicable - Roads Agency function re-allocated to WCG	**0**
TL25	Re-gravel 11km's of road by	8	0	0	0	0	No longer applicable - Roads Agency function re-allocated to WCG	**0**
TL26	Spend 90% of the provincial roads conditional grant allocation received ((Total expenditure/ total budget received)x100)	90%	0	0	0	0	No longer applicable - Roads Agency function re-allocated to WCG	**0%**
TL27	Submit the District Integrated Transport Plan (DITP) to Council by 31 May 2027	1	0	0	0	1	Target date amended to 31 May 2027	**1**
TL28	Assist 1 school with the provision of water/sanitation (installation /upgrade/etc.) by 30 June 2027	1	0	0	0	1	Same as prior year	**1**
TL29	Regulatory Compliance rate at the Cape Winelands Regional Landfill Site	NEW KPI	100%	100%	100%	100%	New KPI	**100%**
TL30	Clear 800km's of road reserves by 30 June 2027	500	0	200	200	400	Same as prior year	**800**
TL31	Complete the annual review of the IWMP and submit to Council by 31 May 2026	1	0	0	0	1	Same as prior year	**1**
TL32	Spend 90% of the capital budget allocated to Facilities Management by 30 June 2027 [(Actual amount spent on capital projects /Total amount budgeted for capital projects) x 100]	90%	20%	40%	70%	90%	Same as prior year	**90%**

Community Development and Planning Services

Internal Ref / Indicator Code	KPI	2025/2026 Adjustment Budget Target	Target Q1	Target Q2	Target Q3	Target Q4	Target Comment	Annual Target for 2026/2027
TL33	Provide training opportunities to 60 fire officers and/or stakeholders at the CWDM Fire Services Academy by 30 June 2027	60	20	0	20	20	KPI wording change	**60**
TL34	Submit the Municipal Disaster Management Plan to Council by 31 May 2027	1	0	0	0	1	KPI wording change	**1**
TL35	Submit the Spatial Development Framework (SDF) to Council by 31 May 2027	1	0	0	0	1	Same as prior year	**1**
TL36	Submit the quarterly Air Quality Officer Report to the Western Cape Government (WCG)	4	1	1	1	1	Same as prior year	**4**
TL37	Attend LED and Tourism expos	NEW KPI	0	0	0	2	New KPI	**2**
TL38	Submit a report on the health outreach programmes (theatre performance) implemented throughout the district to Council by 30 June 2027	1	0	0	0	1	Same as prior year	**1**
TL39	Procure 3 Fire Fighting vehicles by 30 June 2027	1	0	0	0	3	Same as prior year	**3**

**For more details on Circular 88 Indicators, please refer to Appendix C.*

Annexures

Annexures / Appendix as per IDP document

Appendix A - **Cape Winelands District Municipality: Joint District and Metro Approach – Implementation Plan**

Appendix B - **CWDM Performance Management and Development System Framework**

Appendix C - **National Treasury MFMA Circular No. 88 – Municipal Circular on Rationalisation Planning and Reporting Requirements**

Annexures as per Budget document

Annexure N - **Air Quality Management Plan**

Annexure O - **CWDM Spatial Development Framework 2021 – 2025**

Annexure P - **Integrated Waste Management Plan**

Annexure Q - **Corporate Disaster Management Planning Framework**

Appendix A

Cape Winelands District Municipality: Joint District and Metro Approach – Implementation Plan





Joint District and Metro Approach (JDMA)

DCF Progress Report

22 November 2024

Content

- Introduction
- Overview of meetings in 2024
- Progress on CWDM JDMA Implementation Plan
- The way forward

Introduction

JDMA is a strategy aimed at fostering collaboration and alignment between different spheres of government to address complex challenges and improve service delivery outcomes.

- **Integrated Planning:** Ensuring that all government entities operating within a district or metro are aligned in their plans and priorities to avoid duplication and promote efficiency.
- **Improved Service Delivery:** Addressing socio-economic challenges more effectively by leveraging shared resources and expertise.
- **Increased Stakeholder Collaboration:** Engaging municipalities, government departments, traditional leadership, and the private sector to work together towards common development goals.
- **Cost-effectiveness:** Reduce duplication and enhanced coverage.

Overview of meetings in 2024

Planning meeting

- 10 January 2024

JDMA Project Leads

- 14 February 2024
- 4 September 2024

JDMA Interface Team

- 10 June 2024
- 11 November 2024

Other

- 11 April 2024

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Progress on CWDM JDMA projects

Priority Focus Area and Project leads	Project	Progress
1. Profile Data Governance *(CWDM and DLG)*	Compilation of overall data governance strategy	Awaiting slot on CWDM SMT agenda; to discuss the way forward.
2. Community Safety, Risk Reduction and improved Disaster Response *(CWDM and Community Safety)*	District Plan	Implemented. Reviewed annually; up for review soon.
	Area based Plan (Witzenberg) implemented	Peace Officers received training and form part of various Neighbourhood Watches. Mediation Training to be rolled out across the district.
3. Economic Recovery, long term unemployment and its consequences *(CWDM and DEDAT)*	Implementation of Economic Recovery Plan	LED Maturity Assessment completed. Continued collaboration with stakeholders needed.

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Progress on CWDM JDMA projects

Priority Focus Area and Project leads	Project	Progress
4. Resource Resilience *(CWDM, PDMC and stakeholders)*	Climate Change, Biodiversity and Water Management Framework Wildfire Urban Interface: Mitigation of Risks WCG Energy Programme	In progress: Conversation to be set up to consolidate resource resilience aspect, including climate change, disaster management, water, and energy. **Completed:** Municipalities received funds to procure generators.
5. Urbanisation *(CWDM and DEA&DP)*	Develop a Guide to inform future developments	Recommended: Closing out urbanisation guide with available data and focusing on a regional human settlement strategy.

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Progress on CWDM JDMA projects

Priority Focus Area and Project leads	Project	Progress
5. Urbanisation *(DoI and LM's)*	Monitor mega Human Settlement projects (TRANSHEX, Vlakkeland and Vredebes)	Project is ongoing. Challenges: Bulk electricity and long-term planning for phase 2 of Transhex.
6. Waste minimization and management solutions *(CWDM, DEA&DP and LM's)*	Regional Landfill Site	Eastern side - Contractor on site. Anticipated completion date May 2025 Western side – Planning/discussions in progress.
	Waste Minimisation Strategies	All LM's have approved waste minimisation plans. Continued further awareness to be created.
7. Infrastructure management and development *(BVM and DoI)*	N1 Eastern by pass	Currently in detailed design phase.

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Progress on CWDM JDMA projects

Priority Focus Area and Project leads	Project	Progress
8. Agriculture *(BVM, DoA and DWS)*	Brandvlei Storage Dam: Licensing	In progress. Update to be provided at next meeting.
9. Municipal Business Sustainability *(CWDM, LM's and DLG)*	Shared Services	Shared Services Models developed. Currently exploring further additions to the shared service project.
	Digital Transformation Strategy	In progress. Update to be provided at next meeting.
10. Communications and IGR *(CWDM and DLG)*	Institutionalising of the JDMA	Ongoing awareness campaigns.

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Progress on CWDM JDMA projects

Priority Focus Area and Project leads	Project	Progress
11. Operational Support *(Across the DM in the LM's)*	Operational Support Plans	Support plans for Breede Valley and Langeberg are in progress. Support plan for Witzenberg has been completed. Stellenbosch and Drakenstein's projects have been completed; some projects have been elevated to JDMA level. Ongoing projects: Maintenance of infrastructure, high mass lighting and rooftop solar projects.

Way forward

The DCF takes cognisance of the following:

- **New projects to be approved by DCF:**

1. Road to Rail
2. Expansion of Export Harbour
3. Stettynskloof Dam
4. Next Phase of TRANSHEX
5. ESKOM Network Upgrades
6. Public Works: Leasing Pockets of Land / Forestry Towns
7. Adam Tas Corridor development
8. Financial dispensation to ensure basic services delivery funding.
9. ECD's

- **Next meetings**

Project Leads meeting – 13 February 2025
DCF meeting – 14 March 2025 (to be approved)





Thank you

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Appendix B

CWDM Performance Management and Development System Framework

PERFORMANCE MANAGEMENT

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DEVELOPMENT SYSTEM

REVIEW: MARCH 2026

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DRAFT

1. PREAMBLE

The White Paper on Local Government (1998) proposed the introduction of Performance Management Systems (PMDS) for local government as a tool to monitor the progress of service delivery at local government level. The Municipal Systems Act of 2000 requires local governments to develop a Performance Management System. The Municipal Structures Act, 1998 Section 19, and the MFMA, Act 56 of 2003, are the legislation that gives direction to Performance Management in Municipalities. The Local Government Municipal Staff Regulations, Regulation 890, states in Chapter 4 that a Municipality must adopt a performance management and development system that complies with the provisions of this Chapter in the Regulation which applies to all staff members of a municipality.

This document offers Cape Winelands District Municipality a platform to implement, assess, monitor, measure, review, manage and reward performance throughout the Municipality and shall serve as the official Performance Management Framework which informs the performance management processes and practices. It also forms the basis of aligning the IDP with the operational business plans, performance areas and performance indicators of the various departments of the Municipality.

This framework/policy document should be read with:

- All legislation that relates to performance management;
- Other policies and procedures of the municipality that relates to performance management and human resource matters as referenced; and
- The Performance Management Guidelines;

1.2 Definitions

Activities:	The process or actions that use a range of inputs to produce the desired outputs and ultimately outcomes
Baseline:	Is the current level of performance that the institutions aim to improve
Benchmarking:	It's the process whereby an organisation of similar nature uses each other's performance as a collective standard against which to measure their own performance
Grievance:	Any dissatisfaction, perceived or otherwise on the part of a staff member arising from factors that include a staff member's job, working environment or the municipality's employment practices
Impact:	The results achieving specific outcomes, such as reducing poverty and creating jobs
Input:	All resources that contribute to the production and development of outputs

Integrated Development Plan:	Is the strategic 5-year plan of an organisation as envisaged in MSA Section 25
Key performance area:	Is the functional area that the Municipality must perform to achieve its Mission and Vision
Key performance indicator:	It defines how performance will be measured along a scale or dimension to achieve the strategic objectives
Objectives:	The Municipality is striving towards achieving goals over a 5-year period to inform the mission – outcomes
Output:	The final products or goods and services produced for delivery
Outcomes:	The medium-term results for specific beneficiaries that are the consequence of achieving specific outputs
Performance cycle:	Is the period commencing on 01 July annually and ending 30 June of the following year for which performance is planned, monitored and assessed
Portfolio of evidence:	The documentary evidence on progress made by staff towards achieving of the KPA's and KPI's
Moderation:	The process of aligning the staff members performance ratings to the performance of the department during the performance cycle and where applicable, the municipality
Target:	Express a specific level of performance that the institution, programme or individual is aiming to achieve within a given time period
SDBIP:	Is a detailed plan approved by the Executive Mayor of a municipality in terms of MFMA Section 53 (1)(c)(ii) for implementing the municipality's delivery of municipal services and its annual budget
Performance Standards:	Expresses the minimum acceptable level of performance, or level of performance that is generally expected. These should be informed by legislative requirements departmental policies and service level agreements but can also be benchmarked against other institutions performance levels in accordance to best practice principles
Technical Indicator Description:	An organized, purposeful structure that consists of interrelated and interdependent elements (components, entities, factors, members, parts etc.). These elements continually influence one another (directly or indirectly) to maintain their activity and the existence of the system, in order to achieve the goal of the system.

2. INTRODUCTION

Performance Management and Development System is a process which measures the implementation of the organisation's strategy taking into account the skills and the growth thereof. It is also a management tool to plan, monitor, measure and review performance indicators to ensure efficiency, effectiveness and the impact of service delivery by the municipality.

Performance Management is the practice of linking the long-term strategic objectives of an organisation to its day-to-day performance by setting measurable key performance indicators (KPI's) and monitoring performance against those indicators. When implemented correctly, it is an essential tool to monitor whether a municipality is on track to meet targets or serves as an early warning system to identify areas where improvement is required to enhance service delivery and recognise excellent performance.

The municipality deliver services essential to the well-being and development of the communities they serve. To ensure that service delivery is as efficient and economical as possible, municipalities are required to formulate strategic plans, allocate resources to the implementation of those plans, and monitor and report the results. Performance information is essential to focus the attention of the public and oversight bodies on whether municipalities are delivering value for money, by comparing their performance against their budgets and service delivery plans, and to alert managers to areas where corrective action is required.

The Constitution of South Africa (1996), Section 152, dealing with the objectives of local government, paves the way for performance management with the requirements for an "accountable government". The democratic values and principles in terms of Section 195 (1) are also linked with the concept of performance management, with reference to the principles of *inter alia:*

- the promotion of efficient, economic and effective use of resources;
- accountable public administration;
- to be transparent by providing information;
- to be responsive to the needs of the community; and
- to facilitate a culture of public service and accountability amongst staff.

Section 38 of the Municipal Systems Act (MSA), (Act 32 of 2000) requires municipalities to establish a Performance Management System (PMDS). Furthermore, the MSA and the MFMA requires the Integrated Development Plan (IDP) to be aligned to the municipal budget (Section 25(b) of the MSA) and to be monitored for the performance of the budget against the IDP via the Service Delivery and Budget Implementation Plan (SDBIP) [Section of the MFMA]. Section 38 (c) (MSA) also stipulates that a municipality must administer its affairs in an economical, effective, efficient and accountable manner.

In addition, Regulation 7(1) of the Local Government: Municipal Planning and Performance Management Regulations, 2001 states that "A municipality's performance management system entails 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."

This policy therefore describes how the municipality's performance process, for the organisation will be conducted, organised and managed. It also has the following objectives:

- Clarify processes of implementation;
- Ensure compliance with legislation;
- Demonstrate how the system will be managed;
- Define roles and responsibilities;
- Promote accountability and transparency; and
- Reflect the linkage between the IDP, Budget, SDBIP and individual and service provider performance.

2.1 Objectives of the Performance Management System

The Cape Winelands District Municipality's Performance Management and Development System (PMDS) is the primary mechanism to monitor, review and improve the implementation of its strategy and to measure the progress made in achieving its objectives as identified in the IDP. The PMDS has the following objectives to fulfil:

a. Facilitate strategy deployment

Facilitates strategy (IDP) deployment throughout the municipality and align the organisation in executing its strategic objectives.

b. Facilitate increased accountability and transparency

Provide a mechanism for ensuring increased accountability between the local community, the municipal council and the municipal management team.

The development and implementation of a PMDS should be inclusive, transparent and open. The general public should, through the system be made aware of how the operations of the municipality are being administered, how public resources are being spent and who is responsible for what.

c. Facilitate learning and improvement

Facilitate learning in order to enable the municipality to improve on delivery.

d. Provide early warning signals

Ensure decision-makers are timeously informed of performance related risks, so that they can facilitate intervention, if necessary.

e. Facilitate decision-making

Provide appropriate and reliable management information that will allow efficient, effective and informed decision-making, particularly on the allocation of resources.

f. Facilitate objectivity

Developed on a sound value system where the management of the system and the information is based upon being objective and credible. The adopted performance assessments ensure objectivity and credibility in the management of performance.

2.2 Legislative Overview

This Performance Management Policy has been developed in accordance with promulgated local government legislation, regulations and other guidelines.

The following legislation mainly informs the PMDS of the municipality:

- The Constitution of the Republic of South Africa, 1996 (Act 108 of 1996)
- The White Paper on Local Government (1998)
- The White Paper on Transforming Public Service Delivery (Batho-Pele) (1997)
- The Municipal Systems Act, 2000 (Act 32 of 2000)
- Municipal Finance Management Act,2003 (Act 56 of 2003)
- Municipal Planning and Performance Management Regulations (R796, Aug 2001)
- Municipal Performance Regulation for Municipal Managers and Managers directly accountable to MM's (R805, Aug 2006)
- Local Government: Regulations on appointment and conditions of employment of senior managers (R21, Jan 2014)
- Framework for Managing Programme Performance Information (2007)
- MFMA Circular No. 13 – Service delivery budget implementation plan
- MFMA Circular No. 65 – Internal Audit and Audit Committee
- Local Government Regulation 891 and 890 – Municipal Staff Regulation (2021)
- Skills Development Act 97 of 1998
- Basic Conditions of Employment Act
- National Qualifications Framework Act 67 of 2008
- Labour Relations Act 66 of 1995
- Notice 464: Directive: Performance Information Public Audit Act
- Promotion of Access to Information Act 2 of 2000 (PAIA)
- MFMA Circular No. 88 – Rationalisation of Planning, Budgeting and Reporting

3. Performance Management and Development System (PMDS)

Each municipality must adopt a PMDS which explains the complete performance management and development system cycle. The cycle starts with the establishment of an oversight body (Council) who is responsible for the approval of a policy framework which describes the performance management process within the municipality.

The policy framework must explain the performance management cycle as it will be implemented, including timeframes and the implementation framework. The policy framework must be adopted by Council after consultation with the relevant stakeholders.

