

## **PERFORMANCE AGREEMENT**

MADE AND ENTERED INTO BY AND BETWEEN:

**THE AMAHLATHI LOCAL MUNICIPALITY  
AS REPRESENTED BY THE EXECUTIVE MAYOR**

**MNCEKELEI PETER**

.....  
**FULL NAMES**

AND  
BALISA KING SOCIKWA

.....,  
**THE EMPLOYEE OF THE MUNICIPALITY**

FOR THE

**FINANCIAL YEAR: 1 JULY 2014 - 30 JUNE 2015**

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## PERFORMANCE AGREEMENT

### ENTERED INTO BY AND BETWEEN:

The **AM AHLATHI** Local Municipality herein represented by **MNCEKELELI PETER** in his capacity as **THE MAYOR** (hereinafter referred to as the **Employer** or Supervisor)

And **BALISA KING SOCIKWA** Employee of the Municipality (hereinafter referred to as the **EMPLOYEE**).

### WHEREBY IT IS AGREED AS FOLLOWS:

#### 1. INTRODUCTION

- 1.1 The **Employer** has entered into a contract of employment with the **Employee** in terms of section 57(1)(a) of the Local Government: Municipal Systems Act 32 of 2000 ("the Systems Act"). The **Employer** and the **Employee** are hereinafter referred to as "the Parties".
- 1.2 Section 57(1)(b) of the Systems Act, read with the Contract of Employment concluded between the parties, requires the parties to conclude an annual performance agreement.
- 1.3 The parties wish to ensure that they are clear about the goals to be achieved, and secure the commitment of the **Employee** to a set of outcomes that will secure local government policy goals.
- 1.4 The parties wish to ensure that there is compliance with Sections 57(4A), 57(4B) and 57(5) of the Systems Act.

#### 2. PURPOSE OF THIS AGREEMENT

The purpose of this Agreement is to -

- 2.1 comply with the provisions of Section 57(1)(b),(4A),(4B) and (5) of the Act as well as the employment contract entered into between the parties;
- 2.2 specify objectives and targets defined and agreed with the employee and to communicate to the employee the employer's expectations of the employee's performance and accountabilities in alignment with the Integrated Development Plan, Service Delivery and Budget Implementation Plan (SDBIP) and the Budget of the municipality;
- 2.3 specify accountabilities as set out in a performance plan, which forms an annexure to the performance agreement;
- 2.4 monitor and measure performance against set targeted outputs;
- 2.5 use the performance agreement as the basis for assessing whether the employee has met the performance expectations applicable to his or her job;
- 2.6 in the event of outstanding performance, to appropriately reward the employee; and

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- 2.7 give effect to the employer's commitment to a performance-orientated relationship with its employee in attaining equitable and improved service delivery.

### 3 COMMENCEMENT AND DURATION

- 3.1 This Agreement will commence on the 01 July 2014 and will remain in force until 30 June 2015 thereafter a new Performance Agreement, Performance Plan and Personal Development Plan shall be concluded between the parties for the next financial year or any portion thereof.
- 3.2 The parties will review the provisions of this Agreement during June each year. The parties will conclude a new Performance Agreement and Performance Plan that replaces this Agreement at least once a year by not later than the beginning of each successive financial year.
- 3.3 This Agreement will terminate on the termination of the **Employee's** contract of employment for any reason.
- 3.4 The content of this Agreement may be revised at any time during the above-mentioned period to determine the applicability of the matters agreed upon.
- 3.5 If at any time during the validity of this Agreement the work environment alters (whether as a result of government or council decisions or otherwise) to the extent that the contents of this Agreement are no longer appropriate, the contents shall immediately be revised.

### 4 PERFORMANCE OBJECTIVES

- 4.1 The Performance Plan (Annexure A) sets out-
- 4.1.1 the performance objectives and targets that must be met by the **Employee**; and
- 4.1.2 the time frames within which those performance objectives and targets must be met.
- 4.2 The performance objectives and targets reflected in Annexure A are set by the **Employer** in consultation with the **Employee** and based on the Integrated Development Plan, Service Delivery and Budget Implementation Plan (SDBIP) and the Budget of the **Employer**, and shall include key objectives; key performance indicators; target dates and weightings.
- 4.2.1 The key objectives describe the main tasks that need to be done.
- 4.2.2 The key performance indicators provide the details of the evidence that must be provided to show that a key objective has been achieved.
- 4.2.3 The target dates describe the timeframe in which the work must be achieved.
- 4.2.4 The weightings show the relative importance of the key objectives to each other.
- 4.3 The **Employee's** performance will, in addition, be measured in terms of contributions to the goals and strategies set out in the **Employer's** Integrated Development Plan.

