



GOVERNMENT PENSIONS ADMINISTRATION AGENCY

**ANNUAL
PERFORMANCE
PLAN**

2024
2025



the gpa

Department:
Government Pensions Administration Agency
REPUBLIC OF SOUTH AFRICA

| **YOUR BENEFITS** our responsibility |





**YOUR BENEFITS
OUR RESPONSIBILITY**



Enoch Godongwana (MP)

FOREWORD

BY THE EXECUTIVE AUTHORITY

The Government Pensions Administration Agency (GPAA), an organisation entrusted with the responsibility of overseeing the administration of pension funds for public service employees and their beneficiaries, plays a pivotal role in upholding South Africa's commitment to the National Development Plan (NDP) and poverty alleviation.

Our mission is to ensure that those who dedicated their lives to serving our nation in various capacities can retire with the financial security that is so needed in this economic turmoil we live in. To this end, the GPAA holds a vital position in the realisation of Vision 2030 through its outcome-driven approach, which focuses on tangible improvements in the lives of all South Africans. It is therefore our mission to ensure that our people retire with dignity that is brought about by financial stability.

Global disruptions caused by events like the Ukraine/Russia conflict have posed unprecedented challenges to global value chains, logistics networks, foreign investments, and commodity sectors. These challenges have particularly impacted developing countries, including South Africa, where high unemployment rates persist.

During these challenging times, the GPAA

continues to play a crucial role in mitigating some of the hardships faced by South African households. Our commitment remains unwavering as we disburse monthly benefits to our members, pensioners, and beneficiaries.

One of our key priorities as an organisation is the reduction of Unclaimed Benefits. I am pleased to report that there has been significant progress in this regard. Our concerted efforts brought by the Unclaimed Benefits Communications Strategy of the GPAA is slowly yielding results. We remain resolute that we will reduce this account by 60% in the year 2027/28.

I hereby endorse the GPAA Annual Performance Plan for the 2024/25 financial year and pledge my commitment to its successful implementation. Its success will translate into tangible improvements in member experiences, enhanced customer service, and an elevation of GPAA's standing in the eyes of the public.

In conclusion, I would like to extend my heartfelt gratitude to the dedicated leadership of GPAA, led by the CEO, Ms Kedibone Madiehe. The tireless efforts of the leadership and staff continue to ensure the responsible execution of our vital mission.





*Kedibone Madiehe
Chief Executive Officer*

STATEMENT BY THE ACCOUNTING OFFICER

It is my pleasure and honour to present the Government Pensions Administration Agency's (GPAA) Annual Performance Plan (APP) for the financial year 2024/25. This is a significant milestone as it constitutes the fifth and final deliverable of our 2020-2025 Strategic Plan.

With over a decade of dedicated service in the realm of public pension administration, the GPAA remains unwavering in its commitment of fulfilling its mandate. Our primary duty is to ensure efficient and effective administration of the Government Employees Pension Fund (GEPF) and National Treasury's Programme 7 funds.

A pivotal aspect of our Strategic Plan has been the aspiration to become the preferred pension administrator of choice. In our quest of realising this objective, it gives me great pleasure to report that we have been entrusted with the solemn responsibility of administering pension benefits for our new customer, the Department of Military Veterans.

In preparation for this significant responsibility, the GPAA has diligently established the requisite systems and processes, including the infrastructure for military veterans, ensuring a seamless administration and application process. This also aligns seamlessly with our overarching goal of becoming the preferred benefits administrator for the entire public service.

In the period covered by this APP, we will redouble our efforts in several key areas such as:

- 1. Reduction of Employer and Internal Turn-around Time:** As a demonstration of our commitment to enhance the socio-economic well-being of our members, pensioners and beneficiaries, we remain resolute in our quest to reduce benefit payment turn-around times. We are investing in internal capabilities and operational resilience to ensure that we can respond even during times of crisis.
- 2. Reduction of Unclaimed Benefits:** Building on our successes from the previous financial year, we have expanded our efforts by employing additional tracers across all provinces. We also plan to launch a national awareness campaign to foster collaboration with stakeholders, including community-based organisations and government entities, to reduce the Unclaimed Benefits account.
- 3. Human Capital Management Development and Requirements:** Our Talent and Succession Management strategy is designed to bridge the gap between current talent capabilities and those required for future business strategies. We are dedicated to developing our employees particularly women, youths and persons with disability through experiential learning and mentoring programmes. Moreover, we are committed to attracting, developing, and retaining key talent.

4. Equality, Disability, Youth, and Women Procurement: To actualise Women, Youths, and Persons with Disabilities (WYPD) priorities, the current financial cycle will see the inclusion of a Key Result Area (KRA) in the performance agreements of all personnel, including Programme managers and managers at various levels.

Noteworthy achievements in fostering workforce diversity are reflected in our employment of over 5% of individuals with disabilities. Successful internship programmes which offer stipends, have provided valuable workplace skills to 120 graduates. To further support career advancement and skills development, the GPAA has instituted comprehensive policies and strategies. These seek to ensure systematic mentorship for women, youths, and persons with disabilities. Furthermore, our commitment to women and youth ownership in business sourcing aligns with government thresholds and is reinforced by specific policies.

5. Digital Communications: We aim to build upon the progress made in the previous financial year where we reached 61% of our clients digitally. The target for 2024/2025 is to increase this by 9% and we know that with continuous improvement on our digital spaces, it will be possible. Our aspiration is to achieve a fully paperless processing environment, supported by an anticipated automated workflow plan.

6. Modernisation: Under our ongoing in-flight projects, we are implementing transformative changes,

including Identity Access Management (IAM) to streamline access to GPAA systems, Enterprise Content Management (ECM) to migrate from a paper-based environment to Digital Communications. Moreover, we are advancing Pension Case Management (PCM) and Benefit Payment Automation (BPA) to process cases digitally and seamlessly, thereby minimising manual intervention.

The GPAA's management and staff are resolute and committed to realising these strategic thrusts well into the foreseeable future. I would like to extend my heartfelt appreciation to all GPAA employees for their unwavering diligence and hard work in upholding our mandate and embodying our values. I am also deeply grateful to the Minister of Finance and the Deputy Minister for their continued support.



Sincerely,

Kedibone Madiehe

Chief Executive Officer

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PART A
OUR MANDATE

1. UPDATES TO THE RELEVANT LEGISLATIVE AND POLICY MANDATES

1.1 Legislative mandates

The Government Pensions Administration Agency (GPAA) was established as a government component as gazetted in March 2010 in terms of Section 7A (4) of the Public Service Act of 1994 (Proclamation No. 103 of 1994). In accordance with the proclamation, the GPAA's mandate is to provide administration services to its two customers, the Government Employees Pension Fund (GEPF) and National Treasury (NT) Programme 7.

On behalf of the GEPF and its Board of Trustees, the GPAA administers government employees' pensions and funeral benefits in terms of the Government Employees Pension (GEP) Law of 1996. The provision of these services is regulated through Service Level Agreements (SLAs) between the GPAA and its customers. The GPAA's financial affairs are governed by the Public Finance Management Act (PFMA), while its human resource falls under the ambit of the Public Service Act (PSA). The GPAA reports to the Minister of Finance as its Executive Authority and its mandate is to administer pensions on behalf of GEPF and National Treasury in respect of Post-Retirement Medical Subsidies, Military Pensions, Special Pensions, Injury on Duty payments and other Programme 7 functions.

1.2 Key Policy Developments and Legislative Changes

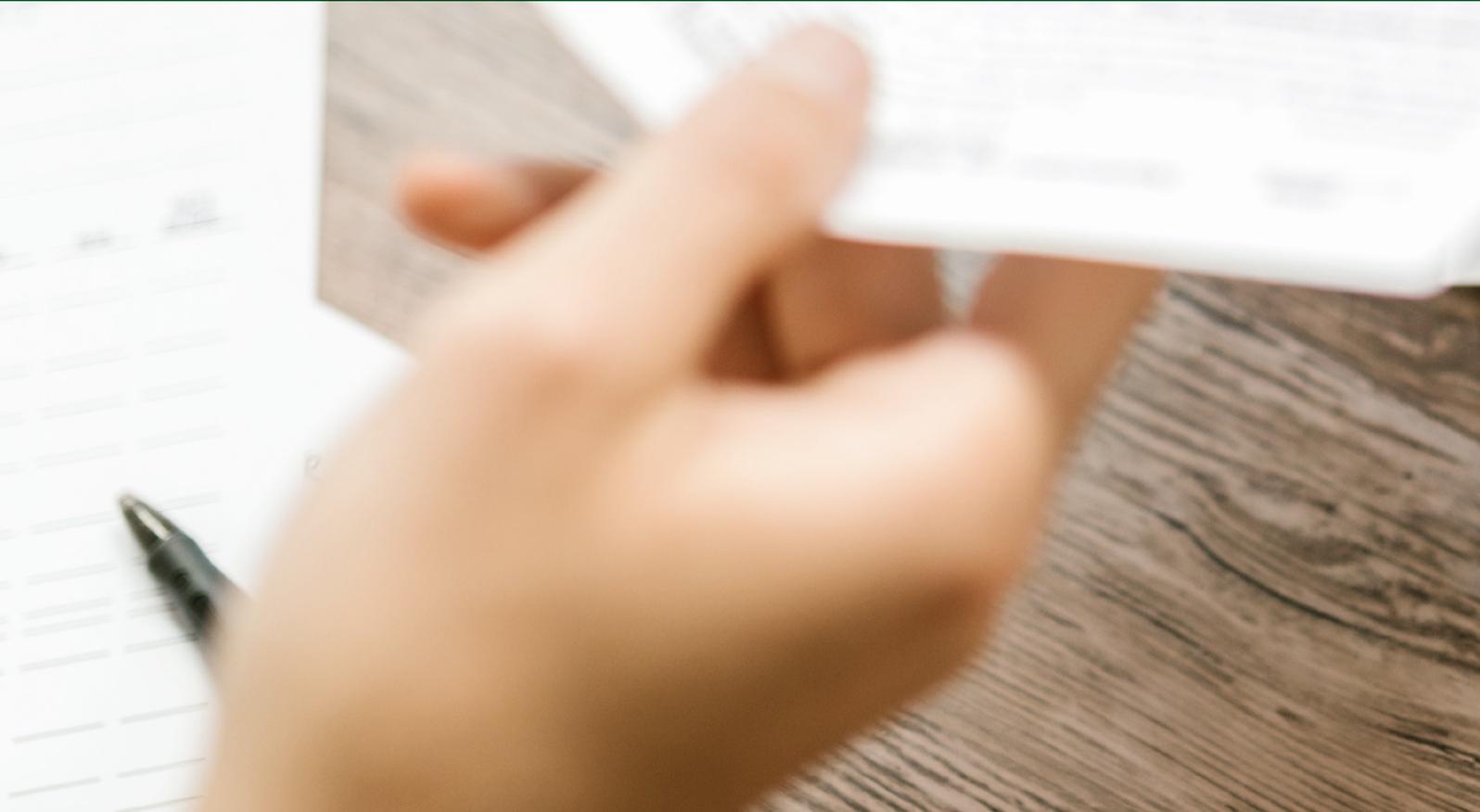
In recent years, the government, under the auspices of the NT, has been actively formulating proposals for potential retirement reforms. It is important to note that this process is ongoing, and the implementation of new reforms will require a significant amount of time and effort.

Furthermore, the GPAA has been entrusted with a crucial role by the Department of Military Veterans (DMV) as the designated administrator for the Military Veterans Pension (MVP). The MVP will be disbursed in accordance with the provisions of the Military Veterans Act, 2011 (Act No. 18 of 2011), which serves several key purposes:

1. To establish a comprehensive framework for the implementation of national policies and standards governing Military Veterans affairs.
2. To enhance the quality of life for Military Veterans and their dependents, facilitating their socio-economic advancement.
3. To acknowledge and pay tribute to Military Veterans during their lifetime and commemorate their sacrifices on behalf of the nation even after their passing.



PART B: OUR STRATEGIC FOCUS



2. Strategic Framework

The GPAA's strategic framework which includes its vision, mission, values and outcomes is as follows:



2.1 OUR VISION

A customer and client-base that is satisfied, served, valued, dignified, cared for and empowered.



2.2 OUR MISSION

To provide administration services to the Government Employees Pension Fund (GEPF) and National Treasury's Programme 7 funds and schemes.



2.3 OUR VALUES

■ Transparency

We undertake to be open and accountable for effective decision-making in our engagements with all of our stakeholders.

■ Respect

We are committed to treating everyone with dignity, equality and trust.

■ Integrity

We act fairly, ethically and openly in all we do.

■ Courtesy

We treat our stakeholders and clients with consideration, compassion and kindness.

■ Service excellence

We commit to giving our clients quality service.

■ Passion

We serve our clients with passion and understanding.

2.4 Strategic Oriented Outcomes

The GPAA's strategic outcomes are summarised in Figure 1 - Impact Statement and Strategic Outcomes.

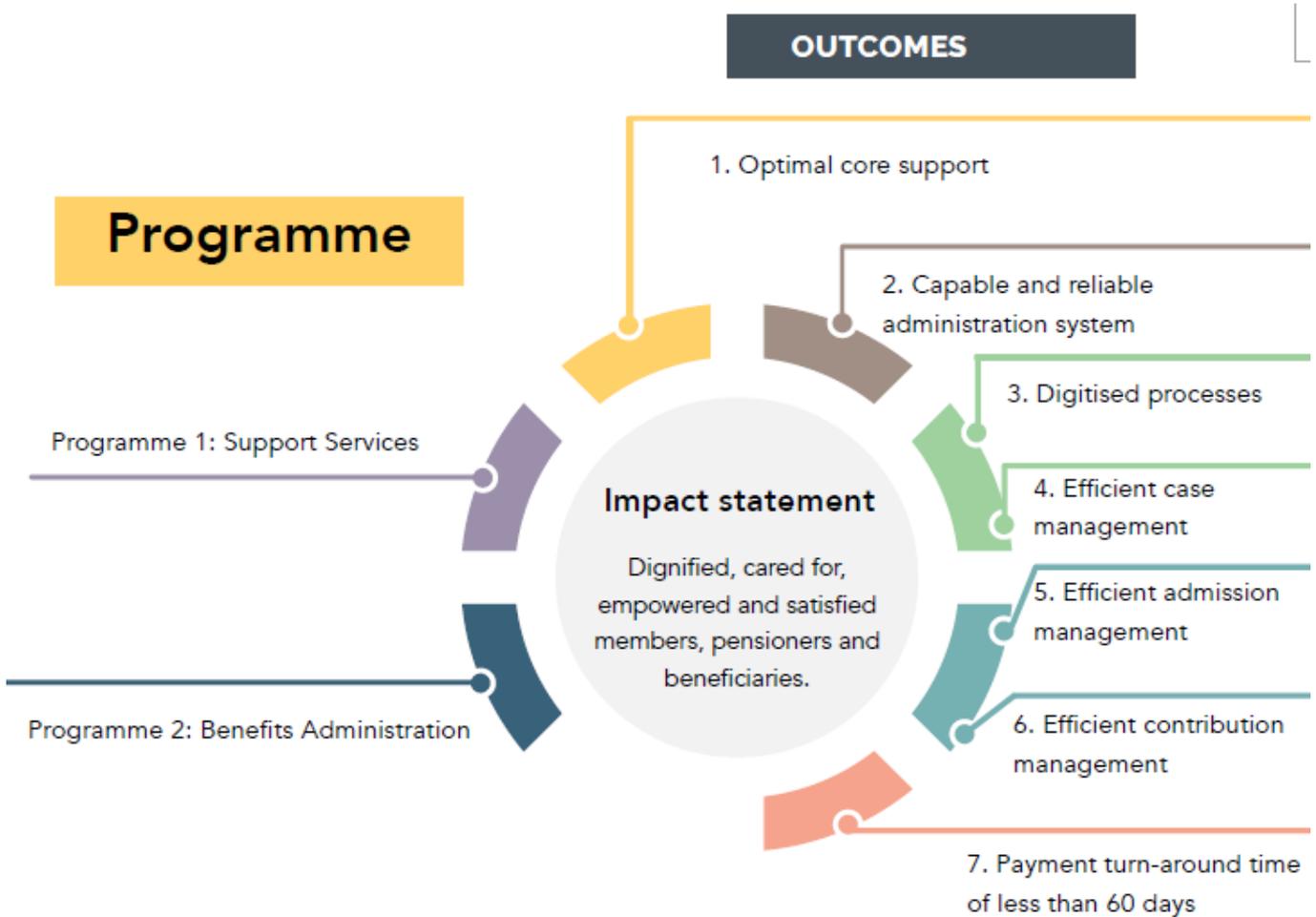


Figure 1 - Impact Statement and Strategic Outcomes

2.5 GPAA Strategic Map 2020-2025

- Reduced internal turnaround time to under 45 days
- Reduced employer turnaround time to under 120 days
- Retrain and up skill employees
- 10-year GPAA organisational review
- Unclaimed Benefits separated from Unpaid Benefits
- 28% clients reached through digital communication channels
- Ministerial inputs addressing employer delays
- Basic business workflow implemented
- National Self-Service roll-out
- Auto population of exit forms



2020/2021

- Reduced internal turnaround time to under 35 days
- Reduced employer average turnaround time to under 100 days
- Knowledge management
- Performance against industry best practices
- Utilising data from transversal systems
- 45% clients reached through digital communication channels
- Business workflow implemented
- 40% of clients enrolled and using Self Service
- Retrain and mobilise staff



2021/2022

GPAA 5 YEAR STRATEGIC THRUSTS

1. Reduction of internal turnaround time
2. Reduction of employer turnaround time
3. Digital communication
4. Process re-engineering and change management
5. Data management strategy
6. Human capital management development and requirements
7. Unclaimed and Unpaid benefits
8. Mandate change and a strategy to address new revenue streams (legislatively and customer requirements)
9. Legacy System Retirement

- Reduced internal turnaround time to under 25 days
- Reduced employer turnaround time to under 90 days
- Head Office 's move to a new building Resilient environment
- 55% clients reached through digital communication
- 55% of clients using Self Service App
- Business workflow implemented
- Employees mobilised to suitable positions
- Prepare to offer financial services
- Biometrics for claims and enrolment
- Contributions reconciled at member level



2022/2023

- Reduced internal turnaround to under 15 days
- Reduced employer average turnaround to under 75 days
- Managed data 65% clients reached through digital communications
- Business workflow implemented
- Streamlined processes
- Re-aligned organisation
- Paper usage reduced by 60%
- Right people at the right positions
- Offering financial services



2023/2024

- Reduced internal turnaround time to under 10 days
- Reduced employer turnaround time to less than 30 days
- Legacy system retired
- Digitised environment (internal and external)
- GPAA provides financial advisory services
- 70% clients reached through digital communication channels
- 0% tolerance admission error
- Preserved Fund
- Preferred benefits administrator by clients and customers
- GPAA, a preferred employer



2024/2025

2.6 Strategic Thrusts

The GPAA has identified the following nine (09) strategic thrusts in the Strategic Plan that was tabled in Parliament in March 2020:

1. Reduction of internal turnaround time;
2. Reduction of employer turnaround time;
3. Digital communication;
4. Process re-engineering and change management;
5. Data management strategy;
6. Human capital management, development and requirements;
7. Unclaimed and Unpaid benefits;
8. Mandate change and a strategy to address new revenue streams (legislatively and customer requirements); and
9. Legacy System retirement.

In the final leg of the Strategic Roadmap deliverables for 2024/25 are the following:

1. Reduced internal turnaround time to under 10 days;
2. Reduced employer turnaround time to less than 30 days;
3. Legacy system retired;
4. Digitised environment (internal and external);
5. GPAA providing financial advisory services;
6. 70% clients reached through digital communication channels;
7. 0% tolerance admission error;
8. Preserved Fund;
9. Preferred benefits administrator by clients and customers; and
10. GPAA, a preferred employer.

2.7 Updated Situational Analysis

2.7.1 Introduction

As outlined in the 2020/21-2024/25 Strategic Plan, the overarching vision of the Government Pensions Administration Agency (GPAA) is firmly rooted in the aspiration to cultivate “a customer and client base that is satisfied, served, valued, dignified, cared for, and empowered.” This vision is underpinned by a mission that is strategically designed “to provide administration services to the GEPF and NT Programme 7 funds and schemes.” The core essence of this mission is to efficiently and effectively administer benefits on behalf of its diverse stakeholders, which include customers and clients.

The organisation receives 93% of its funding from the GEPF whilst 7% comes from NT. The GPAA has displayed an unwavering commitment to instill principles of effective, transparent, accountable, and cohesive governance in the management of the pension funds it administers.