Performance Management and Development System is aimed at ensuring that municipalities monitor the implementation of their IDP's and continuously improve their operations and in terms of Section 19 of the Local Government: Municipal Structures Act 117 of 1998, that they annually review their overall performance in achieving their constitutional objectives and to deliver services in an effective and efficient manner.

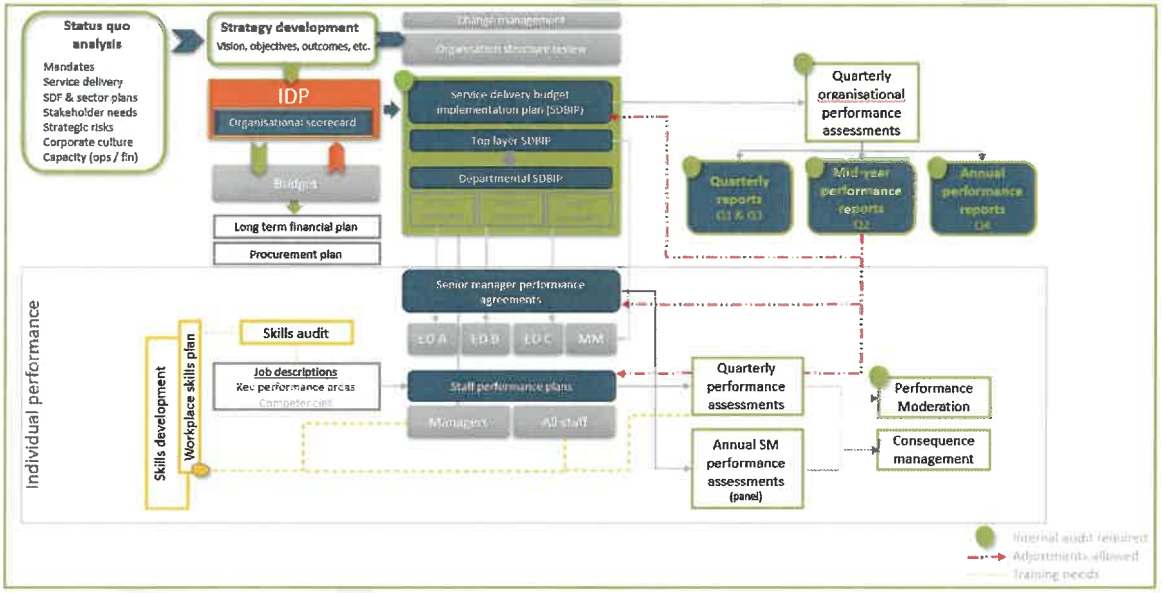
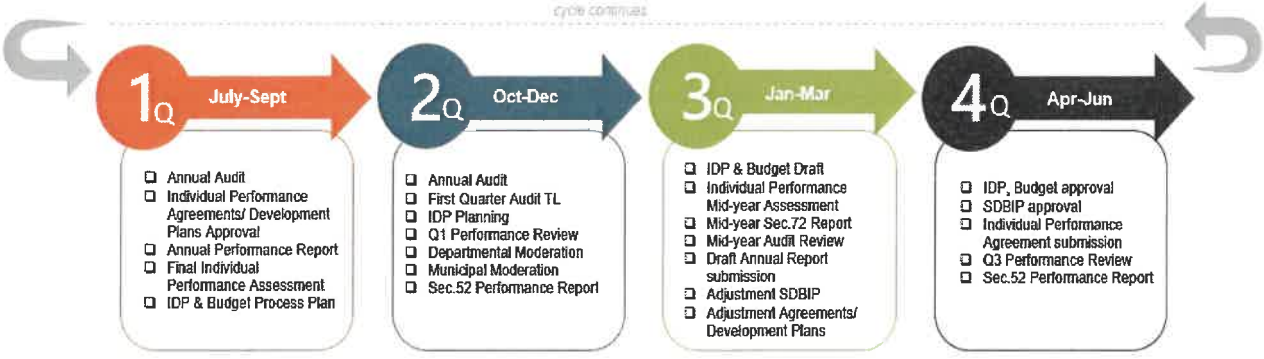


Figure 1: Performance cycles

3.1 Performance and Development Cycle

The overall planning, budgeting, performance monitoring, reporting and development cycle are summarised as follows in the Framework for Managing Programme Performance Information:



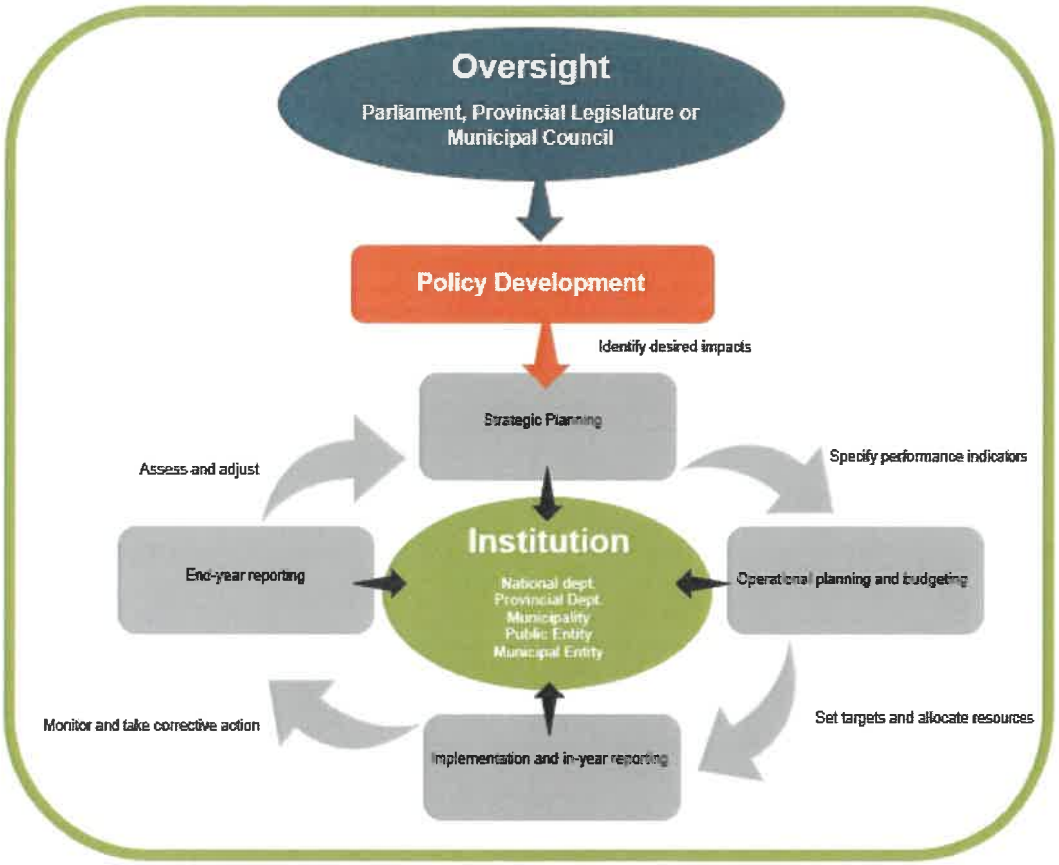


Figure 2: Planning, Budgeting and Reporting Cycle

- **Performance Planning** ensures that the strategic direction of the municipality more explicitly informs and aligns the IDP with all planning activities and resource decisions. This is the stage where Key Performance Areas (KPA's) and Key Performance Indicators (KPI's) are designed to address the IDP objectives and targets are set. The planning of the IDP starts with the beginning of the new financial year and the IDP process plan must be submitted to Council by 31 August every year.
- **Performance Monitoring** is an ongoing process to determine whether performance targets have been met, exceeded or not met. Projections can also be made during the year as to whether the final target and future targets will be met. It occurs during key points in a process. Executive Directors and their managers will monthly monitor the performance of their departments. Quarterly reports on performance information must be submitted to Portfolio Committees and Council.
- **Performance Evaluation** is an analysis of the status of performance, i.e. performance against targets, why there is under-performance (if applicable) or what the factors were, that allowed for good performance in a particular area. Where targets have not been met, the reasons for this must be examined and corrective actions implemented. Evidence to support the status should also be reviewed at this stage. The objective of the review should be based on actual performance and

performance evidence.

- **Performance Reporting** entails regular reporting to management, the Performance Audit Committee, Portfolio Committees, Council and the public in the form of quarterly, bi-annual and annual reports.
- **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 MSA, results of the performance measurement must be audited as part of the municipality's internal auditing process and annually by the Auditor General of South Africa (AGSA). The municipality have therefore established frameworks and structures to evaluate the effectiveness of the municipality's internal performance measurement control systems. Areas of weak performance identified at year-end must be addressed during the following years planning phase.

3.2 Strategy Measurement

The strategy of the municipality is measured in terms of the:

1. **Five-Year Municipal Scorecard** which is included in the IDP and includes the expected outcomes of the objectives for the five years. The outcome indicators:
    a. Indicate what the municipality aim to achieve in terms of its objectives;
    b. Is included in the IDP with baseline data for the most recent year for which data is available;
    c. Include a medium-term target for both the end of the electoral term (5th year) and the outer year of the MTREF (3rd year shifting out); and
    d. Reported on for the latest year for which data is available in the Annual Report
2. **Top Layer Service Delivery Budget Implementation Plan (SDBIP).** The Top Layer SDBIP is a one-year plan and includes the outputs that measure the implementation of the approved budget. The output indicators:
    a. Is the functional link between the final products, goods or services produced for delivery and provide a useful indication of progress toward the intended outcome included in the IDP;
    b. Include baseline data for the preceding financial year;
    c. Include annual targets, split into quarterly projections as appropriate;
    d. Is reported on quarterly, mid-year and annually; and
    e. Included in the annual performance agreements of the municipal manager and senior managers
3. **Departmental SDBIP.** The departmental SDBIP is a one-year operational plan which measures performance at a directorate and departmental level. Indicators included in this plan includes the following:
    a. Budget performance at a departmental level;
    b. Service standards;

c. Activities required towards achievement of the strategy;
d. Measurement in the performance of managers at a directorate level; and
e. Monitored monthly and reported on.

4. District Development Model (DDM)

The District Development Model was adopted by Cabinet in August 2019 and as part of the cabinet adoption, it was agreed that the DDM will provide a district-based approach to speed up delivery and ensuring that municipalities are properly supported and adequately resourced.

This One Plan is a plan for all of government that has a life span of 25 to 30 years. It includes all spheres of government and affirms the transversal alignment approach as well as the long-term planning that is highly recommended and encouraged by government.

The objectives of the DDM are to seek to achieve:

- Solve the Silos at a horizontal and vertical level.
- Maximise impact and align plans and resources at our disposal through the development of *"One District, One Plan and One Budget"*.
- Narrow the distance between people and government by strengthening the coordination role and capacities at the District and City levels.
- Ensure inclusivity by gender budgeting based on the needs and aspirations of our people and communities at a local level.
- Build government capacity to support municipalities.
- Strengthen monitoring and evaluation at district and local levels.
- Implement a balanced approach towards development between urban and rural areas.
- Ensure sustainable development whilst accelerating initiatives to promote poverty eradication, employment and equality.
- Exercise oversight over budgets and projects in an accountable and transparent manner.

The DDM positions the district at the centre of intergovernmental planning, coordination and implementation. The White Paper on Local Government (1998) indicates the role of the district municipalities to include:

- District wide integrated planning; and
- Support and capacity building to local municipalities

Furthermore, the MSA states that a District must develop a District IDP Framework.

This legislation paves the way for the DDM and therefore there is an increased need to position the Cape Winelands District Municipality as facilitator of regional development to enable the promotion of socio-economic development and spatial restructuring throughout its area.

4.1 District Development Framework

The MSA Section 27 requires that each district municipality, after following a consultative process with the local municipalities within its area, must adopt a framework for integrated development planning. This framework binds both the district and local municipality as it gives the direction that the municipalities' IDPs should follow and it drives the integrated development planning within the district area of jurisdiction.

The Framework is for a 5-year period and aligns to the IDP cycle, electoral mandate and should be reviewed on an annual basis. The development of a District Framework normally starts on 01 July and is completed by mid-August, when it is adopted by the District Municipality.

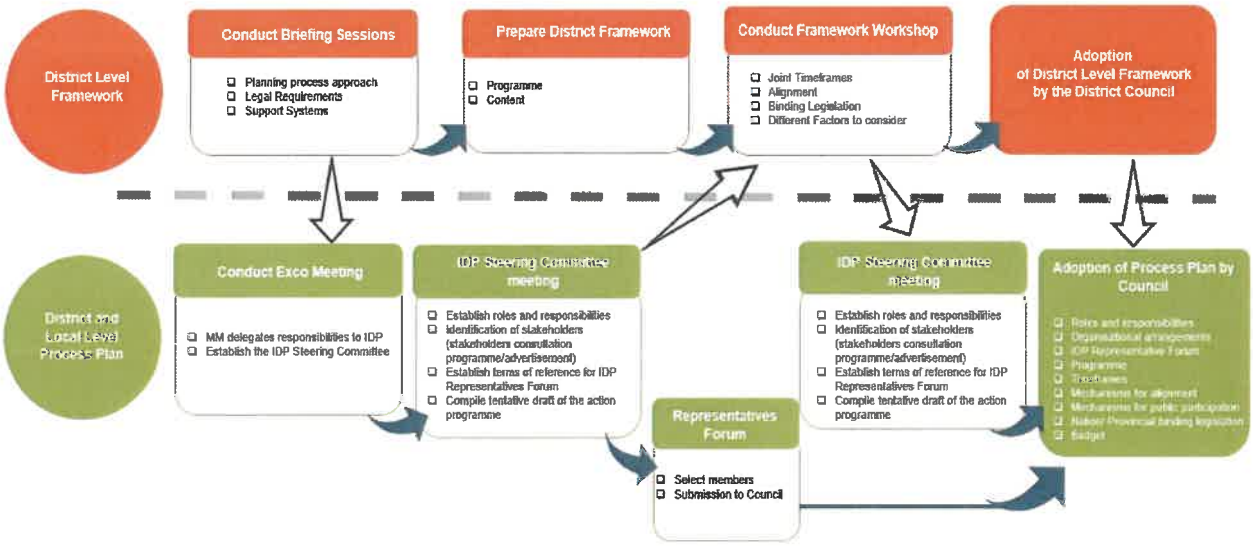


Figure 1: Proposed linkage between District Framework and Process Plan

The key elements that must be included in the District Framework are:

- Introduction / Background / Legislative context
- Framework programme with timeframes and key stakeholders
- Issues, mechanism and procedures for alignment and consultation
- Planning requirements and binding plans/ policies at a National and Provincial level
- Procedures and principles for monitoring of planning procedures and amendments of the framework

It must be stated that the District Framework is a consolidation tool that ensures the integrated development planning between:

- The Cape Winelands District Municipality and it's local B-Municipalities priorities, programmes and projects;
- It provides the Cape Winelands District Municipality's alignment with provincial and national priorities and programmes.

5. ORGANISATIONAL PERFORMANCE

The IDP process and the performance management process must be seamlessly integrated. The IDP is a key document in the performance management cycle as it describes the municipal strategy that needs to be implemented. The PMDS in turn, fulfils the implementation, management, monitoring and evaluation of the municipal strategy.

Organisational performance is the first step to integrate the IDP, the municipal budget and performance management and it is measured through the SDBIP. The SDBIP is a plan that convert the IDP and budget into measurable criteria on how, where and when the strategies, objectives and normal business processes of the municipality will be implemented during the next twelve months. It also allocates responsibility to Head of Department and sub-Head of Department to deliver the services in the IDP and budget.

5.1 Integrated development plan (IDP)

Although the IDP process is not described in detail in this policy framework, it is important to provide some level of background as the performance cycle starts during the IDP process.