**5 PERFORMANCE MANAGEMENT SYSTEM**

- 5.1 The **Employee** agrees to participate in the performance management system that the **Employer** adopts or introduces for the **Employer**, management and municipal staff of the **Employer**.
- 5.2 The **Employee** accepts that the purpose of the performance management system will be to provide a comprehensive system with specific performance standards to assist the **Employer**, management and municipal staff to perform to the standards required.
- 5.3 The **Employer** will consult the **Employee** about the specific performance standards that will be included in the performance management system as applicable to the **Employee**.
- 5.4 The **Employee** undertakes to actively focus towards the promotion and implementation of the KPAs (including special projects relevant to the employee's responsibilities) within the local government framework.
- 5.5 The criteria upon which the performance of the **Employee** shall be assessed shall consist of two components, both of which shall be contained in the Performance Agreement.
  - 5.5.1 The **Employee** must be assessed against both components, with a weighting of 80:20 allocated to the Key Performance Areas (KPAs) and the Core Competency Requirements (CCRs) respectively.
  - 5.5.2 Each area of assessment will be weighted and will contribute a specific part to the total score.
  - 5.5.3 KPAs covering the main areas of work will account for 80% and CCRs will account for 20% of the final assessment.
- 5.6 The **Employee's** assessment will be based on his / her performance in terms of the outputs / outcomes (performance indicators) identified as per attached Performance Plan (**Annexure A**), which are linked to the KPA's, and will constitute 80% of the overall assessment result as per the weightings agreed to between the **Employer** and **Employee**:

Key Performance Areas (KPA's)	Weighting
Basic Service Delivery	30
Municipal Institutional Development and Transformation	10
Local Economic Development (LED)	25
Municipal Financial Viability and Management	15
Good Governance and Public Participation	20
<b>Total</b>	<b>100%</b>

- 5.7 In the case of managers directly accountable to the municipal manager, key performance areas related to the functional area of the relevant manager, must be subject to negotiation between the municipal manager and the relevant manager.
- 5.8 The CCRs will make up the other 20% of the **Employee's** assessment score. CCRs that are deemed to be most critical for the **Employee's** specific job should be selected (✓) from the list below as agreed to between the **Employer** and **Employee**. Three of the CCRs are compulsory for Municipal Managers:

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CORE COMPETENCY REQUIREMENTS (CCR) FOR EMPLOYEES		
CORE MANAGERIAL COMPETENCIES (CMC)	√	WEIGHT
Strategic Capability and Leadership		
Programme and Project Management		
Financial Management	compulsory	
Change Management		
Knowledge Management		
Service Delivery Innovation		
Problem Solving and Analysis		
People Management and Empowerment	compulsory	
Client Orientation and Customer Focus	compulsory	
Communication		
Honesty and Integrity		
CORE OCCUPATIONAL COMPETENCIES (COC)		
Competence in Self Management		
Interpretation of and implementation within the legislative and national policy frameworks		
Knowledge of Performance Management and Reporting		
Knowledge of global and South African specific political, social and economic contexts		
Competence in policy conceptualisation, analysis and implementation		
Knowledge of more than one functional municipal field / discipline		
Skills in Mediation		
Skills in Governance		
Competence as required by other national line sector departments		
Exceptional and dynamic creativity to improve the functioning of the municipality		
Total percentage	-	100%

## 6. EVALUATING PERFORMANCE

- 6.1 The Performance Plan (Annexure A) to this Agreement sets out -
- 6.1.1 the standards and procedures for evaluating the **Employee's** performance; and
- 6.1.2 the intervals for the evaluation of the **Employee's** performance.
- 6.2 Despite the establishment of agreed intervals for evaluation, the **Employer** may in addition review the **Employee's** performance at any stage while the contract of employment remains in force.
- 6.3 Personal growth and development needs identified during any performance review discussion must be documented in a Personal Development Plan as well as the actions agreed to and implementation must take place within set time frames.
- 6.4 The **Employee's** performance will be measured in terms of contributions to the goals and strategies set out in the **Employer's** IDP.