Since its inception over a decade ago, the GPAA has overseen the administration of pensions for a substantial client base, which is currently over 1.9 million individuals. Nevertheless, the GPAA remains dedicated to the pursuit of enhancing its existing processes and systems. This steadfast commitment is aimed at ensuring the seamless and efficient disbursement of benefits to its beneficiaries.

It is important to note that the GPAA is currently in the final year of implementing its comprehensive 2020/25 Strategic framework, which was officially presented in Parliament by the Minister of Finance in March 2020. As part of its annual operational protocol, the GPAA’s management committee conducts periodic revisions of the situational analysis. This analytical process is instrumental in charting the trajectory towards achieving the

seven specified outcomes by the year 2025. It serves as the foundation for evaluating and refining the measures and targets outlined in the Annual Performance Plan (APP).

Over the years, the GPAA has incrementally expanded its operational footprint. This expansion has yielded tangible results, such as a commendable 10% increase in the average monthly benefits disbursed to beneficiaries. Such advancements underscore the GPAA’s dedication to continuous improvement and the realisation of its mission to serve and empower its valued clientele effectively and efficiently.

2.7.2 External Environmental Analysis

In order to discern the factors influencing the pension fund and administration industry, a comprehensive analytical framework known as the Political, Economic, Social, Technological, Environmental and Legal (PESTEL) principle was employed. The selection of the PESTEL technique was predicated upon its intrinsic attributes, which render it particularly apt for scrutinising and assessing the variables that exert either favourable or detrimental impacts on pension fund and administration entities.

This situational analysis was founded on the insights gleaned from the GPAA Five-Year Institutional Evaluation report which spans the period 2015 - 2020 and encompasses data up to 2021 - 2022. The data served as both the cornerstone and the catalyst for augmenting and enriching the development of this analytical endeavour.

Political perspective

In September of 2020, the South African National Treasury unveiled the second draft of the **Conduct of Financial Institutions (CoFI) Bill**, inviting public input. The primary objective of the bill is to enhance customer welfare within the financial sector by prioritising fairness and transparency, thus fortifying compliance and governance. The bill represents a significant overhaul of the legal framework, streamlining the conduct standards for financial institutions previously scattered across multiple financial sector regulations. It also endeavours to establish legislative frameworks that foster equitable, robust, and efficient markets for all financial entities. The GPAA in its Strategic Plan intends to offer financial services hence the importance of complying with the content of CoFI bill.

CoFI will promote financial inclusion, while ensuring customers' fair treatment and protection. The GPAA promotes trust and confidence and applies the application of Treating Customers Fairly (TCF) principles, an approach which has been designed to ensure that institutions deliver clearly stipulated outcomes that are fair and specific. The approach consists of six outcomes, which include providing services that are of an acceptable standard and customers should be able to lodge complaints without any barriers. This should be seen throughout the life cycle of the product.

The effective implementation of the COFI bill hinges on dependable operational procedures, technology, and sufficient capital resources. While institutions equipped with robust customer relationship management systems and comprehensive tools may navigate this transition with ease, those lacking the requisite skills and resources face a formidable challenge. Timely processing and settlement of claims within stipulated timeframes are critical.

Consequently, the GPAA must continually institute measures to reduce the time it takes to disburse

payments to members and beneficiaries. GPAA has established customer support processes, including a dedicated Client Relationship Management (CRM) unit, aimed at nurturing strong, enduring relationships with its clients and customers. However, for the successful implementation of the CoFI bill, the GPAA must acknowledge the imperative to enhance its existing systems and processes.

Following the publication of the Draft Revenue Laws Amendment Bill on July 29, 2022, the National Treasury and the South African Revenue Service (SARS) released, for public comment, the proposed Revenue Laws Amendment Bill and the 2023 Draft Revenue Administration and Pension Laws Amendment Bill on June 9, 2023. These revisions include a proposal to amend the Pensions Act to grant citizens access to a portion of their pension savings.

These draft legislations emphasise that any changes must safeguard the primary objectives of retirement savings without compromising liquidity. Measures are to be put in place to encourage Fund members to consider withdrawals (as a last resort), preserving their savings for retirement. These bills pave the way for the initial phase of the two-component retirement system, slated to commence on 01 September 2024. National Treasury has proposed that any amounts that members save or accrued benefits in their retirement fund will be split into a "savings component" and a "retirement component". Members are automatically enrolled into the Two-pot system; hence no Fund member can opt out.

The GPAA, entrusted with serving over 1.9 million members and pensioners on behalf of the GEPF and the National Treasury, foresees an increase in administrative demands, particularly concerning withdrawal applications.

The impending amendments will result in heightened enquiries through the Call Centre and

Client Service Centres nationwide. Should the initial phase of the Two-Pot retirement system take effect on the expected date, the GPAA may have to adapt its existing systems and processes to accommodate this additional workload.

Furthermore, the GPAA is in the process of serving a new client, the Military Veterans, as per the Military Veterans Act of 2011. On 6 October 2023, the Minister of Defence and Military Veterans published the final Military Veterans Pension Regulations, 2023, for public implementation and rolling out of the military pension benefit.

The GPAA has signed an Administration Agreement and Service Level Agreement with the Department of Military Veterans as the preferred administrator of the Fund.

Associated Institutions Pension Fund (AIPF) and Temporary Employees Pension Fund Act (TEPF)

On 07 July 2023, Government Gazette No. 48917, the Presidency assented to the Associated Institutions Pension Fund Act, 1963, and the Temporary Employees Pension Fund Act, 1979, so as to amend certain definitions and other provisions to align these Acts with their administration by the Minister responsible for finance and to update references to other Ministers.

The Presidency further issued an instruction to amend the Government Employees Pension Law, 1996, so as to amalgamate the Associated Institutions Pension Fund and Temporary Employees Pension Fund into the Government Employees Pension Fund.

Analysing the GPAA's strategic themes over the past nine years (since 2015/2016), it is evident that these themes have evolved annually. However, several strategic themes have remained consistent across all years, including modernisation, client satisfaction, reducing unclaimed and unpaid benefits, and enhancing human capital. As a government entity, the GPAA's administrative

responsibilities are directly influenced by changes in government legislation guiding its operations. Therefore, the GPAA's planning must account for the likelihood of administrative reconfigurations and capacity-building as amendments occur, ensuring its readiness to fulfil additional responsibilities.

Economic perspective

The local macroeconomic landscape significantly influences the operations of the GPAA and the financial assets it manages on behalf of the GEPPF and the NT. Therefore, it is imperative to comprehend and monitor key economic indicators such as the Gross Domestic Product (GDP), population statistics, unemployment rates, inflation trends, disposable income levels, Debt-to-GDP ratios, and the broader impact of global events. In June 2023, South Africa's government debt accounted for 72.7% of the country's nominal GDP, compared to 70.9% in the previous quarter.

In the first quarter of 2023, real GDP showed a slight increase, expanding by an estimated 0.4% after a 1.1% contraction in the fourth quarter of 2022. Furthermore, the total tax revenue collected by SARS witnessed a steady growth, rising from R1,216.5 billion in 2017/18 to R1,563.8 billion in 2021/22, reflecting a compound Annual Growth Rate (CAGR) of 6.5% over this period. The tax-to-GDP ratio experienced fluctuations, decreasing from 23.8% in 2019/20 to 22.3% in 2020/21 before rebounding to 24.9%.

Inflation rates, especially in fuel, power, and food prices, have had a substantial impact on South Africa's headline inflation rate. Fuel price inflation dropped from -2.0% to -3.1% in 2023. Predicted power price increases are expected to be 11.6% for the current year, 13.4% for 2024, and 10.9% for 2025. Food price inflation, initially projected at 10.8% for 2023, was revised downward to 10.3% and is expected to rise slightly to 5.2% in 2024 from 5.0%. Core inflation predictions also decreased to 5.2% in 2023 from 5.3%, and to 4.9% in 2024 from 5.0%, followed by a further decrease to 4.5% in

2025 from 4.6%. South Africa's disposable personal income increased from R 4,356,660 million in the fourth quarter of 2022 to R 4,412,509 million in the first quarter of 2023.

South Africa's economic landscape is significantly influenced by global economic activities, particularly its relations with foreign nations and international organisations. These external factors, combined with local challenges, impact various economic indicators, as outlined above. Pension funds play a crucial role in capital markets but have minimal effects on economic growth and investment levels in South Africa, if any. Despite this, pension funds represent a substantial source of capital that can support national agendas.

South African households tend to undersave for retirement, and increased life expectancy, which reached 63 years in 2022, places additional strain on the pension landscape. This shortfall in retirement savings places pressure on the disposable income of the working population as they must support retired individuals who did not save sufficiently for their pension.

Furthermore, global events such as the Russia-Ukraine war and economic downturn, coupled with high inflation affecting food, fuel, and interest rates, impact South Africa's export capacity, increasing pressure on pension fund members to access their contributions. In developing nations, including South Africa, one in five individuals receives some form of social support, primarily through social grants aimed at poverty reduction, inequality alleviation, and addressing the legacy of apartheid.

South Africa boasts one of Africa's largest cash transfer programmes, with 17.8 million recipients prior to the COVID-19 pandemic. Due to the strong economic recovery following the pandemic, tax revenue increased significantly to R1,563.8 billion in the year ending March 31, 2022, from R1,216.5 billion in 2017/18. During the pandemic, social grant recipients surged to 18.2 million in 2020-2021, with approximately one-third of the population benefiting from grants for older individuals, persons with disabilities, and children.

Additionally, the implementation of the Social Relief of Distress (SRD) grant for unemployed adults during the COVID-19 outbreak led to nearly half of the population receiving unconditional cash transfers.

The GEPF's administrative report for the first quarter of 2023 revealed that 5,018 members resigned from the public sector between 1 April and 30 June 2023. Alarming, 17.9% of these resignations (898 individuals) were aged between 51 and 64. This trend raises economic concerns, as it could negatively impact the financial well-being of those individuals in the future. This, in turn, could increase the number of people dependent on state support, further straining government's financial resources. Retirees are responsible for supporting their households and dependents, and if they fail to secure sustainable incomes, this could have dire consequences for their dependents, especially in a context of low economic growth and limited job creation.

The GEPF, with over 1.267 million active members and more than 524,000 pensioners and beneficiaries, plays a crucial role in providing financial security. If the GPAA, for any reason, cannot fulfil its obligations to pensioners and beneficiaries, it would leave a substantial portion of households without the necessary financial means to sustain themselves. Therefore, ensuring customer satisfaction, efficient processing, and timely payment of claims is paramount for the GPAA. This is not only about fulfilling its mandate but also about combating poverty and inequality.

The current macroeconomic environment in which the GPAA operates is characterised by instability, structural changes and sluggish growth. South Africa's employment figures have seen fluctuations, with a rise in unemployment rates, particularly among young people, leading to reduced pension contributions. High levels of unemployment have resulted in a substantial portion of the population living economically inactive lives, relying on state-funded pension assets for social security and poverty alleviation. Factors such as the energy

crisis and declining business confidence further compound the economic challenges.

To address operational disruptions stemming from load shedding, the GPAA has taken measures such as procuring generators and installing solar systems across its offices nationwide. Additionally, rising inflation increases the risk of indebtedness among South Africans, potentially leading more GEPP and NT members to seek early access to their retirement savings, adding to the GPAA's administrative responsibilities. To fulfil its mandate effectively, the GPAA has embarked on a decentralisation project which will allow for more efficient allocation of resources, as Client Service Centres can assess and address their own resource requirements based on the local demand, thereby optimising productivity and cost effectiveness.

Phase 1 of the project will result in the decentralised Back Office, Funeral Benefits, Contributions and Membership units. These functions will be performed at the GPAA's Regional Offices.

To improve operational efficiencies, a "round robin" operational delivery model will be implemented. This methodology seeks to streamline the efforts, dedicated teams, Business Unit (BU) involvement and guidance – ensuring that the developed solutions are BU-driven and work for the business units and lastly, there will be constant monitoring of the planning and implementation to ensure that progress is being made and that the envisaged benefits are achieved.

Social perspective

The performance of government and the daily experiences of citizens collectively influence the overall sentiment within the nation. Currently, a prevailing sense of pessimism persists, prompting government to initiate gradual measures to address the situation. Amidst numerous challenges facing the country, several key concerns weigh heavily on the minds of citizens.

These include inadequate service delivery, high unemployment rate particularly among women, youths and people with disabilities, corruption, crime, as well as issues related to electricity supply, water provision as well as gender-based violence. GPAA supports its employees through advocacy and awareness campaigns such as the 16 days of Activism against gender-based violence. The organisation also offers training sessions on harassment in the workplace.

One of the fundamental tenets of a developmental state is the promotion of socioeconomic prosperity. Many emerging nations employ policies aimed at accelerating economic growth. This in turn fosters improved living standards for their populations through equitable resource distribution. However, challenges arise when the exercise of constitutionally protected rights, such as the freedom to strike, hinders economic growth. In South Africa, strikes, service delivery protests, and social unrest have become increasingly frequent occurrences, forming a deeply ingrained social phenomenon accepted as a means of expressing dissatisfaction among communities.

This pattern has far-reaching implications for the economy, as well as for businesses, employees and their families. For instance, the taxi strikes in the Western Cape province in August 2023 led to instances of arson, road blockades, property damage, and disruptions to economic activities. Commuters were left stranded across the Cape metropole. Both formal and informal businesses that support numerous households suffered losses, and tragically, lives were also lost. Furthermore, employees struggled to report to work, facilities had to close or operate at reduced capacities, elective surgeries were postponed, and healthcare clinics experienced extended wait times. The education sector was also severely affected, with more than 850,000 students (71% of all students) missing school, 92 schools temporarily closed, and approximately 18,000 staff members absent.

Events such as these significantly impede the functioning of government agencies, private organisations, and corporations. In 2022, there was a total of 193 protests, a level consistent with pre-pandemic times and significantly higher than in 2020 and 2021. To mitigate such disruptions, the GPAA has equipped its officials with technology to enable remote work during such crises.

South Africa has experienced a consistent upward trend in population growth over the past decade, reaching over 60 million people by 2021, according to the mid-year population estimates released by Statistics South Africa in 2022. On average, the country's population has been increasing by 1%, with expectations of continued growth until 2030, followed by a slower growth rate of 0.5%. This population growth continues despite the global impact of COVID-19. Additionally, South Africa's life expectancy at birth improved slightly from 61.7% - 62.8% in 2022.

Given the aging population and the challenging economic environment, the GPAA's role in providing effective and efficient pension administration has never been more critical for both its current standing and long-term viability. However, with persistently high unemployment rates that may endure for an extended period, the historical issue of Unclaimed and Unpaid benefits remains a significant challenge for the GPAA. These Unclaimed Benefits rightfully belong to dependents or beneficiaries, some of whom may find themselves in unemployment and poverty.

From the client's perspective, several factors contribute to the problem of Unclaimed and Unpaid benefits. Some of those factors include; lack of banking details (Z894 - bank form) submitted by the employers, incorrect or closed bank accounts, and death of members without nominating the beneficiaries. Recognising the gravity of this issue, the GPAA's executives approved an Unclaimed Benefits Strategy together with a Communications plan, specifically aimed at addressing the long-standing challenge of Unclaimed and Unpaid

benefits within the GEPF. The GPAA has committed to identify the root causes of these backlogs and implementing a project plan to continually monitor progress. These include establishing a database for these benefits, implementing a beneficiary tracing schedule, and utilising tracing agents to locate and process Unclaimed and Unpaid claims.

Client service is at the core of the GPAA's business. Based on the findings of the client and employee satisfaction surveys in the GPAA's Five-Year Evaluation report, the organisation has developed strategies to enhance client satisfaction. This involves expanding the number of Mobile Offices and standardising service delivery at Regional Offices to significantly reduce turn-around times for pensions pay-outs. Additionally, Regional Offices will be granted more authority, enabling Client Liaison Officers (CLOs) to assist clients directly rather than referring them to the Head Office. The organisation also has initiatives to educate clients about a wide range of products and services it offers.

As with any legislative change, the introduction and implementation of the proposed Two-Pot system, must be carefully considered to ensure that the goal of retirement savings is not compromised. Without a comprehensive strategy, the Two-Pot system may have unforeseen and detrimental long-term effects in a country where a significant portion of the elderly population relies solely on government assistance. Therefore, it is essential to implement educational programmes that alert members about the consequences of prematurely withdrawing pension funds and to provide them with the necessary information to make informed decisions.

Technological perspective

The landscape of pension management and distribution is evolving rapidly, echoing the swift changes occurring in the financial sector driven by technology. Financial Technology (FinTech),

characterised by innovative financial technology applications, is already being harnessed to enhance customer engagement and communication within the pension space. FinTech holds significant potential for aiding pension agencies in optimising their internal processes and risk management.

These advancements have the potential to not only reduce costs but also enhance the accessibility of pension services, ultimately benefiting customers. It is crucial, however, that the regulation of FinTech strikes a delicate balance. It should encourage innovation to unlock the potential benefits of cost reduction, increased transparency, and higher member engagement. Simultaneously, the regulatory framework must accommodate the evolution of business models and ensure the protection of members while guarding against unfair competition from unregulated entities.

The Five-Year Evaluation report of the GPAA underscores the changing technological landscape, which has led clients to expect digital interactions across all experiences. To effectively address strategic and operational challenges, the GPAA recognises Information and Communications Technology (ICT) initiatives as essential interventions to enhance performance and service delivery. These technological initiatives serve as the driving force for streamlining business processes, optimising value streams, and enhancing the experiences of members, pensioners, beneficiaries, staff, and key stakeholders in the realm of pension and benefit administration.

In the wake of the COVID-19 pandemic, the GPAA accelerated the adoption of Information and Communications Technologies to facilitate electronic, online, and remote work. This ensured the organisation's continued effectiveness. The shift further resulted in the distribution of technological devices, primarily laptops, to the staff members.

The GPAA on behalf of the GEPF operates a single Call-Centre located at the Trevenna campus in Pretoria. This Call-Centre receives an average of 1,000 calls daily, which were previously handled by

around 100 employees. The high volume of calls often led to delays in attending to clients, conflicting with the GPAA's vision of ensuring a satisfied, valued, dignified, cared-for, and empowered customer and client base. To address this challenge, a Multi-Channel Contact Centre was launched in November 2022 to diversify service delivery platforms. This initiative introduced capabilities such as Call-Back in April 2023, Fax Over Email in July 2023, and the Email Solution in August 2023.

The Email Solution is designed to help the GPAA efficiently manage incoming email inquiries to the Call-Centre. It allows for the seamless distribution of emails to various Call Centre agents through a single Cisco Finesse portal, streamlining email and call management. Approximately 120 Call Centre agents and supervisors received training and support for this new system.

To meet the increasing demands for service, improved service delivery, transition to a paperless environment, automate benefit payment processes, enhance the client experience through innovation, and retire the legacy Civil Pensions system (CIVPEN), the GPAA is enhancing and updating key application systems and ICT infrastructure. Outdated systems that have reached the end of their useful life will be replaced through the Modernisation Programme and other ICT initiatives.

Implementing pension administration system projects is typically a complex and lengthy process. However, the Modernisation Programme's success should not focus solely on the system. A holistic approach, encompassing the entire value chain and non-system areas, should be adopted for effective implementation. These areas include readiness assessments for staff members and internal stakeholders, data readiness, user support readiness, external stakeholder readiness, plan sponsor readiness, management of deferred functionality, and decision-maker readiness.

The GPAA's ICT initiatives also involve the digitisation and integration of systems across various stages of procurement. Automation streamlines supplier and

contract data input, identifies key issues, employs automated checklists and templates, documents cost savings, and manages contract approvals and documentation. This presents an opportunity for the GPAA to automate procurement processes, particularly the bidding processes. Manual processes have led to duplicated efforts and insufficient monitoring controls, resulting in lengthy turnaround times.

ICT will also proceed to utilise cloud services in line with the DPSA directive and to mitigate any risks associated with ICT infrastructure being out of date and for the replacement of ICT infrastructure.

As it stands, over 40% of the Modernisation initiative's efforts have been completed, resulting in improved working conditions and service delivery. The GPAA recognises the importance of addressing the gaps identified in the GPAA and Employer Administration report of 2018. Recommendations from this report aim to improve processes related to historical claim finalisation, claim form revision, contribution processes, payroll companies, unallocated deposits, suspended contributions and data cleansing.

To guide these efforts, the GPAA commissioned a five-year review/study conducted by a service provider. This study draws parallels between "The GPAA and Employer administration report Outcomes" and the "Five- Year Review and its Action Plan," highlighting several key similarities:

Process Improvement Recommendations: Both reports identify process gaps within the GPAA/GEPF and propose solutions over varying timeframes. Short, Medium, and Long-Term Approaches: Both emphasise implementing changes across different timeframes to address specific issues incrementally.