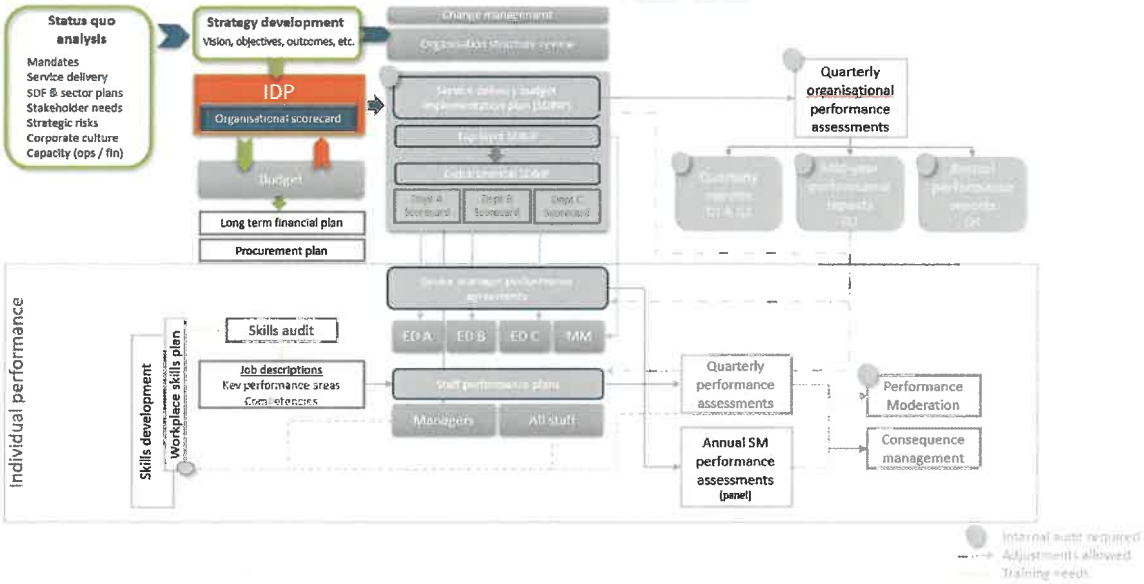


Figure 2: Integrated development planning included in the performance management system

An IDP is an inclusive and strategic plan of the municipality which links, integrates and co-ordinates plans, aligns resources and forms the foundation on which annual budgets must be based on.

The IDP should be inclusive of a 5-year scorecard that is outcomes based driven which are the consequences of achieving specific outputs.

In terms of Section 34 of the Municipal Systems Act, 2000, a Municipal Council must review its IDP:

- Annually in accordance with an assessment of its performance measurements;
- To the extent that changing circumstances so demand; and

- May amend its IDP in accordance with the prescribed process.

An IDP is therefore the principal strategic instrument guiding all planning, management, investment, developmental and implementation decisions, taking into account input from all stakeholders and reflects on:

- The profile of the municipal area including the economic and spatial data.
- The Municipal Council's vision for the long-term development of the municipality.
- An assessment of the existing level of development and performance.
- The Council's developmental priorities and strategic objectives.
- The Council's development strategies.
- A spatial development framework.

The actions emanating from the IDP must be planned for in a municipal scorecard (5-year outcomes) that should be included in the final IDP presented to Council for approval. The scorecard must include the performance indicators, annual targets for the relevant year that the indicator must be delivered in as well as the budget linkages in accordance with the Municipal Standard Chart of Accounts (mSCOA) requirements.

The IDP process is summarised in the following diagram. (Please note that the graph only provides a high-level understanding of the process and that the detailed actions, timeframes and responsibilities should be documented in the annual IDP process plan that must be adopted by Council.)

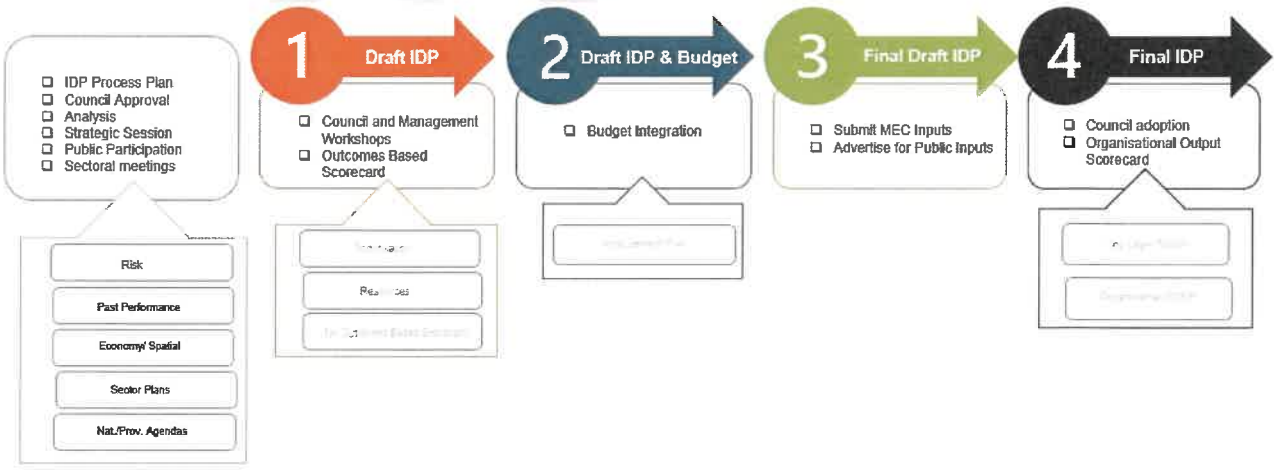


Figure 3: High level IDP Process

5.2 The Service Delivery Budget Implementation Plan (SDBIP)

The SDBIP is a management, implementation and monitoring tool that will enable the Municipality to monitor the performance of the municipality and its departments.

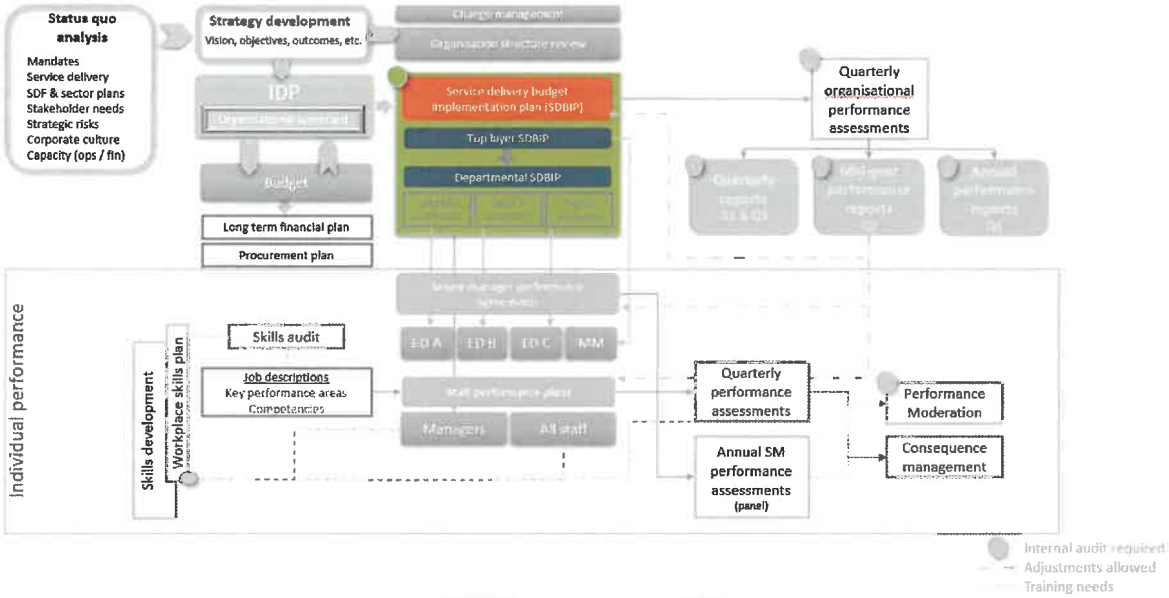


Figure 4: Service delivery budget implementation plan included in the performance management system

The SDBIP will only give effect to the IDP and budget if the IDP and budget are fully aligned with each other. The SDBIP therefore serves as a contract between the administration, the Council and the community, expressing the objectives set by Council as quantifiable outputs that can be implemented by the administration over the next twelve months. The SDBIP facilitates the process of holding management accountable for their performance. It provides the basis for measuring performance in the delivery of services.

The SDBIP enables the Municipal Manager to monitor the performance of Executive Directors, the Executive Mayor to monitor the performance of the Municipal Manager, and the community to monitor the performance of the municipality. The SDBIP should therefore determine (and be consistent with) the performance agreements between the Executive Mayor and the Municipal Manager, and the Municipal Manager and Executive Directors.

The SDBIP consists of two core components, the Top Layer/Level SDBIP (TL SDBIP) which focuses on the strategy and key reporting requirements as well capital budget allocated projects and the Departmental/Organisational SDBIP that measures the departmental performance, the operational matters that those divisions are responsible for.

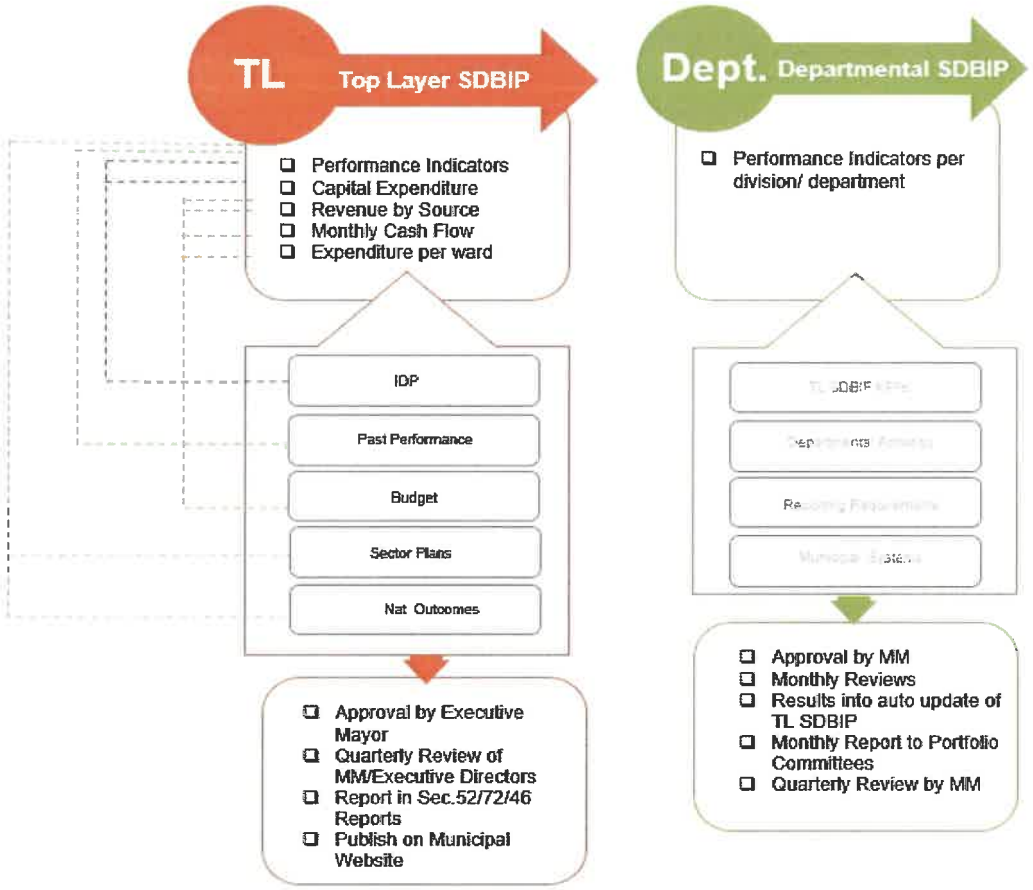


Figure 5: Components of the SDBIP

Top Layer: Dealing with consolidated service delivery targets and linking such targets to top management.

Departmental Layer: Executive Directors provide more detail on each output for which they are responsible for and breaks up such outputs into smaller outputs and linking these to middle-level and lower-level management.

5.3 Top Layer SDBIP

The TL SDBIP indicates the responsibilities and outputs for each of the Head of Department in the top management team, the inputs to be used and the time deadlines for each output. The TL SDBIP will therefore determine the performance agreements of the Municipal Manager and Executive Directors, including the outputs and deadlines for which they will be held responsible. The TL SDBIP is also the part of the SDBIP that's made available to the public.

The TL SDBIP must be submitted to the Executive Mayor within 14 days after the approval of the budget and must be approved by the Executive Mayor within 28 days after the budget has been approved. The TL SDBIP is a public document and must be made public within 14 days after approval.

Any adjustments to the TL SDBIP must be with the approval of the Council, following approval of an adjustments budget (Section 54(1)(c) of MFMA).

Although the TL SDBIP is a **one-year** detailed plan, it should include a **three-year capital plan.**

The Components of the TL SDBIP includes:

- Monthly projections of revenue to be collected for each source;
- Monthly projections of expenditure (operating and capital) and revenue for each vote (Section 71 format) (Cash flow statement);
- Quarterly projections of service delivery targets and performance indicators for each vote;
- Non-financial measurable performance objectives in the form of targets and indicators
- Level and standard of service being provided to the community;
- Ward information for expenditure and service delivery;
- Baseline information indicating the status quo of the Municipality for that particular year; and
- Detailed capital works plan broken down by ward over three years (Capital project sheet).

On the current system that the municipality utilise, the TL SDBIP KPI's will update automatically from the performance reported on monthly in the Departmental SDBIP.

The results will be reviewed quarterly by the Municipal Manager and the Executive Directors. The actual results and corrective actions (where required) forms a critical part of the quarterly (s52 - MFMA), the mid-year (s72 - MFMA) and the annual performance (S46 - MSA) annual (S121 - MFMA) reports.

5.3.1 Technical Indicator Descriptions

Technical Indicator Descriptions (TID's) must be prepared for each TL SDBIP KPI.TID's are essential as to improve the understanding of the requirements of the KPI, the portfolio of evidence (POE) collection and it supports audit procedures. The TID's should address the following:

- KPI Ownership
- Definition of KPI
- Input
- Source documentation origin
- Source documentation information
- Processing transactions
- Output
- Target calculation methodology
- Controls

Regular updates should be done to ensure that the TID's are accurate and relevant. The review of the system descriptions must be done prior to an audit.

5.4 Departmental SDBIP

In the Departmental SDBIP, the Executive Directors provide more detail on each output for which they are responsible for and break up such outputs into smaller outputs and linking these to middle-level and lower-level management.

The Departmental SDBIP will be using such detail to hold middle-level and lower-level managers responsible for various components of the service delivery plan and targets of the municipality. The Departmental SDBIP is compiled by a Head of Department for his/her department and is approved by the Municipal Manager. Any changes to the Departmental SDBIP must be approved by the Municipal Manager.

Each KPI should have clear monthly targets and should be assigned to the person responsible for the KPI's. A good performance indicator (KPI) should be:

- **Reliable** -The indicator should be accurate enough for its intended use and respond to changes in the level of performance
- **Well defined** – The indicator needs to have a clear, unambiguous definition so that data will be collected consistently and be easy to understand and use
- **Verifiable** – It must be possible to validate the process and system that produce the indicator
- **Cost-effective** – the usefulness of the indicator must justify the cost of collecting the data
- **Appropriate** – The indicator must avoid unintended consequences and encourage service delivery improvements and not give managers incentives to carry out activities simply to meet a particular target
- **Relevant** - The indicator must relate logically and directly to an aspect of the institutions mandate and the realisation of strategic goals and objectives

The KPI targets should be **SMART** (specific, measurable, achievable, relevant and time-bound).

Executive Directors, middle-level and lower-level management managers can use the departmental SDBIP to manage the performance of all the sections of his/her department and can monitor it monthly during the departmental management meeting.

Although divisions must update the actual results on the Departmental SDBIP monthly, they will report their performance in terms of the SDBIP to their respective Portfolio Committees quarterly. Decision-makers should be warned immediately of any emerging failures to service delivery so that they can intervene, if necessary. It is important that Departments use these reviews as an opportunity for reflection on their goals and programmes and whether these are being achieved. The SDBIP report submitted should be used to analyse and discuss performance. Changes in indicators and targets on the Departmental SDBIP may be proposed, but can only be approved by the Municipal Manager.

5.6 Update of Actual Performance

The SDBIP system that the municipality currently utilises allows for the TL SDBIP to be updated automatically with the actual results reported in the departmental SDBIP. The departmental SDBIP must be updated monthly. The KPI owners should report on the results of each KPI that they are responsible for by properly documenting the information in the performance response fields and either attach or refer to where the proof/portfolio of evidence (POE) is filed/kept. The appropriate POE and details regarding filing of a POE is documented in a separate document/ policy. In the instance of poor performance, corrective measures must be identified and documented. The POE should speak to the actual performance achieved and confirm the actual as was updated.

The actual performance and POE should be monitored monthly in terms of the objectives, KPI's and targets set.

It is important to note that the Municipal Manager and Executive Directors need to implement the necessary systems and processes to provide the POE for reporting and auditing purposes. Each municipal department and staff member therefore need to prove the achievement of their performance so that it can be measured during performance monitoring and reviews. This information is also used to report performance and for internal and external audit purposes.

5.7 Adjustments to KPI's

5.7.1 Top Layer SDBIP Adjustments

TL SDBIP KPI's can be adjusted after the mid-year assessment and with the adjustment budget process. KPI's should be adjusted in line with the adjustment estimate (incl. capital projects) and the reason for the adjustment of the indicator/target, must be specified when the adjusted TL SDBIP is submitted to Council for approval in terms of Section 54(1)(c) of the MFMA.

5.7.2 Departmental Layer SDBIP Adjustment

The Departmental SDBIP KPI's can be adjusted after the mid-year evaluations of staff have been completed in order to ensure corrective actions/measures have been applied. These adjustments can be to the KPI, unit of measurement, targets, calculation types, POE, etc. Before adjustment can be made valid and credible reasons must be provided for the changes. The Executive Director must recommend these changes via the Performance Management Unit and the changes to the Departmental SDBIP must be approved by the Municipal Manager.