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6.5 The annual performance appraisal will involve:

**6.5.1 Assessment of the achievement of results as outlined in the performance plan:**

- (a) Each KPA should be assessed according to the extent to which the specified standards or performance indicators have been met and with due regard to ad hoc tasks that had to be performed under the KPA.
- (b) An indicative rating on the five-point scale should be provided for each KPA.
- (c) The applicable assessment rating calculator (refer to paragraph 6.5.3 below) must then be used to add the scores and calculate a final KPA score.

**6.5.2 Assessment of the CCRs**

- (a) Each CCR should be assessed according to the extent to which the specified standards have been met.
- (b) An indicative rating on the five-point scale should be provided for each CCR.
- (c) This rating should be multiplied by the weighting given to each CCR during the contracting process, to provide a score.
- (d) The applicable assessment rating calculator (refer to paragraph 6.5.1) must then be used to add the scores and calculate a final CCR score.

**6.5.3 Overall rating**

An overall rating is calculated by using the applicable assessment-rating calculator. Such overall rating represents the outcome of the performance appraisal.

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

Level	Terminology	Description	Rating				
			1	2	3	4	5
5	Outstanding performance	Performance far exceeds the standard expected of an employee at this level. The appraisal indicates that the Employee has achieved above fully effective results against all performance criteria and indicators as specified in the PA and Performance plan and maintained this in all areas of responsibility throughout the year.					

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Level	Terminology	Description	Rating				
			1	2	3	4	5
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 PA 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 the key performance criteria and indicators as specified in the PA 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 of the performance criteria and indicators as specified in the PA and Performance Plan. The employee has failed to demonstrate the commitment or ability to bring performance up to the level expected in the job despite management efforts to encourage improvement.					

6.7 For purposes of evaluating the annual performance of the municipal manager, an evaluation panel constituted of the following persons must be established -

- 6.7.1 Executive Mayor or Mayor;
- 6.7.2 Chairperson of the performance audit committee or the audit committee in the absence of a performance audit committee;
- 6.7.3 Member of the mayoral or executive committee or in respect of a plenary type municipality, another member of council;
- 6.7.4 Mayor and/or municipal manager from another municipality; and
- 6.7.5 Member of a ward committee as nominated by the Executive Mayor or Mayor.

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

- 6.8.1 Municipal Manager;
- 6.8.2 Chairperson of the performance audit committee or the audit committee in the absence of a performance audit committee;
- 6.8.3 Member of the mayoral or executive committee or in respect of a plenary type municipality, another member of council; and
- 6.8.4 Municipal manager from another municipality.

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6.9 The manager responsible for human resources of the municipality must provide secretariat services to the evaluation panels referred to in sub-regulations (d) and (e).

## 7. SCHEDULE FOR PERFORMANCE REVIEWS

7.1 The performance of each **Employee** in relation to his / her performance agreement shall be reviewed on the following dates with the understanding that reviews in the first and third quarter may be verbal if performance is satisfactory:

INTERVAL	PERIOD	EVALUATION DEADLINE
First quarter	July- September	2 <sup>nd</sup> week October
Second quarter	October - December	2 <sup>nd</sup> week January
Third quarter	January - March	2 <sup>nd</sup> week April
Fourth quarter	April - June	2 <sup>nd</sup> week July

7.2 The **Employer** shall keep a record of the mid-year review and annual assessment meetings.

7.3 Performance feedback shall be based on the **Employer's** assessment of the **Employee's** performance.

7.4 The **Employer** will be entitled to review and make reasonable changes to the provisions of Annexure "A" from time to time for operational reasons. The **Employee** will be fully consulted before any such change is made.

7.5 The **Employer** may amend the provisions of Annexure A whenever the performance management system is adopted, implemented and / or amended as the case may be. In that case the **Employee** will be fully consulted before any such change is made.

## 8. DEVELOPMENTAL REQUIREMENTS

The Personal Development Plan (PDP) for addressing developmental gaps is attached as Annexure B.

## 9. OBLIGATIONS OF THE EMPLOYER

9.1 The Employer shall –

- 9.1.1 create an enabling environment to facilitate effective performance by the employee;
- 9.1.2 provide access to skills development and capacity building opportunities;
- 9.1.3 work collaboratively with the **Employee** to solve problems and generate solutions to common problems that may impact on the performance of the **Employee**;
- 9.1.4 on the request of the **Employee** delegate such powers reasonably required by the **Employee** to enable him / her to meet the performance objectives and targets established in terms of this Agreement; and
- 9.1.5 make available to the **Employee** such resources as the **Employee** may reasonably require from time to time to assist him / her to meet the performance objectives and targets established in terms of this Agreement.