Client-Centric Focus: Recommendations from both reports emphasise improving client services and communication, with a focus on digital services and enhanced experiences.

Change Management and Organisational Culture: Both recognise the importance of change management and fostering a culture that embraces new processes.

Technology and Modernisation: Both reports call for enhancements in technology, including ICT infrastructure and legacy system replacements.

Performance Management and Accountability: Recommendations from both sources highlight the need for enforcing performance management and accountability.

Strategic Reporting and Data Utilisation: Both highlight the importance of turning data into insights through enhanced business intelligence.

Skills Development and Resource Allocation: Both emphasise skill acquisition and resource allocation to address various organisational challenges.

In summary, the two reports share a common goal of addressing organisational challenges through process improvements, technology enhancements, client-centric approaches, change management, accountability measures, and strategic development over different timeframes. These parallel efforts collectively aim to transform the GPAA for greater efficiency, improved client satisfaction, and enhanced overall performance.

Environmental perspective

The GPAA diligently adheres to the provisions outlined in the Occupational Health and Safety Act 85 of 1993, along with its subsequent amendments, particularly during periods of disasters. In collaboration with the Department of Public Service and Administration (DPSA), the GPAA has engaged the services of Alexander Forbes as its Health Risk Manager for the period 1 January 2022 -31 December 2024. Synergising the efforts of the GPAA Executive Committee (EXCO) and the Safety Health Environment Risk and Quality (SHERQ)

Committee is instrumental in ensuring a secure working environment that does not compromise the organisation's productivity.

The GPAA places paramount importance on safeguarding the well-being of both its employees and customers. Amidst the challenges posed by the adverse impact of COVID-19, persistent load-shedding, and a high unemployment rate in South Africa, there emerged a concerning outbreak of Cholera. Between 1 February and 06 June 2023, South Africa reported a total of 166 laboratory-confirmed cases and 202 suspected cases of Cholera.

Notably, the Gauteng province bore the brunt of this outbreak, with the Tshwane Metro Municipality (Hammanskraal) serving as the epicentre of the epidemic. Notably, this is also where a significant portion of GPAA staff reside. To ensure the safety of its members, the GPAA has implemented several measures. The organisation continuously urges its employees and clients to exercise vigilance, refraining from consuming suspected contaminated food, water or surfaces. Furthermore, they emphasise the importance of thorough handwashing with soap, especially before handling or preparing food and after using the bathroom, to prevent potential infection.

In response to the Cholera outbreak, the GPAA discouraged the consumption of tap water from its premises. The organisation took steps to provide safe water from trusted sources to both its staff and clients. Gauteng's water supply issues have become a pressing concern, prompting Rand Water to impose water restrictions across the province, which occasionally impact the GPAA offices. In anticipation of such water outages, the GPAA has strategically placed tanks filled with water to ensure that its staff can continue their daily operations despite interruptions in water supply in and around their office locations.

In addition to addressing immediate concerns, the

GPAA is proactively taking measures to mitigate the emission of greenhouse gases resulting from its activities through the Modernisation Programme. This initiative is contributing positively to the fight against global climate change by reducing the organisation's carbon footprint stemming from the implementation of new technological systems and digital processes aimed at achieving organisational objectives efficiently.

The GPAA has recently reviewed its Printing policy through the Policy Task Team (PTT) and is in the final stages of its formulation. This policy is designed to promote a reduction in printing within the organisation. Furthermore, business processes were optimised to facilitate the electronic handling of cases, reducing the need for physical document transfers due to the ongoing implementation of Workflow systems.

The Pension Case Management (PCM) and Benefit Payment Automation (BPA) application have already incorporated the exit claim benefit process as a workflow procedure. To further minimise the volume of paperwork required by employer departments for exit benefit claim processes and reduce the necessity for printing in case printing is required, the GPAA is evaluating the list of documents demanded by these departments.

Additionally, the GPAA is in the process of integrating Oracle WebCentre Content, an off-the-shelf Enterprise Content Management (ECM) solution. This ECM system replaces the outdated, custom-built ECM product that has been encountering technical challenges, ensuring swift access to electronic documents within the GPAA.

The GPAA has recently introduced funeral benefits claim processing using a workflow product, further diminishing the need for document printing and advocating for the use of electronic documents. There is also an ongoing review of the list of requisite documents for the funeral benefits claim process with the aim of reducing this list. In a progressive

move, the GPAA has also incorporated a funeral benefit claim functionality into its Self-Service mobile and web application. This functionality is designed to require no document submissions, thus contributing to the reduction in printing requirements.

Furthermore, the GPAA has implemented an Equitrac print management solution throughout the organisation. This is a practice that has demonstrated significant global reductions in actual printing, sometimes as much as 30%. The organisation has also introduced e-signatures and electronic distribution of payslips. Following the implementation of the GPAA's print management solution, notable reductions in printing were observed between 1 January 2023 and 10 August 2023.

Legal perspective

The GPAA operates within a multifaceted regulatory framework that encompasses a multitude of legislative requirements, each of which plays a pivotal role in shaping various facets of the organisation. Among the myriad legislative frameworks, the preeminent one that imparts foundational principles for the GPAA's operation as a public institution is the Constitution of the Republic of South Africa, Act 108 of 1996. Subsequent to the constitution, the Government Gazette of March 26, 2010, assumes significance as it delineates the purpose, powers, and functions of the GPAA, essentially serving as the organisation's founding document.

Given that the GPAA's core mandate revolves around the provision of administrative functions on behalf of the GEPF (Government Employees Pension Fund) and the National Treasury, the respective Service Level Agreements (SLAs) that outline the services, targets, and performance indicators by which the GPAA must render services on behalf of these two entities constitute a vital component of the regulatory framework governing the GPAA.

In addition to these key documents, several Acts of Parliament exert regulatory control over the GPAA, including:

- The Public Service Act (PSA) No. 103 of 1994, as amended.
- The Public Finance Management Act, No. 29 of 1999, as amended.
- The Government Employees Pensions Law (GEP Law) of 1996, as amended.
- The Government Pensions Administration Law of 1996.

These legislative instruments collectively provide comprehensive guidance to the GPAA concerning its operations, organisational structure, and administrative functions. Furthermore, the GPAA must also acknowledge the existence of other pivotal documents within the regulatory landscape that offer insights into potential future regulatory developments for the organisation. These documents encompass the King Code IV on good governance, Parliamentary Bills, and National Treasury discussion documents.

The Five-Year Evaluation report underscores the significance of embracing the principles outlined in King Code IV, which is effective in encapsulating ethical, governance, structural, personnel, and financial aspects of an organisation. It further recommends that the GPAA aligns itself with these principles to ensure congruence with industry standards while fortifying compliance with its own regulatory environment.

Moreover, the GPAA is committed to the achievement and the promotion of WYPD priorities in line with the public service policies and procedures. These further address the social ills faced in the internal and external environment:

- Gender Equality policy
- Policy on Disability
- Policy and Procedures on the Management of Sexual Harassment in the Public Service
- Employment Equity policy

Looking ahead, the GPAA's most recent Strategic Plan outlines its intention to introduce financial services by the 2023/24 financial year and financial advisory services by the 2024/25 fiscal year as part of its distinctive value proposition offerings. These initiatives provide the GPAA with an opportunity to diversify its revenue streams and enhance the value it offers to clients, thereby bolstering client satisfaction. To ensure the organisation remains competitive, the GPAA also places a strong emphasis on nurturing a competent workforce. Among its various initiatives, it seeks to continuously upskill less-experienced employees, finalise the organisational structure to facilitate decision-making at different levels, fill critical positions with highly competent individuals, and review and realign resources across programmes to align with the organisation's mandate and address staff concerns.

In addition to the PERSEL (Performance, Evaluation, and Rewards in the South African Public Service) analysis conducted on administrative services, the Five-Year review has identified numerous gaps within the GPAA/GEPF processes and has made recommendations to address these gaps in the short, medium, and long term.

Five-Year Review themes

- i. Lack of strategic reporting: The GPAA is good at producing reports and data but lacks the ability to turn data into insights through enhanced business intelligence reports and dashboard. This results in a lack of strategic insights and planning towards improving client experience.
- ii. Lack of formal processes to enforce accountability on employer departments: There is no enforcement of the memorandum of understanding between the GPAA and employer departments to ensure accountability. This leads to a lack of ownership and poor quality of data. Recent efforts are bridging the gap on a better way of working with employer departments and issue resolution.

- iii. Non-compliance to procurement processes.

Five-Year Review Action Plan

The GPAA has formulated an Action Plan to implement recommendations of the review.

Boost organisational morale

- i. Conduct comprehensive organisational form analysis.
 - a. Develop a Rewards and Recognition Programme.
 - b. Appoint dedicated change management employees.
 - c. Develop a structured change management approach and strategy.

Long term

- i. Host internal workshops and team building events to cascade strategy and instill organisational values,
- ii. Integrate change management with project management.

Enhance client experience

- i. Capacitate bottleneck units such as Legal and SCM.
- ii. Appoint people with the right skills in the Finance and ICT units.
- iii. Develop a strategy and an implementation roadmap to automate key processes with digital case tracking and phase out paper.

Long term

- i. Develop targeted marketing efforts to improve the GPAA brand awareness.
- ii. Broaden capabilities such as financial advisory, counselling as well as personalised communication.
- iii. Optimise Call-Centre with additional capabilities such as call me back, WhatsApp and Toll-Free number.
- iv. Enhance ways of working with employer departments

Institutionalise Knowledge

- i. Instill a culture of knowledge through initiatives such as day-to-day standardised reporting structure which includes key learnings across the regions.
- ii. Develop a central Knowledge Management repository accessible by all employees for knowledge sharing.

Long term

- i. Host knowledge sharing workshops across the regions including Head Office.
- ii. Develop Rewards and Recognition programme to encourage knowledge sharing.

Drive Modernisation

- i. Appoint a Programme Manager.
- ii. Develop a S.M.A.R.T strategy with an implementation roadmap.

Long term

- i. Explore ways to get exemption from SITA.
- ii. Develop corrective measures for irregular expenditure.
- iii. Place focus on replacing the Legacy system.
- iv. Incorporate financial data in strategy and organisational decision making.

2.7.3 Internal Environmental Analysis

This section presents the organisational structure and provides details on the Programmes and Sub-programmes of the organisation, the performance information which identifies the organisation's SWOT (Strength, Weaknesses, Opportunities and Threats), as well as the APA (Achieve, Preserve and Avoid). The latter are the actions in which the organisation intends to achieve, preserve and avoid in the financial year 2024/25.

2.7.3.1 Organisational Overview

The organisational structure of the GPAA is led by the Chief Executive Officer (CEO). The structure consists of two programmes, namely: Support Services and Benefits Administration. The two programmes are divided into eight sub-programmes as shown in Figure 2.

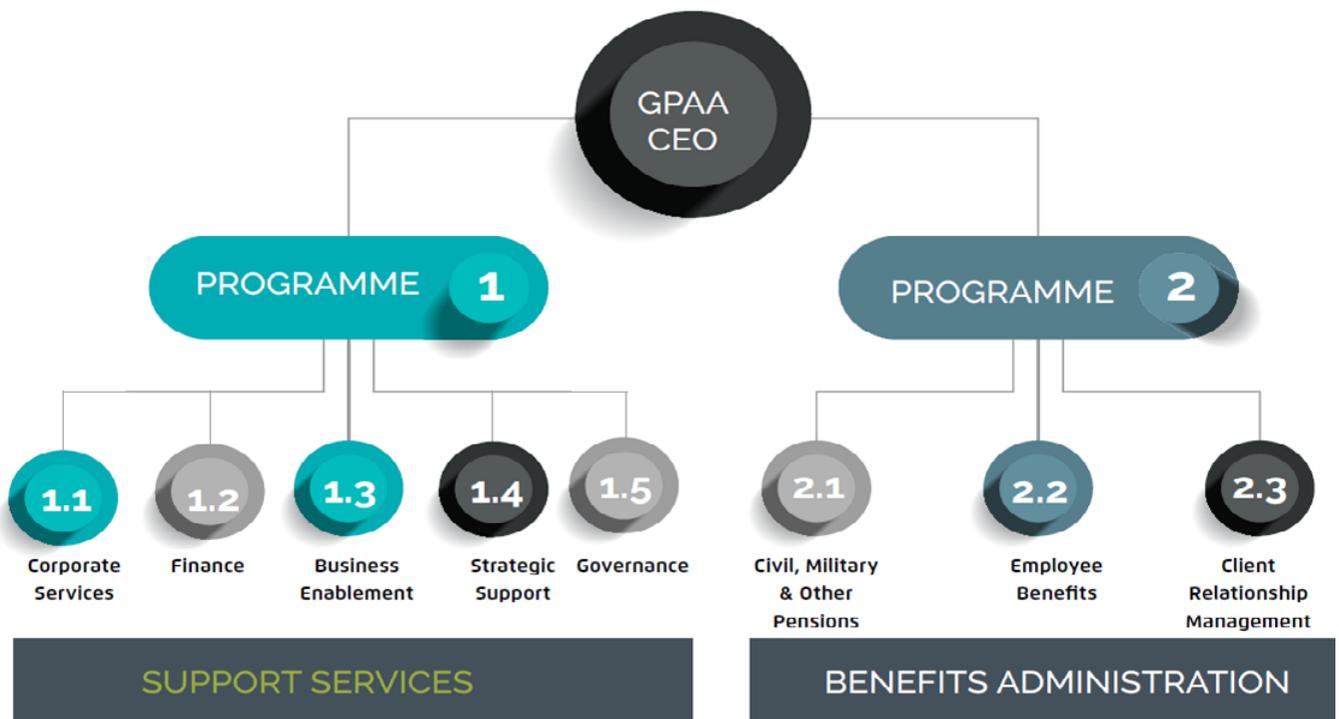


Figure 2 - GPAA's Organisational Structure

The GPAA has a normalised structure with a total of 1 026 approved positions. As of December 2023, the GPAA staff complement was as follows: 913 permanent employees, 166 contract workers and 47 interns, resulting in the actual staff complement of 1 072. The figure below shows the GPAA's staff members per sub-programme.

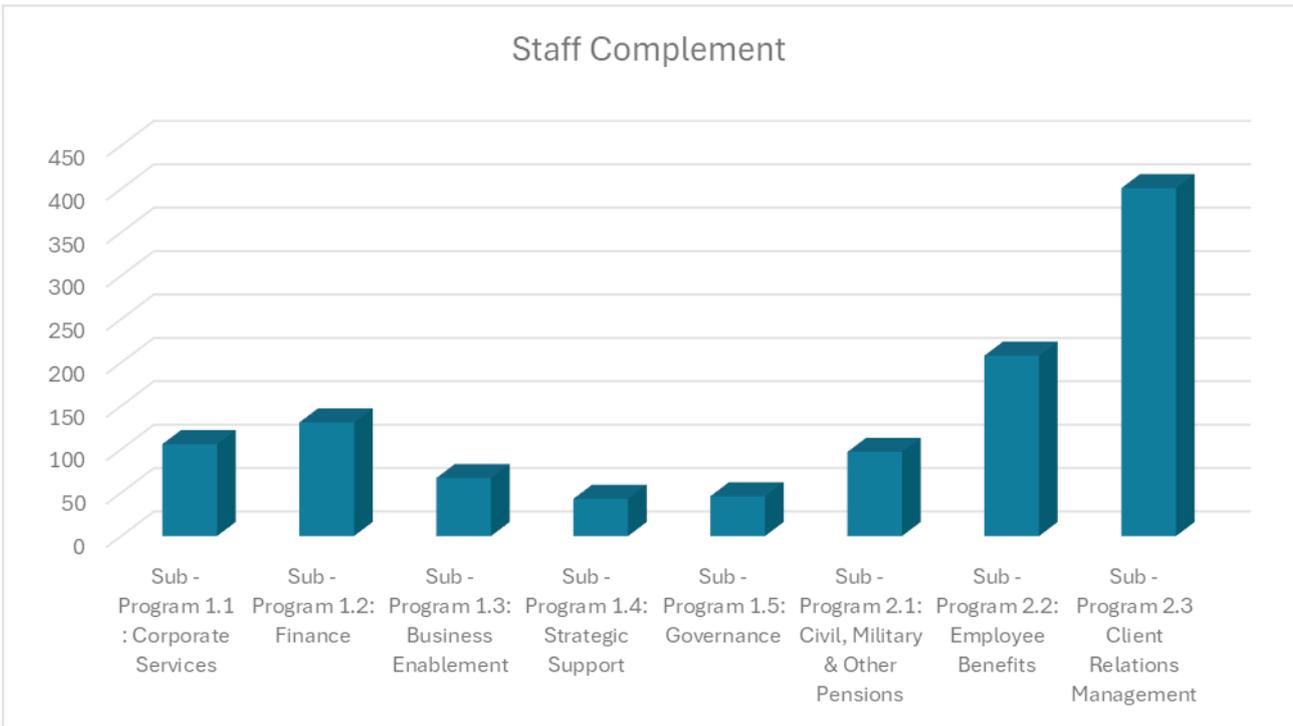


Figure 3 - GPAA staff complement as of December 2023

There is a high number of contract employees in the organisation. This threatens business continuity when contract employees, who are trained and familiar with the GPAA systems and processes have to leave due to contract lapse.

2.7.3.2 Update on Modernisation Programme

Modernisation is the GPAA's business improvement vehicle for the optimisation of business processes, streamlining of value streams, enhancement of key stakeholders' experiences of the Pension and other benefits administration services. Modernisation continues to go through various phases and stages throughout its programme lifecycle. It is now at the point where it is focused on the replacement of the CIVPEN Legacy system that has reached the end of its useful asset life span. Three key software modules that make up CIVPEN, which are also core business functions of Pension Administration System (PAS), Financial Management System (FMS) and Customer Relationship Management (CRM) will be implemented as part of the modernised solution.

- The Modernisation Roadmap (including oversight structures, budget and resources) and Request for Information report were approved by the GEPF Board of Trustees in March 2023. The implementation is envisaged to commence on 1 April 2023. Major milestones for the 2023/2024 financial year will include the Business Cases, Business Requirements Specifications, the AS-IS and TO-BE Enterprise Architecture for PAS, FMS and CRM. These deliverables will enable the optimisation of modelled business processes, streamline the value chain of member enrolment and maintenance, contributions collection, payment of pensions and other benefits as per the GPAA's mandate. The deliverables will allow for the drafting of the Request for Proposal (RFP) document to evaluate and procure the required solution. The GPAA will comply with the conditional approval of the RFP and the governance oversight to execute on the process.

- There are other impactful changes that are being implemented under the In-flight projects. They include:
 - Identity Access Management (IAM)
 - Enterprise Content Management (ECM)
 - Digital Communications
 - Pension Case Management (PCM) and Benefit Payment Automation (BPA)
 - Self-Service (Smartphone Application and Web based application)

The GPAA is starting to see and derive benefits from the earlier implemented phases of these In-flight projects. Continuous improvement of these capabilities, maintenance, and support is an ongoing exercise that is conducted in a risk-averse manner to achieve higher-levels of maturity of service delivery.

Effective and robust organisational change management is critical for the successful modernisation of the GPAA. Emphasis is placed on ensuring organisational readiness through the implementation of the Change Management and Communications plan.

In 2024/25, the Modernisation Programme will follow a properly governed and diligent process to procure a new modernised solution. Implementation will commence after the procurement process and proof of concept have been successfully concluded.