5.8 Validation

An evaluation of the actual performance results and portfolio of evidence (POE) of each target should be evaluated monthly. The KPI owners should report on the results of the KPI by documenting the following information on the SDBIP system:

- The actual result in terms of the target set;
- The calculation of the actual performance reported, where applicable;

- The reasons if the target was not achieved; and
- Corrective actions to improve the performance against the target set, if the target was not achieved.

The Municipal Manager and Executive Directors need to implement the necessary systems and processes to provide the POE for reporting and auditing.

6. INDIVIDUAL PERFORMANCE

Once the municipal objectives and targets have been set, it is prudent to cascade these down to management and employees. Section 9(2) of the Local Government Municipal Planning and Performance Regulation (Regulation 796), indicates "In setting key performance indicators, a municipality must ensure that the key performance indicators inform the indicators set for all its administrative units and employees." Therefore, the performance of the municipality is integrally linked to that of the personnel. It is therefore important to link the organisational performance to individual performance and to manage both at the same time, but separately.

Performance of the Municipal Manager and managers reporting direct to the Municipal Manager, are regulated and evaluated in terms of Regulation 805, whilst performance of all other staff are regulated and evaluated in terms of Regulation 890 since 1 July 2022. (Extension was provided till 01 July 2023 by Circular 12.)

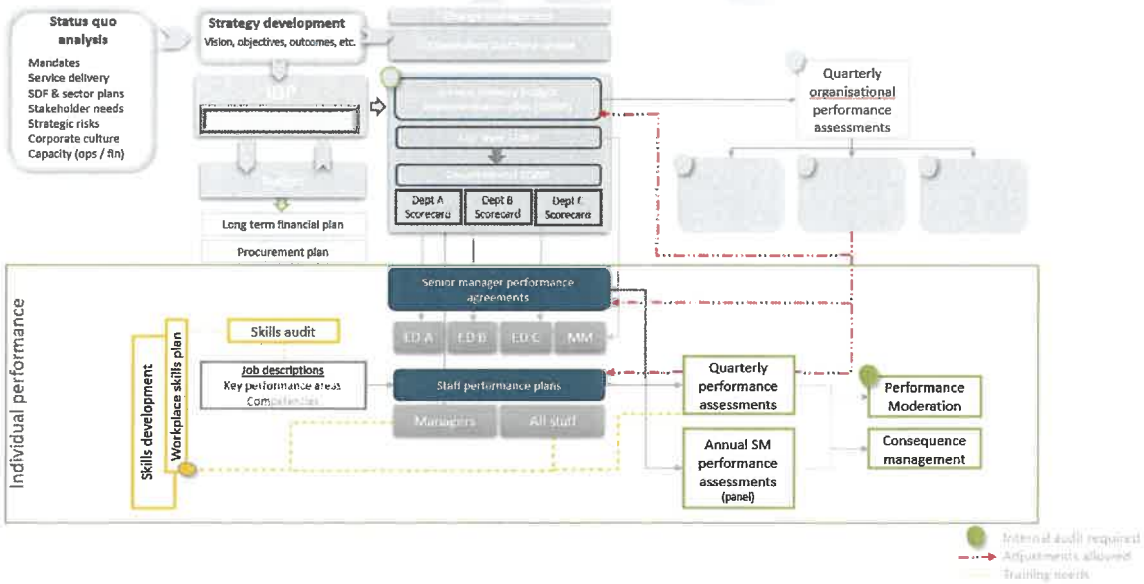


Figure 6: Individual performance included in the performance management system

Managing performance is therefore a key management tool to ensure that:

- Employees know what is expected of them;
- Managers know whether the employee's performance is delivering the required objectives;
- Poor performance is identified and improved; and
- Good performance is recognised; and

- Development of employees are promoted

Since the performance of every employee contributes to the overall delivery of the organisation's objectives, it follows that the performance of every employee should be managed.

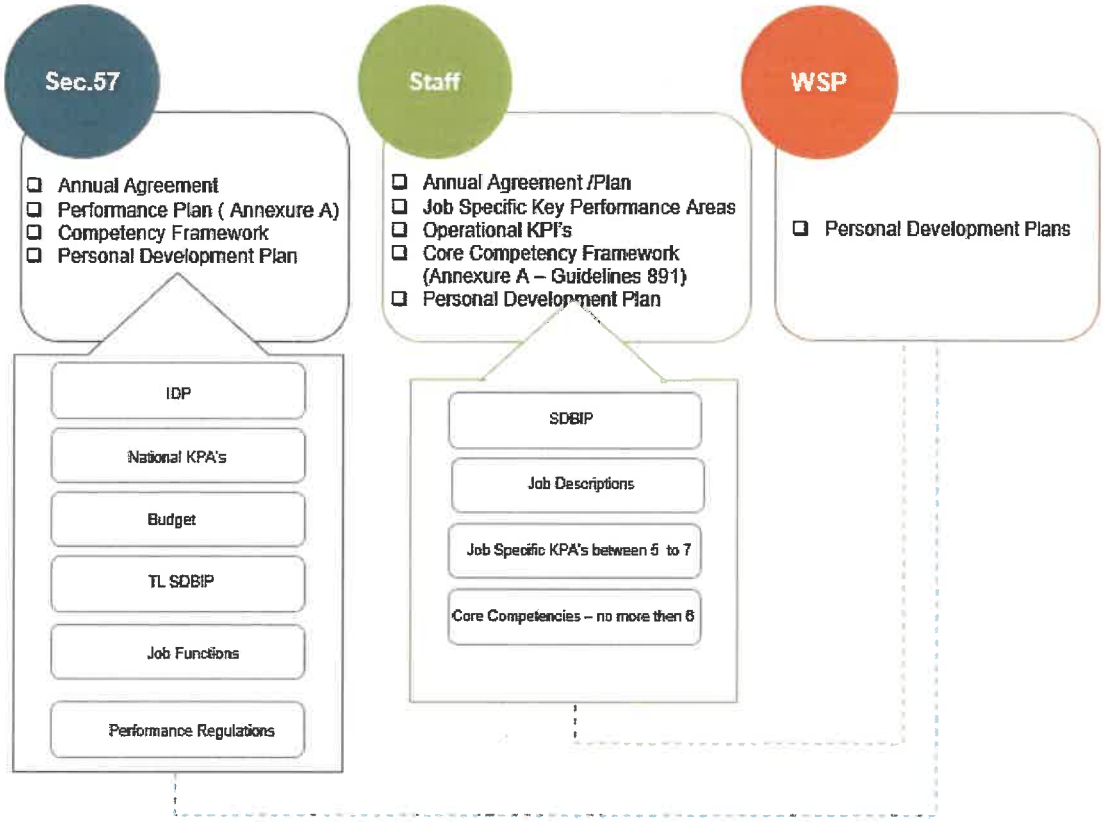


Figure 7: Individual performance components

6.1 Municipal Manager and Executive Directors

6.1.1 Performance Agreements

The MSA and Regulation 805 of August 2006, read with Regulation 21 of January 2014 (Performance of the Municipal Manager and the Managers reporting directly to the Municipal Manager) require, that a Municipal Manager and managers reporting directly to the Municipal Manager enter into annual performance agreements. The performance agreements of the Municipal Manager and Executive Directors should be directly linked to their employment contract, where applicable.

Draft annual performance agreements must be submitted to the Executive Mayor within 14 days of the approval of the annual budget in terms of the MFMA, Section 69(3). In terms of Section 53(3) of the MFMA the performance agreements must be made public no later than 14 days after the approval of the SDBIP. The agreements must be concluded within one month after the beginning of each financial year – MSA, Section 57(2). These performance agreements consist of three distinct parts:

a. *Performance Agreement*

This is an agreement between the Municipal Managers and Executive Directors and the municipality, which regulates the performance required for a particular position and the consequences of the performance. The agreement deals with only one aspect of the employment relationship, namely performance and development. This agreement must be reviewed and renewed annually, subject to the individual's annual performance.

b. *Performance Plan*

The performance plan is an Annexure (Annexure A) to the performance agreement and stipulates in detail the performance requirements for a single financial year. The SDBIP (sorted per Head of Department) transcends into the performance plan(s) of the Municipal Manager and the respective Executive Directors according to their areas of responsibility. The Municipal Manager and Executive Mayor could, in addition to the SDBIP, identify indicators, agreed with the Municipal Manager and Executive Directors, which could be included in the agreement.

c. *Personal Development Plan*

The development plan is an Annexure (Annexure C) to the performance agreement and addresses the developmental needs/ requirements of the person indicating actions and timeframes.

Performance plans included weights per indicator based on the importance of the indicator. Performance agreements are mutually agreed to by the Municipal Manager and Executive Directors / Municipal Manager and Executive Mayor and must be approved/signed within the first month of the financial year or within 3 months after the start of new employment.

6.1.2 *Evaluation Municipal Manager and Executive Directors*

The management of the performance process for the Municipal Manager and the Executive Directors must be done in terms of R805 and Regulation 21 as explained in detail in these Regulations. Performance should be reviewed quarterly, of which the mid-year and year-end performance must be formal evaluations. Performance panels should be constituted in terms of the agreements for the formal evaluations and the results should be reported to Council. In terms of Regulation 805 an evaluation panel constituted of the following persons must be established to evaluate the annual performance of the Municipal Manager

- Executive Mayor;
- Chairperson of the Performance Audit Committee or the Audit Committee in the absence of a performance audit committee;
- Member of the Executive Mayoral or executive committee;
- Executive Mayor and/or municipal manager from another municipality; and
- Member of a ward committee as nominated by the Executive Mayor.

*Cape Winelands District Municipality has an Audit Committee which also constitutes as the Performance Audit Committee

In terms of Regulation 805 an evaluation panel constituted of the following persons must be established to evaluate the managers directly accountable to the Municipal Manager:

- Municipal Manager;
- Chairperson of the Performance Audit Committee or the Audit Committee in the absence of a performance audit committee;
- Member of the Executive Mayoral or executive committee; and
- Municipal Manager from another municipality.

Human Resources Manager must be present during both panels evaluation proceedings in order to take the minutes.

In terms of applicable legislation formal mid-year and final evaluations of performance must occur as follow:

Period 1 (1 July – 30 September): Due by– 30 October annually (informal documented discussion)

Period 2 (1 October – 31 December): **Due by– 30 January annually** (formally with panel)

Period 3 (1 January – 31 March): Due by – 30 April annually (informal documented discussion)

Period 4 (1 April – 30 June): **Due by – 30 December annually** (formally with panel)

6.1.3 Municipal Manager and Executive Directors Evaluation Source Documentation

The onus of keeping credible and verifiable evidence is the responsibility each manager. A POE must be made available to panel members before the formal evaluations take place. This is to ensure scrutiny of the documented evidence that substantiate the actual reported evidence.

6.2 All other Personnel

6.2.1 Performance Agreements/Performance Development Plans

Regulation 890, Chapter 4, Performance Management and Development System states:

Section 32 (1) The performance management and development system apply to all staff members of a municipality" (Excluding Senior Managers). An employee shall enter into a performance agreement with his or her direct supervisor/line manager for each financial year (1 July -30 June).

The agreements of a serving employee must be concluded by **30 July** (on 29 July) each year within 30 days of the commencement of the new financial year of the municipality whilst the performance agreements of other (appointment after probation as from 01 July of the new financial year; transfer or promotion to a new post or return from prolonged leave that is more than three months) employees must be concluded within 60 days of—

In terms of Section 32 (1) the performance management and development system apply to all employees of the Cape Winelands District Municipality except employees-

- Appointed on a fixed term contract with a duration of less than 12 months;

- Serving notice —
  - of termination of his or her contract of employment; or
  - to retire on reaching the statutory retirement age;
- Appointed on an internship programme or participating in the national
- Public works programme or any similar scheme; and
- Appointed in terms of sections 54A and 56 of the Act

In terms of the legislative prescribes an employee shall:

- Participate in setting his or her annual KPAs and KPIs
- Enter into a performance agreement annually with the Municipality
- Remain committed to the KPAs and KPIs throughout the performance period and be accountable for his or her performance
- Take responsibility for his or her personal development and learning opportunities
- Where applicable, maintain a portfolio of evidence if required
- Ensure that the portfolio of evidence is relevant and up to date
- Actively seek out and be open to feedback; and
- An employee shall understand what is expected of him or her.

Performance agreements and/or performance development plans will be agreed with each employee and should include the following information as stated by Guideline 891:

a. Personal information

Details relating to the employee (name and surname), job title and his/her designation (department) and supervisor.

b. Key Performance Areas

The supervisor or superior of the individual together with the staff member must ensure that the performance management is aligned to the staff member's job and KPA's relevant to the post as depicted on the individuals Job Description, that the staff member holds. The KPA's must relate to the staff member's functional area and must consist of not less than 5 and not more than 7 KPA's. As per the Job Description.

c. Key performance indicators

The KPI's include the inputs, activities, programmes or outputs by which performance in respect of KPA's are measured. A KPI must be measurable and verifiable. Where applicable KPI's delegated to employees from the SDBIP can be included here. New KPI's can be added to existing KPI's (from the SDBIP) or new KPI's can be created for employees who do not have KPI's on the SDBIP from the Job Activities Library.

Specific targets should be set as per the "SMART" principles and must be accompanied by a valid and credible POE.

The performance standard for each KPI may be qualitative or quantitative.

d. Target

Once a set of suitable indicators has been defined for a specific programme or project, the level of performance the employee should strive to achieve must be set. This should be done by setting suitable performance targets relative to the current baseline. The target should be in terms of the SMART principles as state by the Framework for Manging Performance Programme.

e. Performance Standards

Performance Standards for each KPI should be expressed in order to indicate the minimum acceptable level of performance. These should be informed by legislative requirements, departmental policies and service level agreements. It can also be benchmarked against performance levels in other institutions, or according to accepted best practices. The decision to express the desired level of performance in terms of a target depends on the nature of the performance indicator.

f. Core Competencies

The job specific competencies, as derived from Annexure A of the Municipal Staff Regulations (Gazette no. 45181), and as listed on an individual's JD must be included with the performance agreements of each staff member. The following prescribes are applicable and must be included:

(i) the name and definition of the specific competency;

(ii) the expected level of capability;

(iii) the relevant weightings;

Furthermore, the competencies must be specific and applicable to the job (as per the job description) of the employee and should not exceed six (6) competencies within a performance cycle.

g. Weights

In terms of the weights the criteria upon which a staff member is assessed consists of two components as defined above being the KPA's (80%) and the core competencies (20%). A KPA weight must be allocated and where applicable, weights must be allocated to each KPI that will relay back to the specific KPA's overall weight percentage. Weights allocated should indicate the relative importance of a KPI. The weights and the distribution of the weights per KPI need to be determined by the Head of Department/ applicable manager/ supervisor/ staff member in the beginning of each financial year and agreed with the employee or group of employees.

Each core competency as selected from the specific competency framework the position belongs to, as per the applicable level, must be provided with a weight as well.

Once the performance is assessed an overall score combined by the KPA weighting and core competencies weight will be evaluated out of a 100%.

h. Personnel Development Plan

Every employee must have a personal development plan that identifies and addresses employees' developmental needs that were identified during the performance review or assessment.

- The personal development plan should contain the actions and timeframes agreed to by the relevant supervisor and employee.
- An employee may only undergo training that is –

(i) contained in personal development plan or

(ii) approved by the municipal manager or his/her delegate

The Personal Development Plan will address the identified training needs. The following should be carefully considered during the identification of training needs:

- Organisational needs;
- The competency requirements of individual jobs. The relevant job requirements (job competency profile) as identified in the job description should be compared to the current competency profile to determine the individual's competency gaps;
- Specific competency gaps and training needs identified during evaluation;
- Individual training needs that are job/career related;
- The training needs should be prioritised since it may not be possible to address all identified training needs in a specific financial year. It is however of critical importance that training needs be addressed on a phased and priority basis. This implies that all these needs should be prioritised for purposes of accommodating critical/strategic training and development needs in the HR Plan and Workplace Skills Plan;
- Consideration must then be given to the expected outcomes, so that once the intervention is completed the impact it had can be measured against relevant output indicators; and
- An appropriate intervention should be identified to address training needs/skills gaps and the outcome to be achieved but with due regard to cost effectiveness.

The performance objectives and targets reflected in the performance agreements/performance development plans are set by the employer in consultation with the employee and based on the IDP, SDBIP and budget of the municipality, job descriptions, and shall include key performance indicators; target dates and weights (where applicable). Executive Directors should be part of the performance planning for lower levels when compiling performance agreements/performance development plans.

The Performance Management Section should annually after the performance agreements/performance development plans are completed, do a sample check of performance agreements/performance development plans for quality purposes.

6.2.2 Team-based performance management and development system

The Municipality may establish a team-based performance management and development system for a category of staff below the level of a supervisor that will assist the Municipality in managing probation, rewards and skills development of staff members, which is consistent with the principles of the Regulation's chapter 4.