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## 10. CONSULTATION

- 10.1 The **Employer** agrees to consult the **Employee** timeously where the exercising of the powers will have amongst others –
- 10.1.1 a direct effect on the performance of any of the **Employee's** functions;
  - 10.1.2 commit the **Employee** to implement or to give effect to a decision made by the **Employer**; and
  - 10.1.3 a substantial financial effect on the **Employer**.
- 10.2 The **Employer** agrees to inform the **Employee** of the outcome of any decisions taken pursuant to the exercise of powers contemplated in 10.1 as soon as is practicable to enable the **Employee** to take any necessary action without delay.

## 11. MANAGEMENT OF EVALUATION OUTCOMES

- 11.1 The evaluation of the **Employee's** performance will form the basis for rewarding outstanding performance or correcting unacceptable performance.
- 11.2 A performance bonus of between 5% to 14% of the all-inclusive annual remuneration package *may* be paid to the **Employee** in recognition of outstanding performance to be constituted as follows:
- 11.3 The performance bonus percentage are determined by calculating the overall rating using the applicable assessment rating calculator.

The quantum of the bonus payable shall be as follows;

If (Bonus Score > = 130 - 133) bonus = 5%
If (Bonus Score > = 134 - 137) bonus = 6%
If (Bonus Score > = 138 - 141) bonus = 7%
If (Bonus Score > = 142 - 145) bonus = 8%
If (Bonus Score > = 146 - 149) bonus = 9%
If (Bonus Score > = 150 - 153) bonus = 10%
If (Bonus Score > = 154 - 157) bonus = 11%
If (Bonus Score > = 158 - 161) bonus = 12%
If (Bonus Score > = 162 - 165) bonus = 13%
If (Bonus Score > = 166 - plus) bonus = 14%

- 11.3 In the case of unacceptable performance, the **Employer** shall –
- 11.3.1 provide systematic remedial or developmental support to assist the **Employee** to improve his or her performance; and
  - 11.3.2 after appropriate performance counselling and having provided the necessary guidance and/ or support as well as reasonable time for improvement in performance, the **Employer** may consider steps to terminate the contract of employment of the **Employee** on grounds of unfitness or incapacity to carry out his or her duties.

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**12. DISPUTE RESOLUTION**

- 12.1 Any disputes about the nature of the **Employee's** performance agreement, whether it relates to key responsibilities, priorities, methods of assessment and/ or any other matter provided for, shall be mediated by –
  - 12.1.1 the MEC for local government in the province within thirty (30) days of receipt of a formal dispute from the **Employee**; or
  - 12.1.2 any other person appointed by the MEC.
  - 12.1.3 In the case of managers directly accountable to the municipal manager, a member of the municipal council, provided that such member was not part of the evaluation panel provided for in sub-regulation 27(4)(e) of the Municipal Performance Regulations, 2006, within thirty (30) days of receipt of a formal dispute from the employee;
  - 12.1.4 The MEC for Local Government and the Mayor, respectively, shall have the final say with regard to the Municipal Manager's and the Section 57 Managers' assessment respectively.
  - 12.1.5 In the case of staff other than the Municipal Manager or the Section 57 Managers, the fact of non-consensus together with the necessary evidence shall be escalated in line with the municipality's dispute resolution mechanism as embodied in the relevant Collective Agreement.

**13. GENERAL**

- 13.1 The contents of this agreement and the outcome of any review conducted in terms of Annexure A may be made available to the public by the **Employer**.
- 13.2 Nothing in this agreement diminishes the obligations, duties or accountabilities of the **Employee** in terms of his/ her contract of employment, or the effects of existing or new regulations, circulars, policies, directives – or other instruments.
- 13.3 The performance assessment results of the municipal manager must be submitted to the MEC responsible for local government in the relevant province as well as the national minister responsible for local government, within fourteen (14) days after the conclusion of the assessment.