2.7.3.3 The GPAA's Core Business

Programme 2 – Benefits Administration will render the GPAA's core business within the distinct areas outlined in Table 1 below:

FUNDS AND SCHEMES:	APPLICABLE LEGISLATION:	ADMINISTERED ON BEHALF OF:
Government Employees Pension Fund (GEPF)	Government Employees Pension Law of 1996	GEPF's Board of Trustees
Temporary Employees Pension Fund (TEPF)	Temporary Employees Pension Fund Act 75 of 1979	National Treasury's Programme 7
Associated Institutions Pension Fund (AIPF)	Associated Institutions Pension Fund Act 41 of 1963	National Treasury's Programme 7
Military Pensions	Military Pensions Act 84 of 1976	National Treasury's Programme 7
Injury on Duty payments	Compensation for Occupational Injuries and Diseases Act 130 of 1993	National Treasury's Programme 7
Special Pensions	Special Pensions Act 69 of 1996	National Treasury's Programme 7
Post-Retirement Medical Subsidies	Public Service Co-Ordinating Bargaining Council (PSCBC) resolutions as provided for and regulated	National Treasury's Programme 7
Other Benefits	Different Acts and Resolutions	National Treasury's Programme 7

Table 1 - Legislations that govern Schemes and Funds Administered by the GPAA

2.7.3.4 Stakeholder Analysis

The GPAA is committed to building and strengthening relationships with all its stakeholders. The organisation's stakeholders, its core services and the interactions associated with each person or group are as indicated on Table 2- GPAA Stakeholders:

STAKEHOLDER	CORE SERVICES PROVIDED / INTERACTION POINTS
External Stakeholders	
Minister of Finance / Deputy Minister of Finance	Provides information (in the form of briefing notes, submissions, or presentations) and support in relation to governance and finance. Regular meetings to discuss workflow, dashboard matters as well as risk and fraud management.
Cabinet	Addresses cabinet memoranda and legislation.
National Treasury (NT)	Feedback on core services and the administration of Programme 7 on administration agreements, funding budgets and SLAs. Submissions of ENE, budgets, reports, strategic plans and annual performance plans. Quarterly feedback to the National Treasury and DG. Ad-Hoc meetings as and when required,
Government Employees Pension Fund (GEPF)	Quarterly feedback to the Board of Trustees, subcommittees, and the Principal Executive Officer. Managing the administration agreements, funding budgets and SLAs. Ad-Hoc meetings as and when required.
Parliamentary Committees	Feedback, clarifications, and meetings on request
Auditor-General of SA (AGSA)	Provides performance information. Responses to audit findings
Government departments and Parliament	The GPAA provides administrative support to the departments in terms of responding to Parliamentary questions, Cabinet memoranda and other departmental requests.
Government Employees Pensions Ombud (GEPO)	The Government Employees Pension Ombud (GEPO) was established by the Board of Trustees of the GEPF as a non-statutory ombud in order to provide a voluntary complaint handling mechanism
Department of Military Veterans	A sub-department of the Department of Defence that is responsible for providing support and services to veterans of the South African military, including veterans of the armed wings of anti-apartheid movements (Umkhonto we Sizwe and APLA). Managing the administration agreements, funding budgets and SLAs.
Internal Stakeholders	
Executive Committee (EXCO)	Delivers on the GPAA mandate through its strategy, annual performance plans and operational plans. Its members are accountable to the CEO for organisational performance. Conducts regular meetings to discuss risk, governance and financial matters; administration and sub-programme performance; workflow; dashboard matters; and fraud prevention.
Audit Committee (AC)	Provides internal audit reports and assurance on the management controls and governance processes of the GPAA
Risk Committee	Provides risk management oversight and assurance on the risk management controls, mitigation progress and fraud prevention.
GPAA employees	Live and demonstrate the value system of GPAA in a conducive environment with their employer of choice. Manage systems, allowing for an open-door approach to problem solving and health care.

Table 2- GPAA Stakeholders



2.7.3.5 The GPAA's Capability Model

The capability model was first published in the GPAA in 2014 on the basis of scientific evidence and benchmarking with other pensions administrators. It was adopted as the working model so that the Modernisation Programme and other business structures would align with the capabilities required to deliver service to the GPAA's two customers and its client base of almost 1.9 million citizens. The model has however changed after recent adjustments to include other required capabilities.

Sixteen (16) focused performance areas of pensions administration were identified, namely: Customer Management, Client Management, Member Management, Key Partner Management, Employer Management, Benefit Management, Service Channel Management, Case Management, Security Management, Enterprise Data Management, Evidence Management, Knowledge Management, Product Management, Finance Management, Debt Management and Fraud Management.

The model realises the capacity of the GPAA to ensure accurate and timeous benefit payments, document management, client management and contribution management. The model aligns and compliments the GPAA's structure, processes and capabilities as depicted on Figure 4 - The GPAA Capability Model.

THE GPAA'S CAPABILITY MODEL

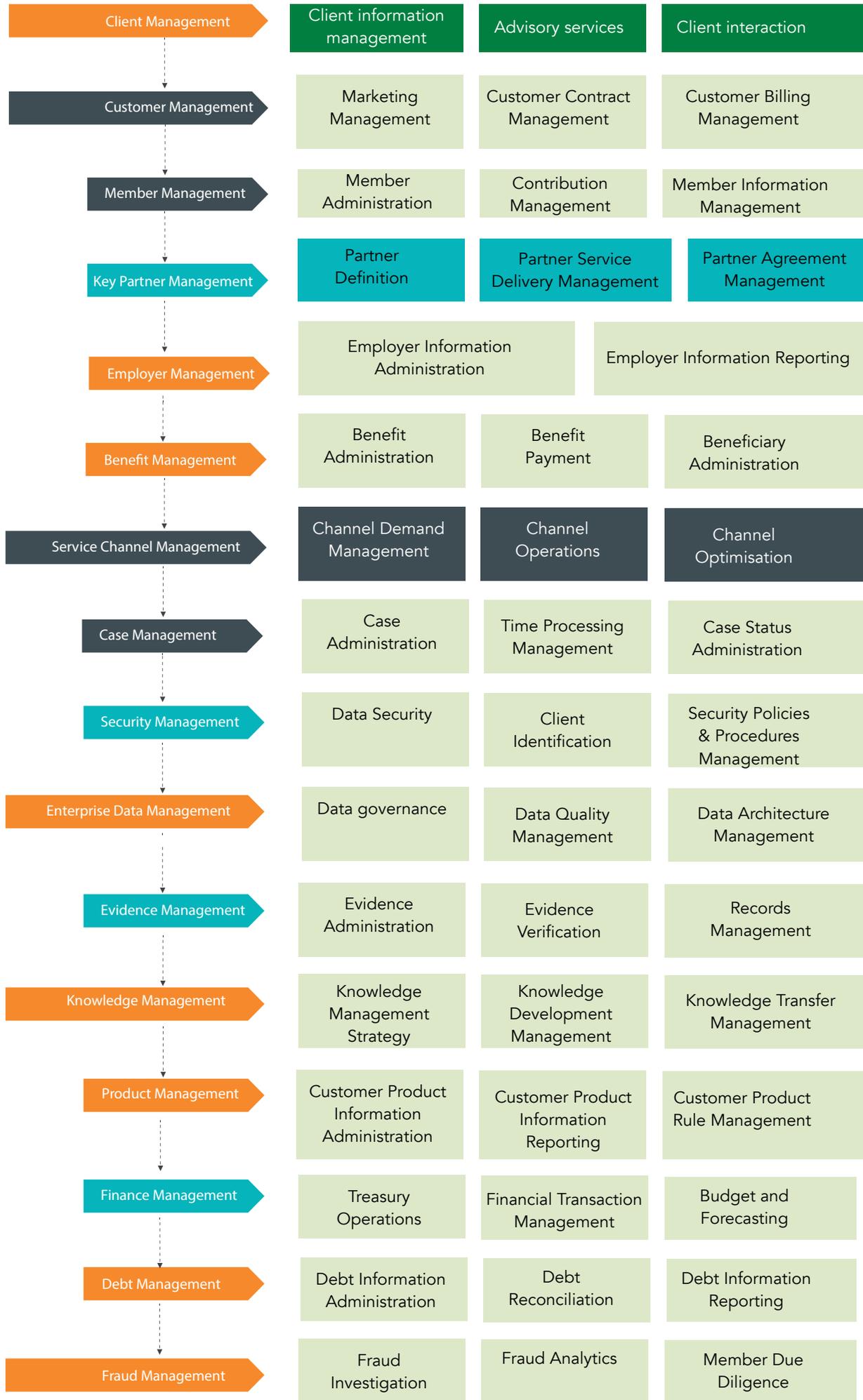




Figure 4 - The GPAA Capability Model

2.7.3.6 The GPAA's Value Chain

The GPAA's core processes, specifically Benefits Administration, which includes client administration, admission of members, contribution collection, member maintenance, pensioner maintenance and benefits processing, rest on the pillars of Support Services. This comprises of Corporate Services, Financial Services, Business Enablement (ICT), Strategic Support and Governance. Both the core processes and support services of the organisation have been enhanced to achieve the GPAA's strategic outcomes. The GPAA's value chain is depicted on Figure 5 - GPAA Value Chain:



Figure 5 - GPAA Value Chain

2.7.3.7 Demographics of the GPAA's Client Base

The GPAA has a client base of approximately 1.969 million people, with the largest populace in the GEPF, at 90% of the administration payload. National Treasury funds have approximately 169 384 (8%) clients in more than five different funds. The remaining 1% is made up of AIPF and TEPF. The demographics of the client base are shown on Figure 6 below.

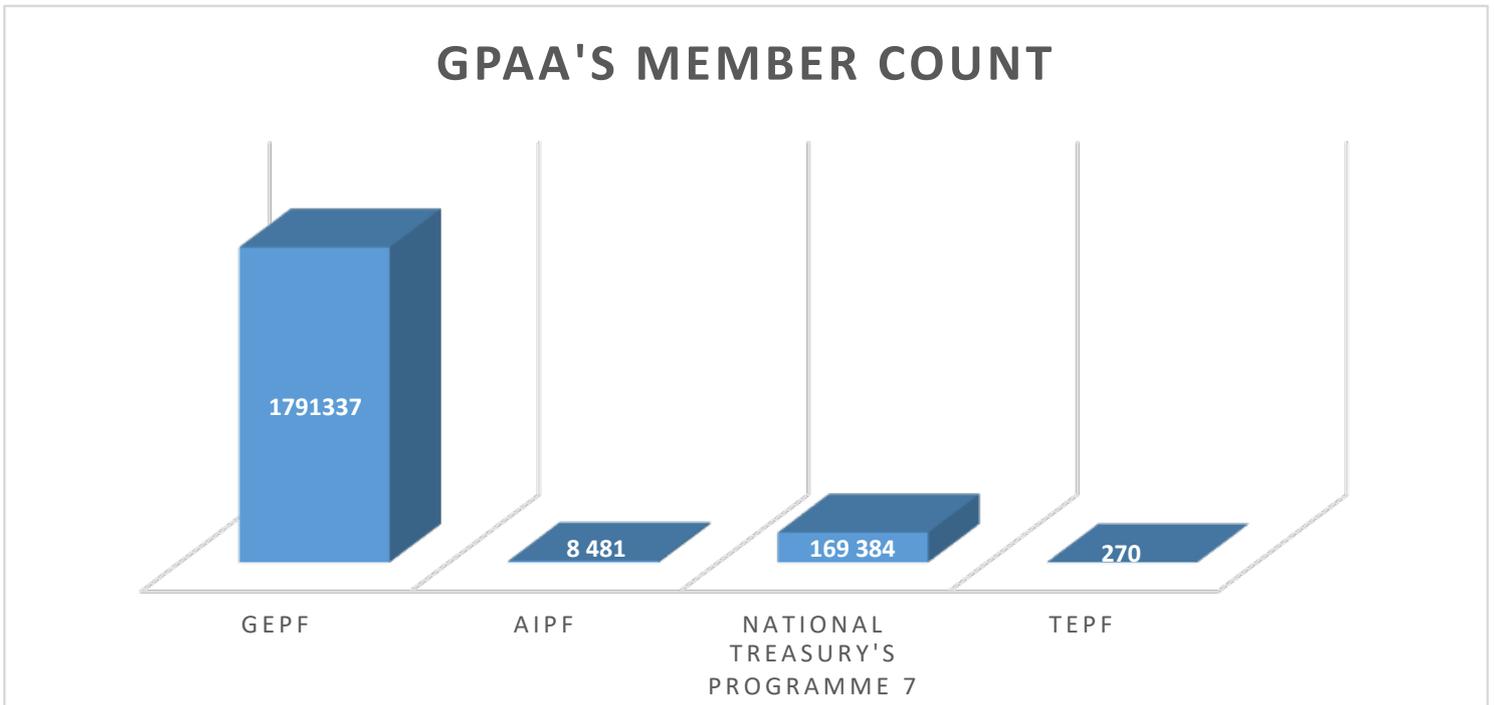


Figure 6 - Member count as of 31 December 2023

The Table 3 below provides a breakdown of Funds per member type:

Funds	Member type	Member count
GEPF	GEPF members	1284442
	GEPF pensioners	346347
	GEPF spouses	173603
	GEPF orphans	21472
National Treasury's Programme 7	Post-Retirement Medical Subsidies	154501
	Military Pensions	4596
	IOD	10092
	Other	722
	Special Pensions	5420
AIPF	AIPF member	2523
	AIPF pensioners	3321
	AIPF spouses	2420
TEPF	TEPF members	7
	TEPF pensioners	152
	TEPF spouses	101
GPAA total members administered		

Table 3 - GEPF Active Member count as of 31 March 2023

Government Employees Pension Fund (GEPF) Active Membership

The GEPF has seen a growth in membership. The total membership grew by 0.01% to 1.267 million in 2022/23 compared to 1.261 million in 2021/22. This could be attributed to government creating new employment opportunities.



Figure 7 - GEPF Active Members

Race demographics

Out of the GEPF's 1 791 337 members (as of March 2023), 60.62% were female and 39.38% male. As of 2021, 7.6 million households in South Africa were led by women. The GPAA therefore acknowledges the importance of paying benefits on time towards the many women headed households, ensuring the empowerment and advancement of women's quality of life. Table 4 - Members per Race depict the demographics of GEPF clients according to race.

Contributing Members

RACE	Female %	Male %
African	60.54%	39.46%
White	64.41%	35.59%
Coloured	57.16%	42.84%
Asian	61.45%	38.55%
Unidentified	72.30%	27.70%
Total	60.62%	39.38%

Table 4 - Contributing Members per Race

Africans are 80.29 % of the total GEPF client base, Whites are 8.72%, Coloureds are 8.40%, Asians are 2.27% and there is an unidentified 0.32% as at March 2023.

Pensioners and Beneficiaries (including Spouse and Child Pensioners). With regard to pensioners and beneficiaries, 69% were female while male constituted 31% as depicted in Table 5 below.

RACE	Female	Male
African	65,19%	34,81%
White	70,73%	29,27%
Coloured	63,42%	36,58%
Asian	54,80%	45,20%
Unidentified	82,93%	17,07%
Total	68,67%	31,33%

Table 5 - Pensioners and Beneficiaries (Include Spouse and Child Pensioners)

Africans were 44.99% of the total GEPF beneficiary base, Whites 38.41%, Coloureds - 5.65%, Asians - 1.74%, and 9.21% could not be identified.

Cases administered and finalised

A comparison between the cases administered by the GPAA in the past two financial years indicates that there has been an increase in Resignations cases as reflected by the increase in the Paid cases. The number of Retirement cases and Transferred cases also increased substantially, together with a notable increase in Death cases within the 2020/2021 and 2022/2023 period. This is tabulated in Table 6- Cases Administered and paid.

CASES ADMINISTERED AND FINALISED AT THE GPAA	CASES PAID 2020/2021	CASES PAID 2021/22	CASES PAID 2022/23
Resignation from GEPF	16 055	20 659	23 850
Retirement from GEPF	27 960	33 627	37 440
Transfer from GEPF	2 513	11 776	3 379
Beneficiaries paid due to death of members	5 888	11 776	8 770
Total	52 416	69 126	73 439

Table 6 - Cases Administered and paid

A concerning upward trend in the number of resignations has been observed since 2020/21 to date.

On average, the GPAA, processed and paid 669 446 monthly benefits in 2021/22. The number increased to 699 677 in 2022/23. Table 7 – outlines the monthly payment by the Fund per recipient.

RECIPIENTS OF MONTHLY PAYMENTS FROM THE FUND	MONTHLY PAYMENTS	MONTHLY PAYMENTS	MONTHLY PAYMENTS
	2020/2021	2021/22	2022/23
Injury on Duty (IOD) payments	10 006	9 744	9 992
Post-retirement Medical Benefits	133 649	142 123	148 454
Military Pensions	4 614	4 606	4 636
Special Pensions	6 043	6 043	5 552
Other benefits	884	774	750
Pension benefits (GEPF)	312 647	322 223	336 629
Spouses' benefits (GEPF)	160 667	167 679	171 592
Children's benefits (GEPF)	6 171	9 824	15 809
Pension benefits (AIPF)	4 083	3 774	3 518
Spouses' benefits (AIPF)	2 607	2 567	2 483
Pension benefits (TEPF)	171	163	155
Spouses' benefits (TEPF)	115	111	107
Total benefits paid per month (averaged)	641 657	669 631	699 677

Table 7 - Recipients of Monthly Payments from the Fund

National Treasury (NT) Sub-programme 2.1 administers non-contributory funds on behalf of the National Treasury through a signed Service Level Agreement with the GPAA. The sub-programme derives its mandate from various Acts and Statutes as well as Resolutions of the PSCBC. It consists of six main sub-units, which form the core delivery vehicles for GPAA in terms of the Service Level Agreement signed with National Treasury. Those sub-units are:

- Post-Retirement Medical Benefit Administration
- Military Pensions;
- Injury on Duty (IOD);
- Special Pensions;
- VIP Benefits; and,
- Military Medical Accounts.

There was an increase in membership in the year 2021/2022 and 2022/2023 for both Post-Retirement Medical Benefits and IOD.

2.7.3.8 Geographical Analysis of Clients

An analysis was performed using the registered home address of all the clients. Approximately 32% of the clients are based in Gauteng, followed by KwaZulu Natal, while the Northern Cape has the lowest clients with just under 1% clientele as depicted on Figure 8 - Members per Residential Address per Province.

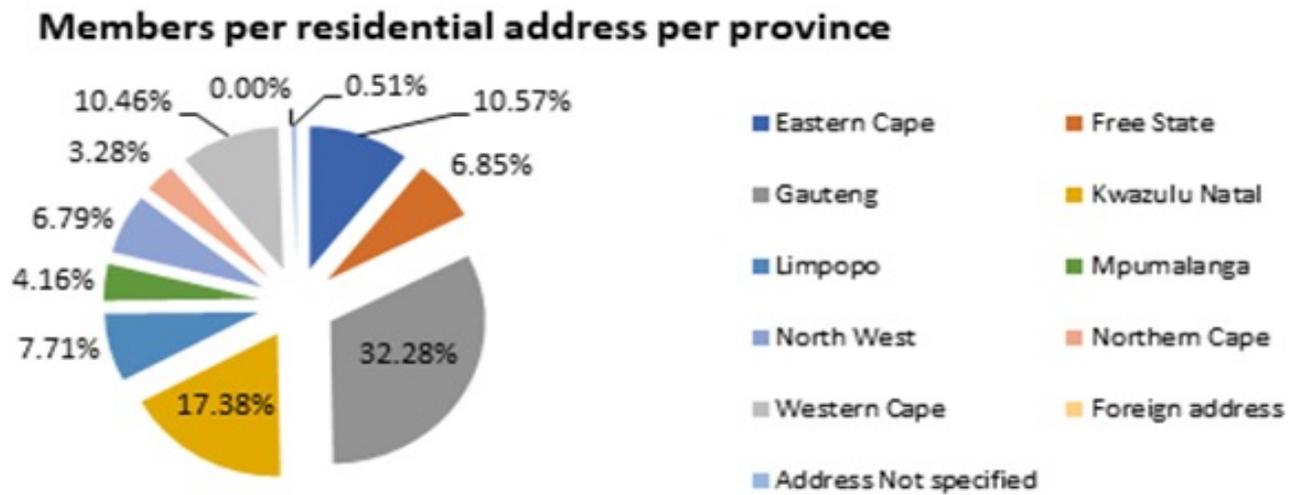


Figure 8 - Members per Residential Address per Province

Figure 10 below reflects the geographical location of GEPF pensioners:

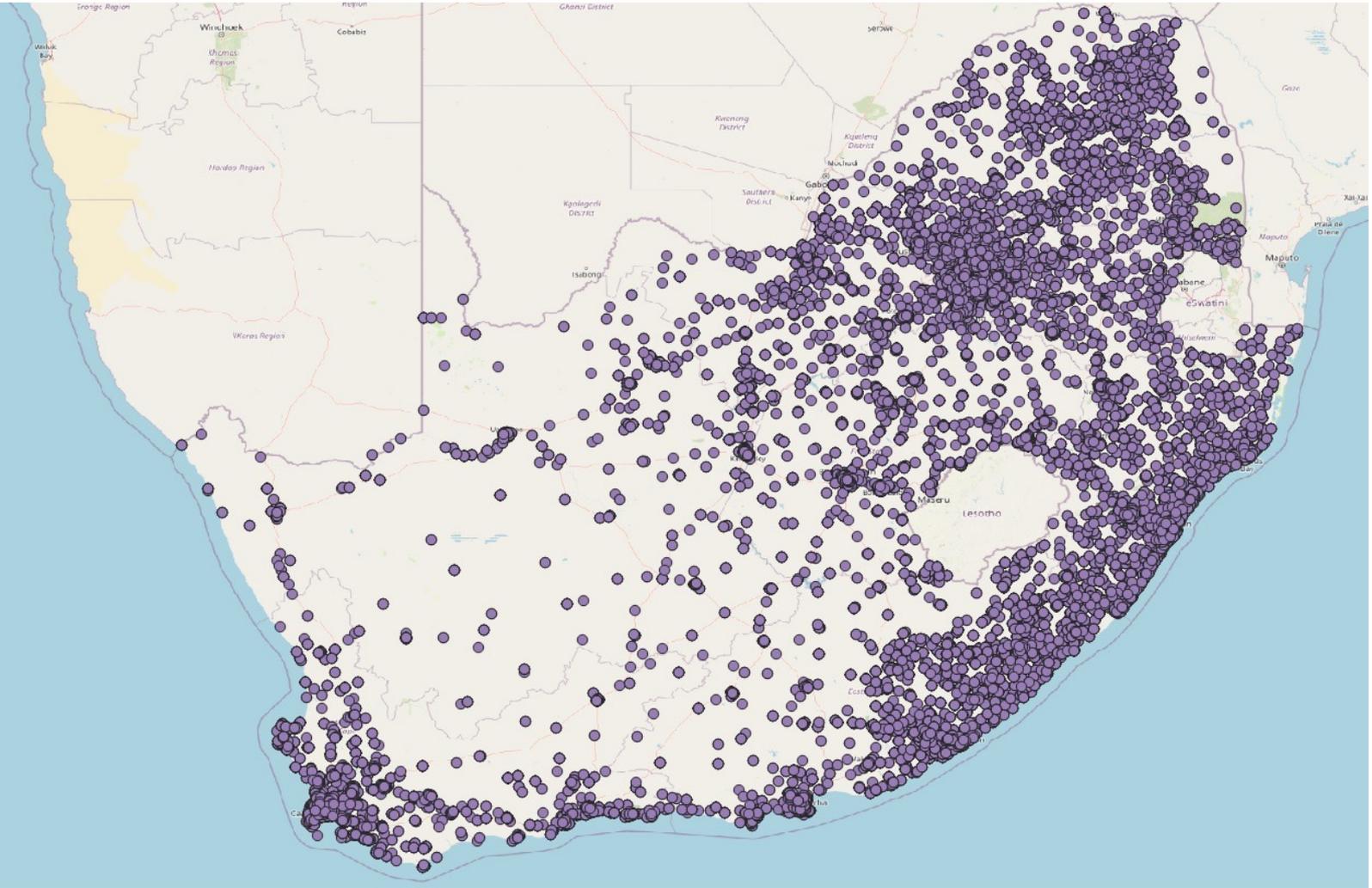


Figure 10 - Geographical location of GEPF pensioners

2.7.3.9 Analysis of the Roadshows

As at December 2023, the total number for the nine (9) GEPF Day events was 4797 from a target of 5600. The attendance breakdown was as follows: 3173 out of 4797 (66.15%) were active members; 1157 out of 4797 (24.12%) were pensioners; 393 out of 4797 (8.19%) were beneficiaries; 51 out of 4797 (1.06%) were spouse and 23 out of 4794 (0.48%) were "Others" who did not indicate any of the categories. Table 8 - Summary of the total number of attendees (31 December 2023) depicts the targeted number versus actual attendance.

PROVINCE AND AREA NAME	DATE OF THE EVENT	TARGETED ATTENDANCE	ACTUAL ATTENDANCE
Limpopo - Burgersfort	13 May 2023	500	368
Gauteng - Fochville	24 June 2023	600	340
North-West - Klerksdorp	29 July 2023	600	721
Mpumalanga - Kwa-Mhlanga	19 August 2023	800	466
Kwa Zulu Natal - Richards Bay	09 September 2023	800	1 072
Kwa Zulu Natal - Newcastle	16 September 2023	500	595
Gauteng - Heidelberg	07 October 2023	500	264
Free State - Parys	21 October 2023	800	295
Northern Cape - Kuruman	11 November 2023	500	676
TOTAL		5 600	4 797

Table 8 - Summary of the total number of attendees (31 December 2023)

2.7.3.10 SWOT Analysis

The GPAA management conducted an analysis of the organisation' Strengths, Weaknesses, Opportunities and Threats (SWOT). The SWOT analysis is intended to guide and direct the organisation in its strategic approach. It identifies strategic opportunities and provides a thorough gap analysis, together with the areas that require strategic intervention. The details are represented on Table 9 – SWOT

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Institutional knowledge • Stable interface with 3rd parties, including PERSAL, SARS and the Department of Home Affairs • Comply with industry standards, i.e. Information Security. Standards for Data Centres • Dedicated and skilled employees • Diversity, good values, and service excellence • Leadership stability • Knowledge of members needs 	<ul style="list-style-type: none"> • Legacy systems (PEKWA, CIVPEN, Oracle portal) • Use of Contract employees • Manual processes • System deficiency controls • Inadequate collaboration between ICT and business • Lack of Change management • Lengthy Supply Chain Management processes • Lengthy recruitment processes • Poor Data • Lack of system integration • Organisational form not fit for purpose. • Stagnant culture • Lack of tracing abilities 	<ul style="list-style-type: none"> • Clean data • Approved structure • Automated processes • Agile Supply Chain Management processes • Embraced technology advances • Stabilised human resources • Additional clients • Teams and Streams • Decentralised processes • Improved workflow • Improved value chain • Reduced Unclaimed Benefits 	<ul style="list-style-type: none"> • Cyber security • Syndicates colluding to get Unclaimed Benefits • Loss of GEPF business • Non-compliance to legislation • Political uncertainty • Legislative changes impacting work

Table 9 – SWOT

Four teams congregated to do a SWOT analysis for Employee Benefits, Legal, Unclaimed and ICT units. The final results were compiled and listed on table 9 – SWOT. The weaknesses and threats were listed for consultation with delegates and staff for the Achieve, Preserve and Avoid (APA) analysis. This consultation was done by means of electronic questionnaire of which the combined results were listed in the APA table 10.

2.7.3.11 Achieve, Preserve and Avoid (APA) Analysis

The GPAA Management set the goals and identified activities to Achieve, Preserve and Avoid. The details are presented on Table 10 - Achieve, Preserve and Avoid.

Number	Achieve	Preserve	Avoid
1	Automated processes	Staff retention (employer of choice)	Client disappointment
2	Compliance	Data management	GEPF choosing a different administrator
3	Cutting-edge technology	Institutional knowledge	Hacking and security threats
4	Decentralisation implementation	Reward structures	Manual processes
5	Employee capacity	Stable interfaces with 3 rd parties, including PERSAL, SARS and the Department of Home Affairs	Paying incorrect beneficiaries
6	Empowering employees to go the extra mile	Staff appreciation	Reputational damage
7	1st time call resolution	Unclaimed cases tracked	Silo mentality
8	Systems and EB Workflow	Employee dedication	Supply Chain Management delays
9	Teams and streams roll-out	Proactive leadership and management	Unnecessary red tape
10	Legacy system replacement	Member maintenance and awareness	Non-compliance with legislation

Table 10 - Achieve, Preserve and Avoid

2.7.3.12 Court Cases

As of 31st January 2024, the GPAA had the following active cases. Table 11 - GPAA Active Cases provides the details of the cases.

NUMBER	LITIGATION IN RESPECT OF THE GPAA SPECIFICALLY
1	CATALINA INVESTMENT PTY (PTD) //GPA

Table 11 - GPAA Active Cases



PART C MEASURING OUR PERFORMANCE

3. INSTITUTIONAL PERFORMANCE INFORMATION

3.1 PROGRAMME 1: SUPPORT SERVICES

Purpose

Programme 1 administers the business and governance affairs of the GPAA and gives rise to strategic outcomes in support of the core business of Programme 2 Benefits Administration. The programme consists of the following sub-programmes:

Sub-programme 1.1 – Corporate Services

The business units within Corporate Services play a supporting role to the provision of primary services, including human resources. The primary aim of the sub-programme is to support the GPAA in realising its strategic outcomes through the management, co-ordination and oversight of all management support, human and physical resources, and various services within the organisation. The business units within Human Resources are Labour Relations, Employee Health and Wellness, Basic Conditions of Employment, Employee Life Cycle, Human Resource Development, Organisational Development Design, Performance Management and Training.

Sub-programme 1.2 - Financial Services

This sub-programme manages the financial resources available to administer pensions and other benefits using best practice principles. This includes the Unclaimed Benefits beneficiaries that are tracked, traced and paid from this sub-programme. In this regard, financial services ensures that financial policies are adhered to; that financial record keeping is done according to appropriate frameworks; and that sufficient cash flow levels are maintained for operational activities. The sub-programme also prepares the financial statements for the organisation and for use by stakeholders. The business units are Taxation, Unclaimed Benefits, Budgets and Management Accounts, Investment Accounting, Cash Flow Management and Supply Chain Management,

Sub-programme 1.3 - Business Enablement

This sub-programme directs and manages the organisation's ICT infrastructure, including two data centres hosting server, storage and application systems, Local Area Networks (LAN) and Wide Area Networks (WAN). The organisation has a national footprint with a whole range of end-user devices including desktops, laptops, tablets, printers, and scanners. Business Enablement provides the GPAA with the enabling capabilities and technologies it needs to deliver on its mandate. The sub-programme is made up of the following business units: Application Middleware, Business Knowledge Management, Business Support Services, Demand and Acquisition, ICT Infrastructure Management and ICT Service Configuration Management, Information Security, Process Innovation and Modernisation.

Sub-programme 1.4 - Strategic Support

The purpose of Strategic Support and the business units that fall within it is to plan, direct and support the organisation in order to ensure that employee benefits, pensions and retirement funds are administered according to the relevant legislation and Service Level Agreements (SLAs). This group of business units is responsible for ensuring that the GPAA is managed effectively in order to deliver services that meet or exceed business requirements of clients. Strategic Support is responsible for the planning and oversight of the GPAA and its overall performance. It is also responsible for building relations with various stakeholders, including intergovernmental engagements which promote the achievement of government priorities and service delivery. The business units are as follows: Corporate Monitoring and Evaluation, Facilities and Security Management, Strategy and Policy, Management Information and Analytics, Project Management Office and Communications.

Sub-programme 1.5 - Governance

The Governance sub-programme consists of the Internal Audit, Legal and Advisory Services, Enterprise-wide Risk Management, as well as the Forensic and Fraud Prevention Management business units. The sub-programme is aimed at ensuring that the required processes and advisory services are in place for decision making and implementation. Consequently, the sub-programme ensures that the characteristics of accountability, transparency, compliance, following the rule of law, responsiveness, effectiveness and efficiency are built into the processes, procedures and policies governing the GPAA, its stakeholders and its decision-making processes. The cluster of business units gives assurance that the GPAA has the capability of withstanding threats that could bring the GPAA or its stakeholders into disrepute.



3.1.1 Programme 1: Support Services (7 years horizon) - Outcomes, Outputs, Performance Indicators and Targets

Table 12 - Programme 1: Support Services Indicators is a representation of Programme 1 Support Services targets from 2021/22 to 2027/28

Links	Outcome	Item	Output	Output Indicators
Priority 6: A capable, ethical and developmental state.	Outcome: 1 Optimal core support	1	Disabled employees	% of disabled employees as total employees
Priority 5: Social cohesion and safe communities				
SDG: Priority for people with disabilities				
SDG 5: Achieve gender equality and empower all women and girls.		2	Female employees at GPAA	% of female employees as total employees
Priority 6: A capable, ethical and developmental state.		3	Black employees at GPAA	% of black employees as total employees
Priority 6: A capable, ethical, and developmental state.		4	Clean audit	Clean audit achieved in Quarter 3 of the next financial year
		5	Valid invoices paid within 30 working days	% of accurate payment of valid invoices paid within 30 working days
		6	Reduced Unclaimed Benefits	% of all amounts in Unclaimed Benefits paid (excluding interest)
	Outcome: 3 Digitised processes	7	Clients reached through Digital Communication channels	% clients reached through Digital Communication channel
	Outcome: 1 Optimal core support	8	ICT systems up-time	% of time ICT system is available during required times per quarter

Table 12 - Programme 1: Support Services Indicators

	Audited/ Actual Performance		Estimated Target	Planned Targets	National Treasury Strategic Framework		
	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28
	5.74%	5.69%	2%	2%	2%	2%	2%
	63.09%	63.29%	51%	51%	51%	51%	51%
	90.20%	90.70%	92%	91%	91%	91%	91%
	Unqualified audit	Unqualified audit with findings	Clean audit	Clean audit	Clean audit	Clean Audit	Clean Audit
	99.32%	99.90%	100%	100%	100%	100%	100%
	42.52%	42.85%	60%	50%	54%	56%	60%
	56.30%	61.47%	55%	68%	68%	68%	68%
	99.89%	99.97%	97%	97%	97%	97%	97%

3.1.2 Programme 1: Support Services – Annual Performance Indicators and quarterly targets for 2024/25

Item	Output Indicators	2023/2024 Planned Target	2024/25 Annual Target	2024/25 Quarterly Targets			
				Q1	Q2	Q3	Q4
1.	% of disabled employees as total employees	2%	2%	2%	2%	2%	2%
2.	% of female employees as total employees	51%	51%	51%	51%	51%	51%
3.	% of black employees as total employees	92%	91%	91%	91%	91%	91%
4.	Clean audit achieved in Quarter 3 of the next financial year	Clean audit	Clean Audit	-	-	Clean Audit	-
5.	% of accurate payment of valid invoices paid within 30 working days	100%	100%	100%	100%	100%	100%
6.	% of all amounts in Unclaimed Benefits paid (excluding interest)	60%	50%	15%	25%	35%	50%
7.	% clients reached through Digital Communication channels	55%	68%	60%	63%	65%	68%
8.	% of time ICT system is available during required times per quarter	97%	97%	97%	97%	97%	97%

Table 13 - Programme 1 Support Services Quarterly Targets

3.1.3 Reconciling performance targets with the Budget and MTEF: Programme 1 Support Services

	2024/25 Budget	2024/25 Quarterly budget				
		Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total
Programme 1: Support Services	953 537	238 384	238 384	238 384	238 384	953 537

Table 14 - Reconciling Performance Target with the Budget and MTEF: Programme 1 Support Services

3.1.4 Explanation of planned performance over the medium-term period

The delivery on outcomes 1: Optimal Core Support, encompasses the entire support structure of Programme 1: Corporate Services, Finance, Strategic Support and Corporate Governance. This ensures that the core business is well supported and governed, which includes areas such as risk management, legal services and internal audit.

Business Enablement delivers on Outcome 2: Capable and Reliable Administration System, to allow for administration of benefits by the core business units. Computer services have increased from R103 million in 2022/2023 to R124 million in 2023/2024 and the main cost drivers for computer services are network data lines, specialised computer services

from SITA and computer software for CIVPEN, ORACLE support and Microsoft Services. ICT Consulting and Professional Services include support on CIVPEN, the ORACLE environment and maintenance and support on applications utilised in the GPAA environment. The ICT CAPEX software budget includes the contractual obligations to procure licenses to allow the GPAA to use the applications and required ICT solutions. The ICT infrastructure is the enabler for Programme 2, Benefits Administration.

The delivery on Outcome 3: Digitised Processes will reduce the cost of mailing and increase interaction with clients on the Self-Service Application. The outcome is meant to bring about a bouquet of digital communication, including Short Messaging Services (SMS), email and WhatsApp. The platform also allows for direct changes of beneficiaries, access to Benefit Statements, IRP5's and pensioner letters, reducing the traffic at the Call and Client - Service Centres.

The 2024/25 budget for Programme 1 is R993.5million and will increase to R1 015.1million in 2026/27. This programme is comprised of five sub-programmes namely: 1.1 Corporate Services; 1.2 Finance; 1.3 Business Enablement; 1.4 Strategic Support; and 1.5 Governance. Service delivery and operational excellence is at the core. The GPAA has since advertised the three level 15 positions, namely Head: Corporate Services, Chief Operations Officer and Chief Financial Officer. Recruitment process is being prioritised.

With regard to Workforce Planning Framework and Key Strategies to attract and recruit a skilled and capable workforce, the GPAA continues to recruit skilled and capable employees within the guidelines of the Human Resource strategy.

The general staff turnover rate of 4.5% in the GPAA is still lower than the norm in the industry, which is approximately 10% with the vacancy rate at 11% as of 31 March 2023.

The GPAA currently has a total of 15 women (which represent 40%) in senior management positions, 119 women that are professionally qualified and experienced specialists and mid-management, 482 women that are skilled technical and academically qualified workers, junior management, supervisors, foremen, and superintendents and 30 women that are

semi-skilled and at discretionary decision making.

The GPAA currently has 181 youths in all levels of the organisation which represents about 17% of the staff complement. The number of youths in total is even higher considering that the internship programme is constituted by the youths.

Regarding capacity building through training: GPAA has training programmes aimed at equipping and empowering Women, Youths and Persons with disabilities through Mentorship, Experiential training and Internship, in house Individual Developmental Plans. There is also financial support through bursaries and affiliation with professional bodies.

Through a concerted effort, the GPAA introduced a Talent Management programme and policy for upskilling young people in the organisation. As a result, the GPAA has introduced a 24-month Internship Programme for graduates which comes with a stipend. At the time of finalisation of the APP, there were 47 interns already at GPAA's employ with an expected number of 120 interns in total for the financial year 2022/2023 and 2023/2024.

Additionally, the GPAA seeks to reasonably accommodate people living with disabilities by ensuring that the lift is fully functional, providing bathrooms for persons with disabilities, ramps for wheelchair use and gender-neutral bathrooms.

The GPAA participates in the global 16 days of activism campaign annually. This campaign aims to address issues of Gender Based Violence in and around the workplace, awareness sessions on sexual harassment and promotes the implementation of the Sexual Harassment policy.

GPAA'S Five-Year-Institutional review highlighted the following findings and plans are in place to implement the recommendations as proposed. The findings are:

- i. Lack of flexibility of the structure and inability to attract and retain the right skills: The current structure restricts the amendment to it. This limits the retention and acquisition of new skills as new positions cannot be added. In response, the GPAA has developed a structure based on its operational needs. The structure has been referred to the Minister of Finance for approval.
- ii. Secondly, it is noted that the GPAA does not have a

strategic direction for the Modernisation Programme: There is a lack of capacity at executive level to drive the Modernisation Programme to meet expectations for the programme. To mitigate this, the organisation will appoint the Executive-levels (Chief Financial Officer, Chief Operations Officer and Head of Corporate Services) who amongst others will prioritise the finalisation of the Modernisation Programme.

- iii. Thirdly, the GPAA is not well geared towards superior client-centricity: The GPAA's client value proposition has a lack of value-add services, such as financial advisory, personalised communication and counselling offered to clients. Centralised functions affect how well clients are served with client-facing centres operating as regional touchpoints. Call Centre and digital offerings exist albeit with challenges. This matter has been placed on a Service Delivery Improvement plan.
- iv. Change management is not embedded within business operations although it is viewed as a strategic enabler.

3.1.5 Programme Resource Considerations

DESCRIPTION	APPROVED BUDGET	MTEF				BUDGET MOVEMENT		
	2023/24	2024/25	2025/26	2026/27	TOTAL	2024/25	2025/26	2026/27
	R '000	R '000	R '000	R '000	R '000	%	%	%
PROGRAMME 1 - SUPPORT SERVICES								
Sub-Programme 1.1 - Corporate Services	63 512	72 347	75 355	78 169	225 871	14%	4%	4%
Sub-Programme 1.2 - Financial Services	87 266	90 435	93 190	96 247	279 872	4%	3%	3%
Sub-Programme 1.3 - Business Enablement	393 040	401 250	403 147	420 050	1 224 448	2%	0%	4%
Sub-Programme 1.4 - Strategic support	290 821	321 534	333 380	347 616	1 002 531	11%	4%	4%
Sub-Programme 1.5 - Governance	65 735	67 971	70 479	73 083	211 533	3%	4%	4%
Total costs	900 373	953 537	975 552	1 015 165	2 944 254	6%	2%	4%

3.2 PROGRAMME 2 – BENEFITS ADMINISTRATION

Purpose

Programme 2 administers a range of benefits and is responsible for client relationship management.

This programme consists of three sub-programmes that administer a range of benefits and offer client relationship management.

Sub-programme 2.1 - Special, Military and Other Benefits (National Treasury)

Administered by the GPAA on behalf of the National Treasury, this sub-programme provides for the payment of non-contributory pensions that are funded by National Treasury to the beneficiaries of various public sector bodies in terms of different statutes, collective bargaining agreements and other commitments. Military Pensions, Post-Retirement Medical Subsidy, Special Pensions and Injury on Duty (IOD) payments are benefits administered under this sub-programme.