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.

6.2.3 Skills Development Plan

The Workplace Skills Plan should be compiled/updated on a yearly basis with the information obtained from the performance agreements/performance development plans taking into account legislative compliance in terms of the Annexure A Core Competency Framework as stipulated by Regulation 890 and Guidelines 891. The relevant Human Resources Manager together with the respective line manager/ supervisor is responsible to facilitate the implementation of the Skills Development Plan.

6.2.4 Formal Performance Evaluations

Although performance should be managed daily, the respective supervisor should do quarterly reviews of which the **mid-year** and **final** year must be formal. Constructive feedback should be provider to ensure that performance standards are being uphold. The feedback should be given verbally and recorded in writing to serve as evidence that performance discussion took place between supervisor and employees.

The formal mid-year and final year assessments should be concluded as follows:

Period 1 (1 July – 30 September): Due by– 30 October annually (informal documented discussion)

Period 2 (1 October – 31 December): **Due by– 30 January annually** (formally on the electronic web-based system)

Period 3 (1 January – 31 March): Due by – 30 April annually (informal documented discussion)

Period 4 (1 April – 30 June): **Due by – 29 August annually** (formally on the electronic web-based system)

The objective of the review should be based on actual performance and performance evidence. The supervisor and employee need to prepare for the review and discuss the performance during a focussed performance meeting.

The employer (supervisor) should prepare by:

- Ensuring that all the information required for the evaluation is available, including obtaining information from other supervisors where required;

- Reviewing the previous period performance and the indicators and targets for the next period;
- Evaluating the level of support required and planning to address the development needs; and
- Provide comprehensive and honest feedback.

The employee should prepare by:

- Ensuring that all the information required for the evaluation is available;
- Identifying new objectives and indicators where required;
- Identifying support and training needed;
- Conduct a self-review; and
- Reflecting on the feedback from the employer.

The assessment of the performance of the employee will be based on the following rating scale:

Level	Terminology	Description
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 Performance Annexure and Performance Plan and maintained this in all areas of responsibility throughout the year.
4	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.
3	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 Performance Annexure and Performance Plan.
2	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 of the key performance criteria and indicators as specified in the Performance Annexure and Performance Plan.
1	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 the performance criteria and indicators as specified in the Performance Annexure 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

Level	Terminology	Description
		to encourage improvement.

Table 3: Performance Rating Scale

The employer shall keep a record of assessment meetings and signed-off assessments must be submitted to Records Section to be placed on the personnel file of the employee.

6.2.5 Portfolio of Evidence

POE should also be kept for all individual performance assessments. The onus for a credible POE is on the individual, however in terms of Regulation 890 the Municipal Manager must constitute a formal process or assign a staff member responsible for those lower level staff who is unable to physically keep POE records. This process is outlined as part of the POE Policy.

6.2.6 Performance Moderation

a. Departmental Moderation Committees

The Municipal Manager must establish a departmental moderation committee. The performance moderation process must take place within a reasonable timeframe after the end of the performance cycle, but no later than six months after the end of the financial year must it be concluded. The departmental performance moderation committee must convene annually.

The departmental moderation committee is constituted as follow:

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

b. Municipal Moderation Committee

The Municipal Council must establish a municipal moderation committee, who will be responsible for the final moderation outcomes of performance for the specific financial year under review which must be concluded before 31 December.

- The municipal moderation committee is constituted as follow:
- The Municipal Manager, who must act as the chairperson of the committee;
- all heads of departments;
- head of municipal planning and organisational performance;
- head of the municipal internal audit;
- a senior human resource functionary to guide, advise and provide support, including

arrangements for secretariat services; and

- a performance specialist, where applicable.

6.2.7 Circumstances That Impact on Performance Evaluations

a. Absence / Maternity leave during the performance cycle

If an employee is on leave or on sick leave for short periods of time, it should not impact on the performance of the employee. In the case of absence for long periods of time, the employee and employer should have a discussion to agree on the rating of the performance for the period not absent. The agreement and the new targets agreed should be documented and be attached to the original agreement.

The employer must carefully consider the rating and assessment of an employee who has been on prolonged leave of absence, to balance the rights of those who were absent with the contribution of those who had to do more work because of others being absent.

b. Acting in higher positions

When an employee is appointed to act in a higher position for shorter than twelve weeks, the performance plan should be based on the post that the employee is permanently appointed to. Depending on the employee's performance during the periods of acting, recognition for performance of duties of the higher position should be given during the performance assessment, on the performance agreement/performance plan of the permanent post.

c. Eventuality for new employees

Employees that have started service and worked for at least 3 months and longer within a financial year will be evaluated.

d. Staff Movements

When employees are transferred at the same level, it is their responsibility to provide their most recent performance assessment to the new department. Where staff members change jobs within the department during the performance cycle, performance reviews related to the employee vacating the post should be completed prior to moving to the new position. If the employee changing jobs is a supervisor or manager, performance reviews for each employee under his/her control should be completed prior to his/her movement. When an employee is transferred to another department, a progress review discussion will be conducted for the current performance cycle prior to the employee leaving the department. In the case of supervisors, regardless of the reason for their departure, they will be required to assess their staff prior to departure.

e. Misconduct and suspension

Decisions pertaining to performance rating should be based on an employee's actual performance. In the event of alleged misconduct, some questions need to be posed.

- What was the nature of the misconduct (e.g. financial, management)?

- Was the person found guilty or not?
- If found guilty, what was the nature of the sanction (e.g. discharge, suspension)?
- Did the misconduct and/or sanction impact on performance?
- Was the employee suspended for a prolonged period?

Each case should however be judged on its own merit. If a misconduct charge, and /or the hearing, and/or any sanctions have a serious negative impact on an employee's performance, it would be difficult to motivate for awarding a 3-rating or higher.

f. Employees on probation

In instances where employees are on probation, the results of the performance assessment could assist in determining whether permanent appointment should be considered. The performance of the employees on probation should be evaluated on a monthly basis and the assessment form should be submitted to the Division Human Resources.

g. Departmental moderation committee

Section 39(5) describes the process for performance not conforming to the norms and standards as detected by the departmental moderation committee and states:

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 lack of 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 re-assessment in consultation with the affected staff member.

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

If the supervisor fails to re-assess the staff member within the stipulated timeframe despite the request to do so 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 re-assess the relevant staff member. **The affected staff member must be consulted and be offered an opportunity to respond.**

6.2.8 Process Flow for Performance Assessments

- The first step in the assessment allows for self-evaluation by the employee. Employees that do not have access to computers at the workplace must be provided with a hardcopy of their performance development plans to facilitate the process of manual assessment. The signed self-assessment must be submitted to the respective supervisor for capturing.

  Note: when mid-year assessment is concluded time must be allowed for adjustments to be made to the performance agreements as stipulated by Section 37(4) of the Regulation and number 4.2.7

of this document.

- The second step in the assessment is the official rating of performance by the relevant supervisor/manager or Head of Department. The outcome of the assessment should be discussed between the supervisor/manager or Head of Department in order to clarify gaps between the self-assessment and the rating scored.
- The third step in the assessment constitutes the moderation of performance outcomes by the Departmental Moderation Committee
- The fourth step is the final moderation by the Municipal Moderation Committee and
- Address poor performance, where applicable.

6.2.9 Record Keeping

The system users performance agreements/ performance development plans and assessments will be signed off electronically and stored on the web-based system whilst non-system users will have to be provided with a hardcopy for sign-off and must be submit to Human Resources Division to be placed on the personnel file of the employee.

It is the responsibility of HR to notify the Performance Management Section when an employee has been transferred/left the service/was newly appointed in order to update the details on the performance management system.

6.2.10 Amendments to Performance Agreements/Performance Development Plans

Performance in the municipality takes place in a dynamic environment and a performance plan can therefore never be cast in stone. Even though the initial agreement is signed at the start of the performance cycle, significant changes and additions could on an on-going basis be reflected in the performance agreement/plan when taking the workplace challenges and changes beyond a staff member's/ team's control into account.

The performance plan against which an employee is assessed at the end of a cycle must accurately reflect the employee's actual activities and outputs during the entire performance cycle. Amendments made to performance agreements/ plans must be signed and dated by both the employee and the employer. Performance can only be assessed on mutually agreed indicators and targets.

In terms of the Executive Directors performance agreements adjustments to the Annexure A performance plans can only be done once Council has approved the adjustment Top Layer SDBIP. The adjusted agreements should then be signed-off by the applicable parties and subsequently made public within the legislative timeframe on the Municipal website.

In terms of other personnel amendments / adjustments can only be made after the midyear evaluation has been completed by mutual agreement of both the employee and the supervisor. The performance agreement/plan must be signed-off and dated by both parties to take effect.

7. Reward and Recognition

The evaluation of the employee's performance will form the basis for acknowledging outstanding performance or correcting unacceptable performance.

7.1 Municipal Manager and Executive Directors

Performance financial rewards will only be applicable with regard to the Municipal Manager and Heads of Departments if such a clause is included in the appointment contract when the person is appointed and as stipulated by Regulation 805.

7.2 Performance Rewards

No provision will be made for financial rewards within the municipality for staff falling under Regulation 890. If in future the municipality decides to financially or otherwise reward excellent performance, the policy framework will be adjusted and a separate policy on reward and recognition will be developed as clarification on performance incentives.

7.3 Managing Poor Performance

7.3.1 *Organisational Performance - SDBIP*

In a case where the targets of the Service Delivery Budget Implementation Plan are not met by the department:

- The Service Delivery Budget Implementation Plan provides for corrective measures where targets are not met.
- The quarterly report is sent to council.
- The Head of Department needs to ensure that corrective actions are implemented and that adequate resources are provided for until the target is met.

7.3.2 *Individual performance*

An employee's performance may either exceed expectations or fall below expected performance standards or planned targets. In the case of unacceptable individual performance, the employer should–

i) A staff member who receives a performance rating below 3 in terms of the Five-Point Rating table in regulation 38(2) must-

- be assisted in developing his or her competencies through training, and supervision; and
- develop a revised personal development plan with his or her supervisor.

ii) The personal development plan must contain at least—

- a description of the behaviour and skills that require improvement;
- a description of the actions that will be undertaken to improve the identified behaviour and skills

that require improvement;

- the deadlines for improvement;
- a schedule of meetings to assess improvements and provide feedback; and
- details of the potential consequences in the event that there is no improvement in performance.

iii) The meetings to assess improvements and to provide feedback must be recorded in writing.

iv) The personal development plan to manage performance improvement must cover a maximum period of six months, at the end of which, a formal evaluation of performance must take place.

v) The following alternatives must be considered in respect of a staff member whose performance has not improved to at least a performance that is fully effective:

- Continuation of the actions referred to in the personal development plan;
- alternative actions to improve performance;
- offering the staff member an alternative job within the municipality that is better suited to the staff member's behaviour and skills; or
- dismissal owing to incapacity in terms of the provisions of the Labour Relations Act.

vi) Poor work performance must be dealt with in in accordance with item 9 of Schedule 8 to the Labour Relations Act.

7.4 Mentoring and Coaching

Regular mentoring and coaching sessions must take place between supervisors and employees. These sessions can be used to change an employee's behaviour to ensure that targets are met or exceeded in instances where underperformance was identified.

These coaching and mentoring sessions are important to track employee performance and assists in strengthening competencies expected from employees. All coaching and mentoring sessions must be documented and signed by all parties involved.

Employees may also be required to undergo training to improve their performance. These training needs should be in line with the training needs in their Personal Development Plans.

Coaching, mentoring and training are not only for employees who are underperforming and must also be provided to those employees who are performing well to ensure that employees are improving on their skills and knowledge to enable them to meet the evolving organisational needs.

8. Appeals Process

8.1 Municipal Manager and Executive Directors

The appeals process as prescribed in R805 of August 2006 and as agreed in the employment and performance agreements of the Municipal Manager and Executive Directors will be applicable in instances where they are not in agreement with their final performance evaluations.

8.2 Other Personnel:

Should employees not agree with the contents or adjustments of their performance agreement after the performance discussions (a grievance must be lodged within 5 days) or with the final scores that are allocated to them, they may elect to follow the municipality's normal grievance procedures. **Grievances should be logged within 30 days from receiving the final score**. (Reg 891 Section 41)

9. Service Providers

The municipality do not currently have any municipal entities or service providers who provides a basic municipal service to the local community on behalf of the municipality. The performance monitoring and reporting processes of any other services providers of the municipality are provided for in the Supply Chain Policy of the municipality.

10. Evaluation and Improvement of the Performance Management System

The MSA requires the municipality to annually evaluate its performance management system. It is proposed that after the full cycle of the annual review is completed; the Performance Management Section will initiate an evaluation report, taking into account the input provided by Head of Department and divisions. This report will then be discussed by the Municipal Manager and Executive Directors and finally submitted to the Council for discussion and approval. The evaluation should assess:

- The adherence of the performance management system to the MSA;
- The fulfilment of the objectives for a performance management system;
- The adherence of the performance management system to the objectives and principles; and
- Opportunities for improvement and a proposed action plan.

While good and excellent performance must also be constantly improved to meet the needs of citizens and improve their quality of life, it is poor performance in particular that needs to be improved as a priority. In order to do this, it is important that the causal and contributing reasons for poor performance are analysed. Poor performance may arise out of one or more of the following:

- Poor systems and processes;

- Inappropriate structures;
- Lack of skills and capacity;
- Inappropriate organisational culture; and
- Absence of appropriate strategy.

To improve performance, the appropriate response strategy should be chosen:

- Restructuring is a possible solution for an inappropriate structure;
- Process and system improvement will remedy poor systems and processes;
- Training and sourcing additional capacity can be useful where skills and capacity are lacking;
- Change management and education programmes can address organisational culture issues;
- The revision of strategy by key decision-makers can address shortcomings in this regard; and
- Consideration of alternative service delivery strategies should be explored.

Performance analysis is a requirement in order to identify poor performance. The Municipal Manager will implement the appropriate response strategy to improve performance.

11. PERFORMANCE MONITORING AND REPORTING

An organization that is performing well is one that is successfully achieving its goals and is effectively executing suitable strategies. Monitoring is the regular collection and analysis of information to track the implementation and measure the performance of the municipality against its pre-determined objectives.

The IDP represents a set of strategic objectives and/or goals about what is aimed to be achieved within the given timeframe. Monitoring provides crucial information about how the municipality is performing and this in turn helps decision makers and other stakeholders to measure whether the organisation is on track in meeting its objectives.

11.1 Reporting Intervals

Report	Frequency	To whom	Content	Comments
Departmental SDBIP	Quarterly	Municipal Manager, Executive Directors and Portfolio Committees	Actual results achieved against department SDBIP KPI's	NB: Reasons for non-performance and corrective measures
Top Layer SDBIP (Could serve as sec 52 report as well)	Quarterly (Sec 52 within 30 days after end of quarter)	Municipal Manager, Executive Directors and Council	Actual results achieved against Top Layer SDBIP KPI's	NB: Reasons for non-performance and corrective measures

Report	Frequency	To whom	Content	Comments
Internal Audit reports on performance results	Quarterly	Council and Performance Audit Committee	Audit outcomes from auditing actual results captured/ indicated/ reported on	Outcomes to be used to rectify KPI's and actuals
MFMA Sec 52 report	Quarterly (within 30 days after end of quarter)	Municipal Manager, Executive Directors and Council (Copy to PT and NT)	Actual results achieved against Top Layer SDBIP KPI's	NB: Reasons for non-performance and corrective measures
MFMA Sec 72 report	25 January	Executive Mayor (Submit to next Council meeting after 25 January and copy to PT and NT)	Consists of 2 parts PM: Actual results achieved against Top Layer SDBIP KPI' Finance: As prescribed by NT	Use results/outcome to motivate adjustments budget
MSA Sec 46 report	31 August	AGSA, Council	Consist of chapters 3 & 4 of the AR	Must form part of AR
Annual report	Draft: 31 October to AGSA Draft: 31 January to Council Final: 31 March to Council with oversight report	AGSA, Council, Audit Committee, Oversight Committee (Copy to PT and NT)	As prescribed	NB: If full draft is submitted earlier to Council, remember that final must be submitted within 2 months after draft has been submitted

Table 4: Reporting Intervals

11.2 Mid-Year Assessment

The performance of the municipality for the first 6 months of the financial year should be assessed and reported on in terms of Section 72 of the MFMA. The accounting officer of a municipality must in terms of Section 72 of the MFMA assess the performance of the municipality for the 1st six months of the financial year and submit a report to the Executive Mayor by 25 January. The municipality must during the assessment consider the appropriateness of the targets in terms of the first six months' performance and the adjustment estimate. This assessment must include the measurement of performance, the identification of corrective actions and recommendations for the adjustments of KPI's, if necessary

According to Section 33 of the Municipal Budget and Reporting Regulations the mid-year budget and performance assessment referred to in Section 72 must be in the format specified in Schedule C of the Regulation and include all the required tables, graphs and explanatory information taking into

account the guidelines issued by the National Minister.