Thus done and signed at STUTTERHEIM on this the 31st day of JULY 2014

**AS WITNESSES:**

1. [Signature]  
2. [Signature]

[Signature]  
EMPLOYEE

**AS WITNESSES:**

1. [Signature]  
2. [Signature]

[Signature]  
EXECUTIVE MAYOR/ MAYOR

# PERSONAL DEVELOPMENT PLAN


Skills Performance Gap	Outcomes Expected	Suggested training or development activity	Suggested mode of delivery	Suggested time frames	Work opportunity created to practice skills/development area	Support Person
LEGAL SKILLS	ABILITY TO CRITICALLY ANALYSE & COMMENT	LLB OR LABOUR RELATIONS	SKILLS DEVELOPMENT	03 - 12 MONTHS	WORK	ECLGTA
GOOD GOVERNANCE	RESPOND TO CURRENT DEVELOPMENTS AND CHALLENGES RELATED TO GOOD GOV & PERFORMANCE	ANY AVAILABLE TRAINING	TRAINING PROGRAMME	12 MONTHS	WORK	
CHANGE MANAGEMENT	DEMONSTRATE ADVANCED PROFESSIONAL CAPABILITIES	BACHELOR OF APPLIED SCIENCE	LEARNERSHIP PROGRAMME	12 MONTHS	WORK	
FINANCIAL MANAGEMENT	DEMONSTRATE PROFESSIONAL CAPABILITY & INFORMED DECISION MAKING ON FINANCE RELATED MATTERS	CPMD	LEARNERSHIP PROGRAMME	12 MONTHS	WORK	
COMPUTER SKILLS	MANIPULATION OF INFORMATION	COMPUTER SKILLS	SHORT COURSE	SHORT COURSE[3 TO 6 MONTHS]	WORK	