Military Pensions and IOD payments provide for the payment of military pension benefits and medical claims arising from treatment for disability, medical assistance devices and other related expenses, in terms of statutory commitments. The business units in sub-programme 2.1 are: Post-Retirement Medical Benefit Administration, Military Pensions; Injury on Duty; Special Pensions; VIP Benefits; and Military Medical Accounts.

The Associated Institutions Pension Fund (AIPF) and Temporary Employees Pension Fund (TEPF) administered by the GPAA for NT Programme 7, are to be amalgamated into the GEPF. Work is underway to proceed with the amalgamation of the TEPF and the GEPF as provided for in the current legislation. A similar process for the amalgamation of the AIPF with the GEPF is also envisaged but requires amendments to current legislation in order to proceed. Once the required legislation has been amended the amalgamation of the AIPF with the GEPF may advance.

Sub-programme 2.2 - Employees Benefits (GEPF)

The GEPF is a contributory defined benefit pension fund that is administered by the GPAA in line with the provision of the Government Employees Pension (GEP) Law of 1996. The GPAA provides the full spectrum of benefit administration services, inclusive of member admissions, contribution collection, member/pensioner/beneficiary maintenance and benefit processing services. Benefit processing starts with a benefit application and ends with the finalisation of the benefit payment from the Fund. These processes are aimed at accurate and timely payment of benefits to GEPF's members and beneficiaries. The business units in Employee Benefits are EB Operations, Membership and Contributions.

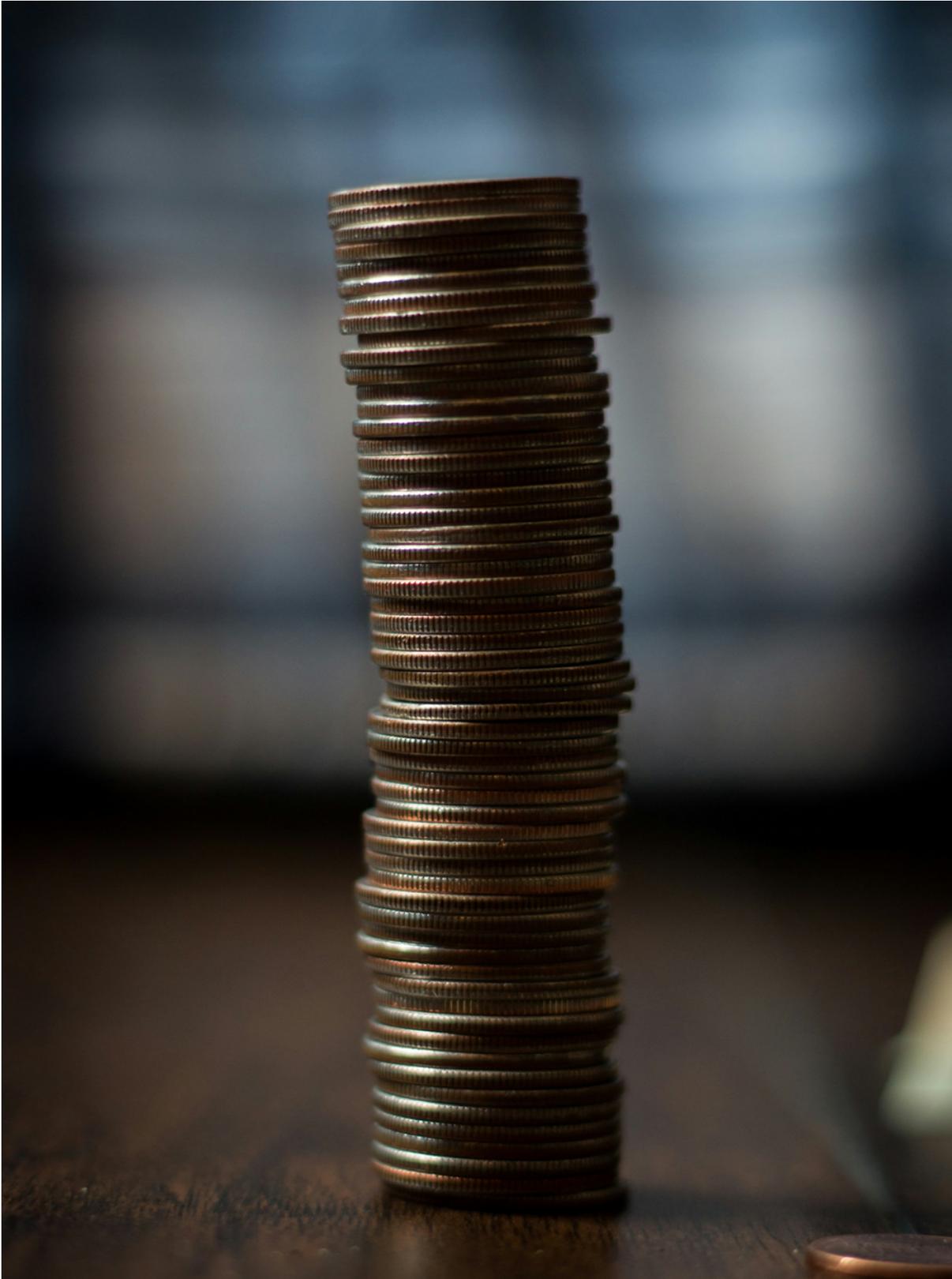
Sub-programme 2.3 – Client Relationship Management

Client Relationship Management (CRM) manages the relationships with all stakeholders including clients, third parties and employer departments by providing high quality and responsive client services based on the principles of Batho Pele. In addition, the CRM unit ensures that all the clients are treated fairly in its daily dealings and also observes the Treating Customers Fairly (TCF) principles. The service channel operations, namely: Call Centre, 11 Mobile Offices, three (3) co-locations and 16 Client Service Centres, ensure effective support of the interface between the GPAA and its client base through accepting, resolving and monitoring all service requests or queries made by clients.

CRM provides employer education and training through its regional and employer liaison units and through outreach programmes such as GEPF Day events, Retiring Member Campaigns and Human Resources and Finance forums. CRM also oversees the document management process to support the GPAA's core functions and business processes. This includes the conversion of paper documents into electronic format, indexing, tracking and storage of these documents.

3.2.1 Programme 2: Benefits Administration (7 years horizon) - Outcomes, Outputs, Performance Indicators and Targets

Table 15 - Programme 2: Benefits Administration is a representation of Programme 2; Benefits Administration targets from 2021/22 - 2027/28.



Links	Outcome	Item	Output	
A capable, ethical and developmental state.	Outcome 7: Payment turn-around time of less than 60 days.	9	Satisfied clients	
		10	Resolved calls	
Priority 5: Social cohesion and safe communities	Outcome 5: Efficient admission management	11	NT members admitted within 14 working days	
		12	GEPF members admitted within 14 working days	
	Outcome 6: Efficient contribution management	13	GEPF contributions received and reconciled by the 22nd of the month	
	Outcome 4: Efficient case management	14	NT clients' records maintained within 21 working days	
		15	NT (suspended pensioners overseas) reinstated within 21 working days after receipt of Life Certificates	
		16	NT membership certificates issued within 30 working days of admission	
	Outcome 7: Payment turn-around time of less than 60 days.	17	NT Death benefits paid within 60 working days after duly completed documents were received.	

Output Indicator	Audited/ Actual Performance		Estimated Target	Planned Target	National Treasury Strategic Framework		
	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28
% of client satisfaction levels	81.25%	94.98%	92%	92%	92%	92%	92%
% of first contact calls resolved versus calls answered excluding escalated calls	45.90%	23.06%	80%	80%	80%	80%	80%
% of NT members admitted within 14 working days	98.82%	99.80%	99%	99%	99%	99%	99%
% of GEPF members admitted within 14 working days	100%	100%	98%	98%	98%	98%	98%
% of GEPF contributions received and reconciled by the 22nd of the month	99.98%	99.96%	97%	97%	97% to member level	97% to member level	97%
% of NT clients' records maintained within 21 working days	99.82%	100%	99%	99%	99%	99%	99%
% of NT suspended pensioners (overseas) reinstated within 21 working days after receipt of Life Certificates	99.56%	100%	99%	99%	99%	99%	99%
% of NT membership certificates issued within 30 working days of admission	99.90%	100%	99%	99%	99%	99%	99%
% of NT Death benefits paid within 60 working days after duly completed documents were received.	93.58%	100%	90%	90%	90%	90%	90%

Links	Outcome	Item	Output	
Priority 5: Social cohesion and safe communities	Outcome 7: Payment turn-around time of less than 60 days.	18	GEPF benefits paid within 45 working days of liability date, excluding Death benefits after receipt of duly completed documents.	
		19	NT benefits paid within 20 working days after receipt of duly completed documents excluding Death benefits	
		20	Visitors serviced	
		21	GEPF Death benefits paid within 60 working days of liability date after duly completed documents were received	
	Outcome 6: Efficient contribution management	22	TEPF contributions received and reconciled by the 22nd of the month.	
		23	AIPF contributions received and reconciled by the 22nd of the month	
	Outcome 7: Payment turn-around time of less than 60 days	24	AIPF benefits paid within a set period (45 working days) of receipt of duly completed documentation	
		25	TEPF benefits paid within a set period (45 working days) of receipt of duly completed documentation	

Table 15 - Programme 2: Benefits Administration

Output Indicator	Audited/ Actual Performance		Estimated Target	Planned Target	National Treasury Strategic Framework		
	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28
% GEPF benefits paid within 45 working days liability date, excluding Death and Unclaimed benefits after receipt of duly completed documents	76.52%	93.81%	87%	87%	87%	87%	87%
% of NT benefits paid within 20 working days after receipt of duly completed documents excluding Death benefits	99.98%	99.99%	90%	90%	90%	90%	90%
% of visitors serviced versus number of visitors	99.86%	99.80%	94%	95%	95%	95%	95%
% of GEPF Death benefits paid within 60 working days of liability date after duly completed documents were received	28.69%	48.68%	60%	50%	54%	56%	60%
% of TEPF contributions received and reconciled by the 22nd of the month.	131.09%	115.12%	97%	97%	97%	97%	97%
% of AIPF contributions received and reconciled by the 22nd of the month.	99.23%	99.12%	97%	97%	97%	97%	97%
% of AIPF benefits paid within a set period (45 working days) of liability date excluding Death and Unclaimed benefits after receipt of duly completed documentation.	16.16%	63.41%	87%	80%	80%	80%	80%
% of TEPF benefits paid within a set period (45 working days) of liability date excluding Death and Unclaimed benefits after receipt of duly completed documentation.	11.11%	30.83%	87%	80%	80%	80%	80%

3.2.2 Programme 2 Benefits Administration – Annual Performance Indicators and Quarterly Targets for 2024/25

Item	Output Indicator	2023/24 Planned Target	2024/25 Annual Target	2024/25 Quarterly Targets			
				Q1	Q2	Q3	Q4
9.	% of client satisfaction levels	90%	92%	92%	92%	92%	92%
10.	% of first contact calls resolved versus calls answered excluding escalated calls	66%	80%	80%	80%	80%	80%
11.	% of NT members admitted within 14 working days	99%	99%	99%	99%	99%	99%
12.	% of GEPF members admitted within 14 working days	98%	98%	98%	98%	98%	98%
13.	% of GEPF contributions received and reconciled by the 22 nd of the month	97%	97%	97%	97%	97%	97%
14.	% of NT clients' records maintained within 21 working days	99%	99%	99%	99%	99%	99%
15.	% of NT suspended pensioners (overseas) reinstated within 21 working days after receipt of Life Certificates	99%	99%	99%	99%	99%	99%
16.	% of NT membership certificates issued within 30 working days of admission	99%	99%	99%	99%	99%	99%
17.	% of NT Death benefits paid within 60 working days after duly completed documents were received	90%	90%	90%	90%	90%	90%
18.	% of GEPF benefits paid within 45 working days liability date, excluding Death and Unclaimed benefits after receiving duly completed documents	87%	87%	87%	87%	87%	87%
19.	% of NT benefits paid within 20 working days after receipt of duly completed documents excluding death benefits	90%	90%	90%	90%	90%	90%
20.	% of visitors serviced versus number of visitors	94%	95%	95%	95%	95%	95%
21.	% of GEPF Death benefits paid within 60 working days of liability date after duly completed documents were received	60%	50%	50%	50%	50%	50%
22.	% of TEPF contributions received and reconciled by the 22 nd of the month.	97%	97%	97%	97%	97%	97%
23.	% of AIPF contributions received and reconciled by the 22 nd of the month.	97%	97%	97%	97%	97%	97%
24.	% of AIPF benefits paid within a set period (45 working days) of liability date excluding Death and Unclaimed benefits after receipt of duly completed documentation.	87%	80%	80%	80%	80%	80%
25.	% of TEPF benefits paid within a set period (45 working days) of liability date excluding Death and Unclaimed benefits after receipt of duly completed documentation.	87%	80%	80%	80%	80%	80%

Table 16 - Programme 2 Benefits Administration Quarterly Targets

3.2.3 Reconciling performance targets with the Budget and MTEF: Programme 2 Benefits Administration

	2024/25 budget	2024/25 Quarterly budget				
		Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total
Programme 2: Benefits Administration	523 244	130 811	130 811	130 811	130 811	523 244

Table 17 - Reconciling Performance Targets with the Budget and MTEF: Programme 2 Benefits Administration

3.2.4 Explanation of planned performance over the medium-term period

In conjunction with Programme 1, Programme 2 aims to deliver on four subsequent outcomes namely:

Outcome 4: Efficient Case Management which posits the assurance to clients and customers that cases are efficiently managed throughout the value chain. This may result in process changes, automation, reduction in touch points and reversals due to errors. This includes the processes between the GPAA and employer departments.

Outcome 5: Efficient Admission Management is crucial and includes, but not limited to the maintenance of member records; updates of beneficiaries; pensioner and beneficiary record maintenance etc. Such services will be made less complex and more accessible to members and pensioners through the Self-Service platform.

Outcome 6: Efficient Contribution Management is imperative to the funding of the GEPF and will be made as efficient as possible. The reconciliation of the collected funds impact on the case turnaround time. The improvement of such processes will ultimately reduce the case life - cycle on the pension, ill health, and death benefit cases.

Outcome 7: Payment Turnaround Time of less than 60 days is the legislative criteria of case aging. The GPAA works to pay claims within 60 days of acquiring the needed and correct documentation from the employer departments. The Pension Case Management system allows for employer departments to have direct access to the GPAA and to submit such documentation electronically. By reducing employer errors and turn - around time, the entire cycle from submission to payment is shortened.

The 2024/25 budget for Programme 2 is R523.2million and will increase to R560.6million in the 2026/27 financial period. This programme is comprised of five sub-programmes namely: Sub-programme 2.1, Civil and Military Pensions; Sub-programme 2.2, Employee Benefits; and Sub-programme 2.3, Client Relationship Management.

3.2.5 Programme Resource Considerations

DESCRIPTION	APPROVED BUDGET	MTEF				TOTAL	BUDGET MOVEMENT		
	2023/24	2024/25	2025/26	2026/27	2024/25		2025/26	2026/27	
	R '000	R '000	R '000	R '000	R '000		%	%	%
PROGRAMME 2 - BENEFIT ADMINISTRATION									
Programme 2.1 Programme 1 National Treasury	72712	76 675	82175	85 940	244 790	5%	7%	5%	
Programme 2.2 - Employee Benefits	104076	110 843	114175	117607	342 625	7%	3%	3%	
Programme 2.3 - Client Relations Management	299186	335 727	346278	357117	1 039 123	12%	3%	3%	
Total costs	475974	523 245	542628	560664	1 626 538	10%	4%	3%	

3.3 EXPENDITURE OVERVIEW

The GPAA has positioned itself as a client-centric institution that will be backed by state-of-the-art systems to support people, process and technology. Hence the high budget allocation for Client Relationship Management as the focus is on members, pensioners and beneficiaries followed by ICT which is technology and modernisation related and lastly, Strategic Support; which provides enabling tools of trade to support the core business which is CRM.

3.3.1 Financial Resources

In its efforts to promote the supply chain principles, the GPAA ensures that women owned companies, according to MTSF preferential procurement framework are prioritised. Currently, the GPAA has 21 companies providing various services that are wholly owned by women and a further 16 companies that are partially owned by women.

The GPAA receives 93 percent of its funding from the Government Employees Pension Fund and 7 percent from the National Treasury. The revenue over the MTEF period is expected to be R1 476.7million for 2024/5, R1 518.1million 2025/26 and R1 575.8million in 2026/27, providing a total of R4 570.7million over the MTEF period.

3.3.2 Modernisation Budget

The implementation of Modernisation solutions, as per the approved roadmap, is ongoing. The approach is workstream based as opposed to deployment of resources (time and material).

Modernisation Projects	2024/25
	R'000
Modernisation Solution Hardware	10 000
Programme Management	2 560
Project Management and Administration	7 500
Organisation Change Management	8 000
Subject Matter Experts	5 000
Existing and Future System Integration	5 000
Contract and SLA Management	1 500
Quality Management and Testing	5 000
TOTAL	44 560

The GPAA is in the process of appointing service provider/s for the execution of the Request for Pricing (RFP) on the above workstreams and solutions.

Feedback on the RFP outcome is due and any updated figures will be included in the revised budget pending the approval from the GEPE.

3.3.2 GPAA Programmes expenditure

The expenditure estimates for Programme 1 and Programme 2 for 2024/2025 financial period is presented on Table 18 - Programme budgets over the 2020/2021 period until 2025/2026:

Programme	Outcome	Audited Results			Allocated Budget	Medium-Term Expenditure Estimate		
		2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
		R'000	R'000	R'000	R'000	R'000	R'000	R'000
Programme 1: Support Services excluding ICT	1. Optimal core support.							
	2. Capable and reliable administration system	834 380	640 990	708 148	900 373	953 537	975 552	1 015 165
	3. Digitised processes							
Programme 2: Benefits Administration	4. Efficient case management							
	5. Efficient admission management							
	6. Efficient contribution management	408 303	342 506	334 790	476 298	523 244	542 628	560 664
	7. Payment turnaround time of less than 60 days							
TOTAL		1 242 681	983 496	1 042 938	1 376 671	1 476 781	1 518 180	1 575 829

Table 18 - Programme budgets

3.3.3 GPAA Economic Classification Expenditure Analysis

The expenditure analysis per economic classification is presented on Table 19 - Economic classification expenditure:

	Audited Outcomes			Approved budget	Medium-Term Expenditure Estimate		
	'000	'000	'000	'000	'000	'000	'000
	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
Current payments							
Personnel remuneration	518,039	511,682	545,896	659 736	692 343	716 410	739 101
Travel and subsistence	4,396	12,912	23,287	29 075	22 438	23 137	23 958
Agency Fees					14 524	15 180	15 868
Entertainment, Grocery and Catering					3 947	4 079	4 222
Insurance					150	150	150
Leases					5 000	5 150	5 304
Maintenance and repairs	5,994	8,185	12,024	27 853	30 028	30 659	31 908
Operating leases	57,766	67,588	70,803	90 173	92 781	96 506	101 720
Professional services and consulting	100,724	120,11	128,88	163 226	147 685	156 352	165 688
Audit fees	3,56	7,027	6,611	6 267	6 200	6 267	6 548
Communication	50,489	58,507	70,018	52 555	55 734	57 605	59 546
Printing and stationery	10,77	22,954	21,161	45 074	43 134	44 543	46 003
Advertising	10,245	8,676	15,944	22 177	21 987	22 936	23 843
Computer services	111,056	62,841	78,489	126 500	130 060	135 847	141 932
Training and staff development	2,579	4,188	7,896	10 637	8 534	8 827	9 162
Other operating expenses	1,687	3,072	5,372	3 569	32 065	33 259	34 317

Table 19 - Economic classification expenditure

3.4 UPDATED KEY RISKS - STRATEGIC RISK MANAGEMENT

The Risk Management unit supports the GPAA to ensure that correct risks are identified and mitigated for the organisation to stand a better chance of achieving its strategic outcomes. The profile of the GPAA's key strategic risks was developed through formalised risk assessment workshops with the GPAA's Executive Committee (EXCO), in conjunction with each Business unit's management team.