Although the report is mainly a financial report, one of the Annexures in terms of Section 7(b) of Schedule C requires a performance assessment in relation to the quarterly performance targets for the delivery of basic services in terms of the TL SDBIP.

In summary, the Municipal Manager should:

Analyse the performance in terms of the targets set in the TL SDBIP;

- Preparation of the adjusted TL SDBIP for submission to Council for approval with the Adjustments Budget by the end of February as required by Section 54(1)(c) of the MFMA and Sections 24 to 26 of the Municipal Budget and Reporting Regulations;
- Effecting the approved adjustments on the SDBIP system;
- Adjusting the Annexure A's of the performance agreements of the MSA Section 56 and 57 managers in line with the adjusted TL SDBIP; and
- Adjusting the performance plans of other personnel directly associated with the Departmental SDBIP to ensure alignment.

11.3 Annual Performance Report

The annual performance report must be completed by 31 August and submitted with the financial statements. This report must be based on the performance reported in the TL SDBIP. Reports should be generated from the respective performance management system, reviewed and updated in the performance comments field for reporting purposes. POE should be kept in order to proof recorded actuals.

11.4 Annual Report

The draft annual report must be prepared and submitted to Council by 31 January and the final annual report by 31 March annually.

11.5 Analysis of Performance Reports and Follow-up

In summary, the quarterly (S52 MFMA), mid-year (S72 MFMA) and the annual (S46 MSA) reports should be analysed and reviewed as soon as the reports are available. It will add credibility to the reports when it is published and to the individual performance assessments of the Municipal Manager and Executive Directors.

The analysis should not only focus on POE when the performance results are audited but also on an analysis of the results. The following are important:

- Performance reported should indicate continuous improvement over time and should not only be to the benefit of communities and should focus on outcomes and not only on processes;
- The performance results reported should be a true reflection of the results reported in the performance management system;

- The results should be effectively communicated so that it is of value to the intended users;
- The quality of performing the function should be balanced with the cost of the performance, also to the consumer and not just to municipality; and
- Promotion of equalities and sustainable growth and development should also be reported on.

Actions should be identified to address the performance shortcomings highlighted during the audit. These actions must be recorded and regularly followed-up to ensure performance improvement.

12. GOVERNANCE

The audit of performance information and system should comply with Section 166 of the MFMA and Regulation 14 of the Municipal Planning and Performance Management Regulations (2001). These processes provide credibility to the overall performance processes.

12.1 Quality Control and Co-ordination

The Performance Management Section is required to co-ordinate and ensure good quality of performance reporting and reviews on an ongoing basis. It is their role to ensure conformity to reporting formats and verify the reliability of reported information, where possible.

The Municipal Manager/Executive Directors/Heads/Managers/Supervisors/ staff member have the responsibility to ensure credible POE's are kept substantiating performance and the actual results.

The Municipal Manager/Executive Directors/Heads/Managers/Supervisors subsequently have the added responsibility to review overall performance and the quality of reported performance monthly along with the applicable POE.

As mentioned the POE documentation, process and all related organisational arrangements regarding POE's is documented in a separate document/ policy as in terms of Regulation 890/891 the Municipal Manager may exempt categories of staff from maintaining a portfolio of evidence in which case the municipality must determine alternative mechanisms, or designate a staff member who will maintain the POE of those staff members.

12.2 Performance Investigations

The Executive Mayor or Audit Committee should be able to commission in-depth performance investigations where there is either continued poor performance, a lack of reliability in the information being provided or on a random ad-hoc basis. Performance investigations should assess:

- The reliability of reported information;
- The extent of performance gaps from targets;
- The reasons for performance gaps; and
- Corrective action and improvement strategies

While the internal audit function may be used to conduct these investigations, it is preferable that

external service providers, who are experts in the area to be audited, should be used. Clear terms of reference will need to be adopted by the Executive Mayor for such investigation.

12.3 Internal Audit

Section 165 of the MFMA requires that each municipality must have an Internal Audit Unit, however such function may be outsourced.

Internal audit can determine the reliability, accuracy, and integrity of financial and operational information. The MSA, Section 45 stipulates that the results of performance measurements must be audited as part of the municipality's internal auditing processes.

The municipality's Internal Audit Unit should continuously assess the performance reports based on the organisational and departmental scorecards and submit a quarterly internal audit report to the Municipal Manager and Audit Committee.

The audit should include an assessment of:

- The usefulness of performance indicators;
- The functionality of the municipality's performance management system;
- Whether the municipality's PMDS complies with the MSA; and
- The extent to which the municipality's performance measurements are reliable in measuring the performance of the municipality by making use of indicators.

Auditing of performance reports must be conducted by the internal Audit Unit prior to submission to the municipality's Audit Committee and the AG.

12.4 Performance Audit Committee

The MFMA and the Municipal Planning and Performance Management Regulations require that the Council establish an Audit Committee consisting of a minimum of three members, where the majority of members are not employees of the municipality. No councillor may be a member of an Audit Committee. Council shall also appoint a chairperson who is not an employee.

The Regulations give municipalities the option to establish a separate Performance Audit Committee whereas the MFMA provides only for a single Audit Committee. The Audit Committee of CAPE WINELANDS DISTRICT MUNICIPALITY also fulfils the duties of the Performance Audit Committee. The operation of this Performance Audit Committee is governed by Section 14 (2-3) of the regulations.

According to the Regulations, the Performance Audit Committee must:

- Review the quarterly reports submitted to it by the internal audit unit;
- Review the municipality's performance management system and make recommendations in this regard to the council of that municipality;
- Assess whether the performance indicators are sufficient; and
- At least twice during a financial year submit an audit report to the municipal council.

It is further proposed that the Performance Audit Committee be tasked with assessing the reliability of information reported.

In order to fulfil their function an Audit Committee may, according to the MFMA and the regulations, must:

- Communicate directly with the Council, Municipal Manager or the internal and external auditors of the municipality concerned;
- Access any municipal records containing information that is needed to perform its duties or exercise its powers;
- Request any relevant person to attend any of its meetings, and, if necessary, to provide information requested by the committee; and
- Investigate any matter it deems necessary for the performance of its duties and the exercise of its powers.

12.4.1 Role of the Performance Audit Committee

The Audit Committee should also be able to commission in-depth performance investigations where there is either continued poor performance, a lack of reliability in the information being provided or on a random ad-hoc basis. The performance investigations should assess:

- The reliability of reported information;
- The extent of performance gaps from targets;
- The reasons for performance gaps; and
- Corrective action and improvement strategies

12.5 Legislative Reporting Processes

The legislative requirements regarding reporting processes are summarised in the following table:

Time frame	MSA/ MFMA Reporting on Performance	Section
Quarterly reporting	The Executive Mayor must within 30 days after the end of each quarter submit a report to council on the implementation of the budget	MFMA S52
	The Internal Auditors must submit quarterly audited reports to the Municipal Manager and to the Performance Audit Committee	MSA Regulation 14(1)(c)
Mid-year reporting	The Performance Audit Committee must review the PMDS and make recommendations to council	MSA Regulation 14(4)(a)
	The Performance Audit Committee must submit a report at least twice during the year a report to Council	MSA Regulation 14(4)(a)
	The municipality must report to Council at least twice a year	MSA Regulation 13(2)(a)

Time frame	MSA/ MFMA Reporting on Performance	Section
	The Accounting officer must by 25 January of each year assess the performance of the municipality and submit a report to the Executive Mayor, National Treasury and the relevant Provincial Treasury.	MFMA S72
Annual reporting	The annual report of a municipality must include the annual performance report and any recommendations of the municipality's audit committee	MFMA S121 (3)(c)(j) & MSA S46
	The accounting officer of a municipality must submit the performance report to the Auditor-General (AGSA) for auditing within two months after the end of the financial year to which that report relates	MFMA S126 1(a)
	The AGSA must audit the performance report and submit the report to the accounting officer within three months of receipt of the performance report	MFMA S126 (3)(a)(b)
	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	MFMA S127(2)
	The AGSA may submit the performance report and audit report of a municipality directly to the municipal council, the National Treasury, the relevant provincial treasury, the MEC responsible for local government in the province and any prescribed organ of the state	MFMA S127 (4)(a)
	Immediately after an annual report is tabled in the council, the accounting officer of the municipality must submit the annual report to the AGSA, the relevant provincial treasury and the provincial department responsible for local government in the province.	MFMA S127 (5)(b)
	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	MFMA S129 (1)
	The meetings of a municipal council at which an annual report is to be discussed or at which decisions concerning an annual report are to be taken, must be open to the public and any organ of the state	MFMA S130 (1)
	The Cabinet member responsible for local government must annually report to Parliament on actions taken by the MECs for local government to address issues raised by the AGSA	MFMA S134

Table 5: MFMA Reporting on Performance

13. SUMMARY OF MUNICIPAL PERFORMANCE CYCLE

The following high level process maps summarise the key organisational and individual performance processes. These process maps should be read with the sections dealing with these performance processes:

13.1 Top Layer SDBIP



Figure 8: TL SDBIP Process Map

13.2 Departmental SDBIP



Figure 9: Departmental SDBIP Process Map

13.3 Individual Performance

13.3.1 Municipal Manager and Executive Directors

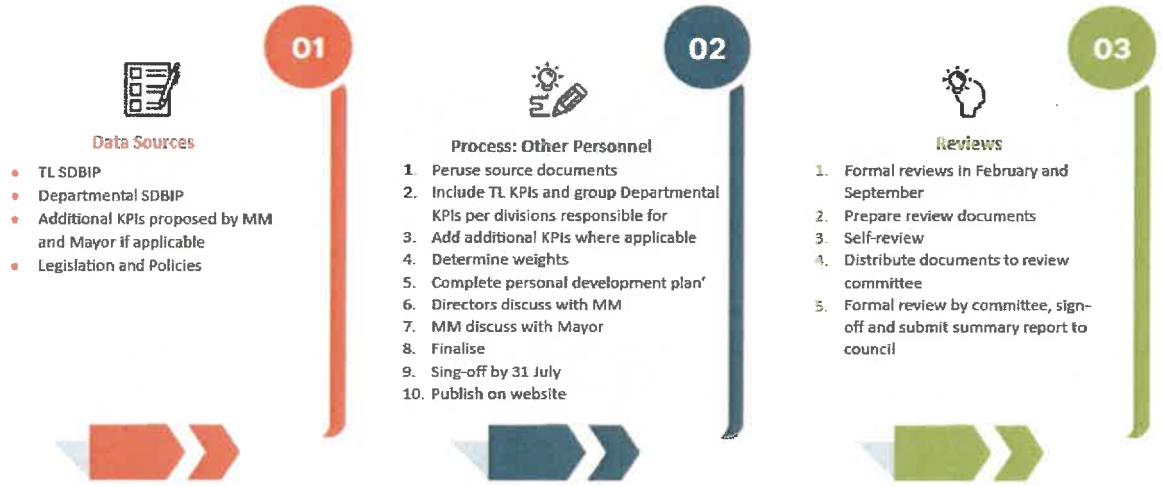


Figure 10 : Individual Performance MM & Executive Directors Process Map

13.3.2 Other Personnel

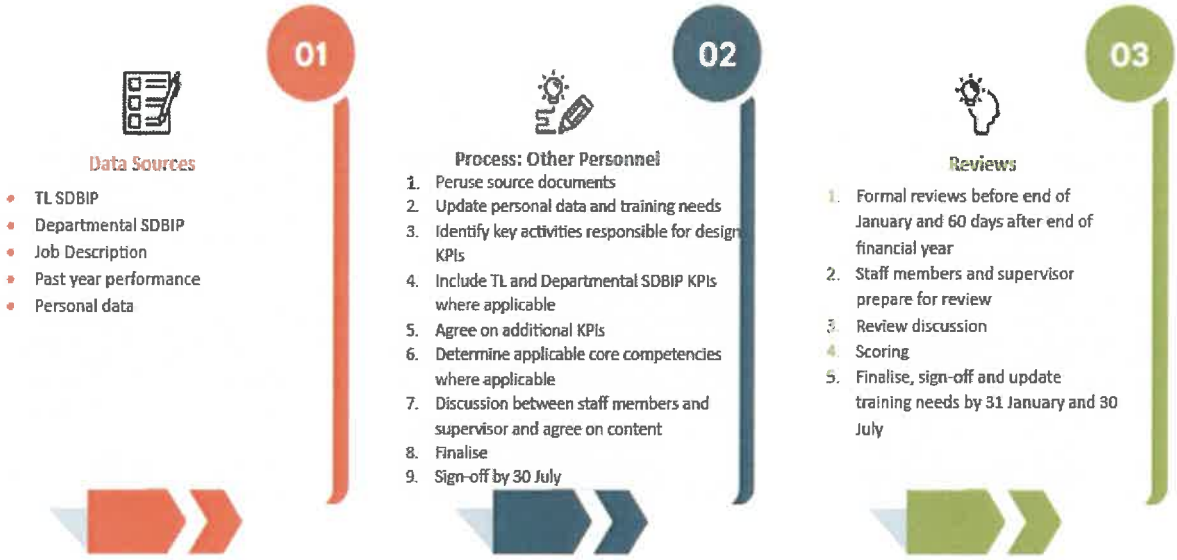


Figure 11 : Individual Performance Other Personnel Process Map

13.4 Performance Calendar

The table below indicates a high-Level summary of the annual municipal performance calendar with the various monthly actions:

Action	Activity	Comment
July		
Service Provider Performance	4th Quarter (previous financial year) service provider report Review performance of service providers	Departments to submit reports to SCM SCM to submit combined report to Council Address poor performance if needed
Performance Reporting	4th Quarter performance Report: Top Layer SDBIP (previous financial year)	Input for Annual Performance Report and Annual Report
MM / Executive Directors performance agreements	Prepare/ approval and sign	Prepare agreements ito R805 Approval and signed before 31 July KPI's aligned with SDBIP
Other Staff	Prepare/ approval and sign	Prepare agreements ito R890/891 Approval and signed before 30 July KPI's aligned with JD's Core Competencies aligned to JD's and Annexure A of the staff regulations
SDBIP system reporting	Update actual results on SDBIP system	Actions to address GAPS

Action	Activity	Comment
August		
SDBIP system reporting	Update actual results on SDBIP system	Actions to address GAPS
Individual Performance (other than MM and Executive Directors)	Formal year-end review of performance	Evaluation of performance for the past 6 months ending June Document and report
IDP	IDP/IDP review Process Plan	Draft process plan to ensure proper planning and involvement of all stakeholders to identify clear objectives and key performance areas Submission to Executive Mayor and Council Approval of plan
Individual Performance (other staff)	Self-Review and Manager Review to be completed as well as identifying the personal growth and development needs	In terms of Reg 890/891
Annual Performance Report	Finalise Annual Performance Report of the previous financial year	Draft report Submit to Auditor General with the financial statements Input for Annual Report
September		
SDBIP system reporting	Update actual results on SDBIP system	Actions to address GAPS
MM/Executive Directors Performance	Final year-end performance review of the previous financial year	Review against targets agreed upon in performance agreements Document and sign-off
Individual Performance (other staff)	Previous financial year's Departmental Moderation	Departmental Moderation Committees moderate the actual results from the performance assessments conducted the previous year
October		
Service Provider Performance	1st Quarter current year service provider report Review performance of service providers	SCM to submit combined report to Council Address poor performance if needed
SDBIP system reporting	Update actual results on SDBIP system	Actions to address GAPS
Performance Reporting	1st Quarter performance Report: Top Layer SDBIP current financial year	Submit to council and other role-players as legislated
MM/Executive Directors Performance	Informal performance discussion	How are we doing, progress and address possible shortcomings
IDP & Budget	Public participation	Consult key stakeholders / role-players Identify potential projects / needs
Annual Report	Finalise draft Annual Report (previous financial year)	Draft to be ready for submission to Auditor-General
November		

Action	Activity	Comment
SDBIP system reporting	Update actual results on SDBIP system	Actions to address GAPS
Planning	Strategic Planning	Planning sessions with Council, MM and Executive Directors Review Mission, Vision and Values Review progress against strategic objections Review strategic direction Identify projects
December		
SDBIP system reporting	Update actual results on SDBIP system	Actions to address GAPS
Individual Performance (other staff)	Previous financial year's Municipal Moderation	Municipal Moderation Committees moderate the actual results from the performance assessments conducted the previous year
January		
Service Provider Performance	2nd Quarter current year service provider report Review performance of service providers	SCM to submit combined report to Council Address poor performance if needed
SDBIP system reporting	Update actual results on SDBIP system	Actions to address GAPS
Performance Reporting	Prepare and submit Mid-year performance report ito s72 of the MFMA	Submit to Executive Mayor by 25 January Submit to next Council meeting after 25 January Submit to other role-players as legislated
Individual Performance (other staff)	Discussion and Manager Review to be completed as well as identifying the personal growth and development needs	In terms of Reg 890/891, decide on actions to address and amendments/ changes to agreements
Annual Report	Submit draft report to Council	Draft submitted to Council for adoption in principle and start public participation process
February		
SDBIP system reporting	Update actual results on SDBIP system	Actions to address GAPS
Individual Performance (other than MM and Executive Directors)	Formal review of Individual Performance (other than MM and Executive Directors)	Evaluation of performance for the past 6 months ending December Document and report
MM/Executive Directors Performance	Mid-year formal performance review	Review against targets agreed upon in performance agreements Document and sign-off
Oversight	Oversight Committee considers Annual Report	Compile oversight report for submission to council with final annual report
March		
SDBIP system reporting	Update actual results on SDBIP	Actions to address GAPS