BALISA KING SOCIETY

2014/07/31

SIGNED AND ACCEPTED BY THE EMPLOYEE

 NAME & SURNAME

2018/02/29 DATE

SIGNED BY THE MAYOR

NAME & SURNAME

DATE



A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X		
Activity	Location	Frequency	Resource	Method	Duration	Priority	Responsible	Start Date	End Date	Progress	Impact	Notes	Outcome	Timeline	Responsible	Impact	Notes	Outcome	Timeline	Responsible	Impact	Notes	Outcome	Timeline	
1. Risk Management and Mitigation Plan	Community Safety	Quarterly	Police, Fire, Ambulance	Joint meetings, risk assessments	15 mins	High	Community Safety	2015/16	2017/18	80%	Improved joint working between services, reduced risk of incidents.	None	None	None	None	None	None	None	None	None	None	None	None	None	None
2. Environmental Audit	Community Safety	Annual	Police, Fire, Ambulance	Joint audits, risk assessments	1 hour	High	Community Safety	2015/16	2017/18	70%	Identified risks in joint services, implemented mitigation strategies.	None	None	None	None	None	None	None	None	None	None	None	None	None	None
3. Safety Training for Volunteers	Community Safety	Quarterly	Police, Fire, Ambulance	Joint training sessions	1 hour	Medium	Community Safety	2015/16	2017/18	60%	Enhanced skills of volunteers in joint services.	None	None	None	None	None	None	None	None	None	None	None	None	None	None
4. Risk Assessment of Community Events	Community Safety	Quarterly	Police, Fire, Ambulance	Joint risk assessments	15 mins	Medium	Community Safety	2015/16	2017/18	85%	Identified and mitigated risks for community events.	None	None	None	None	None	None	None	None	None	None	None	None	None	None
5. Fire Safety Checks	Community Safety	Quarterly	Police, Fire, Ambulance	Joint fire safety checks	30 mins	High	Community Safety	2015/16	2017/18	90%	Identified and corrected fire safety issues.	None	None	None	None	None	None	None	None	None	None	None	None	None	None
6. Public Order Management	Community Safety	Quarterly	Police, Fire, Ambulance	Joint public order management	1 hour	Medium	Community Safety	2015/16	2017/18	75%	Improved public order management across joint services.	None	None	None	None	None	None	None	None	None	None	None	None	None	None
7. Crime Prevention	Community Safety	Quarterly	Police, Fire, Ambulance	Joint crime prevention initiatives	1 hour	High	Community Safety	2015/16	2017/18	65%	Implemented crime prevention measures across joint services.	None	None	None	None	None	None	None	None	None	None	None	None	None	None
8. Safeguarding Children	Community Safety	Quarterly	Police, Fire, Ambulance	Joint safeguarding training	1 hour	High	Community Safety	2015/16	2017/18	80%	Enhanced safeguarding awareness across joint services.	None	None	None	None	None	None	None	None	None	None	None	None	None	None
9. Health and Safety	Community Safety	Quarterly	Police, Fire, Ambulance	Joint health and safety training	1 hour	High	Community Safety	2015/16	2017/18	70%	Improved health and safety awareness across joint services.	None	None	None	None	None	None	None	None	None	None	None	None	None	None
10. Anti-Racism Training	Community Safety	Quarterly	Police, Fire, Ambulance	Joint anti-racism training	1 hour	High	Community Safety	2015/16	2017/18	85%	Enhanced anti-racism awareness across joint services.	None	None	None	None	None	None	None	None	None	None	None	None	None	None
11. Mental Health Support	Community Safety	Quarterly	Police, Fire, Ambulance	Joint mental health support initiatives	1 hour	High	Community Safety	2015/16	2017/18	60%	Improved mental health support for the community.	None	None	None	None	None	None	None	None	None	None	None	None	None	None
12. Domestic Violence Support	Community Safety	Quarterly	Police, Fire, Ambulance	Joint domestic violence support initiatives	1 hour	High	Community Safety	2015/16	2017/18	75%	Improved domestic violence support for the community.	None	None	None	None	None	None	None	None	None	None	None	None	None	None
13. Substance Abuse Support	Community Safety	Quarterly	Police, Fire, Ambulance	Joint substance abuse support initiatives	1 hour	High	Community Safety	2015/16	2017/18	65%	Improved substance abuse support for the community.	None	None	None	None	None	None	None	None	None	None	None	None	None	None
14. Self-Harm Support	Community Safety	Quarterly	Police, Fire, Ambulance	Joint self-harm support initiatives	1 hour	High	Community Safety	2015/16	2017/18	70%	Improved self-harm support for the community.	None	None	None	None	None	None	None	None	None	None	None	None	None	None
15. Suicide Prevention	Community Safety	Quarterly	Police, Fire, Ambulance	Joint suicide prevention initiatives	1 hour	High	Community Safety	2015/16	2017/18	60%	Improved suicide prevention initiatives for the community.	None	None	None	None	None	None	None	None	None	None	None	None	None	None
16. Alcohol Use Reduction	Community Safety	Quarterly	Police, Fire, Ambulance	Joint alcohol use reduction initiatives	1 hour	High	Community Safety	2015/16	2017/18	75%	Improved alcohol use reduction initiatives for the community.	None	None	None	None	None	None	None	None	None	None	None	None	None	None
17. Drug Use Reduction	Community Safety	Quarterly	Police, Fire, Ambulance	Joint drug use reduction initiatives	1 hour	High	Community Safety	2015/16	2017/18	65%	Improved drug use reduction initiatives for the community.	None	None	None	None	None	None	None	None	None	None	None	None	None	None

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Item	Category	Priority	Business Objective	Strategic Initiative	Key Performance Indicator	Responsible Party	Start Date	End Date	Frequency	Reporting Period	Reporting Method	Reporting Frequency	Reporting Location	Reporting Method	Reporting Frequency	Reporting Location	Reporting Method	Reporting Frequency	Reporting Location
213	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management
214	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management
215	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management	Revenue Management







Project/Activity	Phase	Start	End	Duration	Priority	Responsible	Progress	Cost	Impact	Key Deliverables	Dependencies	Risks	Notes
101	Phase 1: Initial Assessment	Q1 2023	Q2 2023	6 weeks	High	Project Manager	100%	\$100,000	High	Completed initial assessment and feasibility study.	None	Low	Initial assessment complete.
		Q3 2023	Q4 2023	6 weeks	High	Project Manager	100%	\$100,000	High	Completed detailed design and procurement.	None	Low	Detailed design and procurement complete.
102	Phase 2: Design & Procurement	Q1 2024	Q2 2024	6 weeks	High	Project Manager	100%	\$200,000	High	Completed design and procurement for Phase 2.	Phase 1	Low	Design and procurement for Phase 2 complete.
		Q3 2024	Q4 2024	6 weeks	High	Project Manager	100%	\$200,000	High	Completed construction for Phase 2.	Phase 2	Low	Construction for Phase 2 complete.
103	Phase 3: Construction & Handover	Q1 2025	Q2 2025	6 weeks	High	Project Manager	100%	\$300,000	High	Completed construction and handover for Phase 3.	Phase 2	Low	Construction and handover for Phase 3 complete.
		Q3 2025	Q4 2025	6 weeks	High	Project Manager	100%	\$300,000	High	Completed final evaluation and reporting.	Phase 3	Low	Final evaluation and reporting complete.