Table 20 - GPAA's Strategic Risk Management depicts the GPAA Risk Description, Contributing Factors and Mitigation:

OUTCOMES	RISK NAME	RISK DESCRIPTION	CONTRIBUTING FACTORS	MITIGATION
<ul style="list-style-type: none"> · Payment turn-around time of less than 60 days · Optimal Core Support 	Timely payment of benefits	Failure to pay benefits timely	1. Internal turnaround times within the value chain are not adequately managed to allow for improved service delivery	1. Management Information System provide statistics to monitor turnaround times.
			2. Poor data quality as a result of data inputted incorrectly internally and externally by employer departments submitting documents with information is misaligned/incomplete/incorrect	2. Operational level agreements are in place, however, there is currently no reporting to measure compliance.
			3. Inefficient processes and systems to enable effective payment of benefits	3. There is a backlog report circulated daily.
			4. Inadequate business continuity plans to recover critical systems and functions in case of a disaster/crisis/emergency	4. Performance monitoring against the SLA. 5. Simplification of key MIS reports to manage timely payment of benefits on OBIEE dashboards and manuals available.
			5. Lack of agility which could be linked to multitasking (Inadequate transferrable skills and institutional know how and ability to adapt)	6. Benefits Statements exception report in place.
			6. Ineffective performance management i.e. performance targets set too low, ineffective management of overtime, inadequate monitoring controls by supervisors to identify long outstanding claims	7. There is a validation report to determine what information can be relied upon. 8. Strategy to use CLOs to clear the Benefits Statements exception report is in place. 9. ICT data quality report in place to highlight data quality issues for cleansing. 10. Data quality managed through the data governance committee.

OUTCOMES	RISK NAME	RISK DESCRIPTION	CONTRIBUTING FACTORS	MITIGATION
<ul style="list-style-type: none"> · Capable and reliable administration system · Digitised processes · Efficient case management · Efficient admission management · Efficient contribution management 	Change Management	Inadequate ownership to manage change within the organisation (Change risk-averse culture)	1.Change management treated as an event instead of a process that is embedded in business operations	There is a Change Management function within the organisation however it's not adequately resourced.
			2.Change management not seen as a strategic enabler	
			3.Inadequate change management strategy/ ineffective implementation and lack of monitoring	
			4. Insufficient resources to drive change management	
Payment turn-around time of less than 60 days	Stakeholder Pressure	Stakeholder pressure	1.Employer departments not complying to timelines for submitting documents or submitting incorrect/incomplete documents	1. Client Liaison Officers appointed to follow up and support employer departments. 2. Quarterly stakeholder meetings with Chief Directors for employer departments with high rejections. 3.Attendance of targeted HOD forums by CD: CRM. 4.Methodology to identify the employers with high rejections in place and implemented. Consultation between GEPF and GPAA during the SLA review. GPAA participation in the consultative forum between GPAA/GEPF/ DPSA/NT
			2.Inadequate interventions to deal with worst performing employer departments	
			3.Idealistic targets and turn-around times from Client Departments i.e. GEPF and National Treasury. SLA targets not aligned to institutional capacity	
			4.Lack of a formal process to hold employer departments accountable	
<ul style="list-style-type: none"> · Capable and reliable administration system · Digitised processes · Efficient case management · Efficient admission management · Efficient contribution management · Payment turn-around time of less than 60 days 	Technology Risk	Technology obsolescence, which might impact negatively on strategy execution	Pension administration system (CIVPEN) will reach end of life in two (2)years. There is currently no contingency plan in place should the system collapse before it is replaced	1. There is a Disaster Recovery Plan (DRP) in place for CIVPEN. 2. An assessment was conducted to determine the extent to which the CIVPEN system can be stretched beyond its life span.

OUTCOMES	RISK NAME	RISK DESCRIPTION	CONTRIBUTING FACTORS	MITIGATION
Capable and reliable administration system	Competition Risk	Competition by the private pension administrators	1.The pension industry is dominated by the private sector which is more agile than the public sector whilst the GPAA is regulated by rules of the public sector, which limit flexibility and competitiveness.	Continuous improvement of business processes and systems to be more efficient
			2.Ineffective processes and systems	
			3.Requirement for government departments to use SITA for ICT services which limits the GPAA's ability to be flexible and efficient.	
			4.Inability to attract and retain the right skills in the market due to uncompetitive remuneration structure	
			5.Misaligned operational form	
Optimal core support	Vacant critical and senior leadership positions	Delays in the filling of critical and senior leadership positions	Extended recruitment process due to the DPSA requirements	<p>Recruitment process for leadership positions underway.</p> <p>The different Chief Directors within the organisation have taken on the responsibility for the work until all critical leadership positions are filled.</p> <p>There are regular follow up meetings with the Human Resource unit to expedite the recruitment process.</p>

Table 20 - GPAA's Strategic Risk Management

3.5 PUBLIC ENTITIES

Name of Public Entity	Entity Mandate	Outcome	Current Annual Budget
Not Applicable			

3.6 INFRASTRUCTURE PROJECTS

No.	Project Name	Programme	Project description	Output	Project start date	Project completion date	Total Estimated cost	Current year Expenditure
Not Applicable								

3.7 PUBLIC PRIVATE PARTNERSHIP

PPP	Purpose	Outputs	Current Value of Agreement	End Date of Agreement
Not Applicable				

3.8 DISTRICT DEVELOPMENT MODEL PROJECT

No.	Project Name	Programme	Project description	Output	Project start date	Project completion date	Total Estimated cost	Current year Expenditure
Not Applicable								



**PART D:
TECHNICAL
INDICATOR
DESCRIPTIONS**

The technical indicator descriptions for each performance indicator are depicted in Table Indicators 1 to 25.

Indicator 1 - Owner – Chief Director: Human Resources Management

Indicator title	% of disabled employees as a total employee
Definition	<p>The indicator measures the number of employees with disabilities as a percentage of all GPAA employees.</p> <p>A disability is any continuing condition that restricts everyday activities, which is attributable to an intellectual, psychiatric, cognitive, neurological, sensory, or physical impairment or a combination of those impairments.</p>
Purpose / importance	To track the percentage of disabled employees at GPAA
Source/collection of data	Declaration forms, Employment Equity report and PERSAL report
Method of calculation/ assessment	<p>% of disabled employees = number of employees with disabilities as a percentage of total number of GPAA employees</p> <p>% of disabled employees = number of disabled employees / GPAA Total employees*100</p>
Means of verification	Employment equity status report that reflects the GPAA's employees with disabilities
Assumptions	<ul style="list-style-type: none"> • That employees will disclose their disability. • The recruitment process will yield suitably qualified disabled candidates
Disaggregation of beneficiaries (where applicable)	Target for people with disabilities
Spatial transformation (where applicable)	N/A
Data limitations	System downtime and availability
Calculation type	Non-cumulative
Reporting cycle	Quarterly
Desired performance	Increased employment of employees with disabilities

Indicator 2 - Owner – Chief Director: Human Resources Management

Indicator title	% of female employees as a total employee
Definition	The indicator measures the percentage of female employees versus all GPAA employees
Purpose / importance	To track the percentage of female employees at GPAA
Source/collection of data	Employment Equity plan report and the PERSAL report.
Method of calculation/ assessment	Total number of females employees as a percentage of the total number of GPAA employees $\% \text{ of female employees as total employees} = \text{number of Female employees} / \text{GPAA total employees} * 100$
Means of verification	Review of Employment Equity status report that reflect the total number of female employees at the GPAA.
Assumptions	That the recruitment process will yield suitably qualified female candidates.
Disaggregation of beneficiaries (where applicable)	Target for women
Spatial transformation (where applicable)	N/A
Data limitations	System downtime and availability
Calculation type	Non-cumulative
Reporting cycle	Quarterly
Desired performance	Increased employment of female employees

Indicator 3 - Owner – Chief Director: Human Resources Management

Indicator title	% of black employees as a total employee
Definition	<p>The indicator measures the number of Black employees as a percentage of all GPAA employees.</p> <p>Black employees are defined by the Employment Equity Act 55 of 1998</p> <p>The B-BBEE Act defines “black people” as follows:</p> <p>“Black people are a generic term which means Africans, Chinese, Coloureds and Indians –</p> <ul style="list-style-type: none"> · Who are citizens of the Republic of South Africa by birth or descent; or · Who became citizens of the Republic of South Africa by naturalisation-Before 27 April 1994; or · On or after 27 April 1994 and who would have been entitled to acquire citizenship by naturalisation prior to that date.
Purpose/importance	To ensure that suitably black employees have equal opportunities to employment and are equitably represented
Source/collection of data	Employment Equity plan report and the PERSAL report
Method of calculation	<p>Total number of Black employees as a percentage of the total number of GPAA employees</p> $\% \text{ of Black employees as total employees} = \frac{\text{nBlack employees}}{\text{GPAA Total employees}} * 100$
Means of verification	Review of Employment Equity status report that reflect the total number of black employees at the GPAA.
Assumptions	The recruitment process will yield suitably qualified Black candidates.
Disaggregation of beneficiaries (where applicable)	N/A
Spatial transformation (where applicable)	N/A
Data limitations	System downtime and availability
Calculation type	Non-cumulative
Reporting cycle	Quarterly
Desired performance	Increased employment of Black employees

Indicator 4 - Owner - Chief Financial Officer

Indicator title	Clean audit achieved in Quarter 3 of the next financial year
Definition	<p>The indicator measures the achievement of an unqualified audit by the Auditor-General of South Africa (AGSA).</p> <p>Clean audit relates to three aspects: that financial statements are free from material misstatements; that there are no material findings on the annual performance report; and lastly, that there are no material findings on compliance with key legislation.</p>
Purpose / importance	To track financial performance of the GPAA
Source / collection of data	Management report by AGSA
Method of calculation	View the final audit opinion by AGSA on the final Management report
Means of verification	View of Auditor' General's final Management report issued.
Assumptions	That there are no material findings on the financial statements, reporting on performance objectives or non-compliance with legislations
Disaggregation of beneficiaries (where applicable)	N/A
Spatial transformation (where applicable)	N/A
Data limitations	System downtime and availability
Calculation type	Non-cumulative
Reporting cycle	Annually
Desired performance	Clean audit outcome for the GPAA

Indicator 5 - Owner – Chief Financial Officer

Indicator title	% of accurate payment of valid invoices paid within 30 working days
Definition	<p>The indicator measures the turnaround time for payment of invoices. Invoice is a document given to the GPAA by a service provider to collect payment for services rendered.</p> <p>Accurate invoices refer to valid invoices which are supported by corresponding Purchase Order and delivery note/progress report.</p>
Purpose / importance	To track whether payment of invoices is made within 30 working days
Source/collection of data	Accounts Payable Module
Method of calculation	<p>Total number of valid and accurate invoices paid within 30 working days as a percentage of all invoices that were received during the reporting period.</p> <p>$\% \text{ of valid and accurate invoices paid within 30 working days} = \text{total accurate invoices paid by the GPAA versus date valid and accurate invoices were received} * 100$</p>
Means of verification	Review the accounts payable report for the total number of valid and accurate invoices paid within 30 working days against the total number of invoices that were paid during the reporting period.
Assumptions	That invoices are accurate and valid. Invoice is supported by corresponding Purchase Order and Delivery note/Progress report.
Disaggregation of beneficiaries (where applicable)	N/A
Spatial transformation (where applicable)	N/A
Data limitations	System downtime and availability
Calculation type	Non-cumulative
Reporting cycle	Quarterly
Desired performance	Accurate invoices paid within 30 working days

Indicator 6 - Owner – Chief Financial Officer

Indicator title	% of all amounts in the unclaimed benefits paid (excluding interest)
Definition	<p>The indicator measures the decrease of the Unclaimed Benefits amount.</p> <p>Unclaimed Benefits are defined as:</p> <p>Those benefits where the mode of exit and the last day of service are known but the benefit is not paid within the 24 months of the last day of service for whatever reason except:</p> <ul style="list-style-type: none"> o Benefits withheld pending the outcome of criminal or civil proceedings in terms of section 37D of the Pension Funds Act until the date of a court judgment in respect thereof, or the date on which a written admission of liability by the member is received by the Fund; or o A pending benefit transfer to another retirement fund.
Purpose / importance	To track the percentage of Unclaimed Benefits paid excluding interest
Source / collection of data	Ledger, Unclaimed Benefits report
Method of calculation	<p>The total Unclaimed Benefits amount paid in the current reporting period relating to the baseline (prior year balance) divide by (Unclaimed Benefits amounts at the beginning of the current reporting period multiplied by 100).</p> <p>$\% \text{ of all amounts in Unclaimed Benefits paid (excluding interest)} = \frac{\text{Total Unclaimed Benefits amount paid in the current reporting period relating to the baseline (prior year balance)}}{\text{(unclaimed benefits amounts at the beginning of the current reporting period multiplied by 100)}}$</p>
Means of verification	Review the total Unclaimed Benefits report for the unclaimed benefits amounts paid at the end of current reporting period in relation to the baseline (prior year balance) against (the Unclaimed Benefits amounts at the beginning of the current reporting period)
Assumptions	<p>That we have tracing capacity, no fraud attempts and internal control limitations</p> <p>97% system availability</p> <p>Limited increase in PDP cases</p> <p>No material impact during disasters or business disruption</p>
Disaggregation of beneficiaries (where applicable)	N/A
Spatial transformation (where applicable)	N/A
Data limitations	HR capacity constraints.
Calculation type	Cumulative
Reporting cycle	Quarterly
Desired performance	Decreased Unclaimed Benefits account

Indicator 7 - Owner – Director: Communication Services

Indicator title	% clients reached through digital communication channels
Definition	Digital communication refers to the interaction between the GPAA and clients using the internet and different digital platforms of choice like Self-Service analytics.
Purpose / importance	To track percentage of clients reached through digital communications channels.
Source/collection of data	Client contact ability report (Oracle BI), WhatsApp, Email, Short Messaging Services and Self-Service platforms.
Method of calculation	<p>% clients reached through Digital Communication channels = total number of GPAA clients reached through any one of the available digital channels as a percentage of the total number of GPAA clients reached.</p> <p>Reach % = Average nClients on (WhatsApp, email, Short Messaging Services, self-service platform) /Total nClients * 100</p>
Means of verification	<p>Review self-service report for the registered clients.</p> <p>Review the Channel Dashboard obtained from Oracle BI portal.</p>
Assumptions	That Digital Communication channel applications are developed and that we have correct data.
Disaggregation of beneficiaries (where applicable)	N/A
Spatial transformation (where applicable)	N/A
Data limitations	System downtime and availability
Calculation type	Cumulative
Reporting cycle	Quarterly
Desired performance	Improved client experience

Indicator 8 - Owner - Chief Information Officer

Indicator title	% of time ICT system is available during required times per quarter
Definition	<p>Ensure ICT systems' availability during working hours and improved network performance on all applications.</p> <p>An ICT system is a set-up consisting of hardware, software, data and the people who use them. It commonly includes communication technology, such as the internet.</p>
Purpose / importance	To track the percentage of time system is available during required times per quarter
Source / collection of data	OMD Monitoring solution
Method of calculation	<p>Determine system availability within the specified business hours.</p> <p>Systematically calculated. The actual is determined by the monitoring solution based on the overall system availability monthly</p>
Means of verification	View and analyse OMD reports used for system availability
Assumptions	Infrastructure is supported and BC in place to ensure minimal facility interruptions
Disaggregation of beneficiaries (where applicable)	N/A
Spatial transformation (where applicable)	N/A
Data limitations	System downtime and availability
Calculation type	Non-cumulative
Reporting cycle	Quarterly
Desired performance	<p>11 hours (97%)</p> <p>To ensure the availability of business systems</p>

Indicator 9 - Owner – Chief Director: Client Relationship Management

Indicator title	% of client satisfaction levels
Definition	<p>Percentage of CRM clients' satisfaction levels that have been achieved during the reporting period as per the following channels (Call Centre, E-mail, Mobile, Outreach activities, Walk-in Centre).</p> <p>Client satisfaction level is a measure of whether GPAA services meet or surpass customer expectation.</p> <p>$n_{\text{Call Centre}} + n_{\text{Emails}} + n_{\text{Mobile}} + n_{\text{Outreach}} + n_{\text{Walkincentre}} = \text{variables}$</p>
Purpose / importance	To track percentage of GPAA's client's satisfaction for the service received.
Source / collection of data	Client Satisfaction survey reports
Method of calculation	<p>Calculation of client satisfaction Index (CSI)</p> <p>For each channel of communication, the CSI = Weight (W)* survey results</p> <p>Weights:</p> <p>Email = 5%</p> <p>Walk in Centre= 30%</p> <p>Outreach (average of roadshows and retirement member campaign) = 25%</p> <p>Call Centre = 15%</p> <p>Mobile= 25%</p> <p>Total variables population = %Weight (Call Centre + Emails + Mobile + Outreach + Walk-in Centre).</p>
Means of verification	Review the client satisfaction survey results/reports as per the following channels (Call Centre, E-mails, Mobile, Outreach, Walk-in Centre).
Assumptions	<p>That there would be high response rate and clients' willingness to participate in the survey.</p> <p>That there is no material impact during disasters or business disruption</p>
Disaggregation of beneficiaries (where applicable)	N/A
Spatial transformation (where applicable)	N/A
Data limitations	System downtime and availability
Calculation type	Non-cumulative
Reporting cycle	Quarterly
Desired performance	Increased satisfaction of client experience for the CRM programme

Indicator 10 - Owner – Chief Director: Client Relationship Management

Indicator title	% of first contact calls resolved versus calls answered excluding escalated calls
Definition	<p>The indicator measures the percentage of first contact calls resolved versus calls answered at the Call Centre on queries excluding escalated calls.</p> <p>Resolved calls are queries that have been resolved on first contact with the Call Centre and this could include but not limited to IRP5s, member letters, updates on beneficiaries and Benefits Statement and Estimate Certificate.</p> <p>Escalated calls are on queries where progress on case management is expected, and the agent has sent an email escalation to internal value chain owners.</p>
Purpose / importance	To track the percentage of calls resolved at first contact by Call Centre agents.
Source / collection of data	Agent Call Handling percentage report (System Generated)
Method of calculation	$\% \text{ of first contact calls resolved versus calls answered excluding escalated calls} = \frac{\text{total number of first contact calls resolved}}{\text{total number of calls answered minus escalated calls}} \times 100$
Means of verification	Review agent's wrap up data report for resolved calls.
Assumptions	<p>97% System up-time</p> <p>No material impact during disasters or business disruption</p> <p>55% of GEPF clients reached through Self- Service</p> <p>Workflow implemented as on the strategic map</p>
Disaggregation of beneficiaries (where applicable)	N/A
Spatial transformation (where applicable)	N/A
Data limitations	System downtime and availability
Calculation type	Non-cumulative
Reporting cycle	Quarterly
Desired performance	Increased efficiency (Call Centre)

Indicator 11 - Owner – Chief Director: Special, Military and Other Benefits

Indicator title	% of NT members admitted within 14 working days
Definition	The indicator measures the percentage of NT members admitted within a specified period of time
Purpose / importance	To track the percentage of NT members admitted within 14 working days
Source / collection of data	CIVPEN for manual admission, turnaround times excels
Method of calculation	Total members admitted within 14 working days after receipt of duly completed documentation against all admissions for the period (Calculate difference between date of receipt at GPAA and GPAA response date) $\% \text{ of NT members admitted within 14 days} = \frac{\text{Total number of NT members admitted within 14 working days after receipt of duly completed documentation}}{\text{Total NT members received for the period}} * 100$
Means of verification	Review turnaround times report (spreadsheets) for date of receipt of information/ forms compared to processing date of admissions on Civpen.
Assumptions	Clean data No material impact during disasters or business disruption
Disaggregation of beneficiaries (where applicable)	N/A
Spatial transformation (where applicable)	N/A
Data limitations	System downtime and availability
Calculation type	Non-cumulative
Reporting cycle	Quarterly
Desired performance	Admit all members within 14 working days after receipt of duly completed documentation

Indicator 12 - Owner – Chief Director: Employee Benefits

Indicator title	% of GEPF members admitted within 14 working days
Definition	The indicator measures the percentage of GEPF members admitted within a specified period of time.
Purpose / importance	To track GEPF members admitted within a specified period of time.
Source / collection of data	CIVPEN for manual admission, turnaround times excels.
Method of calculation	Total members admitted within 14 working days after receipt of the information at GPAA against all admissions for the period (calculate difference between date of receipt at GPAA and GPAA response date) % of GEPF members admitted within 14 working days = Total number of GEPF members admitted within 14 working days after receipt of duly completed information / Total GEPF members received for the period*100
Means of verification	Review turnaround times report (spreadsheets) for date of receipt of information (duly completed) /forms compared to processing date of admissions on Civpen.
Assumptions	Clean data No material impact during disasters or business disruption
Disaggregation of beneficiaries (where applicable)	N/A
Spatial transformation (where cable)	N/A
Data limitations	System downtime and availability
Calculation type	Non-cumulative
Reporting cycle	Quarterly
Desired performance	Admit all members within 14 working days after receipt of information

Indicator 13 - Owner – Chief Director: Employee Benefits

Indicator title	% of GEPF contributions received and reconciled by the 22nd of the month
Definition	The indicator measures the percentage of GEPF contributions received and reconciled on the set date monthly.
Purpose / importance	To track the percentage of GEPF contribution received and reconciled on the set date.
Source / collection of data	Signed off consolidated contribution reconciliation reports for both electronic (Fin Recon reports) and manual contributions reconciled to the general ledger.
Method of calculation	Contributions received for participating employers reconciled by the 22nd of the following month. $\% \text{ of GEPF contributions received and reconciled by the 22nd of the month} = \frac{\text{contribution reconciled by the 22nd of the month}}{\text{contributions payable}} * 100$
Means of verification	Review the consolidated contribution reconciliation reports for both electronic (Fin Recon reports) and manual contributors to be reconciled to the general ledger
Assumptions	Employer departments compliance Clean data No material impact during disasters or business disruption
Disaggregation of beneficiaries (where applicable)	N/A
Spatial transformation (where applicable)	N/A
Data limitations	System downtime and availability
Calculation type	Non-cumulative
Reporting cycle	Quarterly
Desired performance	Track collection of Fund contribution revenue to ensure Fund solvency. Minimum target 97% of reconciliations finalised by the 22nd of the following month. Maximum target 99% of reconciliations finalised by the 22nd of the following month.