Action	Activity	Comment
	system	
IDP	Draft IDP/IDP review to Council	Include clear objectives and targets
Budget	Draft Budget to Council	Budget aligned with IDP to address IDP objectives
Top Layer SDBIP	Draft Top layer SDBIP	Submit to council for information purposes with draft budget
Annual Report	Final Annual Report submitted to council	Public comment considered Oversight committee report submitted
April		
Service Provider Performance	3rd Quarter current year service provider report Review performance of service providers	SCM to submit combined report to Council Address poor performance if needed
SDBIP system reporting	Update actual results on SDBIP system	Actions to address GAPS
Performance Reporting	3rd Quarter performance Report: Top Layer SDBIP current financial year	Submit to council and other role-players as legislated
IDP & Budget	Public participation	Obtain public input on draft documents and consult key stakeholders
MM/Executive Directors Performance	Informal performance discussion	How are we doing, progress and address possible shortcomings
May		
SDBIP system reporting	Update actual results on SDBIP system	Actions to address GAPS
IDP & Budget	Approval of IDP/IDP review and Budget	Submit final documents to Council
SDBIP	Departmental SDBIP development for the new financial year	Workshops with departments Address departmental responsibilities, key activities, challenges and risks; inputs and timeframes
Individual Performance	Update the Work Place Skills Plan	Align needs with the skills as per mid-year performance reports
June		
SDBIP system reporting	Update actual results on SDBIP system	Actions to address GAPS
Top Layer SDBIP	Top Layer SDBIP approval	Top Layer SDBIP to be submitted to Executive Mayor within 14 days after budget approval Approval by Executive Mayor within 28 days after budget approval
SDBIP	Approval of departmental SDBIP	Submit final to the MM for approval

Table 6: Performance Calendar

The proposed performance management framework is aimed at guiding the municipality in the development of a performance management system which will contribute to improving the municipal performance and enhance service delivery. The framework is developed to provide details which 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 process of implementing PMDS must be seen as a learning process, where we are continuously improving the way the system works to fulfil the objectives of the system and address the emerging challenges from a constantly changing environment.

14. ROLES AND RESPONSIBILITIES

The following table indicates the roles and responsibilities of the stakeholders in performance planning, measurement and analysis and performance reporting and reviews:

ROLE PLAYER	ROLES AND RESPONSIBILITIES
Municipal Council	The Municipal Council adopts and approves amongst others the following: o A process plan to guide the planning, drafting, adoption and review of the IDP; o The IDP including organisational indicators and targets; o Changes to the IDP, organisational indicators and targets; o The Performance Management Policy Framework; and o Oversight mechanisms and structures o Establishment of the Municipal Moderation Committee
Executive Mayor	The responsibilities of the Executive Mayor includes amongst others the following: o Identifies, reviews and evaluates the municipality's needs in order of priority; o Recommend strategies, projects and services to the Council in order to address priorities; o Concludes the performance agreement, including measurable key performance indicators (KPI's) and targets for the Municipal Manager; o Performance evaluations of the Municipal Manager; o Ensures the performance agreements of Section 57 employees are made public; o Approves the Top Layer SDBIP and municipal projects as per the IDP; and o Presents the mid-year and annual report to Council.
Executive Committee	The responsibilities of the Executive Committee includes amongst others the following: o Provide strategic awareness and manage the development of the IDP and PMDS; and o Monitor progress via portfolio Committee meetings and advise the Executive Mayor accordingly.
Portfolio Committees	The responsibilities of the Portfolio Committees includes amongst others the following: o Monitor and make recommendations on the implementation of the municipal strategy;

ROLE PLAYER	ROLES AND RESPONSIBILITIES
	○ Monitor make recommendations on the implementation of the IDP; and ○ Monitor make recommendations on the implementation of the SDBIP.
Municipal Manager (MM)	The responsibilities of the Municipal Manager includes amongst others the following: ○ Provide strategic direction and develop strategies and policies for the organisation; ○ Manage the development and implementation of the IDP; ○ Development of the PMDS; ○ Identify indicators and set targets; ○ Ensure that KPI's are useful and relevant; ○ Submission of the draft Top Layer SDBIP to the Executive Mayor; ○ Manage the implementation of the PMDS; ○ Conclude performance agreements, including measurable KPI's and targets for Municipal Manager and Executive Directors; ○ Monitor the implementation of the IDP and the PMDS, identifying risks early; ○ Performance evaluations of the Municipal Manager and Executive Directors; ○ Ensure that regular monitoring, measurement and analysis of performance information takes place and ensure performance reporting is done in terms of legislation; ○ Propose response strategies to the Executive Mayor and Council; and ○ Co-ordinate the compilation of the Mid-year and Annual reports ○ Determine the process for keeping of POE's
Executive Directors	The responsibilities of the Executive Directors includes amongst others the following: ○ Assist in providing strategic direction and developing strategies and policies for the organisation; ○ Assist the Municipal Manager with the development and implementation of the IDP; ○ Ensure that their performance agreements are inclusive and that mandatory KPI's are included as per legislative requirements; ○ Ensure that performance information complies with the SMART (specific, measurable, achievable, relevant and time-bound) principles and audit standards of the AGSA; ○ Ensure that accurate, reliable and evidenced performance results are provided for performance monitoring on a monthly and quarterly basis; ○ Ensure that evidence to support the performance achievements is collected, stored and submitted for internal and external audit purposes; ○ Conclude performance agreements, including measurable key performance indicators and targets for immediate subordinates (Division Heads / Managers) and performance development plans for lower level staff where applicable; and ○ Performance evaluation of immediate subordinates (Division Heads / Managers) and lower level staff where applicable.
Directors/Managers	The responsibilities of the Division Heads include amongst others the following: ○ Ensure that their performance agreements are inclusive and that mandatory KPI's are included as per legislative requirements; ○ Ensure that performance information complies with the SMART (specific,

ROLE PLAYER	ROLES AND RESPONSIBILITIES
	measurable, achievable, relevant and time-bound) principles and audit standards of the AGSA; o Ensure that accurate, reliable and evidenced performance results are provided for performance monitoring on a monthly and quarterly basis; o Ensure that evidence to support the performance achievements is collected, stored and submitted for internal and external audit purposes; o Draft performance agreements, including measurable KPI's and targets for subordinates and performance development plans for lower level staff where applicable; and o Performance evaluation of all employees within the division; o Mentoring and coaching is being conducted in order to promote skills development
Supervisors	The responsibilities of the Supervisors include amongst others the following: o Ensure that performance information complies with the SMART (specific, measurable, achievable, relevant and time-bound) principles and audit standards of the AGSA; o Ensure that accurate, reliable and evidenced performance results are provided for performance monitoring on a monthly and quarterly basis; o Ensure that evidence to support the performance achievements is collected, stored and submitted for internal and external audit purposes; o Draft performance agreements, including measurable KPI's and targets for subordinates and performance development plans for lower level staff where applicable; and o Performance evaluation of all employees reporting to; o Mentoring and coaching is being conducted in order to promote skills development.
Other Staff	The responsibilities of the other staff members include amongst others the following: o Assist with the draft performance agreements, including measurable KPI's and targets are agreed upon and signed-off o Ensure that accurate, reliable and evidenced performance results are provided for performance monitoring on a monthly and quarterly basis; o Ensure that evidence to support the performance achievements is collected and stored for submission to the supervisor for performance assessments; o Ensure that skills acquired are submitted to the responsible supervisor or HR for updating the PDP
Performance Management Section	The responsibilities of the Performance Management Section includes amongst others the following: o The implementation of the Performance Management Policy Framework; o Co-ordinate and ensure good quality of performance reporting and reviews on an ongoing basis; o Ensure conformity to reporting formats and verify the reliability of reported information, where possible; o Prepare the quarterly Top Layer SDBIP performance reports for submission to Council; o Render municipal wide support with updating of actual performance and

ROLE PLAYER	ROLES AND RESPONSIBILITIES
	correcting of performance information; and o Render municipal wide support and assistance with the drafting of individual performance agreements and performance development plans including the development of measurable individual KPI's and targets o Conducting workshops to facilitate understanding of the system and its application in defining and measuring organisational goals and accomplishment; o Ensure skills gaps are addressed through the focused training of employees
Human Resources Division	The responsibilities of the Human Resources Section includes amongst others the following: o The implementation of Individual Performance throughout the organisation o Ensuring that individual performance are conducted within the prescribed timeframes o Ensure record keeping of performance management results o Ensuring that JD's are maintained and aligned with the Performance Agreements o Updating of the Work Place Skills Plan in line with skills development needs as determined by the PDP's o Ensure that the performance management and development system is collaborative, transparent and fair o Establish a consistent system in collaboration with the MM record keeping related to the performance of all staff throughout the organisation o Ensure moderation committees are established for departmental moderation municipal moderation o Establish processes to manage substandard performance o Provide secretariat services to the Senior Managers Evaluation Committees o Provide secretariat services to the Municipal Moderation Committee o Attend all Municipal Moderation Committees o Report on the actual performance on moderating (mid-year report on performance results to the EXCO) o Oversee the effective implementation of mentoring coaching
Internal Audit	The responsibilities of Internal Audit includes amongst others the following: o Quarterly audit the performance measurement of the municipality; o Submit quarterly reports on their audits to the Municipal Manager and the Audit Committee; and o Provide input to management in terms of the quality of the performance indicators.
Performance Management Steering Committee	The responsibilities of the Steering Committee includes amongst others the following: o Oversee or directly responsible for the compilation of all inter-municipality documentation regarding the PMDS, including explanatory briefs and performance monitoring and evaluation forms for the staff appraisals o Review this policy from time to time and make recommendations to council to ensure the development of mechanisms, systems and processes for performance monitoring, measurement and review to champion the development of the system down to other staff levels; o Make recommendations and oversee synergizing of the IDP, Budget and PMDS processes; o Link all PMDS actions to specific timeframes;

ROLE PLAYER	ROLES AND RESPONSIBILITIES
	○ Policy reflects the PMDS as it unfolds.
Performance Management Audit Committee	The responsibilities of the Audit Committee includes amongst others the following: ○ Review the quarterly reports submitted by Internal Audit; ○ Review the PMDS of the municipality and report to the Council in this regard; and ○ Submit an audit report to Council at least twice a year; ○ The full Audit Committee has been appointed as the Performance Audit Committee by Council resolution; ○ May request any Municipal documentation to investigate if it deems necessary; ○ May conduct any special meetings called by its members if required; ○ Consults directly with the Municipal Manager; ○ Must determine its own procedures in consultation with the Executive Mayor; ○ May officially request any person to attend the meeting
Municipal Public Accounts Committee	The responsibilities of the Audit Committee includes amongst others the following: ○ 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: ○ has approved the annual report with or without reservations; ○ has rejected the annual report; or ○ has referred the annual report back for revision of those components that can be revised ○ 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: ○ The annual report (or any components thereof) of each municipality and each municipal entity in the province; and ○ All oversight reports adopted on those annual reports. It is important to note that the oversight committee working with these reports should be chaired by the MPAC.
Departmental Moderation Committees	○ The responsibilities of the Municipal Moderation Committee include amongst others the following: ○ Conduct moderation of annual staff performance results in order to ensure that the 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 and contribution of each staff member with his or her peers towards the achievement of departmental goals; ○ Ensure fairness, consistency and objectivity with regard 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;

ROLE PLAYER	ROLES AND RESPONSIBILITIES
	○ 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.
Municipal Moderation Committee	The responsibilities of the Municipal Moderation Committee include amongst others the following: ○ Provide oversight over all staff performance management and development system to ensure the performance management process is valid, fair and objective ○ Moderate the overall performance assessment score for staff determined after the departmental moderation process ○ Ensure that the final individual performance ratings are fair across each grade and department or Head of Department ○ Ensure that the final individual assessment outcome corresponds with the performance of the municipality and the relevant department aligned to the staff members job description or Head of Department before any recognition of performance is considered ○ Determine the percentages for the merit based rewards subject to affordability and the annual approved municipal budget in terms of section 16 of teMunicipal Finance Management Act; ○ 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 financialand 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 the performance management and development system; and ○ Consider any other matter that may be considered relevant.
Community	The responsibilities of the Community include amongst others the following: ○ Provides inputs during the analysis phase to the IDP in order to inform the priority targets ○ Monitor the Top Layer SDBIP and performance during the year on a quarterly basis ○ Review the Annual Report ○ Keep Council accountable for performance on an annual basis

Table 7: Roles and Responsibilities

ABBREVIATIONS

AGSA	Auditor-General of South Africa
CAPEX	Capital Expenditure
CBP	Community Based Planning
CCR	Core Competency Requirements
CFO	Chief Financial Officer
EE	Employment Equity
ED	Executive Director
HOD	Head of Department
HR	Human Resources
IA	Internal Auditor
IDP	Integrated Development Plan
JD	Job Description
KPA	Key Performance Area
KPI	Key Performance Indicator
LED	Local Economic Development
EC	Executive Committee
MFMA	Municipal Finance Management Act (Act No. 56 of 2003)
MM	Municipal Manager
MMC	Member of Executive Committee
MSA	Municipal Systems Act No. 32 of 2000
mSCOA	Municipal Standard Chart of Accounts
NGO	Non-governmental organisation
NT	National Treasury
NTFMPPI	National Treasury Framework for Managing Programme Performance Information
OPEX	Operating expenditure
PDO	Pre-determined Objectives
PDP	Personal Development Plan

PMDS	Performance Management System
POE	Portfolio of Evidence
PT	Provincial Treasury
SALGA	South African Local Government Organisation
SCM	Supply Chain Management
SDBIP	Service Delivery and Budget Implementation Plan
SDF	Spatial Development Framework
Senior Manager	Municipal Manager and Heads of Department
SMT	Strategic Management Team
SOP	Standard Operating Procedure
TID	Technical Indicator Description
TL	Top Layer

Appendix C

National Treasury MFMA Circular No. 88 – Municipal Circular on Rationalisation Planning and Reporting Requirements

Circular 88 Planning & Reporting Template 2025/26

cooperative governance
Department:
Cooperative Governance
REPUBLIC OF SOUTH AFRICA

This tool is valid only for District municipalities for the reporting period of 2025/2026. Only complete the tab of this template applicable to your category of municipality.
In addition to submission of to your Provincial Department of Cooperative Governance, please CC- lgindicators@cogta.gov.za for all planning & reporting submissions.

Please do not make changes to the structure of this spreadsheet. The consistent formatting for all municipalities is necessary for collating this data.

Step 1: Please fill in all your details and all the municipal details in the table below.
Please make use of the drop down menus to select

Report Details	
Period for this report (The period on which you are reporting)	
Date (i.e. date on which this report was written, DD/MM/YYYY)	
Name of person completing this report (Person Capturing)	
Phone number of person completing this report (Person Capturing)	
Email address of the person completing this report (Person Capturing)	

Municpal Details	
Province	
Name of Municipality	
Municipal Code (e.g EC141)	
Category of Municipality	District Municipality
Type of Executive System	

Step 2: Please fill in all the required data in the table below.
Make use of colour key below, and note the completion percentage above each column to aid in completing the table.

Priority Indicators
When Priority Indicators are confirmed, they will be highlighted in orange. These rows are especially important to complete as this data is used in the municipal performance assessments. At this time, the Priority Indicators have not been formalised and do not yet reflect.