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101	102	103	104	105	106	107	108	109	110	111	112	113	114	115	116	117	118	119	120	121	122	123	124	125	126	127	128	129	130	131	132	133	134	135	136	137	138	139	140	141	142	143	144	145	146	147	148	149	150	151	152	153	154	155	156	157	158	159	160	161	162	163	164	165	166	167	168	169	170	171	172	173	174	175	176	177	178	179	180	181	182	183	184	185	186	187	188	189	190	191	192	193	194	195	196	197	198	199	200

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Item	Project Description	Priority	Category	Sub-Category	Phase	Start Date	End Date	Responsible Party	Current Status	Next Milestone	Estimated Cost	Actual Cost	Progress %	Key Deliverables	Dependencies	Reporting Period	Reporting Manager	Reporting Level
101	Construction of new building at 123 Main St.	High	Construction	Foundation	Phase 1	2023-01-15	2023-03-31	John Doe	100%	Foundation completed	\$1,200,000	\$1,200,000	100%	Foundation completed	Weather, permits	Q1 2023	John Doe	Manager
102	Renovation of existing building at 456 Elm St.	Medium	Construction	Interior	Phase 2	2023-04-01	2023-06-30	Jane Smith	75%	Interior walls and ceiling completed	\$800,000	\$600,000	75%	Interior walls and ceiling completed	Material availability	Q2 2023	Jane Smith	Manager
103	Installation of new HVAC system in building at 789 Oak St.	Low	Construction	Mechanical	Phase 1	2023-07-01	2023-08-31	Mike Johnson	50%	HVAC units installed	\$300,000	\$150,000	50%	HVAC units installed	Unit delivery	Q3 2023	Mike Johnson	Manager
104	Construction of new parking lot at 101 Pine St.	Medium	Construction	Site Work	Phase 1	2023-09-01	2023-10-31	Sarah Lee	20%	Site clearing and grading	\$400,000	\$80,000	20%	Site clearing and grading	Permits, weather	Q4 2023	Sarah Lee	Manager
105	Construction of new playground at 123 Maple St.	Low	Construction	Recreation	Phase 1	2023-11-01	2024-01-31	David Brown	10%	Site preparation	\$200,000	\$20,000	10%	Site preparation	Equipment delivery	Q1 2024	David Brown	Manager

AREA 5: MUNICIPAL TRANSFORMATION AND INSTITUTIONAL DEVELOPMENT

Item	Project Description	Priority	Category	Sub-Category	Phase	Start Date	End Date	Responsible Party	Current Status	Next Milestone	Estimated Cost	Actual Cost	Progress %	Key Deliverables	Dependencies	Reporting Period	Reporting Manager	Reporting Level
106	Review and update of municipal code	High	Policy	Legal	Phase 1	2023-01-15	2023-03-31	Emily White	100%	Code review completed	\$100,000	\$100,000	100%	Code review completed	Legal counsel	Q1 2023	Emily White	Manager
107	Development of new municipal website	Medium	IT	Web Development	Phase 1	2023-04-01	2023-06-30	Chris Green	80%	Website design and development	\$150,000	\$120,000	80%	Website design and development	Content, design	Q2 2023	Chris Green	Manager
108	Implementation of new employee performance policy	Low	HR	Policy	Phase 1	2023-07-01	2023-08-31	Alex Black	60%	Policy draft and review	\$50,000	\$30,000	60%	Policy draft and review	Employee input	Q3 2023	Alex Black	Manager
109	Review and update of municipal budget	High	Finance	Budgeting	Phase 1	2023-09-01	2023-10-31	Mia Blue	40%	Budget review and analysis	\$200,000	\$80,000	40%	Budget review and analysis	Financial data	Q4 2023	Mia Blue	Manager
110	Construction of new municipal building	High	Construction	General	Phase 1	2023-11-01	2024-01-31	Ben Red	15%	Site preparation	\$1,500,000	\$225,000	15%	Site preparation	Permits, weather	Q1 2024	Ben Red	Manager

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