Indicator 14 - Owner – Chief Director: Special, Military and Other Benefits

Indicator title	% of NT clients records maintained within 21 working days
Definition	The indicator measures the percentage of NT clients' records maintained within 21 working days
Purpose / importance	To track NT clients' records maintained within 21 working days
Source / collection of data	CIVPEN updated with records received from clients and maintained as such.
Method of calculation	<p>NT clients' records requiring maintenance (updating) maintained (updated) within 21 working days against total number of all client's records requiring maintenance (updating).</p> <p>$\% \text{ of NT client's records maintained within 21 working days} = \frac{\text{NT clients records requiring maintenance (updating) maintained (updated) within 21 days}}{\text{NT pensioner records requiring maintenance (updating) received}} * 100$</p>
Means of verification	Review CIVPEN report for total number of NT clients' records maintained on the system and on evidence submitted.
Assumptions	<p>Clean data</p> <p>No material impact during disaster or business disruption</p>
Disaggregation of beneficiaries (where applicable)	N/A
Spatial transformation (where applicable)	N/A
Data limitations	System downtime and availability
Calculation type	Non-cumulative
Reporting cycle	Quarterly
Desired performance	Improved maintenance of all NT client's records

Indicator 15 - Owner – Chief Director: Special, Military and Other Benefits

Indicator title	% of NT suspended pensioners (overseas) reinstated within 21 working days after receipt of Life Certificates
Definition	The indicator measures the percentage of NT suspended pensioners (overseas) that were reinstated after receipt of Life Certificates
Purpose / importance	To track the percentage of NT suspended pensioners (overseas) that were reinstated after receipt of Life Certificates
Source / collection of data	Excel report with names of reinstated pensioner Life Certificates
Method of calculation	Total number of NT suspended pensioners (overseas) reinstated after receipt of Life Certificates against total number of Life certificates from suspended pensioners received. % of NT suspended pensioners (foreign or manual pensioners) reinstated within 21 working days after receipt of Life Certificates = NT suspended pensioners (foreign or manual pensioners) reinstated within 21 working days after receipt of Life Certificates / NT suspended pensioners' (foreign or manual pensioners) received * 100
Means of verification	Review Excel report. Comparison between those reinstated within 21 working days of receipt of Life Certificates and all those whose Life Certificates were received.
Assumptions	97% system uptime and availability
Disaggregation of beneficiaries (where applicable)	N/A
Spatial transformation (where applicable)	N/A
Data limitations	System downtime and availability
Calculation type	Non-cumulative
Reporting cycle	Quarterly
Desired performance	Timeous reinstatement of all overseas pensioners whose life certificates have been received.

Indicator 16 - Owner – Chief Director: Special, Military and Other Benefits

Indicator title	% of NT membership certificates issued within 30 working days of admission
Definition	The indicator measures the percentage of NT membership certificates issued within 30 working days of admission.
Purpose / importance	To track whether NT membership certificates are issued on time (within 30 working days) after admission.
Source / collection of data	Letters from member's file or excel of newly admitted members.
Method of calculation	Total number of members issued with membership certificates within 30 working days of admission against total number of members admitted. % of NT membership certificates issued within 30 working days of admission = NT membership certificates issued within 30 working days of admission / NT total number of members admitted * 100
Means of verification	Review the newly admitted members report (excel) for the turnaround time taken to issue membership certificates or letters; the variables to be taken into consideration is date when a member was admitted and the date when the membership certificate was issued.
Assumptions	97% system uptime and availability
Disaggregation of beneficiaries (where applicable)	N/A
Spatial transformation (where applicable)	N/A
Data limitations	System downtime and availability
Calculation type	Non-cumulative
Reporting cycle	Quarterly
Desired performance	Increase in the number of membership certificates issued on time.

Indicator 17 - Owner – Chief Director: Special, Military and Other Benefits

Indicator title	% of NT death benefits paid within 60 working days after duly completed documents were received
Definition	The indicator measures the percentage of NT death benefits paid within the legislated timeframes (within 60 working days) (Special Pensions)
Purpose / importance	To track NT death benefits paid within the legislated timeframes (within 60 working days) (Special Pensions)
Source / collection of data	CIVPEN and OBIEE
Method of calculation	Total Death benefits paid within 60 working days of receipt of correctly completed documents as a percentage of claims paid during reporting period (Special Pensions) $\% \text{ of NT Death benefits paid within 60 working days after duly completed documents were received} = \frac{\text{Total Deaths benefits paid within 60 working days of receipt of correctly completed documents (Special Pensions)}}{\text{Total Death benefits (Special Pensions) received}} * 100$
Means of verification	Review OBIEE report for turnaround time taken to process received death cases, variables to be taken into consideration is date when death case is received and date when death case is paid and compared to CIVPEN record.
Assumptions	97% system uptime and availability
Disaggregation of beneficiaries (where applicable)	N/A
Spatial transformation (where applicable)	N/A
Data limitations	System downtime and availability
Calculation type	Non-cumulative
Reporting cycle	Quarterly
Desired performance	Increase the number of death benefits that were paid on time

Indicator 18 - Owner – Chief Director: Employee Benefits

Indicator title	% GEPF benefits paid within 45 working days of liability date, excluding Death and Unclaimed benefits after receiving duly completed documents
Definition	The indicator measures the benefits that have been paid within the specified time frames during the reporting period (excluding death and Unclaimed benefits)
Purpose / importance	To track whether benefits are paid within the specified timeframes
Source / collection of data	OBIEE, CIVPEN
Method of calculation	Total benefits paid (excluding death benefits) within 45 working days of receipt of duly completed documents as a percentage of claims paid during reporting period. $\% \text{ of GEPF benefits paid within 45 working days of liability date (excluding Death and Unclaimed benefits) after duly completed documents} = \frac{\text{Total GEPF benefits paid (excluding Death and Unclaimed benefits) within 45 working days of liability date on receipt of duly correctly completed documents}}{\text{Total GEPF benefits received (excluding Death and Unclaimed benefits)}} * 100$
Means of verification	Review a total list of members paid against total number of those paid within 45 working days from the OBIEE summary report received (excluding death and unclaimed benefits) and compare against CIVPEN records.
Assumptions	97% system up-time and availability No material impact during disasters or business disruption
Disaggregation of beneficiaries (where applicable)	N/A
Spatial transformation (where applicable)	N/A
Data limitations	System downtime and availability
Calculation type	Non-cumulative
Reporting cycle	Quarterly
Desired performance	Increase in the percentage of benefits that were paid on time

Indicator 19 - Owner – Chief Director: Special, Military and Other Benefits

Indicator title	% of NT benefits paid within 20 working days after duly completed documents, excluding Death benefits
Definition	The benefits paid to beneficiaries have been paid within the legislated timeframes (within 20 working days)
Purpose / importance	To track whether benefits are paid within the specified timeframes during the reporting period
Source / collection of data	CIVPEN and OBIEE
Method of calculation	Total paid within 20 working days of receipt of correctly completed documents as a percentage of claims paid during reporting period. $\% \text{ of NT benefits paid within 20 working days (excluding Death benefits)} = \frac{\text{Total NT benefits paid within 20 working days of receipt of correctly completed documents}}{\text{Total NT benefits received}} * 100$
Means of verification	Review OBIEE report for the turnaround time taken to process newly received cases against CIVPEN records. Variables that are taken into consideration is date when case is received and date when case is paid.
Assumptions	97% system uptime and availability
Disaggregation of beneficiaries (where applicable)	N/A
Spatial transformation (where applicable)	N/A
Data limitations	System downtime and availability
Calculation type	Non-cumulative
Reporting cycle	Quarterly
Desired performance	Increase in the percentage of benefits that were paid on time

Indicator 20 - Owner – Chief Director: Client Relationship Management

Indicator title	% of visitors serviced versus number of visitors
Definition	The indicator measures the percentage of serviced visitors in the Walk-in Centre
Purpose / importance	To track the percentage of serviced visitors in the Walk-in Centre
Source / collection of data	QMatic Management report (System generated)
Method of calculation	$\% \text{ of visitors serviced versus number of visitors} = \frac{\text{total number of visitors serviced}}{\text{total number of visitors}} * 100$
Means of verification	Review QMS system report for tickets issued versus tickets serviced.
Assumptions	97% system up-time and availability No material impact during disasters or business disruption Workflow implemented as in the strategic map 55% of GEPF clients using self service
Disaggregation of beneficiaries (where applicable)	N/A
Spatial transformation (where applicable)	N/A
Data limitations	System downtime and availability
Calculation type	Non-cumulative
Reporting cycle	Quarterly
Desired performance	Increased efficiency (Walk-in Centre)

Indicator 21 - Owner – Chief Director: Employee Benefits

Indicator title	% of GEPF Death benefits paid within 60 working days of liability date after duly completed documents were received
Definition	The indicator measures the percentage of GEPF death benefits paid within the legislated timeframes (within 60 working days)
Purpose / importance	To track GEPF death benefits paid within the legislated timeframes (within 60 working days)
Source / collection of data	CIVPEN and OBIEE
Method of calculation	Total Deaths benefits paid within 60 working days of liability date after receipt of duly correctly completed documents as a percentage of claims paid during reporting period $\% \text{ of GEPF Death benefits paid within 60 working days of liability date after duly completed documents were received} = \frac{\text{Total Deaths benefits paid within 60 working days of liability date after receipt of duly correctly completed documents}}{\text{Total Death benefits received}} * 100$
Means of verification	Review a total list of death benefits paid against total number of those paid within 60 working days from the OBIEE summary report received and compare against CIVPEN records.
Assumptions	System up-time and availability as per SLA requirement No material impact during disasters or business disruption
Disaggregation of beneficiaries (where applicable)	N/A
Spatial transformation (where applicable)	N/A
Data limitations	System downtime and availability
Calculation type	Non-cumulative
Reporting cycle	Half-yearly
Desired performance	Increase the number of Death benefits that were paid on time

Indicator 22 - Owner – Chief Director: Employee Benefits

Indicator title	% of TEPF contributions received and reconciled by the 22nd of the month
Definition	The indicator measures the percentage of TEPF contributions received and reconciled on the set date monthly.
Purpose / importance	To track the percentage of TEPF contribution received and reconciled on the set date.
Source / collection of data	Signed off consolidated contribution reconciliation reports for both electronic (Fin Recon reports) and manual contributors reconciled to the general ledger
Method of calculation	Contributions received for participating employers reconciled by the 22nd of the following month $\% \text{ of TEPF contributions received and reconciled by the 22nd of the month} = \frac{\text{contribution reconciled by the 22}}{\text{contributions payable}} * 100$
Means of verification	Review the consolidated contribution reconciliation reports for both electronic (Fin Recon reports) and manual contributors to be reconciled to the general ledger
Assumptions	Employer departments compliance.
Disaggregation of beneficiaries (where applicable)	N/A
Spatial transformation (where applicable)	N/A
Data limitations	System downtime and availability
Calculation type	Non-cumulative
Reporting cycle	Quarterly
Desired performance	Track collection of Fund contribution revenue to ensure Fund solvency.

Indicator 23 - Owner – Chief Director: Employee Benefits

Indicator title	% of AIPF contributions received and reconciled by the 22nd of the month
Definition	The indicator measures the percentage of AIPF contributions received and reconciled on the set date monthly
Purpose / importance	To track the percentage of AIPF contribution received and reconciled on the set date.
Source / collection of data	Signed off consolidated contribution reconciliation reports for both electronic (Fin Recon reports) and manual contributors reconciled to the general ledger
Method of calculation	Contributions received for participating employers reconciled by the 22nd of the following month $\% \text{ of AIPF contributions received and reconciled by the 22nd of the month} = \frac{\text{contribution reconciled by the 22nd of the month}}{\text{contributions payable}} * 100$
Means of verification	Review the consolidated contribution reconciliation reports for both electronic (Fin Recon reports) and manual contributors to be reconciled to the general ledger
Assumptions	Employer departments compliance.
Disaggregation of beneficiaries (where applicable)	N/A
Spatial transformation (where applicable)	N/A
Data limitations	System downtime and availability
Calculation type	Non-cumulative
Reporting cycle	Quarterly
Desired performance	Track collection of Fund contribution revenue to ensure Fund solvency.

Indicator 24 - Owner – Chief Director: Employee Benefits

Indicator title	% of AIPF benefits paid within a set period (45 working days) of liability date excluding Death and Unclaimed benefits after receipt of duly completed documentation.
Definition	The indicator measures the percentage of AIPF benefits that have been paid within the specified timeframes during the reporting period (excluding Death and Unclaimed benefits).
Purpose / importance	To track whether AIPF benefits are paid within the specified timeframes
Source / collection of data	OBIEE, CIVPEN
Method of calculation	Total benefits paid within 45 working days of receipt of duly completed documents as a percentage of claims paid during reporting period. % of AIPF benefits paid within 45 working days after duly completed documents = Total AIPF benefits paid (excluding Death and Unclaimed benefits) within 45 working days of receipt of duly correctly completed documents / Total AIPF benefits received * 100
Means of verification	Review a total list of members paid against total number of those paid within 45 working days from the OBIEE summary report received (excluding death and Unclaimed benefits) and compare against CIVPEN
Assumptions	97% system up-time and availability.
Disaggregation of beneficiaries (where applicable)	N/A
Spatial transformation (where applicable)	N/A
Data limitations	System downtime and availability
Calculation type	Non-cumulative
Reporting cycle	Quarterly
Desired performance	Increase in the percentage of benefits that were paid on time

Indicator 25 - Owner – Chief Director: Employee Benefits

Indicator title	% of TEPF benefits paid within a set period (45 working days) of liability date excluding Death and Unclaimed benefits after receipt of duly completed documentation.
Definition	The indicator measures the percentage of TEPF benefits that have been paid within the specified timeframes during the reporting period (excluding Death and Unclaimed benefits)
Purpose / importance	To track whether TEPF benefits are paid within the specified timeframes
Source / collection of data	OBIEE, CIVPEN
Method of calculation	<p>Total benefits paid (excluding Death benefits) within 45 working days of receipt of duly completed documents as a percentage of claims paid during reporting period.</p> <p>% of TEPF benefits paid within 45 working days (excluding Death and Unclaimed benefits) after duly completed documents = Total TEPF benefits paid (excluding Death and Unclaimed benefits) within 45 working days of receipt of duly correctly completed documents / Total TEPF benefits received (excluding Death benefits) * 100</p>
Means of verification	Review a total list of members paid against total number of those paid within 45 working days from the OBIEE summary report received (excluding death and Unclaimed benefits) and compare against CIVPEN records.
Assumptions	97% system up-time and availability
Disaggregation of beneficiaries (where applicable)	N/A
Spatial transformation (where applicable)	N/A
Data limitations	System downtime and availability
Calculation type	Non-cumulative
Reporting cycle	Quarterly
Desired performance	Increase in the percentage of benefits that were paid

GLOSSARY OF TERMS

Term	Definition
Accountable	Being held liable for actions, decisions or being answerable to the Executive Authority.
AIPF	The Associated Institutions Pension Fund, as per the AIPF Act 41 of 1963, administered by the GPAA on behalf of National Treasury.
BoT	The Government Employees Pension Fund's Board of Trustees. (GEPF is governed by a Board of Trustees in terms of the GEP Law).
Client	A customer of a professional service provider, or the principal of an agent or contractor.
Core Services	Benefits Administration is the core service of the GPAA according to its mandate and includes Sub-programmes 2.1 National Treasury Schemes and funds. 2.2 GEPF Employee Benefits and 2.3 Client Relationship Management.
Customer	An entity that receives or consumes products (goods or services) and has the ability to choose between different products and suppliers or an entity directly served by an organisation.
Employers	Any government entity employing persons into government services.
External audit	Periodic or specific purpose (ad hoc) audit conducted by external (independent) qualified accountant(s). Its objective is to determine, among other things, whether: (1) the accounting records are accurate and complete, (2) prepared in accordance with the provisions of Generally Accepted Accounting Principles (GAAP), and (3) the statements prepared from the accounts present fairly the organisation's financial position and the results of its financial operations.
GEP LAW	Government Employees Pension Law of 1996, as amended.
GEPF	The Government Employees Pension Fund. A pension fund governed by the Government Employees Pension (GEP) Law of 1996, as amended, administered by the GPAA on behalf of GEPF's Board of Trustees.
GEPO	GEPO, is a voluntary complaint handling mechanism established by the Board of Trustees of the GEPF.
Government	The government of the Republic of South Africa.
GPAA	The Government Pensions Administration Agency.
Human Capital	Human Capital refers to the collective value of the organisation's intellectual capital (competencies, knowledge, and skills).
ICT	Information and Communication Technology.

Term	Definition
Internal audit	A frequent or on-going audit conducted by an organisation's own (as opposed to independent) accountants to: (1) monitor operating results, (2) verify financial records, (3) evaluate internal controls, (4) assist with increasing efficiency and effectiveness of operations and, (5) to detect fraud. Internal audit can identify control problems and aims at correcting lapses before they are discovered during an external audit. Although the internal auditors are the organisation's employees, they normally do not audit themselves or their own departments, but usually entrust this function to independent/external auditors.
Outcome(s)	Short- and medium-term effects of an intervention's output.
Output(s)	Products, capital goods and services which result from an intervention.
Performance Area(s) (PAs)	Areas that, if the business focuses on and does well, will determine its competitive edge/differentiation or competitive advantage.
Performance Indicator(s) (PIs) (indices)	Performance Indicators (PIs) are quantifiable measurements agreed on beforehand that reflect the critical success factors of an organisation.
PFMA	Public Finance Management Act (No.1 of 1999 as amended by Act 29 of 1999).
SLA	Service Level Agreement.
Stakeholder	A person, group or organisation that has a direct or indirect stake in an organisation because it can affect or be affected by the organisation's actions, objectives and/or policies. Key stakeholders in an organisation include creditors, clients, directors, employees, government (and its agencies), owners (shareholders), suppliers, unions, and the community from which the business draws its resources.
TEPF	The Temporary Employees Pension Fund, as per the TEPF Act 75 of 1979, administered by GPAA on behalf of National Treasury.

LIST OF ABBREVIATIONS

Abbreviation	Definition
4IR	Fourth Industrial Revolution
ACEO	Acting Chief Executive Officer
AIPF	Associated Institutions Pension Fund
APP	Annual Performance Plan
B-BBEE	Broad-based Black Economic Empowerment
BOT	Board of Trustees
CAPEX	Capital Expenditure
ERRP	Economic Reconstruction and Recovery Plan
EXCO	Executive Committee
GEPF	Government Employees Pension Fund
GEPO	Government Employee Pensions Ombuds
GPAA	Government Pensions Administration Agency
ICT	Information and Communication Technology
MIS	Management Information Systems
NT	National Treasury
OBIEE	Oracle Business Intelligence Enterprise Edition
OLA	Operational Level Agreement
OMD	Open Monitoring Distribution
PFMA	Public Finance Management Act
PI	Performance Indicator
POPIA	Protection of Personal Information Act
QMS	Queue Management System
SLA	Service Level Agreement
SMS	Short Messaging Services
StatsSA	Statistics South Africa
TEPF	Temporary Employees Pension Fund

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