Data Key
- Data to be populated at the point of planning (once annually)
- Data to be populated at the point of reporting (as at current quarter/annual)
- Do not fill. Indicator value based on an automated calculation of the data elements
- Do not fill. Black cells not to be populated (kept blank)
- Cells highlight indicators

Quick Links

OUTPUT INDICATORS FOR QUARTERLY REPORTING
COMPLIANCE INDICATORS FOR QUARTERLY REPORTING
OUTPUT INDICATORS FOR ANNUAL REPORTING
OUTCOME INDICATORS FOR ANNUAL REPORTING
COMPLIANCE INDICATORS FOR ANNUAL REPORTING
COMPLIANCE QUESTIONS FOR ANNUAL REPORTING

All Indicators % Complete	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

<- Expand and collapse the header as needed with the - and +

C88 Code	Description	Priority Indicator	Baseline (Annual Performance previous financial year)	Medium term target (term of government)	Annual target	1st Quarter Planned output as per SDBIP	1st Quarter Actual output	2nd Quarter Planned output as per SDBIP	2nd Quarter Actual output	3rd Quarter Planned output as per SDBIP	3rd Quarter Actual output	4th Quarter/ Annual Planned performance	4th Quarter/ Annual Actual performance	Variation	Reason(s) for variation	Remedial action/ Steps taken to improve performance	Reasons for no data, if not provided	Steps undertaken, or to be undertaken, to provide data in the future	Estimated date when data will be available
	OUTPUT INDICATORS FOR QUARTERLY REPORTING																		
TR6.12	Percentage of surfaced municipal road lanes which has been resurfaced and resealed																		
TR6.12(1)	(1) Kilometres of municipal road lanes resurfaced and resealed																		
TR6.12(2)	(2) Kilometres of surfaced municipal road lanes																		
TR6.13	KMs of new municipal road network																		
TR6.13(1)	(1) Number of kilometres of surfaced road network built																		
TR6.13(2)	(2) Number of kilometres of unsurfaced road network built																		
TR6.21	Percentage of reported pothole complaints resolved within standard municipal response time																		
TR6.21(1)	(1) Number of pothole complaints resolved within the standard time after being reported																		
TR6.21(2)	(2) Number of potholes reported																		
WS1.11	Number of new sewer connections meeting minimum standards																		
WS1.11(	(1) Number of new sewer connections to consumer units																		
WS1.11(	(2) Number of new sewer connections to communal toilet facilities.																		
WS2.11	Number of new water connections meeting minimum standards																		
WS2.11(	(1) Number of new water connections to piped (tap) water																		
WS2.11(	(2) Number of new water connections to public/communal facilities.																		
WS3.11	Percentage of callouts responded to within 48 hours (sanitation/wastewater)																		
WS3.11(	(1) Number of callouts responded to within 48 hours (sanitation/wastewater)																		
WS3.11(	(2) Total number of callouts (sanitation/wastewater)																		
WS3.21	Percentage of callouts responded to within 48 hours (water)																		
WS3.21(	(1) Number of callouts responded to within 48 hours (water)																		
WS3.21(	(2) Total water service callouts received																		
FD1.11	Percentage compliance with the required attendance time for structural firefighting incidents																		
FD1.11(1	(1) Number of structural fire incidents where the attendance time was 14 minutes or less																		
FD1.11(2	(2) Total number of distress calls for structural fire incidents received																		
LED1.11	Percentage of total municipal operating expenditure spent on contracted services physically residing within the municipal area																		
LED1.11(	(1) R-value of operating expenditure on contracted services within the municipal area																		
LED1.11(	(2) Total municipal operating expenditure on contracted services																		
LED1.21	Number of work opportunities created through Public Employment Programmes (incl. EPWP, CWP and other related employment programmes)																		
LED1.21(1)	(1) Number of work opportunities provided by the municipality through the Expanded Public Works Programme																		
LED1.21(2)	(2) Number of work opportunities provided through the Community Works Programme and other related infrastructure initiatives.																		
LED2.12	Percentage of the municipality's operating budget spent on indigent relief for free basic services																		
LED2.12(	(1) R-value of operating budget expenditure on free basic services																		
LED2.12(	(2) Total operating budget for the municipality																		
LED3.31	Average number of days from the point of advertising to the letter of award per 80/20 procurement process																		
LED3.31(	(1) Sum of the number of days from the point of advertising a tender in terms of the 80/20 procurement process to the issuing of the letter of award																		
LED3.31(	(2) Total number of 80/20 tenders awarded as per the procurement process																		
LED3.32	Percentage of municipal payments made to service providers who submitted complete forms within 30-days of invoice submission																		
LED3.32(	(1) Number of municipal payments within 30 days of complete invoice receipt made to service providers																		
LED3.32(	(2) Total number of complete invoices received (30 days or older)																		
GG1.21	Staff vacancy rate																		
GG1.21(	(1) The number of employee posts on the approved organisational structure																		
GG1.21(	(2) The number of actual employees in the municipality																		
GG1.22	Percentage of vacant posts filled within 6 months																		
GG1.22(	(1) Number of vacant posts filled within 6 months since the date (dd/mm/yyyy) of authority to proceed with filling the vacancy																		
GG1.22(	(2) Number of vacant posts that have been filled																		
GG2.31	Percentage of official complaints responded to through the municipal complaint management system																		
GG2.31(	(1) Number of official complaints responded to according to municipal norms and standards																		
GG2.31(	(2) Number of official complaints received																		
GG5.11	Number of active suspensions longer than three months																		
GG5.11(	(1) Simple count of the number of active suspensions in the municipality lasting more than three months																		
FM1.11	Total Capital Expenditure as a percentage of Total Capital Budget																		
FM1.11(	(1) Actual Capital Expenditure																		
FM1.11(	(2) Budgeted Capital Expenditure																		

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GG3.12	Percentage of councillors who have declared their financial interests	
GG3.12(	(1) Number of councillors that have declared their financial interests	
GG3.12(	(2) Total number of municipal councillors	
FM2.21	Cash backed reserves reconciliation at year end	
FM2.21(	(1) Actual Cash and Cash Equivalents	
FM2.21(	(2) Long Term Investment	
FM2.21(	(3) Unspent grants	
FM2.21(	(4) Statutory requirement	
FM2.21(	(5) Working capital requirements	
FM2.21(	(6) Other provisions	
FM2.21(	(7) Long term investment committed	
FM2.21(	(8) Reserves to be cash backed	
FM3.12	Current ratio (current assets/current liabilities)	
FM3.12(1)	(1) Current assets	
FM3.12(	(2) Current liabilities	
FM4.11	Irregular, Fruitless and Wasteful, Unauthorised Expenditure as a percentage of Total Operating Expenditure	
FM4.11(	(1) Irregular expenditure	
FM4.11(	(2) Fruitless and Wasteful expenditure	
FM4.11(	(3) Unauthorised expenditure	
FM4.11(	(4) Total Operating Expenditure	
FM5.12	Percentage of total capital expenditure funded from capital conditional grants	
FM5.12(	(1) Total Capital Transfers (provincial and national capital conditional grants)	
FM5.12(	(2) Total Capital Expenditure	
FM5.21	Percentage of total capital expenditure on renewal/upgrading of existing assets	
FM5.21(	(1) Total costs of Renewal and Upgrading of Existing Assets	
FM5.21(	(2) Total Capital Expenditure	
FM5.22	Renewal/Upgrading of Existing Assets as a percentage of Depreciation/Asset Impairment	
FM5.22(	(1) Total costs of Renewal and Upgrading of Existing Assets	
FM5.22(	(2) Depreciation	
FM5.22(	(3) Asset impairment)	
FM5.31	Repairs and Maintenance as a percentage of property, plant, equipment and investment property	
FM5.31(	(1) Total Repairs and Maintenance Expenditure	
FM5.31(	(2) Property, Plant and Equipment	
FM5.31(	(3) Investment Property (Carrying Value)	
FM7.31	Net Surplus /Deficit Margin for Electricity	
FM7.31(	(1) Total Electricity Revenue	
FM7.31(	(2) Total Electricity Expenditure	
FM7.32	Net Surplus /Deficit Margin for Water	
FM7.32(	(1)Total Water Revenue	
FM7.32(	(2) Total Water Expenditure	
FM7.33	Net Surplus /Deficit Margin for Wastewater	
FM7.33(	(1) Total Sanitation and Waste Water Revenue	
FM7.33(2)	(2) Total Sanitation and Waste Water Expenditure	
FM7.34	Net Surplus /Deficit Margin for Refuse	
FM7.34(	(1) Total Refuse Revenue	
FM7.34(	(2) Total Refuse Expenditure	
	OUTCOME INDICATORS FOR ANNUAL REPORTING	
TR6.2	Number of potholes reported per 10kms of municipal road network	
TR6.2(1)	(1) Number of potholes reported	
TR6.2(2)	(2) Kilometres of surfaced municipal road network	
WS3.1	Frequency of sewer blockages per 100 KMs of pipeline	
WS3.1(1	(1) Number of blockages in sewers that occurred	
WS3.1(2	(2) Total sewer length in KMs	
WS3.2	Frequency of water mains failures per 100 KMs of pipeline	
WS3.2(1	(1) Number of water mains failures (including failures of valves and fittings	
WS3.2(2	(2) Total mains length (water) in KMs	
WS3.3	Frequency of unplanned water service interruptions	
WS3.3(1	(1) Number of unplanned water service interruptions	
WS3.3(2	(2) Total number of water service connections	
WS4.1	Percentage of drinking water samples complying to SANS241	
WS4.1(1	(1) Number of water sample tests that complied with SANS 241 requirements	
WS4.1(2	Total number of water sample tests undertaken	
WS4.2	Percentage of wastewater samples compliant to water use license conditions	
WS4.2(1)	(1) Number of wastewater samples tested per determinant that meet compliance to specified water use license requirements	
WS4.2(2	(2) Total wastewater samples tested for all determinants over the municipal financial year	
WS5.1	Percentage of non-revenue water	
WS5.1(1	(1) Number of Kilolitres Water Purchased or Purified	
WS5.1(2	(2) Number of kilolitres of water sold	
WS5.2	Total water losses	
WS5.2(1	(1) System input volume	
WS5.2(2	(2) Authorised consumption	
WS5.2(3	(3) Number of service connections	
WS5.4	Percentage of water reused	
WS5.4(1	(1) 1.a Direct use of treated municipal wastewater (not including irrigation)	
WS5.4(2	(2) 1.b Direct use of treated municipal wastewater for irrigation purposes	
WS5.4(3	(3) System input volume	
FD2.1	Disaster Management Centre Readiness	
FD2.1(1)	(1) Number of specified conditions of readiness met	
FD2.2	Fire Services function in accordance with prescribed requirements	
FD2.2(2)	(1) Number of specified conditions of fire services functionality met	
GG1.1	Percentage of municipal skills development levy recovered	
GG1.1(1)	(1) R-value of municipal skills development levy recovered	
GG1.1(2)	(2) R-value of the total qualifying value of the municipal skills development levy	
GG1.2	Top management stability	
GG1.2(1)	(1) Sum of actual working days, in the reporting period, that each S56 and S57 post was occupied by a fully appointed official (not suspended or vacant) with a valid signed contract and performance agreement)	
GG1.2(2)	(2) Total aggregate standard working days for all S56 and S57 Posts	
GG4.1	Percentage of councillors attending council meetings	
GG4.1(1)	(1) The sum total of councillor attendance of all council meetings	
GG4.1(2)	(2) The total number of council meetings	
GG4.1(3)	(3) The total number of councillors in the municipality	
FM1.1	Percentage of expenditure against total budget	
FM1.1(1	(1) Total expenditure (operating + capital)	
FM1.1(2	(2) Total budget (operating + capital)	
FM2.1	Percentage of total operating revenue to finance total debt (Total Debt (Borrowing) / Total operating revenue)	
FM2.1(1)	(1) Debt (Short Term Borrowing + Bank Overdraft + Short Term Lease + Long Term Borrowing + Long Term Lease)	
FM2.1(2	(2) Total Operating Revenue	
FM2.1(3	(3) Operating Conditional Grant	
FM2.2	Percentage change in cash backed reserves reconciliation	
FM2.2(1	(1) Cash backed reserves (previous year)	
FM2.2(2	(2) Cash backed reserves (current year)	
FM3.1	Percentage change in cash and cash equivalent (short term)	
FM3.1(1	(1) Cash and cash equivalent (Current year)	
FM3.1(2	(2) Cash and cash equivalent (Previous year)	
FM4.1	Percentage change of unauthorised, irregular, fruitless and wasteful expenditure	
FM4.1(1	(1) Irregular expenditure (previous year)	
FM4.1(2	(2) Fruitless and Wasteful expenditure (previous year)	
FM4.1(3	(3) Unauthorised expenditure (previous year)	
FM4.1(4	(4) Irregular expenditure (current year)	
FM4.1(5	(5) Fruitless and Wasteful expenditure (current year)	
FM4.1(6	(6) Unauthorised expenditure (current year)	
FM4.2	Percentage of total operating expenditure on remuneration	
FM4.2(1	(1)Employee Related Costs	
FM4.2(2	(2) Councillors' Remuneration	
FM4.2(3	(3) Total Operating Expenditure	
FM4.3	Percentage of total operating expenditure on contracted services	
FM4.3(1	(1) Contracted Services	
FM4.3(2	(2) Total Operating Expenditure	
FM5.1	Percentage change of own funding (Internally generated funds + Borrowings) to fund capital expenditure	
FM5.1(1	(1) Internally Generated Funds (current year)	
FM5.1(2	(2) Borrowings (current year)	
FM5.1(3	(3) Internally Generated Funds (previous year)	
FM5.1(4	(4) Borrowings (previous year)	
FM5.2	Percentage change of renewal/upgrading of existing Assets	
FM5.2(1	(1) Total costs of Renewal and Upgrading of Existing Assets (current year)	
FM5.2(2	(2) Total costs of Renewal and Upgrading of Existing Assets (previous year)	
FM5.3	Percentage change of repairs and maintenance of existing infrastructure	
FM5.3(1	(1) Repairs and maintenance expenditure (current year)	
FM5.3(2	(2) Repairs and maintenance expenditure (previous year)	
FM7.1	Percentage change in Gross Consumer Debtors' (Current and Non-current)	

FM7.1(1	(1) Gross consumer debtors (previous year)		
FM7.1(2	(2) Gross consumer debtors (current year		
FM7.2	Percentage of Revenue Growth excluding capital grants		
FM7.2(1	(1) Total Revenue Excluding Capital Grants (current year)		
FM7.2(2	(2) Total Revenue Excluding Capital Grants (previous year)		
FM7.3	Percentage of net operating surplus margin		
FM7.3(1	(1)Total Operating Revenue		
FM7.3(2	(2)Total Operating Expenditure		
	COMPLIANCE INDICATORS FOR ANNUAL REPORTING		
C5	Number of recognised traditional leaders within your municipal boundary		
C21	Number of approved environmental health practitioner posts in the municipality:		
C31	Number of approved posts in the municipality with regard to municipal infrastructure:		
C37	Number of approved posts in the treasury and budget office:		
C35	Number of approved posts in the development and planning department:		
C41	Number of approved engineer posts in the municipality:		
C46	Number of approved waste management posts in the municipality:		
C48	Number of approved electrician posts in the municipality:		
C50	Number of approved water and wastewater management posts in the municipality:		
C52	Number of maintained sports facilities		
C53	Square meters of maintained public outdoor recreation space		
C54	Number of municipality-owned community halls		
C60	Total number of sewer connections		
C62	Total number of Ventilation Improved Pit Toilets (VIPs)		
C72	Date of the last municipal Disaster Management Plan tabled at Council		
C90	Date of the last Climate Change Needs and Response Assessment tabled at Council		
C91	Date of the last Climate Change Response Implementation Plan tabled at Council		
C95	Number of residential properties in the billing system		
C96	Number of non-residential properties in the billing system		
C103	Number of disclosures for fraud and corruption		
	COMPLIANCE QUESTIONS FOR ANNUAL REPORTING		
Q1.	Does the municipality have an approved Performance Management Framework?		
Q2.	Has the IDP been adopted by Council by the target date?		
Q3.	Does the municipality have an approved LED Strategy?		
Q4.	What are the main causes of work stoppage in the past quarter by type of stoppage?		
Q5.	How many public meetings were held in the last quarter at which the Mayor or members of the Mayoral/Executive committee provided a report back to the public?		
Q6.	When was the last scientifically representative community feedback survey undertaken in the municipality?		
Q7.	What are the biggest causes of complaints or dissatisfaction from the community feedback survey? Indicate the top four issues in order of priority.		
Q8.	Does the municipality have an Internal Audit Unit?		
Q10.	Is there a dedicated position responsible for internal audits?		
Q11.	Is the internal audit position filled or vacant?		
Q12.	Has an Audit Committee been established? If so, is it functional?		
Q13.	Has the internal audit plan been approved by the Audit Committee?		
Q14.	Has an Internal Audit Charter and Audit Committee charter been approved and adopted?		
Q15.	Does the internal audit plan set monthly targets?		
Q16.	How many monthly targets in the internal audit plan were not achieved?		
Q17.	Does the Municipality have a dedicated SMME support unit or facility in place either directly or in partnership with a relevant roleplayer?		
Q18.	What economic incentive policies adopted by Council does the municipality have by date of adoption?		
Q19.	Is the municipal supplier database aligned with the Central Supplier Database?		
Q21.	What is the organisational location of the disaster risk management function within your municipality? (Specify the placement and highest level filled post within it).		
Q22	Please list the name of the structure and date of every meeting of an official IGR structure that the municipality participated in this quarter:		
Q23.	Where is the organisational responsibility for the IGR support function located within the municipality (inclusive of the reporting line)?		
Q24.	Is the MPAC functional? List the reasons why if the answer is not 'Yes'.		
Q25.	Has a report by the Executive Committee on all decisions it has taken been submitted to Council this financial year?		
Q26	Does the municipality have any arrangement (e.g. Service Level Agreement or otherwise) with another organ of state for the provision of municipal health services within the municipal jurisdiction? If so, please list the names of the applicable organs of state		